

## Using third party software with Koha

### MarcEdit

Many libraries like to use MarcEdit for modifications or data cleanup. If you'd like to do this you will need to download it at: <http://marcedit.reeset.net/>

#### Important

Many of the actions described in this chapter can be done in Koha using [Marc Modification Templates](#), but this section is here for those who are used to MarcEdit.

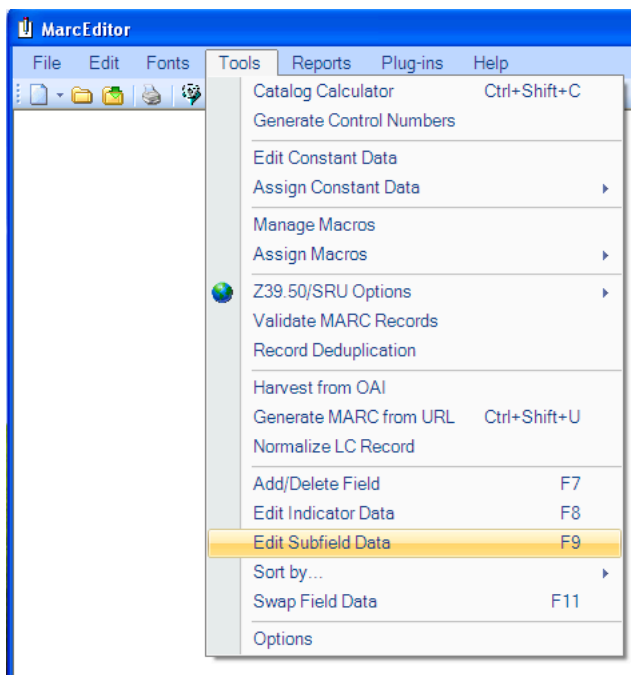
### Adding a prefix to call numbers

When bringing data into Koha, you may want to first clean it up. One common action among Koha users is to add a prefix to the call number.

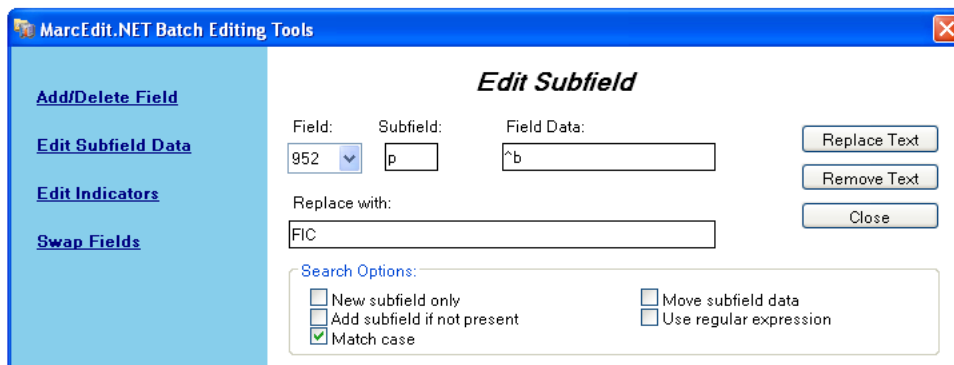
- Open MarcEdit



- Click 'MarcEditor'
- Go to Tools > Edit Subfield Data



- To prepend data the special character is: ^b To simply prepend data to the beginning of a subfield, add ^b to the Field Data: textbox and the data to be appended in the Replace



- To prepend data to the beginning of the subfield while replacing a text string, add ^b[string to replace] to the Field Data textbox and the data to be appended in the Replace With textbox.

## Importing Excel data into Koha

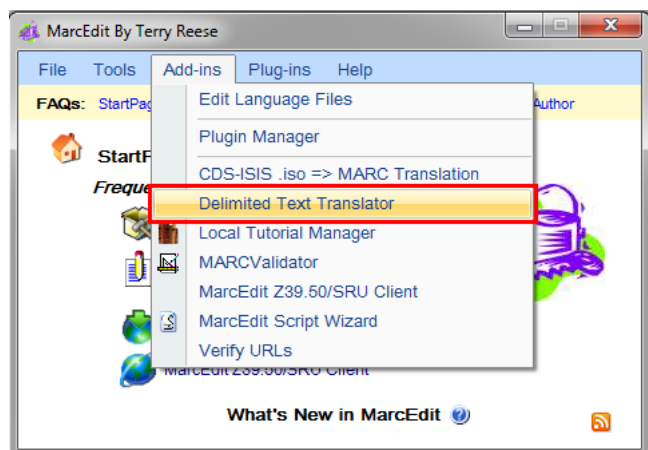
Suppose you have records of your library in excel data sheet format and want them to import into Koha. But how will you do this? Koha will not let you import excel records directly. Well here is a very simple solution for you which will let you import your excel records in Koha easily. First, we will convert excel file into Marc file and then will import it into Koha.

