Integrated Library Systems
Current Status and Future Prospects
General Dissatisfaction with Commercial ILS

- Not just with Aleph
- SIRSI / DYNIX
- III
Dissatisfaction

- Development slow – broken promises
- We can’t fix things, even if we know how
- Procedures cumbersome for
  - Library staff
  - Systems staff
- OPAC User interfaces falling behind commercial sites
  - Google, Amazon
Locked in to a single vendor

- For support
- For product development
- Switching means
  - Large purchase $$$$$
  - Migration
  - RFP
What do you we get for the Support $s?

- Support
- Development
- Enhancements
  - What the Vendor wants to give us
  - What they think will sell systems
On the positive side: Full function ILS

- OPAC
- Cataloging
- Circ
  - Course Reserves
  - Booking
- Inventory
- Serials
  - Binding
- Acquisitions
  - EDI
- ILL
On the positive side – Completeness, Standards & Security

- MARC Format for Holdings (MFHD)
- Robust, granulated security
- Consortium Features
- Ownership of Records
- Audit Trails
Aleph Outlook

- ExLibris bought by private equity firm
- Endeavor (Voyager) bought by same firm
- Difficult and expensive to support multiple
  - Product lines
  - Customer bases
Aleph Outlook

- New product under development as successor to both Voyager and Aleph
- Means migration sometime in next few years no matter what
- Anyone think new product will be included in maintenance fees?
  - Purchase $$$s
  - RFP
  - Migration
There will be a last major release of Aleph

- Ver 21? 22?
- Amount of change will slow
- Bug fixes only
- Most development will be in new product
- Will find out more at ELUNA 08
Ex Libris

- Will support Aleph and Voyager “indefinitely”
  (Couldn’t move whole customer base rapidly in any case)
Next Moves:

- Bolt on a new user interface
  - The Discovery Tool (implemented by PALS)
  - OCLC WorldCat.org, WorldCat Local
  - Primo, Endeca ....
- Choose and implement new ILS
Open Source ILS, an Alternative to Commercial ILS?
What is Open Source?

- Rod Bruce, PALS Unix System Administrator
What is Free Software?

- FSF - Free Software Foundation (1985)
- Free as in Free Speech
- Software should be free for ethical reasons
- www.fsf.org
- Software must be licensed following certain guidelines (e.g. GPL)
What is Open Source Software?

- Free as in Free Kittens
- Software should be free for practical reasons
- www.opensource.org
- Most open source software is also Free software
Our Experience With Open Source

- LAMP Solution Stack
  - Linux (the operating system)
  - Apache (the Web server)
  - MySQL (the database management system)
  - Perl, PHP, and/or Python (programming languages)
Our Experience With Linux

- The Operating System for...
  - Some development workstations
  - Servers running Proxy Services
  - Server running the Discovery Tool
  - Servers running the MnPALS Home Page, Forum, Wiki, and Mailing Lists
Our Experience With Apache

- The web server for...
  - WebPALS
  - Aleph
  - LibProxy
  - Discovery Tool
  - MnPALS Home Page, Forum, Wiki, and Mailing Lists
Our Experience With MySQL

- The database management system for...
  - LibProxy
  - VUFind
  - MnPALS Home Page, Forum, and Wiki
Our Experience With Perl, PHP, and Python

- Perl is the programming language for...
  - WebPALS
  - PLIF Loader
  - Many server side administrative scripts
- PHP is the programming language for...
  - MnPALS Home Page, Forum, Wiki, and VUFind
- Python is the programming language for...
  - Mailman and fac-back opac
Open Source - Free as in “Free Kittens”

- Still needs care and feeding
Open Source ILS Costs

- Migration
- Server operations
- Training
- Help Desk
- Sponsored development instead of maintenance payments
- Replacement of missing functionality
Koha and Evergreen - Two OS ILSs

- Many have seen the 1-hour gee-whizz presentations
  - Not enough information for serious analysis
- Two-day training sessions from support organizations
  - Liblime (Koha)
  - Equinox (Evergreen)
  - Look under the hood
- First look: Are these viable alternatives to Aleph?
Koha

- Design, Architecture, Security
- OPAC
- CAT
- CIRC
- ACQ
- SER
- ILL
- Systems
- Reports
Koha - Design, Architecture, Security

- Relational Database MySQL
- PERL – interpreted language – will it scale?
- ZEBRA – Indexing and Retrieval
Koha - Consortium features not part of original design

- “Branches” all at one level
- No concept of record ownership – patrons or bibs
- Permissions by module not function
  - Need increased granularity
- Lots of global settings
- Consortium features under development
Koha OPAC

- FRBR “light”
- Facets, book covers, reviews
- Web 2.0 features
Koha OPAC-Basic Search Screen
"business innovation" returned 6 results. Limit to currently available items.

