

# Caveat Emptor - An Academic Library's Migration to an Open Source ILS

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# Begin at the Beginning

- ▶ A comparison of proprietary versus open source ILS
  - Who hosts?
  - Source code?
  - Upgrades?
  - Prices?
  - Who controls system?

# What Carthage Did in 14 Easy Steps

1. Made a decision to review options
2. Select a team to evaluate and recommend a new ILS
3. Create criteria needed
4. Compile a list of vendors to evaluate

# What Carthage Did in 14 Easy Steps

5. By process of elimination narrow list to a few vendors to be evaluated in greater detail
6. Request demo and discussion
7. Make selection

Koha **Classic**

# What Carthage Did in 14 Easy Steps

8. Select a team to oversee migration and implementation
9. Discussions with vendor regarding our needs, timetable, contract
10. Determine the migration schedule
11. Vendor migrates data

# What Carthage Did in 14 Easy Steps

12. Check functionality of the ILS
13. Work with vendor to resolve outstanding issues
14. Sign off on system acceptance

# Our Perfect Storm

As Paul Harvey would say,  
“Here is the rest of the story”

Time  
Money

# A Short Tour of Koha

## OPAC



# Hedberg Library Catalog



[Basic Search](#) | [Advanced Search](#) | [Browse by Subject](#)

[Lists](#) ▾

[Cart](#)

- [Purchase Suggestions](#)
- [Interlibrary Loan](#)

## Search the Library Catalog

[Advanced Search](#)

### Log in to Your Account:

Login:

Password:

Hedberg Library, Carthage College, 2001 Alford Park Drive, Kenosha, WI 53140 262-551-5950

Languages:||||

- my summary
- my fines
- my personal details
- my purchase suggestions
- my lists

Hello, Kathy Myers ([Click here](#) if you're not Kathy Myers )

Message from the library

Checked Out Credits

5 Items Checked Out

	Title	Call No.	Due	Renew	Fines
	<a href="#">Back to the basics</a>	HF 5718 B33 2005	03/27/2009	<a href="#">Renew</a> (8 of 8 renewals remaining)	No
	<a href="#">We shall not be moved</a> : Dash, Joan.	HD 5325 C62 1909 N48 1996	04/13/2009	<a href="#">Renew</a> (8 of 8 renewals remaining)	No
	<a href="#">Growing up in coal country</a> / Bartoletti.	HD 6247 M6152 U63	04/13/2009	<a href="#">Renew</a>	No



# Hedberg Library Catalog



Basic Search | **Advanced Search** | Browse by Subject

Search for:

Keyword

Keyword

Keyword

Limit type to: match any of the following:

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> Abstracts and Indexes | <input type="checkbox"/> Archives            | <input type="checkbox"/> Atlas                   | <input type="checkbox"/> General Collection |
| <input type="checkbox"/> Curriculum            | <input type="checkbox"/> Curriculum Oversize | <input type="checkbox"/> Curriculum Software     | <input type="checkbox"/> Heide Collection   |
| <input type="checkbox"/> Information Desk      | <input type="checkbox"/> Leisure Reading     | <input type="checkbox"/> Library                 | <input type="checkbox"/> Microform          |
| <input type="checkbox"/> Carthage Network      | <input type="checkbox"/> New Book Shelf      | <input type="checkbox"/> Newspapers              | <input type="checkbox"/> none               |
| <input type="checkbox"/> NonPrint              | <input type="checkbox"/> Office              | <input type="checkbox"/> Office-Modern Languages | <input type="checkbox"/> Carthage Web Site  |
| <input type="checkbox"/> Oversize              | <input type="checkbox"/> Reference           | <input type="checkbox"/> Reserve                 | <input type="checkbox"/> Periodicals        |
| <input type="checkbox"/> Saemann Lab           | <input type="checkbox"/> Video               | <input type="checkbox"/> Curriculum Video        |   |

Location and availability:

Sort by:



# Hedberg Library Catalog



Basic Search | Advanced Search | Browse by Subject

Lists ▾

Cart

my summary

my fines

my personal details

my purchase suggestions

my lists

## Lists

Your Lists Public Lists

<< < 1 2 3 ... 6 > >>

List Name	Contents	Type	
<a href="#">Cassidy-Art of the Americas</a>	1 item(s)	Public	Edit  Delete
<a href="#">Chilsen/Larson-Public Speaking (CDM 120)</a>	6 item(s)	Public	Edit  Delete
<a href="#">Education</a>	4 item(s)	Public	Edit  Delete
<a href="#">Hauser-Principles of Sociology</a>	8 item(s)	Public	Edit  Delete
<a href="#">Heritage 103 (1)</a>	29 item(s)	Public	Edit  Delete
<a href="#">Heritage 104 (2)</a>	40 item(s)	Public	Edit  Delete
<a href="#">Larson-Gospels</a>	2 item(s)	Public	Edit  Delete
<a href="#">Mitchell/Welch-Latin America (Honor104/205)</a>	1 item(s)	Public	Edit  Delete
<a href="#">Noer-Historiography</a>	1 item(s)	Public	Edit  Delete

# A Short Tour of Koha

## Staff modules

Koha staff client - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/mainpage.pl

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - kmyers@c... Koha staff client

Do you want Firefox to remember this password for Carthage Mail - Inbox (85) - kmyers@carthage.edu

Remember Never for This Site Not Now

Circulation Patrons Search More ▾ Hedberg Library (Set) | kmyers (Log Out) | [?]

## News

### What's Next?

Now that you've installed Koha, what's next? Here are some suggestions:

- [Read Koha Documentation](#)
- [Read/Write to the Koha Wiki](#)
- [Read and Contribute to Discussions](#)
- [Report Koha Bugs](#)
- [Submit Patches to Koha using Git \(Version Control System\)](#)
- [Chat with Koha users and developers](#)

Posted on 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

## Circulation

• Check out to:  OK

- [Check in](#)
- [Transfers](#)

## Patrons

• Search:  OK

## Search

• Search catalog:  OK

## Lists

## Cataloging

- [Add MARC Record](#)
- [Authorities](#)
- [Serials](#)

## Acquisitions

## Reports

## Koha administration

- [System preferences](#)

## Tools

## About Koha



AIM AIM

Firefox

Document1 - Microsof...

2:55 PM

Koha > Patrons > Patron Details for Richard Hren (0800004330) - Mozilla Firefox


File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/members/moremember.pl?borrowernumber=1689

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - km Myers @ c... Koha > Patrons > Patron Details f...

Circulation Patrons Search More Hedberg Library (Set) | km Myers (Log Out) | [?]



Enter patron card number or partial name:

order by: Surname Search

[Search Patrons](#) [Check Out](#) [Search the Catalog](#)

[Home](#) > [Patrons](#) > Patron Details for Richard Hren (0800004330)

**Richard Hren**  
**(0800004330)**

2660 Eleventh Place, #412  
Kenosha 531406405  
[rhren@carthage.edu](mailto:rhren@carthage.edu)  
Category: Faculty (FACULTY)  
Home Library: Hedberg Library

[Check Out](#)

[Details](#)

[Fines](#)

[Modification Log](#)

**Richard Hren (0800004330)**

..

2660 Eleventh Place, #412  
Kenosha 531406405

**Home:** \_\_\_\_\_  
**Mobile:** \_\_\_\_\_  
**Work:** \_\_\_\_\_  
**Fax:** \_\_\_\_\_  
**Email (home):** [rhren@carthage.edu](mailto:rhren@carthage.edu)  
**Email (work):** \_\_\_\_\_  
**Initials:** \_\_\_\_\_  
**Date of birth:** \_\_\_\_\_  
**Sex:** \_\_\_\_\_  
**Ethnicity:** \_\_\_\_\_  
**Ethnicity notes:** \_\_\_\_\_

**Library use**

**Card number:** 0800004330  
**Borrowernumber:** 1689  
**Category:** Faculty (FACULTY)  
**Registration date:** 02/16/1995  
**Expiration date:** 08/15/2009  
**Registration branch:** Hedberg Library  
**Sort field 1:** \_\_\_\_\_  
**Sort field 2:** \_\_\_\_\_  
**OPAC login:** rhren  
**OPAC password:** \*\*\*\*\*  
**Circulation note:** \_\_\_\_\_  
**OPAC note:** \_\_\_\_\_

[Edit](#)

[Edit](#)

[Add child](#)

[Change Password](#)

[Print](#)

[More](#)

Done

start AIM AIM Firefox Document1 - Microsof... 2:56 PM



Koha > Circulation > Checking out to Myers, Kathy (0000892205) - Mozilla Firefox


File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/circ/circulation.pl?borrowernumber=1575

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - kmyers@... Koha > Circulation > Checking out ...