Follow the given steps to import your excel records into Koha

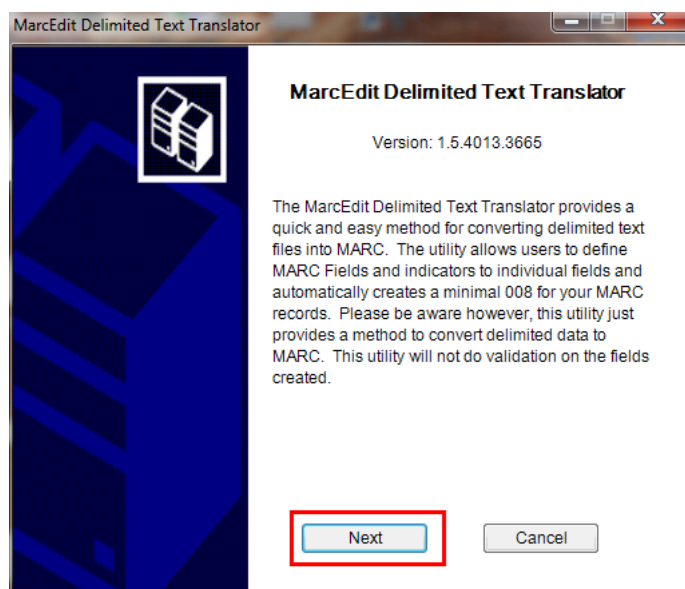
### Converting from Excel format into .mrk format

First, we will convert excel format into .mrk format. For this we will use MarcEdit. You can download it from <http://marcedit.reeset.net/>

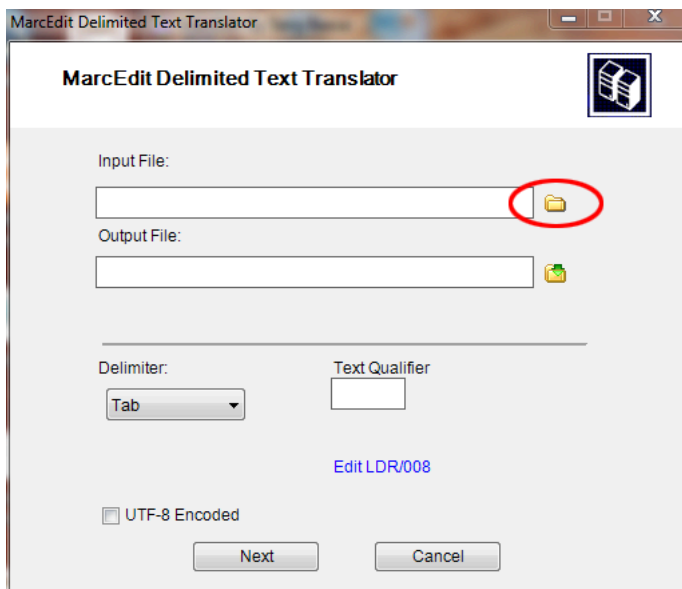
Now open it and select Add-ins->Delimited Text Translator.



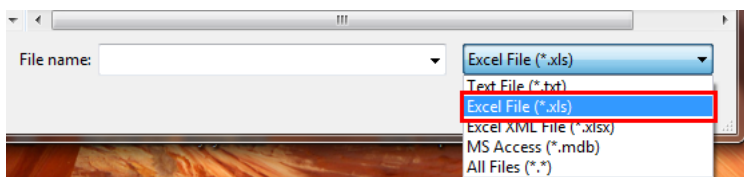
Click Next when the following window appears.



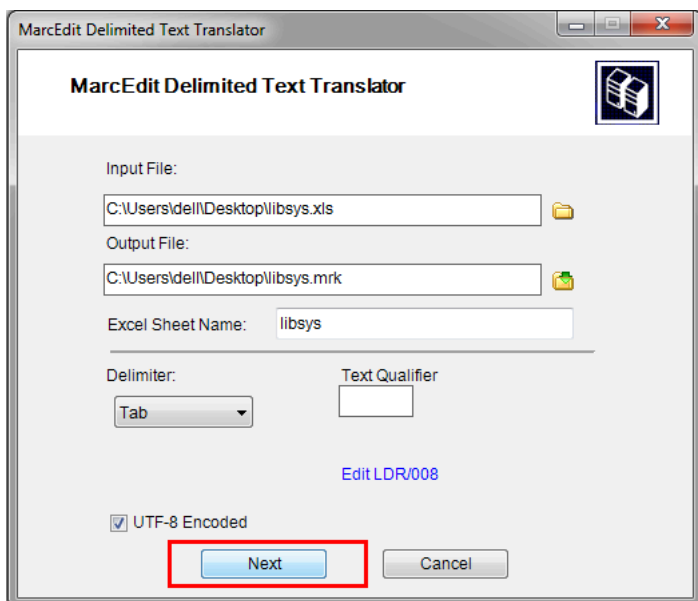
Browse for your excel file.



Locate your excel file by choosing the format Excel File(\*.xls).

