

Preservation workflows management with Koha

Appendix 4 - Other appendices

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For the attention of Koha developers	Sanctioned by Data team leaders
File Koha > Services	Version 2.0

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 last appendix presents some model proposals and the list of additional development needs that may be requested in the years to come to expand the initial functionalities of the module and allow a computerization of all the circuits of the preservation treatments.

Summary

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Models

Koha homepage: addition of the Preservation menu at the bottom of the first menu column (final place to be defined)



Preservation menu homepage: menus planned in the future in the module once all the circuits have been recomputerized



Developments to come

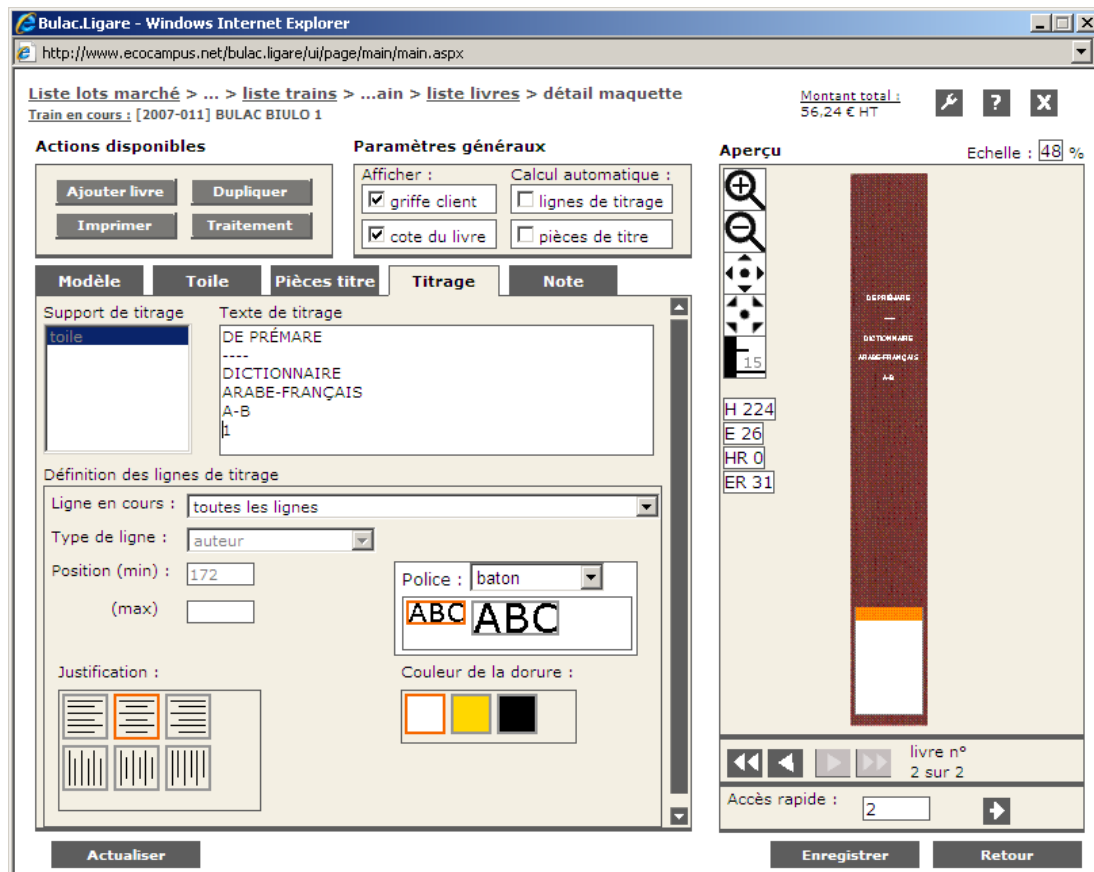
Several additional functionalities may be requested later to complete the functionalities expected in the long term in the Preservation module.

They are briefly described here so that the developers are aware of these wishes and can orient, if necessary, the developments so as to allow later an easier attachment of these new features.

Complementary developments on the batches

- Titling preview tool: for binding requiring titling, a simulation of the spine based on the "height" and "thickness" measurements will make it possible to best adjust the title caesura according to the format of the work and the size of the police. The settings should allow for different font sizes and different layouts on the spine; free text zones can be defined at the top and/or bottom of the book to ensure that no titling will be done on this intended location, for example, for placing the dimension label.

Example of titling preview tool from the Lig@re software previously used by BULAC:



- Budget management :
 - configuration of budgets and funds lines: on the same behavior as for the Acquisitions module, it will be possible to define budgets divided into funds lines. The budgets used in the Acquisitions and Preservation modules will have different settings and should only be displayed in the module to which they belong.
 - budgetary estimate of the cost of processing a document: thanks to a table setting detailing the different processing rates, a price estimate will be defined on each item form by crossing the type of processing, format and options selected, and thus facilitate the budget management but also, if necessary, adjust the treatment as best as possible (relevance of an expensive treatment if the purchase price of the work is much lower)
 - billing system integration
 - asset management and refunds
- Option to add an item to a batch from the bibliographic record or the subscription
- Option to print barcodes and/or callnumber labels from the worksheet
- Display in the batch of icons linked to authorized values (cloth colors for example)

Additional developments on preservation treatments

- On the bibliographic record, addition of an option to indicate a need for preservation treatment for an item. Reports will be listed in a sub-menu of the Preservation module.

Other developments

- Addition of a statistical tool on the home page of the “Reports” module
- Alerts for items tracked as “Entered” in the module but not processed beyond a certain time