

From: **MASITA BINTI A RAHMAN** <cta@iium.edu.my>

Date: Wed, Feb 24, 2021 at 9:29 AM

Subject: Request for Information on Charged for an In-House Hands-on Training on Deployment of KOHA

To: MD RAZIB BIN KARNO PSZ <mdrazib@utm.my>

Cc: MASITA BINTI A RAHMAN <cta@iium.edu.my>

Assalamualaikum En. Md Razib,

With reference to our online visit to UTM on 13th. January 2021 on the sharing of knowledge and experience in the implementation of KOHA by the UTM Library team, we would like to request for information regarding the charges for organizing an in-house hands-on training at IIUM, on the deployment of KOHA Library Management System by your team.

Attached is the soft copy of the training module specification which we would like UTM to provide us with the information on the charges for delivering the in-house hands-on training. For your kind information, the training participants comprises functional and technical members of the KOHA deployment team of IIUM.

Should you need further clarification on the above, please do not hesitate to contact myself.

Thank you and wassalam.

Masita binti A. Rahman

Director (IT)

Dar Al-Hikmah Library,

International Islamic University Malaysia (IIUM)

Office Phone : 03-64214885 Mobile Phone : 019-2141993

Email : cta@iium.edu.my Website : www.iium.edu.my



LEADING THE WAY
KHALĪFAH • AMĀNAH • IQRA' • RAHMATAN LIL-ĀLAMĪN

**IN-HOUSE HANDS-ON TRAINING PROGRAMME ON THE DEPLOYMENT OF KOHA LIBRARY
MANAGEMENT SYSTEM
FOR DAR AL-HIKMAH LIBRARY, IIUM**

NO.	TRAINING MODULE SPECIFICATION	PERSON-IN-CHARGE	WORK/DAYS
1.0	Module 1 This module shall cover theory and hands-on exercises on the following topics:	Md Razib Karno	1 Hari
1.1	General Overview of KOHA modules	Norhafisah Zakaria	
1.2	Infrastructure Architecture for KOHA	Sharul Ismail	
1.3	Database structure mapping between KOHA and Symphony		
1.4	Data cleaning requirements	Norhafisah Zakaria	
1.5	Data migration checklist	Sharul Ismail	
1.6	Data migration techniques with sampling inclusive of and not limited to bibliographic, item, patron and transaction log records		
2.0	Module 2 This module shall cover theory and hands-on exercises on Parameter Setting of KOHA Administration as follows:	Norhafisah Zakaria	1 Hari
2.1	Basic Parameter		
2.2	Acquisition		
2.3	Catalog		
2.4	Patron and Circulation		
2.5	Additional parameters		
2.6	Plugins		
3.0	Module 3 This module shall cover theory and hands-on exercises on GLOBAL SYSTEM PREFERENCES as follows:	Norhafisah Zakaria	1 Hari
3.1	Acquisitions		
3.2	Administration		
3.3	Authorities		
3.4	Cataloging		
3.5	Circulation		
3.6	Enhanced content		
3.7	I18N/L10N		
3.8	Labs		
3.9	Local use		
3.10	Logging		
3.11	OPAC		
3.12	Patrons		

3.13	Searching			
3.14	Serials			
3.15	Staff client			
3.16	Tools			
3.17	Web services			
4.0	Module 4 This module shall cover theory and hands-on exercises on TOOLS SETTING as follows:	Mohd Fahiezan Md Zan / Ahmad Luqman Abdul Hamid	1 Hari	
4.1	Patrons and circulation			
	a. Import Patron			
	b. Notices and Slips			
4.2	Catalog			
	a. Export data			
	b. Label creator			
	c. Quick spine label creator			
	d. Perform MARC import/export utilities			
4.3	Additional tools			
	a. Calendar			
	b. Log viewer			
	c. Task Scheduler			
	e. Tools plugins			
5.0	Module 5 This module shall cover theory and hands-on exercises on ACQUISITION as follows:	Yusrul Hisham Mohd Yusof		
5.1	Budgets			
5.2	Funds			
5.3	Vendor			
5.4	Manage orders			
5.5	Invoices			
5.6	Payment			
5.7	Claiming			
5.8	Cancellation of orders			
5.9	Supporting all types of acquisition processes, e.g purchase, gift, etc			