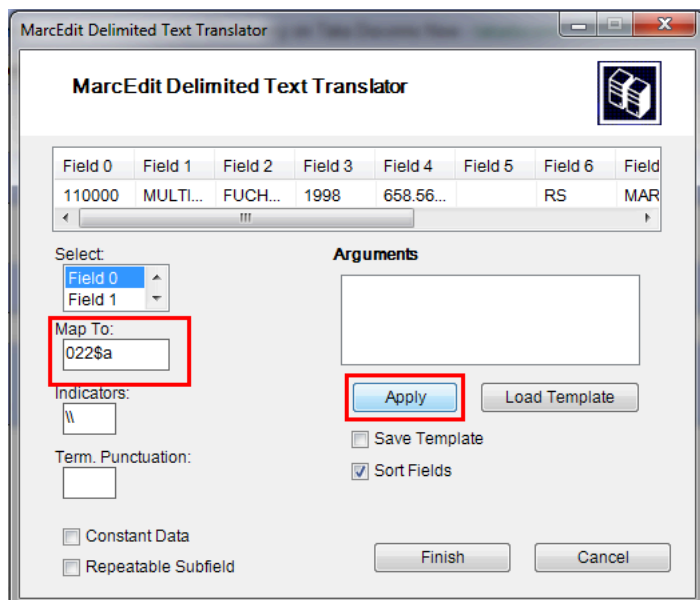


Similarly, fill all the other entries such as Output File, Excel Sheet Name and check UTF-8 Encoded (if required) and Click Next.



Now you will be prompted for mapping the fields to recognise the fields by standard marc format.

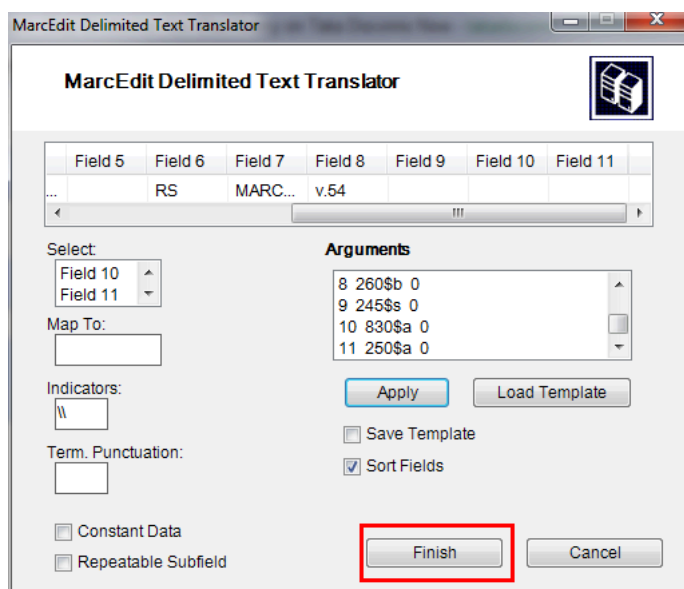
Suppose for Field 0 that is first column I entered Map to: 022\$a( Valid ISSN for the continuing resource) and then click on Apply.



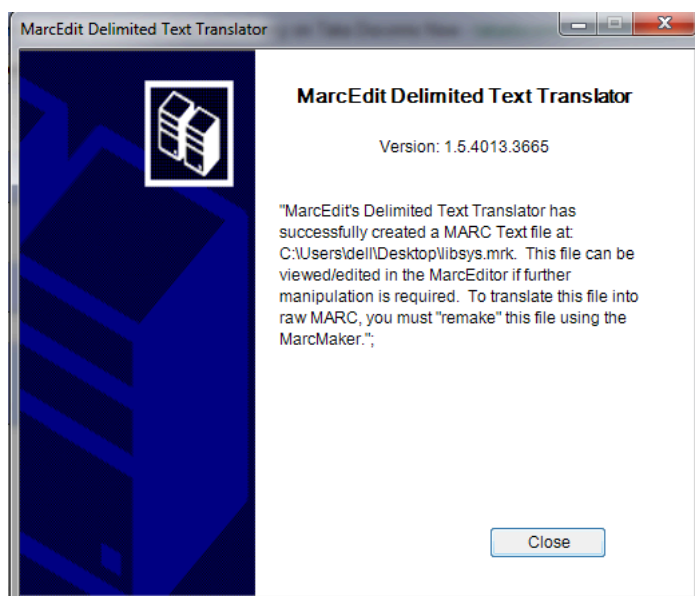
### Note

You can customize Indicators and all other things, for more information on marc21 format visit the [official library of congress site](http://www.loc.gov/marc/bibliographic/) [http://www.loc.gov/marc/bibliographic/].

Similarly map all other fields and then Click on Finish.



And then a window will appear indicating that your Marc Text File(\*.mrk) has been created.

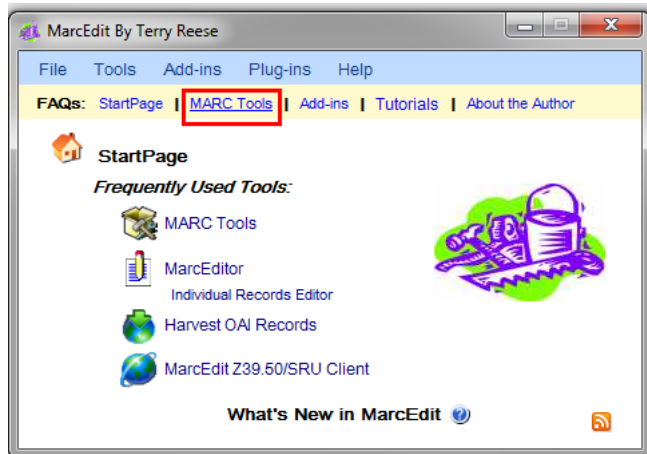


Click Close and we have created a .mrk file from .xls file in this step. You can view the file by double clicking on it.

