

Koha Implementation Checklist

Data Migration

- 1. Location/Branch codes created and defined
- 2. Patron category type codes created and defined
- 3. Alternate patron attribute fields created and defined
- 4. Item type codes created and defined
- 5. Additional item authorized values (collection codes, shelving locations, etc.) created and defined
- 6. Review data migration and sign off on data mapping

Circulation Configuration

- 1. Set-up circ/fines matrix
- 2. Define whether circ rules are based on item's location, patron's location or transaction location (sys pref = CircControl)
- 3. Set-up calendar for closed days / holidays
- 4. Set whether due dates can fall on closed days (sys pref= useDaysMode)
- 5. Set whether fines are charged for closed days (sys pref = finesCalendar)
- 6. Set sys pref 'finesMode' to "production" just prior to go-live
- 7. Enable "Specify Due Date" form in circulation (sys pref = SpecifyDueDate)
- 8. Enable printing of circulation receipts (sys pref = printcirculationslip)
- 9. Specify if items should be sent back to their owning location at checkin (sys pref = AutomaticItemReturn)
- 10. Specify how current checkouts sort on the circulation page (sys pref = todaysIssuesDefaultSortOrder)
- 11. Specify how previous checkouts sort on the circulation page (sys pref = previousIssuesDefaultSortOrder)
- 12. Define max amount owing to block checkouts (sys pref = noissuecharge)
- 13. Specify whether checkout is prevented if patron expires before due date (sys pref = ReturnBeforeExpiry)
- 14. Specify whether requests can be placed on items that are not on loan (sys pref = AllowOnShelfLoans)
- 15. Specify whether requests can be placed on items with a damaged status (sys pref = AllowHoldsOnDamagedItems)
- 16. Define max amount of holds a patron can place (sys pref = maxreserves)
- 17. Define max amount owing to block ability to place requests (sys pref = maxoutstanding)
- 18. Define number of days on hold shelf before request expires (sys pref = ReservesMaxPickupDelay)
- 19. Set-up and define notice templates
- 20. Set-up and define notice triggers
- 21. Set-up and define staff patron records and set permissions
- 22. Enable web-based self checkout if applicable (sys pref = WebBasedSelfCheck)

Patron Configuration

- 1. Specify the max amount accrued for a single late return (sys pref = MaxFine)
- 2. Specify the number of days overdue before an item is marked lost and patron is charged (cron job = longoverdues.pl)
- 3. Specify the number of days before a patron expires to alert staff at checkout (sys pref = NotifyBorrowerDeparture)
- 4. Set whether circulation history will be displayed in the staff client if maintained (sys pref = intranetreadinghistory)
- 5. Define mandatory fields in patron record (sys pref = BorrowerMandatoryField)
- 6. Specify the default email address where notices are sent (sys pref = AutoEmailPrimaryAddress)
- 7. Enable ability for patrons to sign up for additional messages about items due or nearly due (sys pref = EnhancedMessagingPreferences)

Searching Configuration

- 1. Enter stopwords to be used in searching in the Stop Word page under Administration
- 2. Remove defined stopwords from queries (sys pref = QueryRemoveStopwords)
- 3. Enable fuzzy queries (sys pref = QueryFuzzy)
- 4. Enable field weighting (sys pref = QueryWeightFields)
- 5. Enable query stemming (sys pref = QueryStemming)
- 6. Enable query truncation (sys pref = QueryAutoTruncate)
- 7. Specify which field will comprise the Type limit in advanced search (sys pref = AdvancedSearchTypes)
- 8. Specify the maximum number of hits to display on results list in staff client (sys pref = numSearchResults)
- 9. Specify the maximum number of hits to display on results list in OPAC (sys pref = OPACnumSearchResults)
- 10. Specify the maximum number of items to display on results list in OPAC (sys pref = maxItemsInSearchResults)
- 11. Specify the default field used to sort in staff client (sys pref = defaultSortField)
- 12. Specify the default field used to sort in OPAC (sys pref = OPACdefaultSortField)
- 13. Specify the default sort order in staff client (sys pref = defaultSortOrder)
- 14. Specify the default sort order in OPAC (sys pref = OPACdefaultSortOrder)
- 15. Define whether full item information or item status only should appear on the results list (sys pref = OPACItemsResultsDisplay)
- 16. Specify whether advanced search options should be auto-expanded in the staff client (sys pref = expandedSearchOption)

