Advanced Koha Workshop

Library Technology Conclave – LTC 2018
23-25 Jan 2018 – Goa University, Goa, India
Who am I?

Katrin Fischer

katrin.fischer@bsz-bw.de

- Librarian
- Working at BSZ
- IT coordinator at BSZ in Konstanz, Germany
- Involved in the Koha Community since 2008
  - Bug Wrangler (1 year)
  - Translation Manager Assistant (0.5 years)
  - Quality Assurance Manager 3.12-16.05, 18.05 (3.5 years+)
  - Release Maintainer 16.11 (1 year)
  - Koha Documentation Team (1 year)
What is BSZ?

Bibliotheksservice-Zentrum Baden-Württemberg

- A public institution in the business area of the Ministry of Science, Research, and Art of Baden-Württemberg since 1996
- Headquarter in Konstanz, Germany
- About 65 employees
- Organized in 3 departments
  - Union Catalog (SWB)
  - Library Systems
  - Museums, Archives and Repositories
Koha as Software-as-a-Service / Cloud offer

- Hosting
- Data migration
- Support
- Training
- Documentation

Currently supporting

- 25 libraries in Germany
- 97 libraries of the Goethe Institute world wide
  New Delhi, Kolkata, Bangalore, Mumbai, Pune, Chennai
Feature Overview

- OPAC & Searching
- Cataloguing
- Patron management
- Patron Clubs
- Circulation
- Article Requests
- Acquisitions
- Serials
- ILL
- APIs
OPAC & Searching

- Responsive mobile friendly layout
- Search engine based (Zebra)
- Different search levels
  - Simple search
  - Advanced search
  - Expert search with CQL commands
- OPAC and staff search mostly identical
  - Exception 1: Alphabetic index search
  - Exception 2: Item search
WELCOME TO THE ONLINE CATALOGUE OF THE GOETHE-INSTITUT / MAX MUELLER BHAVAN NEW DELHI

Our library houses a selection of up-to-date print and audiovisual media in German and in translation to keep you informed about the latest trends and current issues in Germany. 40% of our collection consists of books and media in English language.

Main subject areas are German language and culture, contemporary literature and art and German feature films & documentaries on DVD. A special feature of our library’s collection is the "German as a foreign language" section, which is tailored to meet the needs of language students and teachers. The collection includes easy readers, comics, grammar books, reading and listening comprehension materials as well as media for self-study and exam preparation.

For detailed information on the library, please visit our website.
Item search

- Item specific search
- Multi-select search options
- Exact search results for items
- Option to export itemnumber list for batch editing
- Custom search options can be configured
Item search

Go to advanced search

Home library
- Riverside
- Springfield
- Troy
- Union

Current location
- All libraries
- Centerville
- Fairfield
- Fairview

Shelving location
- All locations
- Audio Visual
- Book Cart
- Children's Area

Item type
- All item types
- Books
- Computer Files
- Continuing Resources

Collection code
- All collection codes
- Fiction
- Non-fiction
- Reference

Status
- All statuses
- Not for Loan
- Ordered
- Staff Collection
Item search

Item search field: Non-public note

Edit field

Name: NonPublicNote
Label: Non-public note
MARC field: 952
MARC subfield: x
Authorised values category: - None -

Submit  Cancel

New search field

Item search fields

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
<th>MARC field</th>
<th>MARC subfield</th>
<th>Authorised values category</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>NonPublicNote</td>
<td>Non-public note</td>
<td>952</td>
<td>x</td>
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<td>TypeOfAcquisition</td>
<td>Type of Acquisition</td>
<td>952</td>
<td>E</td>
<td>ACQTYPE</td>
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</table>
Cataloguing

- Manage bibliographic and authority records
  - Form based editor
  - Advanced text based editor
- Manage item information
- Manage uploads
- Batch record modification and deletion
- Batch item modification and deletion
- Staged import using matching rules
### Add MARC record

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<table>
<thead>
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<td>005</td>
<td>? - DATE AND TIME OF LATEST TRANSACTION</td>
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<td>007</td>
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<td>National bibliography number</td>
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</tr>
</tbody>
</table>
Patron Management

- Manage user information
  - Address data, email addresses, …
- Patron import
- Batch patron editing
- Batch patron deleting
- Patron lists
Patron Clubs

- Manage club templates
- Manage clubs based on templates
- Configure additional fields for the template
- Configure additional fields for enrollment
- Optionally let users enroll from the OPAC
- Optionally require a valid email address
- Optionally limit enrollment to specific library
- Set start and end date
Patron Clubs

Create a new club template

Name: Summer Reading Program

Description: Template Summer Reading

Allow public enrollment: ✔ If a template allows public enrollment, patrons can enroll in a club based on this template from the public catalog.