Innovation and entrepreneurship: practice and principles / by Drucker, Peter Ferdinand.
Copies available at: Meadville Public Library (1).

The best secrets of great small businesses: creative, innovative, and cost-saving ideas from great business minds / by Silverstein, Ray.
- 2006 - Sourcebooks; Naperville, Ill.: - 242 p.; : Includes index.; 20 cm.
No copies available. On loan (1).

The essential Drucker: selections from the management works of Peter F. Drucker / by Drucker, Peter Ferdinand.
Copies available at: Meadville Public Library (1).

The definitive Drucker / by Edersheim, Elizabeth Haas.
The best secrets of great small businesses: creative, innovative, and cost-saving ideas from great business minds /

By Silverstein, Ray.

ISBN: 9781402207662
LCNN: 2006019050
Publisher: Naperville, Ill.: Sourcebooks, 2006
Physical Details: 242 p.; 20 cm.
Subject(s): Small business -- Management | Small business -- Growth.
Description:

- Includes index.
- The business owner's role/management strategies -- Sales -- Sales management -- Marketing -- Performance and organization -- Human assets -- Innovation and implementation -- Finance: money, find it, get it, keep it -- Succession and transition -- Diagnostic tests.

Related URLs: [http://www.loc.gov/catdir/toc/ecirc0615/2006019060.html](http://www.loc.gov/catdir/toc/ecirc0615/2006019060.html)

<table>
<thead>
<tr>
<th>Collection</th>
<th>Itemtype</th>
<th>Location</th>
<th>Status</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>NF</td>
<td>Non-Fiction</td>
<td>Meadville Public Library (658 Silverstein)</td>
<td>Checked Out</td>
<td>2008-01-22</td>
</tr>
</tbody>
</table>
Koha Staff Interface

- Has No Staff Client – Entirely Web-Based
  - + No Client to install, configure and update
  - - Might be slower, uses http for everything
Koha Creating a New Bib Record
Koha Search Catalog and Reservoir to Edit MARC Record
Koha Edit the Bib Record (older MARC Editor)

Edit MARC Record Number 1921
( Clowns through the ages [by] John Hornby. Illustrated by Siriol Clarry. )

000 - LEADER
00743cam a2200229k 4500

001 - CONTROL NUMBER
FIN01001594

003 - CONTROL NUMBER IDENTIFIER

005 - DATE AND TIME OF LATEST TRANSACTION
19970610144106.0

006 - FIXED-LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL CHARACTERISTICS--GENERAL INFORMATION
007 - PHYSICAL DESCRIPTION FIXED FIELD--GENERAL INFORMATION
008 - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION
760602c19651962nyua j 000 0 eng

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
027 - STANDARD TECHNICAL REPORT NUMBER
Other Cataloging Features

- Authorities good
- Biblio Editor
  - Advanced MARC Editor Created by Liblime
  - Javascript application.
  - Similar to OCLC Connexion.
Koha Tools – Stage MARC records for Import

Stage MARC Records For Import

- Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalogue.
- You can enter a name for this import. It may be useful, when creating a biblio, to remember where the suggested MARC data comes from!

Stage records into the reservoir

- Select the file to stage:  
  - Upload file

Notes about this file:
- Character encoding: MARC21

Look for existing records in catalogue?
- Record matching rule: Do not look for matching records

Check for embedded item record data?
- Yes
  - Create a label batch for this import?

