

KohaCon18 Conference

- Alex Chen, Information Systems Technician

First, I'd like to thank the Friends groups and the Library Advisory Board for providing funds to support this conference trip, without your generous support this trip wouldn't be possible. And as we discussed in the meeting prior to the trip, I would bring back something from KohaCon18 to benefit the library and its patrons.

There is a simple way to summarize my love for Portland - it's a lovely rogue city that I just wanted to go rogue with. But there is no one sentence that can summarize the whole conference, so I would like to use the conference schedule as a reference and add comments to some selected presentations. The conference is recorded and will be available on Bywater's YouTube channel for reference.

September 10 - 12, Main Conference

Keynote - Stephanie Chase, Library Director, Hillsboro Public Library, Portland, Oregon

The highlight of Stephanie's presentation was about a "self-managing, self-organizing, flat-structured" library work environment, it basically means no (or a lot less) specific job classifications and no specific job duties - "all library staff are created equal" - library staff are more comprehensively trained, and well-versed in pretty much all facets of the library operation this way. And by hiring staff that are also embracing this type of culture, they are able to create a much efficient and collaborative work environment and reduce bureaucracy and staff/departmental politics. I think this is an idea that we might want to look into, because we're essentially a department that provides services but generates little, if not no, revenue, so if a structure that can improve customer service, efficiency, and reduce administrative cost, then it should be quite beneficial to the taxpayers.

Using Course Reserves in a Public Library to manage displays! - Ed Veal, Librarian Supervisor at McKinney Public Library, McKinney, Texas

This presentation provided an idea to use the Course Reserves function in Koha to manage displays. We all have some sort of displays in our libraries, but we mostly use "Lists" for staff selected materials. There is no way to elaborate how this exactly going to be implemented in this short paragraph, but it's a new angle to look into other than "Lists", and also might be a good feature for people who are interested in working in an academic library to further explore this function, because Course Reserves are mostly used in academic libraries.

A Functional Pathway from Millennium to Koha - Christopher Todd, Cataloging and Systems Librarian, University of Pittsburgh Barco Law Library

This presentation provided a real-life example of data migration, or ILS migration, from an older system Millennium to Koha. The whole process is theoretically simple - export the old data, format it in the correct way, and then import to the new system. But in reality, when migrating data from one system to another, there will be all types of roadblocks such as data parsing, compatibility issues, character encoding, delimiter, standardization, MARC formats, file type conversion, and all sorts of other possible issues when the number of data entries multiply. This could be quite a headache for even computer scientists, but with the right tools, patience, trial and errors and troubleshooting skills, step by step it could be done by librarians who have limited computer science background.

Pluggability and Extensibility - Nick Clemens, Sonic Screwdriver, Bywater Solutions

Flexible plugins and themes is really a feature that I would like to see in Koha. Kyle Hall also had a discussion with a group of us during the HackFest, and I brought it up that I really would like to see Koha's plugin and theme system becomes as robust as WordPress's. Luckily they are developers actively working on it and Kyle said he was inspired a lot by WordPress, and is working on a mechanism that will make plugins more friendly for non-technical librarians to use.

A simple explanation of plugins will be that plugins are ways to add new features or solve an issue - sometimes features that are unique to you (or one library) - without touching the core Koha code. This provides great flexibility for feature add-ons and customized problem-solving, but it also has a downside that the maintenance and updates of the plugins depend on the developers.

How to keep the bugs out - Katrin Fischer, System Librarian / IT Coordinator, Bibliotheksservice-Zentrum Baden-Württemberg

This presentation is mostly about the QA process of Koha bug fixes and development signoffs. Developers' perspective is sometimes different from the users' perspective, QA is likely to be the "enemy of developers" because one development might be kicked back multiple times until it passes QA. But it's really a friend of both users and developers because it provides the third person perspective to delivery quality service and products to the end users.

Updating Koha to 18.05 running Elasticsearch in production in a multiscript context: feedback from a French Academic Library - Séverine Queune, BULAC

Search indexing is something I've been thinking about for a while, especially when it comes to multiple languages, special characters, and apostrophe. Séverine's presentation and discussion during HackFest provide some things for me to chew on regarding search indexing, Elasticsearch vs Zebra, and some tricks when searching the catalog for desired titles and

authors. I couldn't really elaborate this in writing, but Elasticsearch might be something we could look into in the future if catalog indexing and searching becomes an issue.