Circulation Patrons Search More Hedberg Library (Set) | kmyers (Log Out) | [?]



Enter patron card number or partial name:



[Check Out](#) [Check In](#) [Search the Catalog](#)

Home > Circulation > Checkouts > Kathy Myers

**Kathy Myers (0000892205)**  
 23901 62nd Street  
 Salem 53168-9689  
[kmyers@carthage.edu](mailto:kmyers@carthage.edu)  
 Category: Faculty (FACULTY)  
 Home Library: Hedberg Library

[Check Out](#)  
[Details](#)  
[Fines](#)  
[Modification Log](#)

**Checking out to Kathy Myers (0000892205)**  
 Enter item barcode:

Specify Due Date:  
  Remember for Session:

**Attention:**  
 > **Credits:** Patron has a credit

**Notes:**

**5 Checkout(s)** **0 Holds**

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
<b>Previous checkouts</b>							
03/27/2009	<a href="#">Back to the basics</a>	2	HF 5718 B33 2005	<a href="#">25053006631832</a>		<input type="checkbox"/>	<a href="#">Check In</a>
04/13/2009	<a href="#">We shall not be moved :</a>	1	HD 5325 C62 1909 N48 1996	<a href="#">25053006867592</a>		<input type="checkbox"/>	<a href="#">Check In</a>

Done

start AIM AIM Firefox Document1 - Microsof... 2:58 PM



[Edit](#)

[Checked Out](#) [Fines & Charges](#) [On Hold](#)

### Checked Out

Item Type	Title	Checked out on	Date due	Charge	Price	Renew <a href="#">select all</a>   <a href="#">none</a>	Return <a href="#">select all</a>   <a href="#">none</a>
Video	<a href="#">Back to the basics</a> ; Cambridge Educational, <a href="#">25053006631832</a>	02/17/2009	03/27/2009	0.00		<input type="checkbox"/>	<input type="checkbox"/>
Normal	<a href="#">Growing up in coal country /</a> , by Bartoletti, Susan Campbell. ; Houghton Mifflin Co. , <a href="#">25053006610091</a>	01/13/2009	04/13/2009	0.00		<input type="checkbox"/>	<input type="checkbox"/>
Normal	<a href="#">The Triangle Shirtwaist Factory fire /</a> , by Schaefer, A. R. ; World Almanac Library, <a href="#">25053006744528</a>	01/13/2009	04/13/2009	0.00		<input type="checkbox"/>	<input type="checkbox"/>
Normal	<a href="#">We shall not be moved :</a> , by Dash, Joan. ; Scholastic, <a href="#">25053006867592</a>	01/13/2009	04/13/2009	0.00		<input type="checkbox"/>	<input type="checkbox"/>
Normal	<a href="#">The World Book encyclopedia.</a> ; World Book, <a href="#">25053006814081</a>	01/13/2009	04/13/2009	0.00		<input type="checkbox"/>	<input type="checkbox"/>
<b>Total replacement cost:</b>					0.00	Renewal due date: <input type="text"/> Forgive fines on return: <input type="checkbox"/>	

Done

Koha > Catalog > Details for We shall not be moved : - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/catalogue/detail.pl?biblionumber=117563

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - kmyers@c... Koha > Catalog > Details for We s...

Circulation Patrons Search More ▾ Hedberg Library (Set) | kmyers (Log Out) | [ ? ]



Enter search keywords:



[Check Out](#) [Check In](#) [Search the Catalog](#)

[Home](#) > [Catalog](#) > Details for *We shall not be moved* :

Normal

MARC

ISBD

Items

Holds

[Checkout history](#)

[Modification log](#)

### We shall not be moved :

By [Dash, Joan](#).

- **Published by:** [Scholastic](#). (New York :)
- **Description:** 165 p. : ill. ; 22 cm.