Stage for import
Can Undo Batch Imports!
Koha Circulation Loan (Issue)/Return

**Koha**
Open Source Library System
Librarian interface

**Circulation**

- **Issue**
  - Enter borrower card number or partial last name
  - OK

- **Return**
  - Enter Book Barcode
  - Item Barcode: OK

**Acquisitions**

**Catalogue**

**Members**

**Authorities**

**Reports**

**Parameters**
Koha Circulation Borrower Details

Circulation: Issues

 Parameters

Branch: West Library. Printer: HP Deskjet

Borrower information

Stephen Hedges (V10000008) detail edit
00 Drive St. Anytown
Category: A
6 Issues, 5 Overdue

 Enter Book Barcode

Item Barcode:
Day Month Year

Sticky Due Date

 Previous Issues

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Bar Code</th>
<th>Title</th>
<th>Author</th>
<th>Call number</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/02/2006</td>
<td>31000011</td>
<td>Spycatcher</td>
<td>Wright, Peter.</td>
<td>505.5 WR</td>
</tr>
<tr>
<td>08/02/2006</td>
<td>31000017</td>
<td>Birds of North America</td>
<td>Chandler Robbins</td>
<td></td>
</tr>
<tr>
<td>08/02/2006</td>
<td>31000015</td>
<td>The dark tower vii</td>
<td>King, Stephen.</td>
<td></td>
</tr>
<tr>
<td>08/02/2006</td>
<td>31000013</td>
<td>The dark tower vii</td>
<td>King, Stephen.</td>
<td>FIC King</td>
</tr>
<tr>
<td>08/02/2006</td>
<td>31000016</td>
<td>The dark tower vii</td>
<td>King, Stephen.</td>
<td></td>
</tr>
<tr>
<td>08/02/2006</td>
<td>31000014</td>
<td>Ghost soldiers</td>
<td>Sides, Hampton.</td>
<td>940.54 Si</td>
</tr>
</tbody>
</table>
Koha Patron Detail Entry Screen
Koha Holds Pending Screen

Logged in as: kohaadmin

Reserves pending served as of 15/03/2006

<table>
<thead>
<tr>
<th>Priority</th>
<th>Reserve Date</th>
<th>Patron</th>
<th>Title</th>
<th>Location</th>
<th>Notes</th>
</tr>
</thead>
</table>

Home || Catalogue || Members || Acquisitions || Circulation || Reports || Parameters || About || Help
Circulation – Outstanding Issues

- Calendar - Only daily not hourly
  - Daily Loans and fines
- No Course Reserve Module
- No Booking Module
Koha Acquisitions/Serials

- Current acquisitions and serials piece is quite simple
  - No Fund Hierarchies
  - No EDI
- Waldo is working with Liblime to develop more robust acquisitions and serials modules (Sponsored Development)
  - Fall ‘08?
Opening page for Acquisitions
Vendor and budgets are set up beforehand

Acquisitions
Start, receive, or modify any order

Vendor

Pending suggestions
No suggestions waiting

Budgets and funds

<table>
<thead>
<tr>
<th>Budgets</th>
<th>Total</th>
<th>Spent</th>
<th>Commt</th>
<th>Avail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books</td>
<td>1000.00</td>
<td>350.25</td>
<td>585.25</td>
<td></td>
</tr>
<tr>
<td>Sells</td>
<td>3000.00</td>
<td>0.00</td>
<td>55.00</td>
<td>2945.00</td>
</tr>
<tr>
<td>Total</td>
<td>4000.00</td>
<td>350.25</td>
<td>640.25</td>
<td>3305.00</td>
</tr>
</tbody>
</table>

Use your reload button [ctrl + r] to get the most recent figures. Committed figures are approximate only, as exchange rates will affect the amount actually paid.

Exchange rates

<table>
<thead>
<tr>
<th>Currency</th>
<th>Rate</th>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAD</td>
<td>1.02067</td>
<td></td>
</tr>
<tr>
<td>EUR</td>
<td>0.87420</td>
<td></td>
</tr>
<tr>
<td>GBP</td>
<td>1.59020</td>
<td></td>
</tr>
<tr>
<td>USD</td>
<td>1.00000</td>
<td></td>
</tr>
</tbody>
</table>

Help
To begin an order, local purchase or donation, search for the vendor or benefactor, and then you can create a new Basket.
A Basket is a collection of orders.
To order an item you need to establish whether a biblio already exists for it, and either add an item, or set up a new biblio and then add the item.
Go to vendor page to add an order.