Require valid email address: ☐ If set, a club based on this template can only be enrolled in by patrons with a valid email address.

Library: [click to select]

If set, only librarians logged in with this branch will be able to modify this club template.

Club fields:

These fields will be used in the creation of clubs based on this template

New club field

Name: Year

Description: Year

Authorised value category: [click to select]

Delete field
Enrollment fields

These fields will be used when enrolling a patron in a club based on this template

New enrollment field

Name: Newsletter
Description: Int to receive our newsletter?
Authorised value category: YES_NO

Delete field

Add new field

Save  Cancel
Modify club Summer Reading Club 2017

Name: Summer Reading Club 2017

Description: Fun in the sun... with books!

Start date: 01/01/2018

End date: 31/01/2018

Library: 

Year: 2017

Save   Cancel
Hello, Katrin Fischer

Click here if you're not Katrin Fischer

Checked out (1)  Clubs (1/0)  Holds (4)

Clubs currently enrolled in

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Date enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Reading Club 2017</td>
<td>Fun in the sun... with books!</td>
<td>22/01/2018</td>
</tr>
</tbody>
</table>

× Cancel enrollment
Circulation

- Checkouts / On-site checkouts
- Holds
Holds – Multiple Libraries

If more than one library has the item, which library should fill the hold?

- Use ‘Holds to pull‘ report
  - First one to check-in an item that can fill the hold.
- Use ‘Holds queue‘ report
  - Pick a library randomly from a list
  - Pick a library from a list in a given sequence
  - Pick the ‘cheapest‘ option
### Holds Policy

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>StaticHoldsQueueWeight</td>
<td>Satisfy holds using items from the libraries CPL, FFL, FPL, PVL, RPL</td>
</tr>
<tr>
<td>HoldsQueueSkipClosed</td>
<td>(as branchcodes, separated by commas; if empty, uses all libraries)</td>
</tr>
<tr>
<td>RandomizeHoldsQueueWeight</td>
<td>when they are open in random order.</td>
</tr>
</tbody>
</table>

### Checkout Policy

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>UseTransportCostMatrix</td>
<td>Don't use Transport Cost Matrix for calculating optimal holds filling between branches.</td>
</tr>
</tbody>
</table>

Save all Circulation preferences

Cancel
Defining transport costs between libraries

Costs are decimal values between some arbitrary maximum value (e.g. 1 or 100) and 0 which is the minimum (no) cost.
Red cells signify no transfer allowed.
Click on individual cells to edit.

<table>
<thead>
<tr>
<th>From \ To</th>
<th>Centerville</th>
<th>Fairfield</th>
<th>Fairview</th>
<th>Franklin</th>
<th>Institut Protestant de Théologie</th>
<th>Liberty</th>
<th>Midway</th>
<th>Pleasant Valley</th>
<th>Riverside</th>
<th>Springfield</th>
<th>Troy</th>
<th>Union</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centerville</td>
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<tr>
<td>Fairview</td>
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<td>Franklin</td>
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<tr>
<td>Institut Protestant de Théologie</td>
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</tr>
</tbody>
</table>
If there is more than one user requesting the item, which one should get it first?

- Order of holds placed
- Prefer users in the item’s home library
- Reorder holds manually...

Circulation preferences

Holds Policy

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>LocalHoldsPriority</td>
<td>Don’t give priority for filling holds to patrons whose pickup library matches the item's holding library</td>
</tr>
<tr>
<td>LocalHoldsPriorityPatronControl</td>
<td></td>
</tr>
<tr>
<td>LocalHoldsPriorityItemControl</td>
<td></td>
</tr>
</tbody>
</table>
Article Requests

- Completely separate from checkouts
- Can work on record and on item level
- Works with or without items
- Request articles from OPAC or staff interface
- Manage and process article requests
- Send status updates to patrons
  - Requested, Processing, Canceled, Done
## Configuration