OPAC Configuration

- ___ 1. Enable 'Book Cart' in OPAC (sys pref = opacbookbag)
- ___ 2. Enable patrons to place holds in OPAC (sys pref = RequestOnOpac)
- ___ 3. Enable item level holds in OPAC (sys pref = OPACItemHolds)
- ___ 4. Enable or disable display of user login features (sys pref = opacuserlogin)
- ___ 5. Enable patrons to change their password via OPAC (sys pref = OpacPasswordChange)
- ___ 6. Enable patrons to renew items from OPAC (sys pref = OpacRenewalAllowed)
- ___ 7. Enable display of patron's circ history (sys pref = opacreadinghistory)
- ___ 8. Enable patrons to submit reviews (sys pref = reviewson)
- ___ 9. Enable patrons to submit reviews anonymously (sys pref = AnonSuggestions)
- ___ 10. Enable patron created 'Lists' in OPAC (sys pref = virtualshelves)
- ___ 11. Enable patrons to submit purchase requests (sys pref = suggestion)
- ___ 12. Enable public display of user's purchase requests (sys pref = OPACViewOthersSuggestions)
- ___ 13. Disable user logins (sys pref = noOPACUserLogin)
- ___ 14. **IMPORTANT:** disables all functionality requiring user authentication
- ___ 15. Enable display of 'Change Languages' feature in OPAC (sys pref = opaclanguesdisplay)
- ___ 16. Create / implement library branded custom stylesheet for the OPAC
- ___ 17. Customize and enable XSLT stylesheet changes to reflect changes to the display content of bibliographic information for either the results list or bibliographic detail pages of the OPAC (sys prefs = XSLTResultsDisplay & XSLTDetailsDisplay)
- ___ 18. Making customizations to the vanilla OPAC:
 - Define the library name shown on main OPAC page (sys pref = LibraryName)
 - Enter url to library logo to replace default Koha logo (sys pref = opacsmallimage)
 - Define html credits at bottom of the OPAC page (sys pref = opaccredits)
 - Define text to display in the main content area of the OPAC main page (sys pref = OpacMainUserBlock)
 - Define library specific url links to display in the left hand navigational bar of the OPAC main page (sys pref = OpacNav)
 - Define html to include a custom header in the OPAC (sys pref = opacheader)
 - Add CSS to be included in the OPAC (sys pref = OPACUserCSS)
- ___ 19. If library has technical expertise on staff they may also choose to create custom stylesheet and enter url to library created custom stylesheet (sys pref = opacstylesheet)

IMPORTANT: Do not remove the default values colors.css or opac.css from the sys prefs opaccolorstylesheet and opaclayoutstylesheet as these are the defaults required to fall back on in case of problems with user created stylesheets

 - Define custom javascript for inclusion in OPAC (sys pref = opacuserjs)
- ___ 20. Enable highlighting of search terms in the results list (sys pref = OpacHighlightedWords)
- ___ 21. Disable display of 'lost' items in the OPAC (sys pref = hidelostitems)
- ___ 22. Define default tab to display on bibliographic detail page (sys pref = BiblioDefaultView)
- ___ 23. Enable Shelf Browser on item details page (sys pref = OPACShelfBrowser)