Uses basket (collection for orders)
New order form

### New order

**Catalogue details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Old school hot rods</td>
</tr>
<tr>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>Publisher</td>
<td>Atkravado Publications</td>
</tr>
<tr>
<td>Copyright date</td>
<td>2008</td>
</tr>
<tr>
<td>Item type</td>
<td>Reference</td>
</tr>
<tr>
<td>ISBN</td>
<td>97813998992452</td>
</tr>
<tr>
<td>Series</td>
<td></td>
</tr>
<tr>
<td>Library</td>
<td>Manhatto</td>
</tr>
</tbody>
</table>

#### Accounting Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>1</td>
</tr>
<tr>
<td>Family</td>
<td>Book budget</td>
</tr>
<tr>
<td>Vendor price</td>
<td>55.00</td>
</tr>
<tr>
<td>Replacement cost</td>
<td>55</td>
</tr>
<tr>
<td>Budgeted Cost</td>
<td>52.25</td>
</tr>
<tr>
<td>Total</td>
<td>52.25</td>
</tr>
</tbody>
</table>
Example of invoice/receipt

Receipt Summary for [ 217217 ] on 04/04/2008

Invoice number: 217217
Received by: galen
On: 04/04/2008

Items in shipment

<table>
<thead>
<tr>
<th>Item</th>
<th>Basket Order</th>
<th>Summary</th>
<th>View MARC</th>
<th>Est cost</th>
<th>Actual cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1 / 4</td>
<td>What the heart knows</td>
<td>View MARC</td>
<td>15.00</td>
<td>15.00</td>
<td>15.00</td>
</tr>
</tbody>
</table>

SUBTOTAL 15.00 15.00 15.00

TOTAL 15.00

Search orders to add to this shipment

Search ISBN or Title:

or select a pending orders

<table>
<thead>
<tr>
<th>Item</th>
<th>BASKET</th>
<th>Summary</th>
<th>View MARC</th>
<th>Still on order</th>
<th>Unit cost</th>
<th>Order cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>Common wild flowers of Minnesota</td>
<td>MARC</td>
<td>Card</td>
<td>1</td>
<td>21.00</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>Sleeping like a baby: simple sleep solutions for infants and toddlers</td>
<td>MARC</td>
<td>Card</td>
<td>1</td>
<td>15.00</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Into the storm: a novel</td>
<td>MARC</td>
<td>Card</td>
<td>22</td>
<td>0.00</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>Old days</td>
<td>MARC</td>
<td>Card</td>
<td>1</td>
<td>15.00</td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>ABA Banking Journal</td>
<td>MARC</td>
<td>Card</td>
<td>1</td>
<td>55.00</td>
</tr>
</tbody>
</table>

TOTAL 26 106.00
Serial opening page
Example of Subscription Record

Subscription for ABA Banking Journal

Subscription information
- Subscription ID: 2
- Librarian: galen
- Vendor: Netlan and Netlan
- ISBN: (147) ABA Banking Journal
- Location: MANKATO

Planning
- Beginning date: 01/01/2008
- Frequency: 1/month
- Manual history: 

<table>
<thead>
<tr>
<th>Number pattern</th>
<th>Volume, Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting with</td>
<td>55, 2</td>
</tr>
<tr>
<td>Relieves</td>
<td>12</td>
</tr>
</tbody>
</table>

First annual: 01/01/2008
Number of months: 12

Serial issues

<table>
<thead>
<tr>
<th>Issue number</th>
<th>Planned date</th>
<th>Published date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vol 55, No 2, Feb.</td>
<td>02/01/2008</td>
<td>02/01/2008</td>
<td>Expected</td>
</tr>
<tr>
<td>Vol 55, No 1, January</td>
<td>01/01/2008</td>
<td>01/01/2008</td>
<td>Arrived</td>
</tr>
</tbody>
</table>

Subscription summary

<table>
<thead>
<tr>
<th>Start date</th>
<th>01/01/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>End date</td>
<td>01/01/2008</td>
</tr>
</tbody>
</table>
Serials

- Subscription shows next expected issue
- Can do routing and claiming
  - Currently no holding record
Koha & ILL

- No ILL Module
- Plan links to third-party ILL systems
- "There will be an announcement from Koha sometime in May concerning their plans for ILL. Indications are that Koha will probably interact with existing ILL systems and include a discovery component."
Koha & ILL

- Can do inter-branch circulation of returnables IF both are on the same instance of Koha
- Where would we manage ILL?
  - ILLAD, VDX, Other?
- Additional $$$ for an ILL System
Welcome to Koha

Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Ketico Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe.