5.10	Push MARC records to acquisition via Z39.50 protocol		
5.11	Late orders		
5.12	Currencies		
6.0	Module 6 This module shall cover theory and hands-on exercises on AUTHORITY LIST and CATALOGUING as follows:	Norhafisah Zakaria	1/2 Hari
6.1	Authority List		
6.2	Cataloguing		
	a. Create New Record		
	b. Z39.50 / SRU		
	c. Advanced Editor		
	d. Cataloguing framework		
	e. Creating/editing a brief title record		
	f. Editing existing titles		
	g. Duplicating an existing title		
	h. Removing title, call number/volume or copies		
	i. Creating and editing call number/volume records		
	j. Adding or editing copies (includes global edits)		
	k. Offering authority control options (display, add, duplicate, edit, remove)		
	l. Providing access to a Cataloguing review file		
	m. Transferring title, call number or copies		
	n. Linking order line holdings to titles		
	o. Fully Unicode support (diacritic and all cataloguing character types include Arabic character)		

	p. Capturing and editing records from Z39.50 sources using a Z39.50 copy Cataloguing client and support batch process		
7.0	Module 7 This module shall cover theory and hands-on exercises on PATRON and CIRCULATION as follows:	Norhafisah Zakaria	2 Hari
7.1	Patron and Circulation Module		
	a. Check-in, check-out, renew processes		
	b. Patron new registration and data upload		
	c. Patron data integration with the University central authentication	MRK to discuss with Pn. Masitah on LDAP requirement	
	d. Fine	Norhafisah Zakaria	
	e. Circulation history		
	f. Statistics		
7.2	Patron	Norhafisah Zakaria	
	a. Update details of patron record by batch – barred status, emails, address, phone number, etc		
	b. Clearance of duplicate patron’s bill record which were migrated from Symphony		
	c. Extract and archive inactive patron records, accessible in csv, txt or xml format	MRK to discuss with Pn. Masitah	
7.3	Circulation	Norhafisah Zakaria	
	a. Full text search of any word within any bibliographic field		
	b. Enable staff to circulate items on-the-fly		
	c. Brief bibliographic records as well as charging and lending items for interlibrary loans		
	d. Circulate items borrowed through ILL once a brief bibliographic record has been created, with local circulation loan parameters determined by a		

	matrix of user profile, item type and location		
	e. Place and track items in transit (for multi-branch and multi-library systems)		
	f. Check-out items through Circulation Counter and Self-Check-Out System (barcode and RFID)		
	g. Check-in items through Circulation Counter and Self Check-In System (book drop) – (barcode and RFID)	Sharul Ismail	
	h. Fines and payment (accounting) – usage of cash card in the library		
	i. Monitoring payment done at the counter by individual login ID		
	j. Fines setting according to item type		
	k. Lost items	Norhafisah Zakaria	
	l. Display, create, edit, copy, and remove user record		
	m. Renew user privilege		
	n. Send user a message		
	o. Place, edit, display, remove holds		
	p. Claims returned		
	q. Lost card processing		
	q. Modify an item's assigned due date		
	r. Mark item used and inventory item		
	s. Charge ephemeral (impermanent) items		
	t. Loan items to ILL partner libraries by creating a user record for each library's ILL department		

	u. Full text, Boolean searching of any field within the user address fields or customer-defined fields		
	v. Integration between Self Check System with LMS via SIP2	Sharul Ismail	
8.0	Module 8 This module shall cover theory and hands-on exercises on SERIALS as follows:	Yusrul Hisham Mohd Yusof	1/2 Hari
8.1	Claims		
8.2	Check-in / Receiving		
8.3	Manage frequencies		
8.4	Manage numbering patterns		
8.5	Add subscription fields		
9.0	Module 9 This module shall cover theory and hands-on exercises on OPAC as follows:	Mohd Fahiezan Md Zan	1 Hari
9.1	Patron services		
	a. Patron account management		
	b. Reservation (Hold) – users can hold items		
9.2	Discovery search		
	a. Simple and advanced search		
	b. Improve effectiveness and efficiency searching to the existing Online Public Access Catalogue (OPAC) by:		
	i) Picture library		
	ii) Improved holdings, displays, and options		
	iii) Request/ILL module		
	iv) Browse reserves		
	v) Call number browse		
9.3	Enriched content		
9.4	Syndetic Enriched Content Basic Academic		

	a. Provide contextual linking from OPAC to web-based content using multiple match keys to create the link, such as ISSN/ISBN but also, title, author, subject, and call number		
	b. Offer these types of additional information:		
	i) Tables of contents		
	ii) Book cover art images		
	iii) Summaries and annotations		
10.0	Module 10 This module shall cover theory and hands-on exercises on REPORTING and STATISTICS as follows:		
10.1	Guided reports		
	a. Guided reports wizard	Mohd Fahiezan Md Zan	1 Hari
	b. Build new		
	c. Used saved		
	d. Create from SQL		
10.2	Statistics wizards		
10.3	Report plugins		
10.4	Top lists		
11.0	Module 11 This module shall cover theory and hands-on exercises on ADMINISTRATION and TECHNICAL as follows:		
11.1	System maintenance and troubleshoot	Sharul Ismail	1 Hari
11.2	Backup		
11.3	System restoration		
	Please indicate compliance to the following requirements:		Comply (Y/N)
12.0	Training requirement		

