

Pioneer/Koha Migration Considerations

When's the last time you inventoried and weeded your collection? Prior to migration is the time to weed and weed deep. You pay by record for every item you bring over. Why not clean up your collection and save some money?

If you need help or have questions, ask another Pioneer library that migrated from a similar ILS what they did. Don't re-invent the wheel working on issues that already have a resolution.

This is a good time to make physical changes to your collection that will impact item locations and/or spine labels. For example, our children's picture books were sorted by a confusing category color code established a long time ago at Sump. We chose the migration as a time to re-label and re-shelve these books by authors' last names. We did a lot of other clean up and changes too. We used the migration as the justification for this work. We also used the migration to justify policy changes required to conform to the established Pioneer standards and take advantage of Koha's features.

It's a good idea to go back and run reports on your old system to use for comparison during the migration and to save for future use. This is especially true if your old system will become unavailable for access after you migrate from it. Did you run monthly reports in the past? If not, wouldn't that be a good habit going forward for collection development and reporting to your Board?

Communicate with your patrons through signage, point of contact, and any other communication venue you use – newspaper, website, Facebook, etc. Let them know that changes are coming. Consider offering classes to Patrons on how to use Koha.

Have you trained your staff before the final migration? Your cataloger will need additional training. The "sandbox" permits you to complete this training well in advance of your go-live date.

Can you close for the migration? If not, plan how you will manage check-ins/check-outs while you wait for the migration process to be completed.

Are you using 14-digit, numbers-only barcodes for items and patrons? If not:

Do you have a registered 4-digit prefix for the 14-digit barcode? If not, contact:

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to get one prior to migration.

How will you convert your existing item/patron barcodes? For example if they have any non-numeric characters (common issue with libraries using a Follett ILS), it is recommend that they be dropped. Can your barcode scanners be programmed to drop the non-numeric characters? Will you need to replace/relabel items and patrons' library cards?

Do you have databases and/or other eResources that patrons use their barcode number to gain access to? Are you going to update the access requirements to them to require the full 14-digit patron barcode number?

Will you start using 14-digit barcodes when you're existing supplies are used up?

Have you validated how your item/patron barcodes scan (common issue with libraries using a Follett ILS)? Open Notepad on a PC with a barcode scanner and scan a variety of really old to current barcodes and see how they look. If you get different results, can your barcode scanners be programmed to handle them?

Are you using and/or can you use Firefox as your browser for Koha? It is the recommended browser. Other browsers may have some issues working properly with Koha.

You will need to test your receipt printer with Firefox/Koha to make sure it is compatible (old printers using the Windows Generic/Text driver will not work). This can be done prior to migration using the "sandbox" so you will know if you need to acquire new receipt printers prior to migration if necessary.

Do you know how or have access to the instructions/support to get the necessary data out of your current ILS so it can be imported into Koha? This would include data such as patron info/status, item status (overdues, holds, reserves, lost etc.) as well as the MARC formatted bibliographic and item records. For the importing of bibliographic records into Koha, you should have the ISBN numbers set for the titles in your ILS.

Based on your library's hours of operation, you may want to consider closing for a day for the migration. This permits plenty of time to complete the migration and resolve any issues that may arise.

Does your library's website have a link to the ILS? How quickly can this be switched to Pioneer?

Can access to the old ILS be blocked to your patrons but still accessible to your staff? If want to access historical info after the migration, you will need to retain staff access to the old ILS.

Since Koha resides in the "cloud", your connection to it is as good as your Internet access. Is your Internet access reliable? Do you need to consider having a faster or backup Internet connection?

Does your library charge fines? If not, do you have prices set for your items? If you don't have prices set, you should have an average price set for each book as part of the migration so you can block checkouts to patrons that have "lost" items using a fine limit. The fine limit block can be over-ridden, but it's useful to have it to alert you to patrons that are not returning items.

Do you have self-checkout? It needs to support SIP2 to be compatible with Koha. Pioneer does have a very affordable self-check system developed for use with Koha.

Created by Andrew Sherman, IT Coordinator & Robin Clark, Director at Sump Memorial Library. (1/9/2012)