Posted on 10/20/2007 Edit | Delete | New

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 10/20/2007 Edit | Delete | New
System Preferences

**Global system preferences**
- Manage global system preferences like MARC flavor, date format, administrator e-mail, and templates.

**Basic parameters**
- **Libraries, branches and groups**
  - Define libraries, branches and groups.
- **Accounts and budgets**
  - Accounts and budget 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.
- **Road types**
  - Define road types (street, avenue, way, etc.). Road types display as authorized values when adding/editing patrons and can be used in geographic statistics.
- **Circulation rules**
  - Define circulation rules in a matrix for libraries / patrons / item types / circ codes (number of checkouts, duration, fee, etc.).
- **Fines rules**
  - Define fines in a matrix for libraries / patrons / item types (cost, grace period, etc.).
- **Circulation and fines rules (alternate layout)**
  - Define circulation rules and fines as a list.

**Catalogue**
- **Authorised values**
  - Define categories and authorised 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.
- **MARC Authorities framework**
  - Create and manage Authorities frameworks that define the characteristics of your MARC Records (field and subfield definitions).
- **Classification sources**
  - Define classification sources (e.g., call number schemes) used by your collection. Also define filing rules used for sorting call numbers.
- **Record matching rules**
  - Manage rules for automatically matching MARC records during record imports.

**Additional parameters**
- **Stop words**
  - Words ignored during search.
- **Network Printers**
  - Printers [UNIX paths].
- **Z39.50 Client Targets**
  - Define which servers to query for MARC data in the integrated Z39.50 client.
Systems Administration

System Preferences
- System Preferences

Basic parameters
- Libraries, branches, groups
- Accounts and budgets
- Currencies and exchange rates
- Item types and circulation codes

Patrons and circulation
- Patron types and categories
- Cities and towns
- Road types
- Circulation rules
- Fines rules
- Alternate issuing rules

Catalogue
- Authorised values
- MARC Bibliographic framework
- Koha to MARC mapping
- MARC Bibliographic framework test
- MARC Authorities framework
- Classification sources
- Record matching rules

Additional parameters
- Network Printers
- 239.50 Client Targets

Libraries
- Name: Gustavus, Code: GUSTAVUS, Address: (nothing entered)
- Name: Mankato, Code: MANKATO, Address: (nothing entered)

Group(s): Search Domain
- Name: Minnesota, Code: MN

Group(s): Properties
- No Properties Defined
News
Write news for the OPAC and staff interfaces
Label and Patron Card Creator
Create printable labels and barcodes from catalog data and patron cards from patron data
Calendar
Define days when the library is closed
Comments
Moderate patron comments

Stage MARC Records For Import
Stage MARC records into the reservoir.
Manage Staged MARC Records
Managed staged MARC records, including completing and reversing imports
Export bibliographic and holdings
Export bibliographic and holdings data
Import patrons
Import patron data
Patrons (anonymize, bulk-delete)
Delete old borrowers and anonymize circulation history (deletes borrower reading history)
Upload patron images
Upload patron images in batch or one at a time
Task Scheduler
Schedule tasks to run

Notices
Define notices (print and email notification messages for overdues, etc.)
Overdue notice/status triggers
Set notice/status triggers for overdue items
Log viewer
Browse the system logs
Inventory/stocktaking
Perform inventory (stocktaking) of your catalogue
Define the holidays for branch Gustavus

- Search in the calendar the day you want to set as holiday.
- Complete the information in the right area.
- Once you finish the steps above, click Save.

Working day Unique holiday Repeatable holiday Holiday exception

Calendar information

<table>
<thead>
<tr>
<th>April, 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>wk</td>
</tr>
<tr>
<td>13</td>
</tr>
<tr>
<td>14</td>
</tr>
<tr>
<td>15</td>
</tr>
<tr>
<td>16</td>
</tr>
<tr>
<td>17</td>
</tr>
</tbody>
</table>

Select date
Guided Reports

Use the guided reports engine to create non-standard reports. This feature aims to provide some middle ground between the built-in canned reports and writing custom SQL reports.