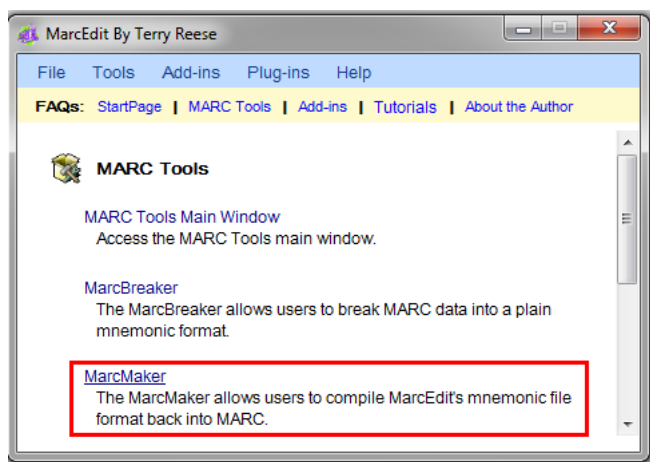
## Convert .mrk file to .mrc

We will convert .mrk file that we have created in the above step into raw Marc format that can be directly imported into Koha.

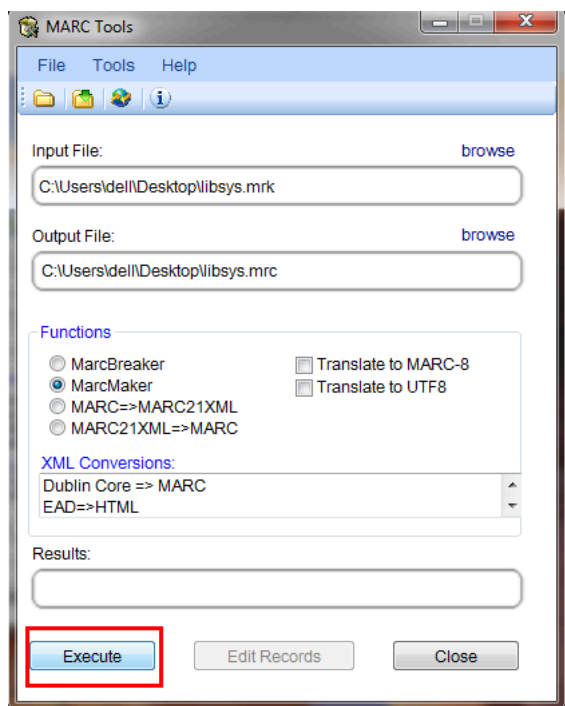
For this again open MarcEdit and Select MARC Tools.



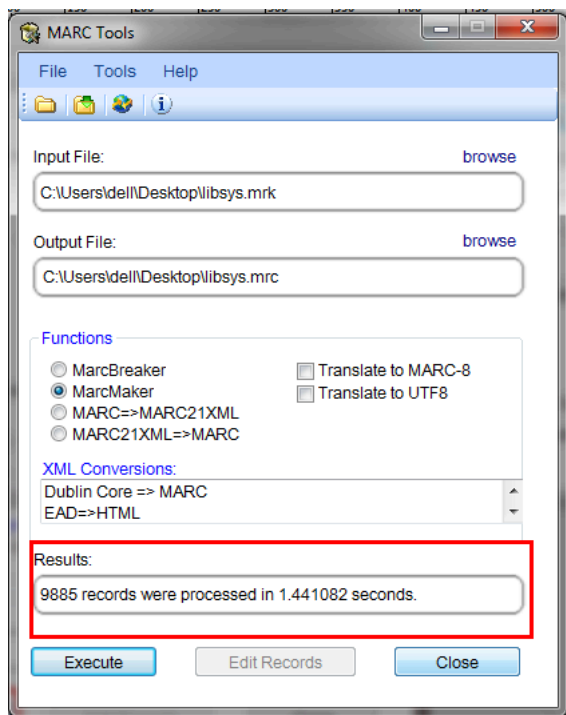
Next Select MarcMaker to convert .mrk file into .mrc format.



Locate your input file and name your output file. Then Click Execute.



And it will show you the Result.



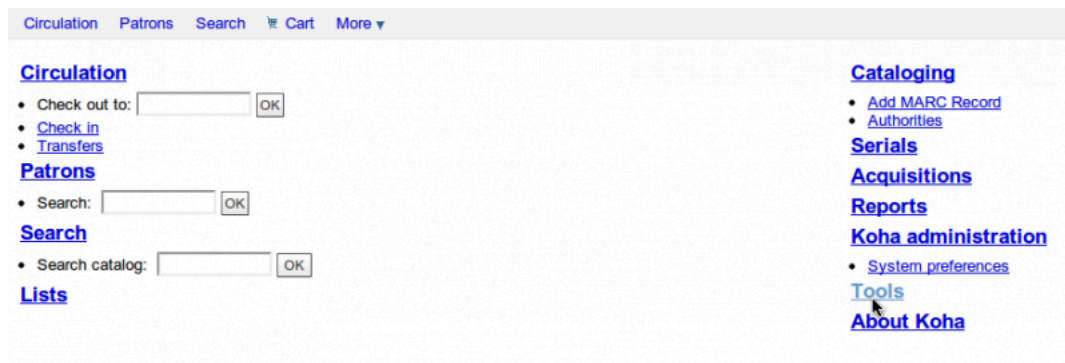
Click Close and now we have raw Marc records with us (.mrc file).