- ___ 24. Set whether urls in the OPAC open in a new window or not (sys pref = OPACURLOpenInNewWindow)
- ___ 25. Limit results to items owned at user's library by default (sys pref = SearchMyLibraryFirst)
IMPORTANT: Only applicable for multi-branch or multi-library dbs
- ___ 26. If using serials in Koha:
 - Specify how to display serial issue information in the OPAC (sys pref = OPACSubscriptionDisplay)
 - Specify whether to display extended serial issue information in the OPAC (sys pref = OPACDisplayExtendedSubInfo)
 - Define display preference for serial issue history (sys pref = SubscriptionHistory)
- ___ 27. If you have loaded / migrated full MARC authorities:
 - Enable authority searching and OPAC Dictionary (sys pref = Disable_Dictionary)
 - Enable the search authorities link in OPAC (sys pref = OPACAuthorities)
 - Enable subject authorities browser in OPAC (sys pref = OPACBrowser) + ensure build_browser.pl is running on the server

Enhanced Content Configuration

- ___ 1. Decide whether to enable social tagging feature in OPAC and enable if desired (sys pref = TagsEnabled)
- ___ 2. Enable input of tags from the results list in OPAC (sys pref = TagsInputOnList)
- ___ 3. Enable input of tags from the bibliographic detail page in OPAC (sys pref = TagsInputOnDetail)
- ___ 4. Define number of tags to display on results list in OPAC (sys pref = TagsShowOnList)
- ___ 5. Define number of tags to display on the bibliographic detail page in OPAC (sys pref = TagsShowOnDetail)
- ___ 6. Enable tag moderation (sys pref = TagsModeration)
- ___ 7. Specify or have ByWater Solutions specify the path on server to the local ispell executable (sys pref = TagsExternalDictionary)
- ___ 8. Decide whether to display Amazon based enhanced content (book jacket covers, etc.)
 - a. Apply for Amazon access key at <http://aws.amazon.com>
 - b. Enable Amazon content in Koha (sys pref = AmazonContent)
 - c. Enter AmazonAccessKeyID and AmazonAssocTag (sysprefs = AWSAccessKeyID and AmazonAssocTag)
- ___ 9. Enable Google Book Jackets (sys pref = GoogleJackets)
- ___ 10. Decide whether to enable FRBRize editions functionality.
 - a. Enable ability to FRBRize editions (sys pref = FRBRizeEditions)
 - b. Enable various isbn services:
 - + OCLCAffiliateID
 - + PINESISBN
 - + ThingISBN
 - + XISBN

IMPORTANT: the XISBN service is free for non commercial use when usage does not exceed 500 requests per day ... the sys pref XISBNDailyLimit is set to 499 upon install

- ___ 11. For customers with contracts with Baker&Taylor for Content Café:Enable Baker & Taylor
 - a. enhanced content features (sys pref = BakerTaylorEnabled)
 - b. Enter user name to access Content Café content (sys pref = BakerTaylorUserName)
 - c. Enter password to access Content Café content (sys pref = BakerTaylorPassword)
 - d. Enter url for Baker & Taylor Bookstore if applicable (sys pref = BakerTaylorBookstoreURL)

Cataloging Configuration

- ___ 1. Codes / descriptions for any custom authorized values entered
- ___ 2. z39.50 client targets defined for copy cataloging
- ___ 3. MARC Bibliographic frameworks defined for different templates
- ___ 4. Run MARC Bibliographic framework test to ensure any changes to frameworks are error free
- ___ 5. Classification sources used in cataloging defined in database
- ___ 6. Record matching rules for import/overlay defined
- ___ 7. MARC Organization Code entered for 003 tag (sys pref = MARCOrgCode)
- ___ 8. Verify MARC support is enabled (sys pref = marc)
- ___ 9. Verify MARC Flavor is set to MARC21 (sys pref = marcflavour)
- ___ 10. If using frameworks, set type of label display (sys pref = LabelMARCView)
- ___ 11. If using frameworks, enable Advanced MARC editor (editor does not display tag / subfield labels) (sys pref = advancedMARCEditor)
- ___ 12. Specify default classification scheme (sys pref = DefaultClassificationSource)
- ___ 13. Specify default view for bibliographic detail page in staff client (sys pref = IntranetBiblioDefaultView)
- ___ 14. Modify default tags / subfields displayed in ISBD view if necessary (sys pref = ISBD)
- ___ 15. Define tag / subfield from MARC bibliographic record to derive item call number from (sys pref = itemcallnumber)
- ___ 16. Enable auto item barcode generation if desired (sys pref = autoBarcode)
- ___ 17. If using serials and serials routing:
 - Enable serials routing (sys pref = RoutingSerials)
- ___ 18. The following cataloging system preferences should already be set and should not be modified.
 - item-level_itypes = ON
 - NoZebra = OFF
 - NoZebraIndexes = 0