	The training shall be conducted based on the following requirements:		
12.1	The training approach is a hands-on training where the participants shall be exposed in practical exercises in the Koha deployment activities such as installation, configuration, customization, data migration and other relevant activities associated with the modules as described in items 1.0 until 11.0 above		✓
12.2	Upon discussion between the Library and the training provider, the training shall be conducted face to face or online, depending on the suitability of the topics to be covered and the situation of COVID-19		✓
12.3	The number of training participants will not have any impact to the charges for each training session		✓
12.4	The training sessions shall be scheduled according to the phases and schedules as agreed by the Library and the training provider. However, the last training session should be completed no later than 1 st December 2021		✓
13.0	Training Payment The training payment shall be paid according to the following:		
13.1	First payment : Completion of Modules 1,2,3,4,5 & 6		
13.2	Second payment : Completion of Modules 7,8,9,10 & 11		
13.3	The Library and the training provider acknowledge that changes in executing the training sessions according to the above sequence of modules from 1 until 11 may result in changes in determining progressive payment criteria as specified in items 13.1 and 13.2		

KOHA Hannd On Training Schedule

Platform : Zoom Apllication

Module No.	No. of Days	Day	Date	Time	Facilitator
Module 1	1	Monday	6-Sep	9 am - 1 pm	Md Razib
		Thursday	9-Sep	9 am - 1 pm	Norhafisah Sharul
Module 2 Module 3	2	Tuesday	21-Sep	9 am - 1 pm	Norhafisah
		Thursday	23-Sep	9 am - 1 pm	
		Monday	27-Sep	9 am - 1 pm	
		Wednesday	29-Sep	9 am - 1 pm	
Module 4 Module 5	1	Tuesday	5-Oct	9 am - 1 pm	Mohamad Fahiezan
		Thursday	7-Oct	9 am - 1 pm	Ahmad Luqman Yusrul Hisham
Module 6 Module 8	1	Monday	11-Oct	9 am - 1 pm	Norhafisah
		Tuesday	12-Oct	9 am - 1 pm	Yusrul Hisham
Module 7	2	Wednesday	13-Oct	9 am - 1 pm	Norhafisah Sharul
		Wednesday	20-Oct	9 am - 1 pm	
		Monday	25-Oct	9 am - 1 pm	
		Wednesday	27-Oct	9 am - 1 pm	
Module 9	1	Monday	1-Nov	9 am - 1 pm	Mohamad Fahiezan
		Wednesday	3-Nov	9 am - 1 pm	
Module 10	1	Monday	8-Nov	9 am - 1 pm	Mohamad Fahiezan
		Wednesday	10-Nov	9 am - 1 pm	
Module 11	1	Monday	15-Nov	9 am - 1 pm	Sharul
		Wednesday	17-Nov	9 am - 1 pm	

Ruj. Kami : UTM.J.04.02.01/10.11/1/1 (1)
Tarikh : 15 November 2021

SEPERTI SENARAI EDARAN

Saudara,

KELULUSAN PERMOHONAN PEGAWAI JABATAN PERPUSTAKAAN UTM UNTUK MENYAMPAIKAN LATIHAN SECARA TERBUKA - KOHA HANDS-ON TRAINING

Dengan segala hormatnya saya merujuk kepada surat daripada pihak Dar al-Hikmah Library, International Islamic University Malaysia, Kuala Lumpur bernombor rujukan IIUM/204/S3.2/18/6/2 bertarikh 1 November 2021 dan perkara di atas adalah berkaitan.

2. Sukacita dimaklumkan bahawa pihak Jabatan Perpustakaan UTM tiada halangan dan meluluskan permohonan pihak berkenaan untuk menjemput Pegawai jabatan ini bagi menyampaikan latihan secara bersemuka seperti ketetapan berikut:

Tarikh : 17 – 18 November 2021 (Rabu – Khamis)

Masa : 8.00 pagi – 5.00 petang

Tempat : Dar al-Hikmah Library (Kampus Gombak)

Tajuk Projek : *The Provision of An In-House Hands-on Training Programme on the Deployment of KOHA Library Management System*

Modul : i) *Data Migration Techniques*
ii) *System Maintenance & Troubleshoot*

Tenaga Pengajar : i) En. Yusrul Hisham bin Mohd Yusof
- Ketua Seksyen Automasi
ii) En. Sharul bin Ismail
- Pengurus IT
iii) En. Mohamad Fahiezan bin Md Zin
- Pustakawan Kanan
iv) En. Ahmad Luqman bin Abdul Hamid
- Pembantu Pustakawan

3. Sehubungan dengan itu, kerjasama saudara adalah dipohon untuk hadir ke latihan tersebut sebagai Tenaga Pengajar dan saudara bolehlah membuat urusan perjalanan yang berkenaan.