### Import .mrc into Koha

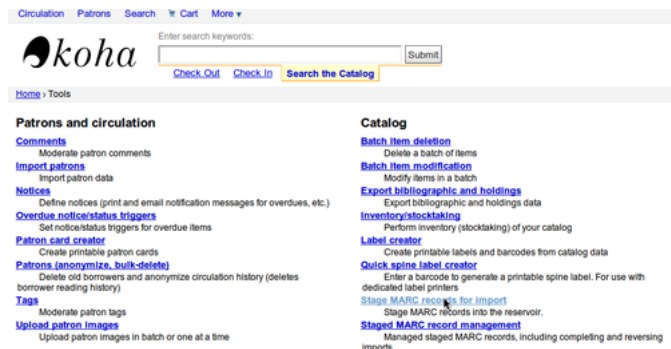
More information on importing records into Koha can be found in the [Stage MARC records for import](#) section of this manual.

Finally we will import above created .mrc file into Koha.

Click on Tools in your Koha staff client.



Next Click on Stage MARC Records for Import.



After this, choose your previously created .mrc file and click on Upload.

Circulation Patrons Search Cart More

NO\_LIBRARY\_SET (Set) | root (Log Out) | [?] | [?]

Enter search keywords:

[Check Out](#) [Check In](#) [Search the Catalog](#)

Home > Tools > Stage MARC Records For Import

Tools Home

Patrons and circulation

- Comments
- Import patrons
- Notices
- Overdue notice/status triggers
- Patron card creator
- Patrons (anonymize, bulk-delete)
- Tag moderation
- Upload patron images

Catalog

- Batch item deletion
- Batch item modification
- Export bibs/holdings
- Inventory/stocktaking
- Label creator
- Quick spine label creator
- Stage MARC for import**
- Staged MARC management

Additional Tools

- Calendar
- CSV profiles
- Log viewer
- News
- Task scheduler

## Stage MARC Records For Import

- Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalog.
- You can enter a name for this import. It may be useful, when creating a biblio, to remember where the suggested MARC data comes from!

Stage records into the reservoir

Select the file to stage:

You can also add comment about file and finally click on Stage For Import.

Tag moderation

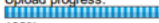
Upload patron images

Catalog

- Batch item deletion
- Batch item modification
- Export bibs/holdings
- Inventory/stocktaking
- Label creator
- Quick spine label creator
- Stage MARC for import**
- Staged MARC management

Additional Tools

- Calendar
- CSV profiles
- Log viewer
- News
- Task scheduler

Upload progress:  100%

Comments about this file:

Character encoding:

Look for existing records in catalog?

Record matching rule:

Action if matching bibliographic record found:

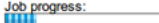
Action if no match is found:

Check for embedded item record data?

☒ Yes

☐ No

How to process items:

Job progress:  15%

When the import is done, you will get a result something like this

## Stage MARC Records For Import

MARC Staging results :

- 9885 records in file
- 0 records not staged because of MARC error
- 9885 records staged
- Did not check for matches with existing records in catalog
- 0 item records found and staged
- [Manage staged records](#)
- [Back](#)

Next, click on Manage staged records.

Here you can even change matching rules.

Circulation Patron Search Cart More

**koha** Enter search keywords

Check Out Check In Search the Catalog

Home Tools Manage Staged MARC Records Batch 7

Tools Home

**Patrons and circulation**

- Comments
- Import patrons
- Notices
- Override notification status
- Patron card creator
- Patrons (personnel, bulk-import)
- Tag moderation
- Upload patron images

**Cataloging**

- Batch item deletion
- Batch item modification
- Export item holdings
- Inventory/scheduling
- Label creator
- Quick spine label creator
- Stage MARC for import
- Staged MARC management

**Additional Tools**

- Calendar
- CSV profiles
- Log viewer
- News
- Task scheduler

**Manage Staged MARC Records Batch 7**

File name: Stage7.mrc

Comments: mar21@me

Staged: 2010-12-29 19:18:43

Status: staged

Matching rule: [No match rule for matching records](#)

Action if matching record found: [Add incoming record](#)

Action if no match found: [Add incoming record](#)

Item processing: [Always add items](#)

[Apply different matching rules](#)

[Import this batch into the catalog](#)

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41

42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81

82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117

118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149

150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180

181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213

214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244

245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276

277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307

308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337

338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367

368 369 370 371 372 373

Click on Import this batch into catalog when you are done.

