

# Good-Bye Athena, Hello Koha: the Migration to an Open Source ILS at the Albert Alphin Library

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# With Athena, you can do visual searches.....



# For example, you can search for birds and find Messiaen's music.

The screenshot shows a web browser window titled "Searching - Athena". The main content area has a purple header with the Athena logo and the text "ACTIVE COLLECTION IS BC - THE BOSTON SEARCH RESULTS". Below this, it says "Viewing 1 - 7 of 7 for Birds". There are "Start Over" and "Help" buttons in the top right. The main list contains seven entries, each with a title, author, call number, and availability. On the right side of the list are navigation buttons: "Previous", "Next", "Go To", "Sort" (with "A to Z" and "Z to A" options), and "Go Back". At the bottom, there is a navigation bar with buttons for "Search", "Search Results", "Bibliography", "Print", and "Menu".

Title	Author	Call Number	Availability
The outermost house : a year of life on the Great Beach o...	Beston, Henry,	QH105.M4 B47 19	In
Catalogue d'oiseaux	Messiaen, Olivier,	LP .M56 C3	In
Quatuor pour la fin du temps ; Le merle noir : for flute and...	Messiaen, Olivier,	LP .M56 Q3 Rec.2	In
Oiseaux exotiques /	Messiaen, Olivier,	MSc .M56 O3	In
Cantus arcticus : concerto for birds and orchestra /	Rautavaara, Einojuhani,	MSc .R185 C36	In
Quintet [Bird sanctuary] : for two violins, viola and two cel...	Boccherini, Luigi,	M552 .B67 G.276	In
Birds /	Menaboni, Athos.	QL681 .M49 art se	Out

Navigation buttons: Previous, Next, Go To, Sort (A to Z, Z to A), Go Back

Bottom bar: Search, Search Results, Bibliography, Print, Menu

# What we wanted in a new ILS:

- Better search functionality & user friendliness
- Patron self-renewal feature
- Acquisitions module
- Ability to create customized item locations
- System-generated overdue and fines notices
- To separate our 2 libraries by collection for future use
- Hosting by vendor & good tech support
- Ability to create an abundance & variety of reports
- Something that was affordable for our budget

# Migration Schedule

- The project began on Feb. 11 and we went live on June 9, 2010!

# What Was Involved in the Project Plan?

- Extract and transfer of bib/items and patron data for test load (us)
- Data analysis (LibLime)
- Share item/patron analysis documents (LibLime)
- Finalize item/patron mapping (us)
- Configure loading programs (LibLime)
- Test load bib/item and patron data (LibLime)
- System administration overview (both)

# Project Plan cont.

- Review test data (us)
- Set up OPAC URL/customize (both)
- Sign-off on test loads (us)
- On-site training (both) (on phone!)
- Finalize loading programs (LibLime)
- Cataloging/patron cut-off (us)
- Extract and transfer of bib/item and patron data for production load (us)
- Production load of bib/item and patron data
- Sign-off and go-live

# Who Was Involved?

- From LibLime/PTFS: the Project Manager, the Data Migration Specialist, the OPAC Interface Customization Specialist, and the LibLime/PTFS Trainer.

# Item & Patron Data Analysis

- We extracted and transferred to LibLime via FTP
  - All MARC bibliographic and item records
  - All patron records in .CSV format
  - No circulation, fines, item status
- TWO data analyses 
  - February 26, 2010
  - March 22, 2010
- Results shared in Google Docs

# Why analyze your data?

- Understand how your current ILS stores item and patron data
- Find errors, inconsistencies, and other mistakes that might cause your new ILS to reject data or display it improperly 
- Have the opportunity to standardize data to make mapping easier for new ILS

# Types of Patron Record Errors

- Addresses not split up properly between fields
- Invalid patron types
- About 15% of patrons didn't have e-mail addresses 
- Inconsistent wording in patron notes

# Types of MARC Errors



A	B	C	D
1	Fri Feb 26 13:12:59 2010 MARC items statistics:		
2	Corrupt leader (see corrupt.mrc) :	10	
3	bad leader position 5 [a-z] :	8	
4	bad leader position 6 [a-z] :	8	
5	bad leader position 7 [a-z] :	9	
6	bad leader position 9 [ a] :	7	
7	bad leader position 18 [ aiu] :	1	
8	bad leader position 20,21 [45] :	9	
9	sample size :	65	
10	Marc Record count:	38648	
11	Biblio cnt :	38648	
12	Diacritic records (see diacritic.mrc) :	14664	
13	Non Diacritic records (see nondia.mrc)		
14	Records using MARC-8 chars pos9 ' ' :	14664	
15	852 tag Item count:	43631	
16	number of 952 tags :	16	
17	barcode is in tag 852 subfield : p		
18	Serial Biblio count :	8	
19	Number of bibs with more then 1 245's :	10	
20	Number of bibs with isbn (020a):	9066	
21	Number of bibs with issn (022a):	3	
22	Number of ISBN (020a) with hyphens:	0	

# Data Migration Spreadsheet

(from Hell) 

- Library Codes
- Item Type Codes
- Collection Codes
- Shelving Location Codes
- Patron Record Mapping
- Patron Categories
- Item Record Mapping
- Other Coded Values

# Instructions for Shelving Codes

- This sheet is used to describe shelving location codes in your current system which may need to be migrated to Koha. Shelving location codes represent the physical location of the item within the library.   
Shelving codes display next to the location name in OPAC. They are also used for circulation and cataloging statistics. In the columns below **please enter the other codes that exist in your current system**. If the same code is to be used in Koha, enter that code in the Koha other code column. If you would like to change a code upon migration or merge more than one existing code into a single Koha code specify this different code in the Koha column.

