

Analytics in Koha



Analytics overview

- Hierarchical links between related bibliographic records
 - serial / article, edited work / chapter, CD / track
 - bound-with volumes (individual works bound into a single volume)
- MARC21 tag 773 in the child record contains the linking information.
- Coded values in Leader tag 000 are important for correct display of the links on the staff client and OPAC.



Two approaches in Koha

- **Analytics Enhanced Workflow** (use control number)
 - For simple host/child record linking – e.g. Serial/Article
 - Linking is based on the unique control number of the host record (MARC 001 tag)
- **Easy Analytics**
 - Creates links to/from a specific item in addition to the host bibliographic record
 - Useful for loanable/reservable items and ‘bound-with’ volumes



Analytics Enhanced Workflow

Use control number

Set system preferences as follows:

- UseControlNumber set to 'Use'
- EasyAnalyticalRecords set to 'Don't display'



Analytics Enhanced Workflow / Use control number

Cataloguing process

- Create a new host catalogue record in the usual way, check 000 Leader values are correct for a host
- Save the record and then copy the biblionumber of the new record to the 001 tag so that it is available for linking
- From the host record, go to New > New child record
- Create the new child catalogue record, checking 000 values
- The linking information is added automatically to the 773 tag of the new child record



Create a child record from a host record

Business ethics

+ New ▾ Edit ▾ Save ▾ Add to ▾

- New record
- New item
- New subscription
- New child record**

OPAC view: [Open in new window.](#)
MARC Preview: [Show](#)

... in the 773 tag of the child record

- Title of the host record added to 773\$t
- 001 (record control number) of the host record added to 773\$w



773 ? 0 - HOST ITEM ENTRY

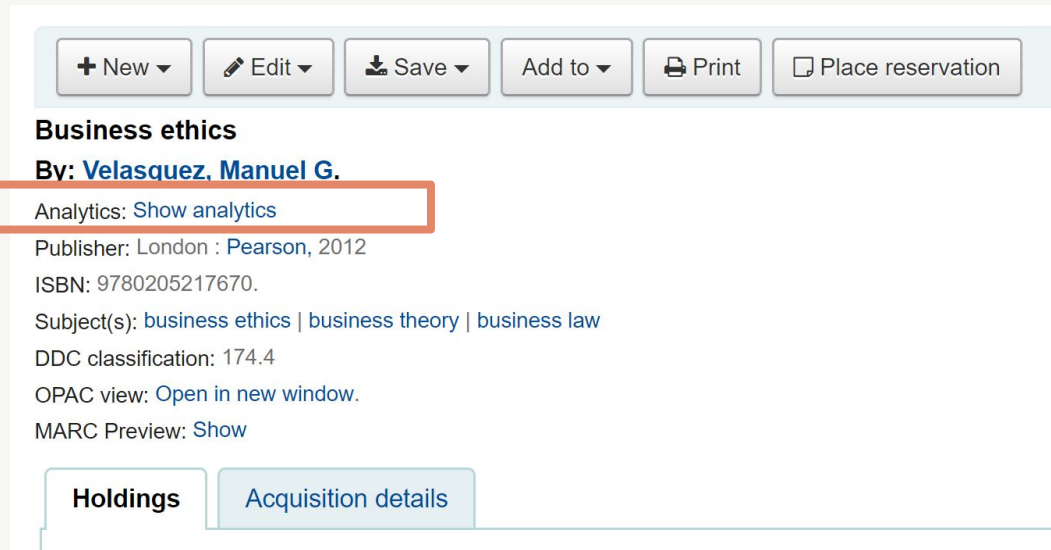
w Record control number 212974

t Title Business ethics

- May also need to edit LDR (MARC tag 000) in host and/or child records to correct value (see later slide for reference)

Staff interface display - host record

- Analytics: Show analytics link to see the child records associated with this host



Staff interface display for a host record. The interface includes a toolbar with buttons for '+ New', 'Edit', 'Save', 'Add to', 'Print', and 'Place reservation'. The record title is 'Business ethics' by 'Velasquez, Manuel G.'. The 'Analytics: Show analytics' link is highlighted with a red box. Other details include the publisher (London : Pearson, 2012), ISBN (9780205217670), subject(s) (business ethics | business theory | business law), DDC classification (174.4), OPAC view (Open in new window), and MARC Preview (Show). At the bottom, there are tabs for 'Holdings' and 'Acquisition details'.