Thats it. After all the records get imported, check Status and it should read “imported”

Circulation Patron Search Cart More

**koha** Enter search keywords

Check Out Check In Search the Catalog

Home Tools Manage Staged MARC Records Batch 6

Tools Home

**Patrons and circulation**

- Comments
- Import patrons
- Notices
- Override notification status
- Patron card creator
- Patrons (personnel, bulk-import)
- Tag moderation
- Upload patron images

**Cataloging**

- Batch item deletion
- Batch item modification
- Export item holdings
- Inventory/scheduling
- Label creator
- Quick spine label creator
- Stage MARC for import
- Staged MARC management

**Additional Tools**

- Calendar
- CSV profiles
- Log viewer
- News
- Task scheduler

**Manage Staged MARC Records Batch 6**

File name: 01style-Bat6.mrc

Comments: mar21@me

Staged: 2010-12-29 18:12:00

Status: imported

Matching rule: [No matching rule in effect](#)

Action if matching record found: [create\\_new](#)

Action if no match found: [import\\_new](#)

Item processing: [always\\_add](#)

[Undo import into catalog](#)

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41

42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81

82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117

118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149

150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180

181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213

214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244

245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276

277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307

308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337

338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367

368 369 370 371 372 373

| #  | Citation   | Status   | Match?      | Bin |
|----|--|----------|-------------|-----|
| 1  | MULTIMETER QUALITY CONTROL FUCHS G AND KENNETT R S (110000)                                    | imported | no_match_1  |     |
| 2  | PRECISION MANUFACTURING GOETTER, S M (110002)  | imported | no_match_2  |     |
| 3  | PROCESSING MODELING IN COMPOSITES MANUFACTURING ADVANI S G AND BOGUE R M (110000)              | imported | no_match_2  |     |
| 4  | GEOMETRY IMPLEMENTATION AND REGISTRATION MARGOLIS D (110000)                                   | imported | no_match_4  |     |
| 5  | QUALITY AND PRODUCTIVITY FOR BANKERS AND FINANCIAL MANAGERS LATONJ R J (110000)                | imported | no_match_5  |     |
| 6  | QUALITY CONTROL FOR FROST LESTER R I AND OTHERS (110000)                                       | imported | no_match_6  |     |
| 7  | QUALITY ENGINEERING HANDBOOK TUCKER L AND BERGHEIM R L ED (110000)                             | imported | no_match_7  |     |
| 8  | QUALITY MANAGEMENT HANDBOOK KIMMERL J AND OTHERS ED (110000)                                   | imported | no_match_8  |     |
| 9  | QUALITY PLANNING, CONTROL, AND IMPROVEMENT IN RESEARCH AND DEVELOPMENT ROBERTS G W ED (110000) | imported | no_match_9  |     |
| 10 | QUALITY PROMISE INCALCULABLES R J (110000)   | imported | no_match_10 |     |
| 11 | QUALITY PROMISE INCALCULABLES R J (110000)   | imported | no_match_11 |     |
| 12 | REL ENGINEERING THE MANUFACTURING SYSTEMS REVIEW R (110002)                                    | imported | no_match_12 |     |
| 13 | RELIABILITY ENGINEERING AND RISK ANALYSIS MOGENSEN M AND OTHERS (110002)                       | imported | no_match_13 |     |
| 14 | RELIABILITY IMPROVEMENT WITH DESIGN OF EXPERIMENTS CONRAD J W (110000)                         | imported | no_match_14 |     |
| 15 | STATISTICAL PROCESSING AND MANAGEMENT MOCHER M (110000)  | imported | no_match_15 |     |
| 16 | STATISTICAL PROCESSING AND MANAGEMENT MOCHER M (110000)  | imported | no_match_16 |     |
| 17 | THEORY OF CONSTRUCTS STEIN R (110000)  | imported | no_match_17 |     |
| 18 | THERMODYNAMIC PROPERTIES OF HELIUM ECKHART V (110000)  | imported | no_match_18 |     |
| 19 | THERMODYNAMIC PROPERTIES OF NITROGEN ECKHART V (110000)  | imported | no_match_19 |     |
| 20 | THERMODYNAMIC PROPERTIES OF METHANE ECKHART V (110000)   | imported | no_match_20 |     |
| 21 | THERMODYNAMIC PROPERTIES OF ETHANE ECKHART V (110000)  | imported | no_match_21 |     |
| 22 | THERMODYNAMIC PROPERTIES OF PROPANE ECKHART V (110000)   | imported | no_match_22 |     |
| 23 | THERMODYNAMIC PROPERTIES OF BUTANE ECKHART V (110000)  | imported | no_match_23 |     |
| 24 | THERMODYNAMIC PROPERTIES OF PENTANE ECKHART V (110000)   | imported | no_match_24 |     |
| 25 | THERMODYNAMIC PROPERTIES OF HEXANE ECKHART V (110000)  | imported | no_match_25 |     |

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41

42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81

82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117

118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149

150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180

181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213

214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244

245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276

277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307

308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337

338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367

368 369 370 371 372 373

You can even undo the Import operation.

And within few minutes, we have imported around 10,000 records in Koha

## OCLC Cataloging Services

Koha can be set to work with the OCLC cataloging services such as

- WorldShare Record Manager <https://www.oclc.org/en/worldshare-record-manager.html>
- Connexion <https://www.oclc.org/en/connexion.html>

This allows librarians to use the WorldShare Record Manager web interface or the OCLC Connexion Client desktop software as their cataloging tool and send those records to Koha with a single click.

## Setting up the OCLC Connexion Daemon

First, you will need to set up the [OCLC Connexion Daemon](#) on your server. If you have a system administrator you will want to consult with them on this process.



