

Preservation workflows management with Koha

Appendix 2 - "Users" specifications

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For the attention of Koha developers	Sanctioned by Data team leaders
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This memo presents the goals related to the digitization of the processing channels at work in the Preservation and Heritage team, whose specifications were established following several discussions and meetings with the leaders of this team and the Koha team.

This memo is composed of a main part describing in details the existing channels and the target channels the BULAC wants to aim at, and of 4 appendices describing the target channels according to different profiles :

- Main principles
- Appendix 1 - Specifications of the "Admin" needs
- **Appendix 2 - Specifications of the "Users" needs**
- Appendix 3 - Specifications of the "Architecture" needs
- Appendix 4 - Other appendices

This second appendix details the use of the preservation module for "user" profile. A specific user permission will be required to access every item.

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1. Treatment circuit

Items entry

The items are scanned in the Preservation unit > Items input. The following informations are automatically listed in a table :

- barcode
- call number
- location
- itype
- input timestamp : first barcode scan in the “Items entry” menu
- output timestamp : once the treatment is checked and approved at the end of the workflow
- deleting and archiving items options in the preservation module
- cataloguing control options : if data is missing, the system sends a warning to a registered contact

A side form allows searching on items especially on by dates so that it is easy to verify the duration of the treatment and if the item has already been treated. “Warnings” and archiving status can also be checked.

Filtre sur :

Date d'entrée :

Du :

Au :

Alerte catalogage ☐

Afficher archives ☐

The document status is updated automatically when adding the document to the list.

Batch opening

This part is really similar to the Acquisition module.

The batch homepage is similar to the existing homepage of the acquisitions module:

- there is a search box for suppliers and (with user permission on) an "adding" button if a new supplier needs to be created
- (optional, can be developed later) a table shows the active budget and the current spendings

On the supplier form, you can add a batch by filling the following informations:

- *batch number (automatic)*
- batch name
- type of treatments (see setting details in annexe 1)
- billing address
- delivery address
- internal note
- supplier note

Adding a document

A table lists all the documents in the batch.

Documents can be added by different people at the same time.

When the batch is opened, you can add a document by using an "adding" button. Like in the acquisition module, a popup shows up to search for the book in the catalog (by barcode or by key-words) if the barcode is unknown.

The bibliographic and item datas set previously are displayed. Depending on the batch parameters, they can be modified if needed.

Regarding the treatment of large collections, the history of the treatment done on other items linked to the bibliographic record is displayed.

The treatment can be duplicated by two ways:

- duplication of the treatment just added in the batch
- duplication of one of the history treatment

You can choose which data you want to duplicate or delete when duplicating a treatment by checking boxes.

Navigation in the different fields is possible with the keyboard ("Tabulation" key). The "Enter" key must not validate the processing form: it is important to be able to use it, in particular, to include the caesura in the titling requested from the binder.

The default item creation settings chosen for the treatment can be modified if needed.

Printing options for the label and barcode are available on the document summary.

Once the treatment is approved, you can go back to the batch summary page.

The item status is automatically updated following the settings of the syspref.

If the printing option is activated for the document form, each item is checked when the treatment is saved. An option enables you to print all the item forms at once (see setting details in annexe 1).

Batch closing

When closing a batch, a csv export can be done.

The list can be sent to the supplier if an email is set in the supplier section.

The item status is automatically updated when closing the batch, according to the settings in the syspref.

Quality control

When receiving the documents, you can :

- approve the treatment
 - a timestamp is registered
 - according to the syspref, the item status is automatically updated
- refuse the treatment
 - a popup shows up to create a new secondary batch or to open an existing one
 - in case of creation of the secondary batch, the following informations are required
 - name of the batch
 - sending date
 - due date
 - original treatment datas and nem batch are displayed

- a free entry area allows the service provider to be informed of the corrections requested (mandatory field)

2. In the other modules

A new tab displays a history of preservation treatments in the bibliographic record.

As with the “Notes”, “Subscriptions” or “Suggestions” tab, it is only displayed if data exists.

The following information is displayed for each item that has been processed:

- callnumber
- barcode
- treatment(s)
- batch(s)
- entry date in Preservation module
- sending date to the provider
- provider's return date
- quality validation date

This tab can be displayed in the OPAC using a syspref.