- **ISBN:** 0590484095 (ha)
- **Subjects:**
  - [Strikes and lockouts](#) -- [Clothing trade](#) -- [New York \(State\)](#) -- [New York](#) -- [History](#) -- [20th century](#) -- [Juvenile literature](#).
  - [Women clothing workers](#) -- [New York \(State\)](#) -- [New York](#) -- [History](#) -- [20th century](#) -- [Juvenile literature](#).
- **Copyright:** 1996

[Holdings](#) [Descriptions](#)

Item type	Location	Call Number	Status	Last seen	Barcode
Normal	Hedberg Library Curriculum	HD 5325 C62 1909 N48 1996	Checked out to <a href="#">Kathy Myers</a> : due 04/13/2009	01/13/2009	<a href="#">25053006867592</a>

Done

start AIM AIM Firefox Document1 - Microsof... 3:00



Koha > Cataloging > Add MARC Record - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/cataloguing/addbiblio.pl?frameworkcode=

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Circulation Patrons Search More ▾ Hedberg Library (Set) | kmyers (Log Out) | [?]

Home > Cataloging

Koha > Z39.50 Search Results - Mozilla Firefox

http://carthage-staff.kohalibrary.com/cgi-bin/koha/cataloguing/z3950\_search.pl?frameworkcode=

### Z39.50 Search Points

Title: <input type="text"/>	Author: <input type="text"/>
ISBN/ISSN: <input type="text"/>	Subject Heading: <input type="text"/>
LC Call Number: <input type="text"/>	Dewey: <input type="text"/>

**Search targets** [Select All](#) [Clear All](#)

- NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]
- NEW YORK PUBLIC LIBRARY [catnyp.nypl.org]
- COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]
- SMITHSONIAN INSTITUTION LIBRARIES [siris-libraries.si.edu]
- LIBRARY OF CONGRESS [z3950.loc.gov]

[Cancel](#)

Done

Done

start AIM 2 AIM Carthage ... Koha > Cat... Koha > Z39... WAAL Koha Microsoft P... Document1... 11:19 AM



## Add MARC Record

Change framework:

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9

**000** - LEADER

**001** - CONTROL NUMBER -

**003** - CONTROL NUMBER IDENTIFIER -

**005** - DATE AND TIME OF LATEST TRANSACTION

**006** - FIXED-LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL CHARACTERISTICS--GENERAL INFORMATION + -

**007** - PHYSICAL DESCRIPTION FIXED FIELD--GENERAL INFORMATION + -

**008** - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION

**010**   - LIBRARY OF CONGRESS CONTROL NUMBER -

**015**   - NATIONAL BIBLIOGRAPHY NUMBER + -

**016**   - NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBER + -

**020**   - INTERNATIONAL STANDARD BOOK NUMBER + -

**022**   - INTERNATIONAL STANDARD SERIAL NUMBER + -

**024**   - OTHER STANDARD IDENTIFIER + -



Normal

MARC

ISBD

Items

Holds

Checkout history

Modification log

## Items for The amber forest : by Poinar, George O. (Record #80983)

	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Location (home branch)	Sublocation or collection (holding branch)	Shelving location	Date acquired	Koha issues (times borrowed)	Koh full c numl
<a href="#">Edit</a> <a href="#">Delete</a>			lcc			Hedberg Library	Hedberg Library	General Collection	1999-09-07	2	QE 7. P64 1999

### Add Item

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme

3 - Materials specified (bound volume or other part)

4 - Damaged status

5 - Use restrictions

7 - Not for loan

8 - Koha collection

X - Title catalogs

a - Location (home branch)

b - Sublocation or collection

Done



Search Subscriptions:

ISSN:  Title:

[Search Subscriptions](#) [Check Out](#) [Search the Catalog](#)

[Home](#) > Serials

- [Claims](#)
- [Check Expiration](#)

[New Subscription](#)

### Serials subscriptions

ISSN	Title	Note	Library (Callnumber)		
0009-8094	<a href="#">Civil War times illustrated.</a>		HEDBERG	<a href="#">Issue History</a>	<a href="#">Serial receive</a>
1348-7906	<a href="#">Hiragana times.</a>			<a href="#">Issue History</a>	<a href="#">Serial receive</a>
0040-781X	<a href="#">Time.</a>		HEDBERG	<a href="#">Issue History</a>	<a href="#">Serial receive</a>
0307-661X	<a href="#">TLS, the Times literary supplement.</a>		HEDBERG	<a href="#">Issue History</a>	<a href="#">Serial receive</a>

[subscription detail](#)



Koha > Acquisitions - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/acqui/acqui-home.pl

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Circulation Patrons Search More Hedberg Library (Set) | kmyers (Log Out) | [?]