1. Find the script on your server and view its documentation.

```
/usr/share/koha/bin/connexion_import_daemon.pl --help
```

2. Create a configuration file. You could put this anywhere that is readable by the user that will be running the service, e.g., `/etc/koha/sites/my_instance/oclc_connexion.conf`. The output of the help command provides the details about what this file should contain. Here is an example:

```
host: 0.0.0.0
port: 5500
log: /var/log/koha/my_instance/oclc_connexion.log
koha: https://staff.mylibrary.example.com
user: koha_staff_user_name
password: koha_staff_user_password
connexion_user: oclc_connexion_user_name
connexion_password: oclc_connexion_user_password
import_mode: direct
```

3. Since the configuration file contains passwords, make sure that it's only readable by the user running the script, and nobody else.

```
chmod 400 /etc/koha/sites/my_instance/oclc_connexion.conf
```

4. Run the script.

- You can do this manually to test it out:

```
/usr/share/koha/bin/connexion_import_daemon.pl --config /etc/koha/sites/my_instance/oclc_connexion.conf
```

- Or you can set up a systemd unit to keep the script running even when it crashes or the server reboots:

1. Create a file at `/etc/systemd/system/koha-oclc-connexion.service`:

```
[Unit]
Description=Koha OCLC Connexion Daemon
After=network.target

[Service]
Type=exec
ExecStart=/usr/share/koha/bin/connexion_import_daemon.pl --config /etc/koha/sites/my_instance/oclc_connexion.conf
Restart=always

[Install]
WantedBy=multi-user.target
```

2. Enable and start the service:

```
systemctl enable koha-oclc-connexion
systemctl start koha-oclc-connexion
```

3. Check the status of the service:

```
systemctl status koha-oclc-connexion
```

## WorldShare Record Manager

### Setting up WorldShare Record Manager

1. Log in to your WorldShare account.
2. Go to the “Metadata” tab.
3. Select “Record Manager” in the sidebar.
4. Select “User Preferences” in the sidebar.

#### Note

Since these are *User* Preferences, they must be configured for each user who will be using the service.

5. Go to “Exporting – Bibliographic Records”.

The official documentation from OCLC for all settings under this heading is found at

[https://help.oclc.org/Metadata\\_Services/WorldShare\\_Record\\_Manager/Record\\_Manager\\_user\\_preferences/Exporting\\_Bibliographic\\_records#Set\\_preferences\\_f](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Record_Manager_user_preferences/Exporting_Bibliographic_records#Set_preferences_f)

6. Go to the “General” tab.

1. Set the “Format” to “MARC 21 with UTF-8 Unicode”, since Koha always uses UTF-8.
2. Click “Save”.

7. Go to the “TCP/IP” tab.

1. Enter the host name or IP address at which the OCLC connexion daemon service (configured [above](#)) can be reached.
2. Set the Authentication to “Login ID” and enter the connexion\_user and connexion\_password from the configuration file (created [above](#)).
3. Optionally set the connection delay, connection attempts, and other settings.
4. Click “Save”.

## Using WorldShare Record Manager

### Sending a single record from the WorldShare Record Manager to Koha

1. Log in to your WorldShare account.

2. Go to the “Metadata” tab.
3. Select “Record Manager” in the sidebar.
4. Search for a record.
5. Click on the title of a record to open it.
6. Click on the “Record” dropdown menu, then “Send to”, then “Local System (via TCP/IP)”  
[worldshare\\_record\\_menu\\_export.png](#)
7. After a while, depending on your “connection delay” settings, you should see the record in Koha.
  - If you used `import_mode: direct` in your configuration file, the record will be available in the catalog.
  - If you used `import_mode: staged` in your configuration file, the record will be [staged for import](#).

#### **Sending multiple records from the WorldShare Record Manager to Koha**

1. Log in to your WorldShare account.
2. Go to the “Metadata” tab.
3. Select “Record Manager” in the sidebar.
4. Search for a record.
5. Click on the title of a record to open it.
6. Click on the “Record” dropdown menu, then “Send to”, then “Export List ...”. Select a list to which to add the record.
7. Repeat from step 4 as needed.
8. Click on “Export Lists” in the sidebar.
9. Click on the name of a list to open it.
10. Click on the “Export” dropdown menu, then “Send to local system (via TCP/IP)”.
11. After a while, depending on your “connection delay” settings, you should see the record in Koha.
  - If you used `import_mode: direct` in your configuration file, the record will be available in the catalog.
  - If you used `import_mode: staged` in your configuration file, the record will be [staged for import](#).

## **OCLC Connexion Client desktop software**

### **Setting up the OCLC Connexion Client desktop software**

#### **Note**

Screenshots are OCLC Connexion Client v.2.50, Koha v.3.12

To set up the OCLC Connexion desktop client to connect to Koha, go to Tools > Options, then choose the Export tab.

- Click the “Create...” button to set up a new destination, then choose “OCLC Gateway Export” and click OK.
  - Enter the following information:
    - “Host Name:” Your catalog’s appropriate IP address (from your [config file above](#))
    - “Port:” Your catalog’s appropriate port number (from your [config file above](#))
    - “Login ID:” The cataloger’s Koha login
    - “Password:” The cataloger’s Koha password
    - “Notify Host Before Disconnect” = checked,
    - “Timeout” = 100, “Retries” = 3, “Delay” = 0 (zero),
    - “Send Local System Logon ID Password” = checked.
- Select “OK” when finished, and you should see your new “Gateway Export” option listed (The catalog’s IP address and port are blacked out in the following screenshot)

Gateway Export Added

- Click on “Record Characteristics” and make sure that the bibliographic records are using MARC21, UTF-8 Unicode, and click OK to save.