Authorities Configuration

The following system preferences only need be checked if your library has migrated / loaded full MARC authorities and / or plans to implement authority control in Koha:

- 1. Enable creation of brief minimal MARC authorities when adding bibliographic records whose authority controlled tags do NOT match an existing authority in the database (sys pref = BiblioAddsAuthorities)
- 2. Specify whether an update to an authority record auto updates the associated bibs (sys pref = dontmerge)
- 3. Define the character used to display between subfields of an authority (sys pref = authoritysep)

Acquisitions Configuration

- 1. Specify type of acquisitions to enable in Koha (sys pref = acquisitions)
- 2. Create vendor records & fund accounts
- 3. Specify if OPAC purchase suggestions are emailed rather than handled via acquisitions (sys pref = emailPurchaseSuggestions)
- 4. Specify whether a purchase suggestion is created when a serial renews (sys pref = RenewSerialAddsSuggestion)

Log Configuration

- 1. Enable which transaction data the system should keep a log of:
- 2. Patron creation / modification (sys pref = BorrowersLog)
- 3. Bibliographic record creation / modification (sys pref = CataloguingLog)
- 4. Fines assessment / payment (sys pref = FinesLog)
- 5. Checkouts (sys pref = IssueLog) *
- 6. Checkins (sys pref = ReturnLog) *
- 7. Notices (sys pref = LetterLog) *
- 8. Serial checkin (sys pref = SubscriptionLog)

TIP: If you have high circulation volume, you do not activate the logging for checkouts, checkins and notices as they can slow down the system.

Localization Configuration

- 1. Ensure the following preferences are set correctly (the following are US specific):
 - dateformat = us
 - language = en
 - opaclangues = en

Admin Configuration

Most admin system preferences are part of the vanilla system and need not be touched. There are only a handful of administrative system preferences you may wish to set / check before go-live:

- 1. Enable IP authentication to block access to staff client from unauthorized IP addresses (sys pref = AutoLocation)

- ___ 2. Specify the default separator character for separating values for exported reports (sys pref = delimiter)
- ___ 3. Specify the default application for exporting report data (sys pref = MIME)
- ___ 4. Specify a master address to use for printing on receipt, overdues if different from the physical address in the branch record (sys pref = libraryAddress)
- ___ 5. Specify email address to which OPAC self initiated patron record modification requests are sent (sys pref = KohaAdminEmailAddress)
- ___ 6. Specify inactivity timeout period for OPAC (sys pref = timeout)
- ___ 7. Enable single branch mode (sys pref = singleBranchMode)
IMPORTANT: This is only applicable for single location sites and enabling it eliminates the branch selection limits / facets in the OPAC

Planning for go-live

- ___ 1. Work with your service provider (if you have one) to determine a go-live date
- ___ 2. Schedule training dates / times with your service provider
- ___ 3. Schedule training dates / times with your staff if you are going to do a additional in-house training to your staff
- ___ 4. If migrating from another system, determine with help of implementation team the timeline for extracting, loading and indexing data for go-live
- ___ 5. Schedule any extractions jobs which must be run by your current vendor to supply your data to ByWater Solutions in time for the final migration
- ___ 6. Determine whether the library will run two systems in parallel during go-live, close during the final migration of data.
- ___ 7. Determine your production db's staff client and OPAC urls and communicate this information with staff
- ___ 8. Ensure server is ordered in time to be configured and set-up for the final load. Ensure that you have a back-up power system in case of power failure