In order to complete this,  
we needed:



And...



# Create New Data to Map

- Used a batch editor to add codes into 852\$b
- Assigned one of 32 different codes to capture:
  - Circulation lengths and replacement prices
  - Icons for item types to display to patrons
  - Sections that might be transferred to storage
  - Subject collections for search limiting

# Why 32 Codes?

Limit to any of the following:

- |  |  |  |  |
|--|--|--|--|
| <input type="checkbox"/> Books - Dance                     | <input type="checkbox"/> Books - General & Liberal Arts        | <input type="checkbox"/> Books - Music (ML,MT)       | <input type="checkbox"/> Books - Theater             |
| <input type="checkbox"/> Chamber sets & parts (M177-M1489) | <input type="checkbox"/> Commercial audio recordings (CD, LP)  | <input type="checkbox"/> Commercial videos (DVD, VR) | <input type="checkbox"/> PERFLIB large ensemble sets |
| <input type="checkbox"/> Scores - Classical                | <input type="checkbox"/> Scores - Collected works (REF M2, M3) | <input type="checkbox"/> Scores - Study (MSc)        | <input type="checkbox"/> Scores - Theater & Pop      |
| <input type="checkbox"/> Software                          | <input type="checkbox"/> TBC performances                      |  |  |

Subtype limits

Location and availability:

All libraries  
Albert Alphin Library  
Performance Library

Sort by:

[\[Fewer Options\]](#) [\[New Search\]](#)

# Progress on Batch Editing

		Feb 26th	March 22nd	
36				
37				
38	Subfield occurrence: # of unique values			
39	852\$6 : format	3 : 2	1 : 1	stripped data
40	852\$7 : fund	1 : 1	1 : 1	field never used
41	852\$8 : date acquired	43198 : 2714	42838 : 2726	KEEP
42	852\$9 : replacement price	1113 : 134	653 : 110	stripped at migration
43	852\$ATHENA prefix:	43631 : 135	43293 : 105	
44	852\$a : Institution	3418 : 41	14 : 2	stripped data
45	<b>852\$b : Location</b>	<b>6467 : 31</b>	<b>43286 : 36</b>	<b>ADDED DATA</b>
46	852\$h : call number class	43619 : 13936	43287 : 14413	combined at migration
47	852\$i : call number cutter	33207 : 22340	32556 : 21766	combined at migration
48	852\$k : call number prefix	6685 : 23	6411 : 6	combined at migration
49	852\$l : ?	1 : 1	1 : 1	combined at migration
50	852\$m : call number serial	19017 : 3877	19397 : 3736	combined at migration
51	852\$p : barcode	43633 : 43631	43294 : 43293	KEEP
52	852\$t : copy number	8073 : 4	7966 : 4	stripped at migration
53	852\$z : ?	1 : 1	1 : 1	field never used

# Other steps...

- Test load data, adjust mapping
- Program circulation parameters
- Customize OPAC and staff interfaces
- Staff Training
- Closed for 3 days to transfer current checkouts & fines

# GO LIVE! ☺

[Log in to Your Account](#)



ALPHIN LIBRARY  
**CATALOG**

Search

Go



[Advanced Search](#) [Course Reserves](#)

[LIBRARY HOME](#)

[COURSE RESERVES](#)

[REFERENCE](#)

[PERIODICALS](#)

[INTERNET RESOURCES](#)

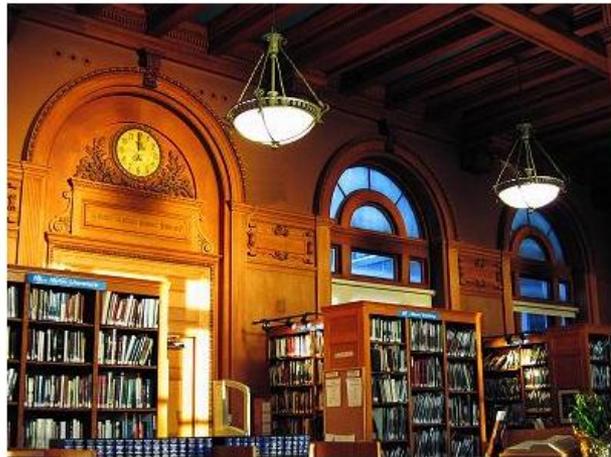
[SEARCH TIPS](#)



[Log in to your account](#) to renew or check your fines

Click **Advanced Search** above to limit by format or collection.

**Is an item that you want checked out? Place a hold on it!**  
Holds cannot be placed on items that are available on the shelf.



## LIBRARY HOURS

### Semester Hours

Sunday	2pm - 10pm
Monday	8am - 11pm
Tuesday	8am - 11pm
Wednesday	8am - 11pm
Thursday	8am - 11pm
Friday	8am - 6pm
Saturday	10am - 5pm

### Holiday Hours & Exceptions:

Closed Mon. 4/18/11  
for Patriot's Day

### Spring Break Hours

Sat. 3/12 - Fri. 3/18

Sat - Sun	CLOSED
Mon - Thurs	9am - 5pm
Friday, 3/18	CLOSED

### Jennifer Hunt

Director of the Library  
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*Contact for donations and purchase requests*

### Rachel Fox von Swearingen

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### Reg Didham

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*Contact for inter-library loan*

### Robert Cunningham

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### Brendan Higgins

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And then,  
Athena was no more...