Build And Run Reports

Guided Reports

Build and Run Reports

- Build New
- Use Saved
- Create from SQL

Reports Dictionary

Guided Reports

- Build new
- Used saved
- Create report from SQL

Reports Dictionary

Use the reports dictionary to define custom criteria to use in your reports.
Evergreen

- Design, Architecture, Security
- OPAC
- CAT
- CIRC
- ACQ
- SER
- ILL
- SYSTEMS
- Reports
Evergreen Disclaimer

- The following is what we have discovered by ourselves
- We have not had our 2-day session with Equinox yet
- We will have more information after the Equinox session
Evergreen
Design, Architecture, Security

- Database – PostgreSQL
- “C” and PERL
- Apache, Mod_Perl
- Does have a staff client (cross platform)
Evergreen
Design, Architecture, Security

- Clustered hardware configuration
- Consortium – oriented design
- Hierarchical entities and branches
- Don’t know yet
  - Permissions
  - Record ownership
Evergreen OPAC

- FRBR Display
- Facets, book covers, reviews
- Web 2.0 features
<table>
<thead>
<tr>
<th>Title</th>
<th>Author(s)</th>
<th>Year</th>
<th>Edition</th>
<th>Publisher</th>
<th>Status</th>
<th>Copies</th>
<th>Total Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovation : create an idea culture, redefine your business, grow...</td>
<td>Gorman, Tom.</td>
<td>2007</td>
<td></td>
<td>Adams Media</td>
<td>Place Hold</td>
<td>1/1</td>
<td></td>
</tr>
<tr>
<td>Making money with your computer at home : the inside information...</td>
<td>Edwards, Paul</td>
<td>1997</td>
<td>2nd ed.</td>
<td>Jeremy P. Tarcher</td>
<td>Place Hold</td>
<td>3/7</td>
<td></td>
</tr>
<tr>
<td>Seeing what's next? [sound recording] using the theories of innov...</td>
<td>Christensen, Clayton M.</td>
<td>2004</td>
<td></td>
<td>Recorded Books</td>
<td>Place Hold</td>
<td>2/2</td>
<td></td>
</tr>
</tbody>
</table>
Evergreen Individual Record

Title: Innovation - create an idea culture, redefine your business, grow your profits
Author: Gorman, Tom.
ISBN: 978159691542
Edition
Publication Date: 2007
Publisher: Adams Media
Physical Description: print 184 p.; 18 cm.
Format: text
Abstract
Online Resources: Table of contents only

Library: Dougherty County Public Library
Callnumber: 658.4063
GORMAN, TOM
Details: browse
Actions: Available 1, Checked out 0, In process 0, In transit 0, Reshelving 0, On holds shelf 0, On order 0
Evergreen Client
Cataloging Module

1: mgrl-go-demo-localadmin@MGRL-GO-mork.demo.gapines.org

File    Edit    Search    Circulation    Cataloging

Search the Catalog    F3
Retrieve record by ICN Shift+F3
Display Item (B)      F5

Manage Copy Buckets
Manage Volume Buckets
Manage Record Buckets

Create New Marc Record
Import Record from Z39.50

Replace Barcode
Retrieve Last Record    Shift+F8
Evergreen Add MARC Record
Evergreen Client Search

[Image of Evergreen Client Search interface]

- **Search Input**
  - Keyword Contains
  - Add Search Row
  - Submit Search

- **Search Filters**
  - Item Form: Braille, Electronic, Large print
  - Item Type: Books, Audiobooks, Video Recordings
  - Library Form: Advanced
  - Language: English, Spanish, French
  - Audience: Adult, Juvenile, General

- **Quick Search**
  - ISDN
  - Submit

- **MARC Export Search**
  - Tag: 245
  - Subfield: a
  - Value: down
  - Add Row
  - Submit
Evergreen - Bucket

Actions for this Record
- OPAC view
- MARC View
- MARC Edit
- Holdings Maintenance
- View Holds
- Add to Bucket
- Mark for Overlay
- Delete Record
- Duplicate in New Tab
- Remove this Frame
- Set bottom interface as Default
- Reset Display