Data Driven Decision Making - Spencer Smith, Library Director, McKinney Public Library

This is one of the presentations I like the most. I am a data driven person, I like looking at data and facts and making decisions based on them. I recommend any library management and budgeting team to watch his presentation about how they used various statistical data to make decisions on library operations, and it's proven effective. The highlights I like the most is the cost per circulation and GIS data overlay, which is something we're interested in as well.

Getting started with collection finances in Koha - John Sterbenz, University of Michigan, Kresge Library Services

This presentation is similar as the Course Reserves for Displays, which gives a demo of how to use Koha's built-in budget function to do financial management. This function is very comprehensive and it could be helpful if a library decides to use it, it does provide a clearer view of financial management than separate billing and financial systems.

Document all the things! AKA Not in the manual? You can change that! AKA This Sphinx is not talking in riddles! - Katrin Fischer, System librarian / IT Coordinator, Bibliotheksservice-Zentrum Baden-Württemberg, and Chris Cormack, Technical Lead, Koha Team, Catalyst IT

Documentation is probably the number one important thing besides development, if not more important than it. Without the right documentation to keep track of the changes made, features will not be well-sustainable and it will take future developers and support people more time to figure out the same thing over and over again, which is a waste of time. And documentation is also a way to provide instructions and references for peer libraries to reproduce the issues and features that have already been resolved/implemented.

Koha on the Go: Establishing a Bike Library and Other Unique Collections - Bill Carroll, Deb Stephenson, Michelle Oberhoffer, Carnegie-Stout Public Library, and Andrew Fuerste-Henry, ByWater Solutions

Butte County Library has a book bike as well, but clearly this library has made their book bike more of a "mobile branch" than just an occasional outreach event. They periodically send their book bike to far side of the town to serve the underserved patrons, and the way they manage their book bike collection is something we might be interested in checking out.

Koha as supportable software - Barton Chittenden, Support Lead, ByWater Solutions
and

Koha, open source and a modular systems architecture: the case of Stockholm University Library - Andreas Hedström Mace, Stockholm University Library

These two presentations are mostly geek talks, I just would like to say that I relate so much in the support methodology Barton was talking about and the modular design methodology Andreas was presenting. A step by step, deducing, troubleshooting methodology is the key of narrowing down the underlying issues when doing technical support, analytical thinking also plays a key role. And modular design is probably the most important lesson I learned from building automated systems - breaking down big problems/systems into smaller "blocks" to tackle, and then build your way up to the entire system.

September 14 - 16, HackFest

During the HackFest I had the opportunities to discuss some ongoing projects and issues with Bywater people to resolve (or at least get insights from them) quickly. The following are the topics discussed.

CSUC OneCard:

- FTP server is set up, next step is for CSUC to provide an IP address for Bywater to allow access for student data upload.
- Decided that student barcode number will be used to match accounts, each periodical update will add new students, override existing students' information that has the same barcode, and report errors with accounts that are unable to import. Notifications will be sent to Jodi at CSUC and KohaAdmin of Butte County Library.

eCard:

- Worked with Lucas from Bywater to tackle some issues when self-registration is enabled to allow patrons to register an online only account. A few tweaks of back end coding will be needed, but should have minimal impact on existing user creation page.

Holds queue:

- Holds queue refresh interval is set 1 hour by default. If needs to be changed, Bywater can change it to any interval we choose.

Special characters:

- Discussed with Margaret on how to remove non-standard/unicode characters that caused garbled chars in catalog records. MARC records encoding needs to be investigated, and a report can be created to pull titles containing garbled chars.
- Also helped Margaret with some Chinese translations!

Test System:

- This is something I think Butte County Library could be part of, which is providing a test system for future librarians, local developers who are interested in supporting Koha, or whoever would like to get their hands dirty on learning the Koha system a test platform to practice in a Koha instance that has test data loaded, which won't impact the live system and real user data.
- I spoke with Nate at Bywater and he would like to help with test systems setup.

Bywater Solutions YouTube channel for viewing recordings:

https://www.youtube.com/playlist?list=PLV_OXyJ1D3BgcRtxrjVkCBXjSt7Dr1qKy

Photos:

https://drive.google.com/drive/folders/1J6Q2b2UP54DnJ8BltgKZTGq22iXh_39o

Presentation Slides:

<https://drive.google.com/drive/folders/1G-Dd3s6DvPZEymj0annlN6y7re6LFrtB>