- **System preferences**

### Article Requests

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ArticleRequests</td>
<td>Enable ▼ patrons to place article requests.</td>
</tr>
<tr>
<td>ArticleRequestsMandatoryFields</td>
<td>For records that are record level or item level requestable, make the following fields mandatory ▼ 4 of 7 s... ▲</td>
</tr>
<tr>
<td>ArticleRequestsMandatoryFieldsItemOnly</td>
<td>For records that are only item level requestable, make the following fields mandatory ▼ 4 of 7 s... ▲</td>
</tr>
<tr>
<td>ArticleRequestsMandatoryFieldsRecordOnly</td>
<td>For records that are only record level requestable, make the following fields mandatory ▼ 4 of 7 s... ▲</td>
</tr>
</tbody>
</table>
# Article Requests

## Configuration

### Circulation conditions

<table>
<thead>
<tr>
<th>No automatic renewal after (hard limit)</th>
<th>Holds allowed (count)</th>
<th>Holds per record (count)</th>
<th>On shelf holds allowed</th>
<th>Item level holds</th>
<th>Article requests</th>
<th>Rental discount (%)</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td></td>
<td>Yes</td>
<td>Don't allow</td>
<td>Yes</td>
<td>0.000000</td>
<td>Edit</td>
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<tr>
<td>5</td>
<td>2</td>
<td></td>
<td>Yes</td>
<td>Force</td>
<td>Yes</td>
<td>0.000000</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Katrin Fischer | Advanced Koha Workshop | LTC 2018
Article Requests

Configuration

- 4 notices (open, canceled, processing, completed)
- 1 slip

Notices and Slips

<table>
<thead>
<tr>
<th>Library</th>
<th>Module</th>
<th>Code</th>
<th>Name</th>
<th>Copy notice</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>(All libraries)</td>
<td>acquisition</td>
<td>ACQ_NOTIF_ON_RECEIV</td>
<td>Notification on receiving</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
<tr>
<td>(All libraries)</td>
<td>circulation</td>
<td>AR_CANCELED</td>
<td>Article request - canceled</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
<tr>
<td>(All libraries)</td>
<td>circulation</td>
<td>AR_COMPLETED</td>
<td>Article request - completed</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
<tr>
<td>(All libraries)</td>
<td>circulation</td>
<td>AR_PENDING</td>
<td>Article request - open</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
<tr>
<td>(All libraries)</td>
<td>circulation</td>
<td>AR_PROCESSING</td>
<td>Article request - processing</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
<tr>
<td>(All libraries)</td>
<td>circulation</td>
<td>AR_SLIP</td>
<td>Article request - print slip</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
<tr>
<td>(All libraries)</td>
<td>circulation</td>
<td>CHECKIN</td>
<td>Item Check-in (Digest)</td>
<td>Copy to Centerville</td>
<td>Copy</td>
</tr>
</tbody>
</table>
Your search returned 22 results.

1. **Gairm.**
   - Material type: Continuing resource
   - Format: print
   - Type of continuing resource: periodical
   - Publisher: Glaschu : [s.n.], 1952-2002
   - Availability: Items available for loan: Centerville (1).
   - Place hold  Request article  Save to Lists  Add to cart

2. **Chapman.**
   - Material type: Continuing resource
   - Format: print
   - Type of continuing resource: periodical
   - Publisher: Edinburgh, Scotland : Chapman Magazine
   - Availability: No items available
   - Place hold  Request article  Save to Lists  Add to cart

3. **Farmers weekly agricultural register.**
   - by Reed Business Information.
   - Material type: Continuing resource
   - Format: print
   - Publisher: East Grinstead : Reed Business Information,
   - Other title: Agricultural register.
   - Availability: No items available
   - Place hold  Request article  Save to Lists  Add to cart
Article Requests

Place article request for Farmers weekly agricultural register.

Title: Seeds and growth rate of carrots

Author:

Volume:

Issue: 2018

Date: 1

Pages: 12.24

Chapters:

Notes:

Pickup library: Centerville

Place request
### Article requests (1 total)

<table>
<thead>
<tr>
<th>Record title</th>
<th>Placed on</th>
<th>Title</th>
<th>Author</th>
<th>Volume</th>
<th>Issue</th>
<th>Date</th>
<th>Pages</th>
<th>Chapters</th>
<th>Notes</th>
<th>Status</th>
<th>Pickup library</th>
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<tbody>
<tr>
<td>Farmers weekly agricultural register.</td>
<td>22/01/2018</td>
<td>Seeds and growth rate of carrots</td>
<td></td>
<td>2018</td>
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<td>12.24</td>
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<td>Pending</td>
<td>Centerville</td>
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### Article requests