Add to Bucket
Record Buckets
Copy this 1 record into which bucket?
Test
Add to Selected Bucket  Add to New Bucket
Cancel
<table>
<thead>
<tr>
<th>Author</th>
<th>Edition</th>
<th>ISEN</th>
<th>PubDate</th>
<th>Publisher</th>
<th>TCN</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roberts, Jim</td>
<td></td>
<td>0941599108 (pbk.)</td>
<td>c1991</td>
<td>Piccadilly Books</td>
<td>PIN711314286</td>
<td>Strutter's complete guide to down ma...</td>
</tr>
<tr>
<td>Selman, LaRue W.</td>
<td></td>
<td></td>
<td></td>
<td>Aro</td>
<td>PIN970110351</td>
<td>Sammy Skunk plays the down</td>
</tr>
</tbody>
</table>
Evergreen Circ Checkout Screen

1 Patron: Grechy, Anne

Status
- TempRes12
- MGRL-GO
- Internet: Filtered
  Expires on 2007-02-22
- Holds: 0
- Available: 0
- Bills: $0.00
- Check Outs: 0
  - Overdue: 0
  - Long Overdue: 0
  - Claimed Returned: 0
- Lost: 0
- Non Cat: 0

ID/Contact Info
- Library Card: 345211
- ID 1: Other
- ID 2: DOB: 1972-06-17
- Day Phone:
- Evening Phone:
<table>
<thead>
<tr>
<th>User Identification</th>
<th>Barcode</th>
<th>Username</th>
<th>Password: 6683</th>
<th>Verify Password</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Contact Info</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Addresses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Groups and Permissions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Statistical Categories</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Surveys</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Finish</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: required or invalid fields are marked with color
Evergreen Check In Screen
## Evergreen Holds Pull List

### Evergreen Holds Pull List: Gordon Public Library

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Copy Location</th>
<th>Call Number</th>
<th>Item Barcode</th>
<th>Copy Number</th>
<th>Format</th>
<th>Patron Barcode</th>
<th>Hold Placement Date</th>
<th>Hold Type</th>
</tr>
</thead>
</table>

Note: Click on a column header to sort the column.
Evergreen – Serials and Acquisitions

- None at this time!
- In development with University of Windsor.
  - Expected in August of 2008??
Evergreen & ILL

- Can do inter-branch circulation of returnables
- No ILL Module
- No plans for one
Evergreen & ILL

- Must use third-party applications
- Where would we manage ILL?
  - ILLAD, VDX, Other?
- Additional $$$ for an ILL System
Local System Administration

Workstation Configuration
- Global Font and Sound Settings
- Printer Settings Editor

Library Configuration
- Closed Dates Editor
- Copy Locations Editor
- Library Settings Editor
- Non Cataloged Types Editor
- Statistical Categories Editor

Maintenance Reports
- Pull List for Hold Requests (Testing)
- Pull List for Hold Requests (Classic)
- Reports
- Cash Reports
- Transit List
Library Settings Editor

Edit Settings for: **Gordon Public Library**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
<th>Apply</th>
<th>Apply to all Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPAC Inactivity Timeout (in seconds)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff Login Inactivity Timeout (in seconds)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lost Materials Processing Fee</td>
<td>$0.00</td>
<td>Apply</td>
<td>Apply to all Locations</td>
</tr>
<tr>
<td>Default Item Price</td>
<td>$0.00</td>
<td>Apply</td>
<td>Apply to all Locations</td>
</tr>
<tr>
<td>&quot;FRCM&quot; email address for patron notices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(note: delivery failures will be returned</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>this address)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. "Apply to all Locations" will force the new setting to be applied to all locations in the location dropdown.
Closed Dates Editor

Edit Closed Dates for: [Gordon Public Library]

<table>
<thead>
<tr>
<th>Closed Duration</th>
<th>Reason for Closing</th>
<th>Delete</th>
</tr>
</thead>
</table>

Note: All dates must have the form YYYY-MM-DD. Times must have the form HH:MM.
### Aleph, Koha and Evergreen — Summary