**koha** Search vendors:

[Vendor Search](#) [Orders Search](#)

[Home](#) > [Acquisitions](#) >

- [Late orders](#)
- [Manage suggestions](#)
- [Funds and Budgets](#)

### Acquisitions

Start, receive, or modify any order

Vendor:

**Pending suggestions**

4 suggestions waiting [Manage suggestions](#)

### Funds and Budgets

[\[ Manage \]](#)

Budgets	Total	Spent	Comtd	Avail
Art Book	<a href="#">2000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	2000.00
Art Media	<a href="#">1000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1000.00
Bindery	<a href="#">6000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	6000.00
Biology Book	<a href="#">2000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	2000.00
Biology Media	<a href="#">1000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1000.00
Business Book	<a href="#">1000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1000.00
Business Media	<a href="#">1000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1000.00
Chemistry Book	<a href="#">1000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1000.00
Chemistry Media	<a href="#">1000.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1000.00
Classics Book	<a href="#">500.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	500.00
Classics Media	<a href="#">500.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	500.00
Communications Book	<a href="#">500.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	500.00
Communications Media	<a href="#">500.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	500.00

start AIM 2 AIM Carthage ... Koha > Acq... Koha > Z39... WAAL Koha Microsoft P... Document1... 11:25 AM

Koha > Reports - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/reports/reports-home.pl

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - kmyers@c... Koha > Reports

Circulation Patrons Search More ▾ Hedberg Library (Set) | kmyers (Log Out) | [?]



Enter patron card number or partial name:

Submit

[Check Out](#) [Check In](#) [Search the Catalog](#)

[Home](#) > Reports

## Reports

### Guided Report Wizard

- [Guided Reports](#)

### Statistics wizards

- [Acquisitions](#)
- [Patrons](#)
- [Catalog](#)
- [Circulation](#)

### Inactive

- [Patrons who haven't checked out](#)
- [Items with no checkouts](#)

### Top Lists

- [Patrons checking out the most](#)
- [Most-Circulated Items](#)

### Other

- [Items lost](#)
- [Catalog by itemtype](#)
- [Average loan time](#)

start

AIM AIM

Firefox

Document1 - Microsof...

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3:02 PM

Koha > Reports > Catalog statistics - Mozilla Firefox


File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/reports/catalogue\_stats.pl

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - kmyers@c... Koha > Reports > Catalog statistics

Circulation Patrons Search More ▾ Hedberg Library (Set) | kmyers (Log Out) | [ ? ]



Enter search keywords:



[Check Out](#) [Check In](#) [Search the Catalog](#)

[Home](#) > [Reports](#) > Catalog statistics

**Guided Reports**

- [Guided Reports](#)

**Statistics wizards**

- [Acquisitions](#)
- [Patrons](#)
- [Catalog](#)
- [Circulation](#)

**Top Lists**

- [Patrons with the most checkouts](#)
- [Most-Circulated Items](#)

**Inactive**

- [Patrons who haven't checked out](#)
- [Items with no checkouts](#)

**Other**

- [Lost Items](#)
- [Catalog by Item Type](#)
- [Average loan time](#)

**Catalog statistics**

Title	Row	Column	Filter
Koha Full Call Number	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
	<input type="radio"/>	<input type="radio"/>	<input type="text"/> characters
Item Type	<input type="radio"/>	<input type="radio"/>	<input type="text"/> ▾
Publisher	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Publication Year	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
Home Library	<input type="radio"/>	<input type="radio"/>	<input type="text"/> ▾
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/> ▾
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/> ▾

**Output**

To screen into the browser:

To a file:  Named:  Into an application: EXCEL ▾ ;

Koha > Administration - Mozilla Firefox


File Edit View History Bookmarks Tools Help

http://carthage-staff.kohalibrary.com/cgi-bin/koha/admin/admin-home.pl

Getting Started Koha > Log in to Koha FirstSearch Login Scre... Carthage Webmail Ent... Carthage College LibG... Google Calendar Google Apps

Carthage Mail - Inbox (85) - kmyers@c... Koha > Administration

Circulation Patrons Search More ▾ Hedberg Library (Set) | kmyers (Log Out) | [?]