Diharapkan dengan kelulusan ini dapat melancarkan lagi perjalanan program serta objektif yang dirancang dengan jaya dan semoga kerjasama seperti ini dapat diteruskan pada masa-masa akan datang.

Sekian, untuk perhatian dan tindakan saudara selanjutnya. Atas segala kerjasama yang diberikan amatlah dihargai dan didahului dengan ucapan terima kasih.

“Wawasan Kemakmuran Bersama 2030”

“Berkhidmat untuk Negara kerana Allah”

Saya yang menjalankan amanah,



(NOR ASIKIN BINTI MOHAMAD)

Ketua Pustakawan

Jabatan Perpustakaan UTM

☎ : 5530101

✉ : asikin@utm.my

s.k. - Timbalan Ketua Pustakawan (Automasi & Perkhidmatan)

NAM/nas

SENARAI EDARAN

En. Yusrul Hisham bin Mohd Yusof
Ketua Seksyen Automasi

En. Sharul bin Ismail
Pengurus IT

En. Mohamad Fahiezan bin Md Zin
Pustakawan Kanan

En. Ahmad Luqman bin Abdul Hamid
Pembantu Pustakawan

Seksyen Automasi
Jabatan Perpustakaan UTM
UTM Johor Bahru

Ruj. Kami : UTM.J.04.02.01/21.10/4 (15)
Tarikh : 15 November 2021

Puan Noraini binti Mukhtar

Ketua Pustakawan
Dar al-Hikmah Library
International Islamic University Malaysia (IIUM)
Jalan Gombak
53100 Kuala Lumpur

Puan,

**KELULUSAN PERMOHONAN PEGAWAI JABATAN PERPUSTAKAAN UTM
UNTUK MENYAMPAIKAN LATIHAN SECARA TERBUKA
- KOHA HANDS-ON TRAINING**

Dengan segala hormatnya saya merujuk kepada surat puan bernombor rujukan IIUM/204/S3.2/18/6/2 bertarikh 1 November 2021 dan perkara di atas adalah berkaitan.

2. Sukacita dimaklumkan bahawa pihak Jabatan Perpustakaan UTM tiada halangan dan meluluskan permohonan puan untuk menjemput Pegawai jabatan ini bagi menyampaikan latihan secara bersemuka seperti ketetapan berikut:

- Tarikh** : 17 – 18 November 2021 (Rabu – Khamis)
- Masa** : 8.00 pagi – 5.00 petang
- Tempat** : Dar al-Hikmah Library (Kampus Gombak)
- Tajuk Projek** : *The Provision of An In-House Hands-on Training Programme on the Deployment of KOHA Library Management System*
- Modul** : i) *Data Migration Techniques*
ii) *System Maintenance & Troubleshoot*
- Tenaga Pengajar** : i) En. Yusrul Hisham bin Mohd Yusof
- Ketua Seksyen Automasi
ii) En. Sharul bin Ismail
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- Pustakawan Kanan
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- Pembantu Pustakawan

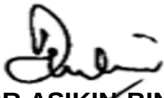
Diharapkan dengan kelulusan ini dapat melancarkan lagi perjalanan program serta objektif yang dirancang dengan jaya dan semoga kerjasama seperti ini dapat diteruskan pada masa-masa akan datang.

Sekian, untuk perhatian dan tindakan puan selanjutnya. Atas segala kerjasama yang diberikan amatlah dihargai dan didahului dengan ucapan terima kasih.

“Wawasan Kemakmuran Bersama 2030”

“Berkhidmat untuk Negara”

Saya yang menjalankan amanah,



(NOR ASIKIN BINTI MOHAMAD)

Ketua Pustakawan

Jabatan Perpustakaan UTM

b.p. Naib Canselor

☎ : 07-5530101

✉ : asikin@utm.my

s.k. - Timbalan Ketua Pustakawan (Automasi & Perkhidmatan)
 Jabatan Perpustakaan UTM
 UTM Johor Bahru

NAM/nas