<table>
<thead>
<tr>
<th>Feature</th>
<th>Aleph</th>
<th>Koha</th>
<th>Evergreen*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design, Architecture</td>
<td>RDMS + Control Files, scalable Cobol</td>
<td>My SQL</td>
<td>PostgreSQL, C, PERL, Mod_PERL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Perl – Scalability issues?</td>
<td>Scalable Hundreds of Libraries</td>
</tr>
<tr>
<td>Consortium Friendly</td>
<td>Somewhat</td>
<td>No, Some development underway</td>
<td>Yes</td>
</tr>
<tr>
<td>Robust, granulated security</td>
<td>Yes</td>
<td>No</td>
<td>Yes?</td>
</tr>
<tr>
<td>OPAC</td>
<td>Old, difficult to use</td>
<td>Facets, Web 2.0, FRBR lite</td>
<td>FRBR, facets, Web 2.0</td>
</tr>
<tr>
<td>MFHD</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Cataloging</td>
<td>Difficult</td>
<td>good</td>
<td>Ok?</td>
</tr>
</tbody>
</table>
Aleph, Koha and Evergreen – Summary - 2

<table>
<thead>
<tr>
<th>Feature</th>
<th>Aleph</th>
<th>Koha</th>
<th>Evergreen*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circ</td>
<td>Complete but difficult</td>
<td>Simple, consortium elements missing</td>
<td>Better for consortium?</td>
</tr>
<tr>
<td>Course Reserve</td>
<td>Yes</td>
<td>No, under development</td>
<td>No ?</td>
</tr>
<tr>
<td>Booking</td>
<td>Yes</td>
<td>No</td>
<td>No ?</td>
</tr>
<tr>
<td>Serials</td>
<td>Yes, complete but difficult</td>
<td>Simple,</td>
<td>No, Expected soon</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>Yes, complete but difficult</td>
<td>Simple ,Ver. 2 soon</td>
<td>No, Expected soon</td>
</tr>
<tr>
<td>EDI</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Binding</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>ILL</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Inter-branch Callslip for Returnables</td>
<td>Yes in 18, (we haven’t implemented)</td>
<td>Yes, if on same instance</td>
<td>Yes</td>
</tr>
</tbody>
</table>
## Aleph, Koha and Evergreen – Summary – 3

<table>
<thead>
<tr>
<th>Feature</th>
<th>Aleph</th>
<th>Koha</th>
<th>Evergreen*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports</td>
<td>Difficult, not everything is in tables</td>
<td>Yes, Prepackaged, Builder, SQL</td>
<td>Yes</td>
</tr>
<tr>
<td>Ownership of Records</td>
<td>Yes</td>
<td>No</td>
<td>?</td>
</tr>
<tr>
<td>Audit Trails</td>
<td>Yes</td>
<td>No</td>
<td>?</td>
</tr>
<tr>
<td>Staff Client</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Time and Effort to Use and Maintain – Library staff</td>
<td>Very High</td>
<td>Low?</td>
<td>Low?</td>
</tr>
<tr>
<td>Time and Effort to Maintain–system staff</td>
<td>Very High</td>
<td>Low?</td>
<td>Low?</td>
</tr>
<tr>
<td>Total Cost of Ownership</td>
<td>Very High</td>
<td>After sponsored development, probably low</td>
<td>After sponsored development, probably low</td>
</tr>
</tbody>
</table>
Conclusions

- Aleph – Complete but difficult
  - Limited life
  - High cost of ownership
- OS ILS
  - Modern design, architecture and presentation
  - Incomplete from a academic and consortium perspective
  - Some sponsored development underway
  - More sponsored development needed for MnPALS to use
Next Steps

- Lean more about Ex Libris’ plans for Aleph and successor product
- Track OS ILS development efforts & projects
  - Academic features
  - Consortium features
  - Missing functionality
    - Sponsor development or find alternatives
- Assess options
- Provide additional informational and participative opportunities to the consortium
Discussion Questions

- How important is a shared ILS and shared records such as bibs, patrons, and vendors?
- What role does the ILS play in our Consortium?
- What will it take for Open Source Library System software to be ready for your library?
  - What can you live without?
  - What functionality can be provided in some other way?
- Can some libraries move to a new system sooner and others later?