 Enter search keywords:

[Check Out](#) [Check In](#) [Search the Catalog](#)

[Home](#) > Administration

## System Preferences

[Global system preferences](#)  
Manage global system preferences like MARC flavor, date format, administrator email, and templates.

### Basic parameters

[Libraries and groups](#)  
Define libraries and groups.

[Funds and budgets](#)  
Funds and budgets administration for acquisitions.

[Currencies and exchange rates](#)  
Define currencies and exchange rates used for acquisitions.

[Item types and circulation codes](#)  
Define item types and circulation codes used for circulation rules.

### Patrons and circulation

[Patron categories](#)  
Define patron categories.

[Cities and towns](#)  
Define cities and towns that your patrons live in.

### Hint:

Configure these parameters in the order they appear.

## Catalog

[Authorized values](#)  
Define categories and authorized values for them.

[MARC Bibliographic framework](#)  
Create and manage Bibliographic frameworks that define the characteristics of your MARC Records (field and subfield definitions) as well as templates for the MARC editor.

[Koha to MARC mapping](#)  
Define the mapping between the Koha transactional database (SQL) and the MARC Bibliographic records. Note that the mapping can be defined through MARC Bibliographic Framework. This tool is just a shortcut to speed up linkage.

[MARC Bibliographic framework test](#)  
Checks the MARC structure. If you change your MARC Bibliographic framework it's recommended that you run this tool to test for errors in your definition.

[Authority types](#)  
Create and manage Authorities frameworks that define the characteristics of your MARC Records (field and subfield definitions).

[Classification sources](#)  
Define classification sources (i.e. call number schemes).

start AIM Firefox Document1 - Microsof... 3:03 PM

- Admin
- Acquisitions
- Enhanced Content
- Authorities
- Cataloguing**
- Circulation
- 118N/L10N
- Logs
- OAI-PMH
- OPAC
- Patrons
- Searching
- Staff Client
- Local Use

New Preference

## System preferences admin

### Cataloguing preferences

Preference	Explanation	Value	Edit	Delete
<a href="#">advancedMARCeditor</a>	If ON, the MARC editor won't display field/subfield descriptions	<input type="radio"/> ON <input checked="" type="radio"/> OFF <input type="button" value="Save"/>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">autoBarcode</a>	Used to autogenerate a barcode: incremental will be of the form 1, 2, 3; annual of the form 2007-0001, 2007-0002; hbyymmncr of the form HB08010001 where HB=Home Branch	OFF <input type="button" value="Save"/>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">DefaultClassificationSource</a>	Default classification scheme used by the collection. E.g., Dewey, LCC, etc.	lcc <input type="button" value="Save"/>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">hide_marc</a>	If ON, disables display of MARC fields, subfield codes & indicators (still shows data)	<input type="radio"/> ON <input checked="" type="radio"/> OFF <input type="button" value="Save"/>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">IntranetBiblioDefaultView</a>	IntranetBiblioDefaultView	normal <input type="button" value="Save"/>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">ISBD</a>	ISBD	<a href="#">Click to Edit</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">item-level_itypes</a>	If ON, enables Item-level Itemtype / Issuing Rules	<input checked="" type="radio"/> ON <input type="radio"/> OFF <input type="button" value="Save"/>	<a href="#">Edit</a>	<a href="#">Delete</a>



# Parting Advice

1. Allow yourself enough time
2. Test everything
3. Don't believe everything you hear
4. Leave yourself an escape clause
5. Test everything
6. Trust but verify
7. Caveat emptor

# Resources

- ▶ Breeding, Marshall. “Open source integrated library systems.” Library Technology Reports 44.8 (2008).
- ▶ Google

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