Record Characteristics configured

You should be ready to go! To export a record from OCLC Connexion Client to Koha, just press F5 while the record is on-screen. The export dialog will pop up, and you’ll see Connexion attempting to talk to Koha. You should get a message that the record was added or overlaid, including its biblio number, and a URL that you can copy into your web browser to jump straight to the record.

### **Using the OCLC Connexion Client desktop software**

Records can be exported from Connexion either in a batch or one by one.

#### Exporting records one by one

To export bibliographic records one by one, be sure your “Batch” options are correct: from the “Tools” menu, select “Options”, and select the “Batch” tab. In the “Perform local actions in batch” area, “Bibliographic Record Export” should be unchecked

When ready to export, from the “Action” menu, select “Export” or use the F5 key. You will see a screen similar to the following if the import is successful and if the record is new to the Catalog; you may copy & paste the resulting URL into your Koha catalog to see the new record.

If the record was overlaid, you will see a message to that effect in the “OCLC Gateway Export Status” window

#### Exporting records in a batch

To export bibliographic records in a batch, be sure your “Batch” options are correct: from the “Tools” menu, select “Options”, and select the “Batch” tab. In the “Perform local actions in batch” area, “Bibliographic Record Export” should be checked

When a record is ready to export, from the “Action” menu, select “Export” or use the F5 key, and it’s export status will be “ready.”

When ready to export the batch, from the “Batch” menu, select “Process batch” and check the appropriate “Path” and “Export” boxes

The export will begin, and the bib records will be exported & imported into Koha one by one; you will see “OCLC Gateway Export Status” windows, as above, showing you the results of each export. That window will stay there until you select “Close,” and then the next record’s export/import will begin. The process will continue until all records in the batch are completed. Then you may or may not see the Connexion Client export report (depending on your Client options for that).

#### Items in OCLC

If you’d like to create your item records in OCLC you can do so by adding a 952 for each item to the bib record you’re cataloging. The order of subfields in the 952 field doesn’t matter; you may wish to set up a text string or macro in the OCLC Connexion Client desktop software for frequently used subfield strings. [location and item information](#) cataloging guide will break down what subfields you can use in the 952, but at the minimum you want to have subfield 2, a, b, and y on your items.

952 \ \$2CLASSIFICATION\$aHOMEBRANCHCODE\$bHOLDINGBRANCHCODE\$yITEMTYPECODE

- The subfield 2 holds the classification code. This can be ddc for Dewey or lcc for Library of Congress or z for Custom. Other classification sources can be found in the [Classification Sources](#) area in administration
- Subfield a is your home library and needs to be the code for your home library, not the library name. You can find these codes in the [Libraries](#) administration area.
- Subfield b is your holding library and needs to be the code for your holding library, not the library name. You can find these codes in the [Libraries](#) administration area.
- Subfield y is your item type code. It needs to be the code, not the item type name. You can find these codes in the [Item Types](#) administration area.

952 \ \$2ddc\$aMAIN\$bMAIN\$yBOOK

In addition to these required fields you can enter any other subfield you’d like. Most libraries will enter a call number in subfield o and a barcode in subfield p as well. Review the [Location and item information](#) cataloging guide for a full list of subfields and values.

#### Overlaying a bib record from OCLC

To overlay a bib record from OCLC, include a 999\_\_\$c in the record with the Koha record number of the Koha bib record to be overlaid in the \$c subfield. The 999\_\_\$c is in the Koha MARC21 record and also at the end of the record’s URL. Please note that only bibs can be overlaid and item records can not be overlaid, so the item records will be unaffected.

## Talking Tech

Talking Tech i-tiva is a third party, proprietary, product that libraries can subscribe to. Learn more here: <http://www.talkingtech.com/solutions/library>.

### Installation and setup instructions

Be sure you’ve run installer/data/mysql/atomicupdate/Bug-4246-Talking-Tech-itiva-phone-notifications.pl to install the required data pack (new syspref, notice placeholders and messaging transport preferences)

To use, [TalkingTechItivaPhoneNotification](#) system preference must be turned on.

If you wish to process PREOVERDUE or RESERVES messages, you’ll need the [EnhancedMessagingPreferences](#) system preference turned on, and patrons to have filled in a preference for receiving these notices by phone.

For OVERDUE messages, overdue notice triggers must be configured under More > Tools > [Overdue notice/status triggers](#). Either branch-specific triggers or the default level triggers may be used (script will select whichever is appropriate).

### Sending notices file

1. Add the [TalkingTech\\_itiva\\_outbound.pl](#) script to your crontab
2. Add an FTP/SFTP or other transport method to send the output file to the i-tiva server
3. If you wish, archive the sent notices file in another directory after sending

Run TalkingTech\_itiva\_outbound.pl –help for more information

## Receiving results file

1. Add an FTP/SFTP or other transport method to send the Results file to a known directory on your Koha server
2. Add the [TalkingTech\\_itiva\\_inbound.pl](#) script to your crontab, aimed at that directory
3. If you wish, archive the results file in another directory after processing

Run `TalkingTech_itiva_inbound.pl --help` for more information