**Pending (1)**

<table>
<thead>
<tr>
<th>Title</th>
<th>Requested article</th>
<th>Collection</th>
<th>Item type</th>
<th>Call number</th>
<th>Copy number</th>
<th>Enumeration</th>
<th>Barcode</th>
<th>Patron</th>
<th>Date</th>
<th>Actions</th>
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</thead>
<tbody>
<tr>
<td>Farmers weekly agricultural register.</td>
<td>Title: Seeds and growth rate of carrots</td>
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<td></td>
<td>22/01/2018</td>
<td></td>
</tr>
<tr>
<td>Reed Business Information, v. :</td>
<td>Issue: 2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Fischer, Katrin</td>
<td>(42)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date: 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Pages: 12.24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Acquisitions

- Manage budgets and funds
- Manage vendor information and contacts
- Manage orders
- Manage claims
- Manage deliveries and invoices
- Manage subscriptions
- Manage frequencies
- Manage numbering patterns
- Receive issues
- Manage claims
- Email alert for new serial issues
Interlibrary Loans (ILL)

Problem

– No international open standard for ILL
– Different protocols, some proprietary
– Different workflows
  – Lending from one central library to others (BL)
  – Peer to peer lending between libraries
  – ILL requests managed by a central system
Solution

- Build ILL as a very generic module
- Capable of handling different backends
- Flexible workflows
- „Pluggable“
Interlibrary Loans (ILL)

Features

- Ill requests from staff interface and OPAC
  - Search external source
  - Manual entry
  - Works with multiple backends simultaneously
- Cancel requests from OPAC
- Order from other libraries by email
- Record and item have to be created manually
- Place a hold to inform the patron
Interlibrary Loans (ILL)

Configuration

- System preferences
- Configuration in koha-conf.xml file
- Backends available from different repositories

Interlibrary Loans

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILLModule</td>
<td>Enable the interlibrary loans module (master switch).</td>
</tr>
<tr>
<td>ILLModuleCopyrightClearance</td>
<td>Adding text will enable the copyright clearance stage in request creation. The text you enter will be the text displayed. Click to Edit</td>
</tr>
</tbody>
</table>
Interlibrary Loans (ILL)

1. 340 <interlibrary_loans>
2. 341     <!-- Path to where Illbackends are located on the system
3. 342     - This setting should normally not be touched -->
4. 343     <backend_directory>/home/vagrant/kohaclone/Koha/Illbackends</backend_directory>
5. 344     <!-- How should we treat staff comments?
6. 345     - hide: don't show in OPAC
7. 346     - show: show in OPAC -->
8. 347     <staff_request_comments>hide</staff_request_comments>
9. 348     <!-- How should we treat the reply_date field?
10. 349     - hide: don't show this field in the UI
11. 350     - any other string: show, with this label -->
12. 351     <reply_date>hide</reply_date>
13. 352     <!-- Where should digital ILLs be sent?
14. 353     - borrower: send it straight to the borrower email
15. 354     - branch: send the ILL to the branch email -->
16. 355     <digital_recipient>branch</digital_recipient>
17. 356     <!-- What patron category should we use for p2p ILL requests?
18. 357     - By default this is set to 'ILLLIBS' -->
19. 358     <partner_code>ILLLIBS</partner_code>
20. 359   </interlibrary_loans>
ILL backends

Home > Documentation

A generic ILL module is being added to Koha on Bug 7317. This will provide a generic framework for implementing different ILL workflows and protocols in Koha. These implementations will take the form of different "backends". It is not yet clear if these backends will become part of Koha, or live outside Koha as more freestanding plugins.

