

KOHA-RELATED CAPABILITIES

There are two versions of Koha

- The open source main version, supported by the Koha Community (<http://koha-community.org/>) [ByWater is the support company for several US customers]
- A proprietary version, forked from the open source version and supported by LibLime (<http://www.koha.org/>)

Orders

- Open source Koha supports the ingest of embedded order data as would be supplied in Electronic Order Confirmation Records (EOCRs).
- Both systems support the import of cataloging files
- Types of GOBI Library Solutions records that are supported by Koha:
 - GobiAPI (requires use of Koha GobiAPI plug-in)
 - EOCR records
 - GOBI Library Solutions Metadata records
 - GOBI-OCLC Plus Metadata records
 - OCLC WorldShare Collection Manager (formerly WCP or PromptCat) records
 - X12 invoices [LibLime version only]
 - X12 purchase orders output from Koha [LibLime version only]

Possible order workflows:

GOBI ordering/API Plug-in (open source, main version of Koha only, version 17.05 or higher)

1. Selection by collection development or acquisitions on GOBI (optional)
2. Orders placed on GOBI
3. Bibliographic and order data output automatically from GOBI and loaded to Koha to create a brief bibliographic record and an order. Koha returns the Order Line ID # to GOBI; Koha stores the GOBI Order Key.
4. Koha Order Line ID # is returned to GOBI Library Solutions automatically and loaded to the Purchase Order field in the GOBI order; Koha stores the GOBI Order Key.
5. At point of receipt, GOBI Library Solutions, or OCLC-supplied cataloguing can overlay the brief record.
6. GOBI Library Solutions does not currently support EDIFACT invoices or the EDIFACT ORDRSP message.

GOBI Ordering

1. Library identifies the appropriate item on GOBI and places order, filling in key data elements like fund and location.
2. [EOCR option]
 - a. The next day, GOBI Library Solutions outputs a file of electronic order confirmation records (EOCRs) with bibliographic information plus the order details.
 - b. Library loads EOCRs into Koha to create bibliographic and order records.
3. [Rekeying option]
 - a. Library creates bibliographic record in Koha.

- b. Library keys order into Koha manually. Note: Denise Hannibal at Washington University Medical School (hannibald@wusm.wustl.edu) has automated this somewhat:
"We use Koha acquisitions but we are small enough that I can key orders into the vendor system and then download a spreadsheet or a file of MARC records. If I use a spreadsheet I process the data into MARC records with MarcEdit. For this to work, the cost of a single copy needs to be in the 020 subfield c and it needs to end with a decimal point and 2 numerals. Then in Koha I can stage my file of marc records. I move to the acquisition module and add all the records to a basket (Order) at one time with the option "From a staged file". This process can be set to use a default template to create items and that template can be for acquisitions use only. It's not as easy as EDI but it saved me from a lot of re-keying.
GOBI Library Solutions can supply list price data in the 020 \$c field of the EOCR.
4. At point of receipt, GOBI Library Solutions can supply any of the following:
 - a. GOBI Library Solutions metadata records, with or without OCLC data, to overlay brief confirmation records
 - b. Facilitate OCLC WorldShare Collection Manager records to overlay the brief confirmation records
 - c. Physical processing, either partial or fully shelf-ready
 - d. X12 invoices for LibLime Koha only, though there may not be a reliable Koha match point for orders originally placed via GOBI
5. GOBI Library Solutions does not currently support EDIFACT invoices or the EDIFACT ORDRSP message.

Approval Plans

Types of records that are supported:

- GobiShip records
- GOBI Library Solutions Metadata records
- GOBI-OCLC Plus Metadata records
- OCLC WorldShare Collection Manager (formerly WCP or PromptCat) records
- X12 invoices [LibLime version only]

Possible approval workflow:

1. GOBI Library Solutions outputs brief shipping records, metadata records, or facilitates the production of OCLC WorldShare Collection Manager records records
 2. Library loads records to Koha to create bibliographic and order records.
 3. Library receives/closes the order records, and keys the invoice.
- or
4. Library does not create individual order records for each title, and just pays the invoice as a summary invoice.
 5. Library finishes the cataloging process (by overlaying the brief shipping record with a full cataloging record, or by reviewing the full cataloging record).

Other Koha Electronic Services Supported by GOBI Library Solutions

Electronic Order Confirmations (a.k.a. Electronic Status Reports)

Customers may opt to receive electronic status reports in XML, delimited, or HTML format via e-mail or FTP pickup, replacing printed, mailed status reports.