Here is a list of backends that have been developed so far:

Demo backends

- Dummy - a demo with some sample data baked in, does not talk to any outside sources

"Real" backends

- BLDSS - British Library ILL
- FreeForm - "The FreeForm backend is a simple backend that is supposed to act as a fallback. It provides the end user with some mandatory fields in a form as well as the option to enter additional fields with arbitrary names & values."
- Libris - Swedish ILL, in very early stages of development
- NNCIPP - Norwegian ILL, based on NCIP

Category: Documentation

Home > Documentation
### Interlibrary loan requests

<table>
<thead>
<tr>
<th>Author</th>
<th>Title</th>
<th>Requested from</th>
<th>Request type</th>
<th>Status</th>
<th>Request placed</th>
<th>Last updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Vacation at the lake of Constance</td>
<td>FreeForm</td>
<td></td>
<td>New request</td>
<td>2018-01-22</td>
<td>2018-01-22</td>
</tr>
</tbody>
</table>
New Interlibrary loan request

Search a dummy request

Search string: Bodensee

Pickup branch: Centerville

Request type: Book

Search  Cancel
## Interlibrary Loans (ILL)

### Interlibrary loan requests

Request placed

[Create a new request](#)

<table>
<thead>
<tr>
<th>Author</th>
<th>Title</th>
<th>Requested from</th>
<th>Request type</th>
<th>Status</th>
<th>Request placed</th>
<th>Last updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Vacation at the lake of Constance</td>
<td>FreeForm</td>
<td>New request</td>
<td>2018-01-22</td>
<td>2018-01-22 05:12:02</td>
<td></td>
</tr>
</tbody>
</table>
- Protocol for metadata harvesting
- Harvest new and changed bibliographic records
- Optionally harvest information about deleted records
- Optionally include item information
- Provide sets of data that fit special criteria
- Can be used to build a union catalog (i.e. with VuFind)
- … or to integrate printed resources into an RDS
## OAI-PMH - Configuration

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OAI-PMH (modified)</strong></td>
<td>Enable Koha's OAI-PMH server.</td>
</tr>
<tr>
<td>OAI-PMH:archiveID (modified)</td>
<td>Identify records at this site with the prefix LIBRARYID:</td>
</tr>
<tr>
<td>OAI-PMH:AutoUpdateSets (modified)</td>
<td>Enable automatic update of OAI-PMH sets when a bibliographic record is created or updated</td>
</tr>
<tr>
<td>OAI-PMH:ConfFile</td>
<td>YAML OAI Koha server configuration file: If empty, Koha OAI Server operates in normal mode, otherwise it operates in extended mode. In extended mode, it's possible to parameter other formats than marcxml or Dublin Core. OAI-PMH:ConfFile specify a YAML configuration file which list available metadata formats and XSL file used to create them from marcxml records.</td>
</tr>
<tr>
<td>OAI-PMH:DeletedRecord</td>
<td>Koha’s deletedbiblio table will never be emptied or truncated (persistent)</td>
</tr>
<tr>
<td>OAI-PMH:MaxCount</td>
<td>Only return records at a time in response to a ListRecords or ListIdentifiers query.</td>
</tr>
</tbody>
</table>
**Repository Information**

<table>
<thead>
<tr>
<th>Repository Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Mail Contact</td>
<td>root@localhost</td>
</tr>
<tr>
<td>Repository identifier</td>
<td></td>
</tr>
<tr>
<td>Sample identifier</td>
<td></td>
</tr>
<tr>
<td>Protocol Version</td>
<td>2.0</td>
</tr>
<tr>
<td>Earliest Registered Date</td>
<td>2014-05-07 13:36:23</td>
</tr>
<tr>
<td>Date Granularity</td>
<td>YYYY-MM-DD hh:mm:ss</td>
</tr>
<tr>
<td>Deletion Mode</td>
<td>persistent</td>
</tr>
</tbody>
</table>

Powered by Koha
## List of Records

Results fetched 1 - 50

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIBRARY:1</td>
<td>2017-12-04 13:28:31</td>
</tr>
</tbody>
</table>

### Metadata

```xml
<oai_dc:dc:title>E Street shuffle : the glory days of Bruce Springsteen &amp; the E Street Band /</oai_dc:dc:title>
<oai_dc:dc:creator>Heylin, Clinton.</oai_dc:dc:creator>
<oai_dc:dc:type>text</oai_dc:dc:type>
<oai_dc:dc:language>eng</oai_dc:dc:language>
<oai_dc:dc:description>Includes discography (pages 315-318), bibliographical references (pages 305-314) and index.</oai_dc:dc:description>
<oai_dc:dc:subject>Springsteen, Bruce.</oai_dc:dc:subject>
<oai_dc:dc:subject>E Street Band.</oai_dc:dc:subject>
<oai_dc:dc:subject>Rock musicians</oai_dc:dc:subject>
</oai_dc:dc>
```
Thank you!
Any questions?

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katrin.fischer@bsz-bw.de