Business ethics
By: **Velasquez, Manuel G.**
Analytics: [Show analytics](#)
Publisher: London : Pearson, 2012
ISBN: 9780205217670.
Subject(s): [business ethics](#) | [business theory](#) | [business law](#)
DDC classification: 174.4
OPAC view: [Open in new window.](#)
MARC Preview: [Show](#)

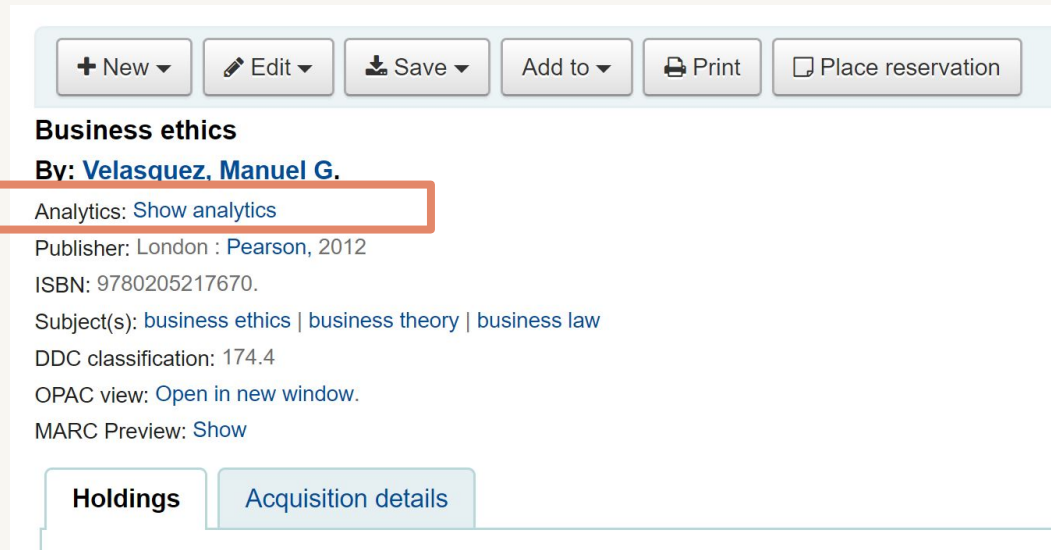
Holdings | [Acquisition details](#)

Linking tags and subfields structure

Host record	Child record
<p>000LDR //x////////////////////////////////</p> <p>001 <i>Host control number</i></p> <p>245 <i>Host title</i></p> <p>x = Position 7 - usually either 's' for Serial or 'm' for Monograph</p>	<p>000LDR //x////////////////////////////////</p> <p>245 <i>Child title</i></p> <p>773 \$t <i>Host title</i></p> <p>773 \$w <i>Host control number</i></p> <p><i>With Easy Analytics also:</i></p> <p>773 \$0 <i>Host biblionumber</i></p> <p>773 \$9 <i>Host itemnumber</i></p> <p>x = Position 7 - usually either 'a' or 'b' for Serial or Monographic component part</p>

Staff interface display - host record

- Analytics: Show analytics link to see the child records associated with this host



The screenshot displays a staff interface for a host record. At the top, there is a toolbar with six buttons: '+ New', 'Edit', 'Save', 'Add to', 'Print', and 'Place reservation'. Below the toolbar, the record title is 'Business ethics' by 'Velasquez, Manuel G.'. The 'Analytics: Show analytics' link is highlighted with a red rectangular box. Below this, the publisher information is 'London : Pearson, 2012', the ISBN is '9780205217670', and the subject(s) are 'business ethics | business theory | business law'. The DDC classification is '174.4', the OPAC view is 'Open in new window', and the MARC Preview is 'Show'. At the bottom, there are two tabs: 'Holdings' and 'Acquisition details'.

Business ethics
By: Velasquez, Manuel G.
Analytics: [Show analytics](#)
Publisher: London : Pearson, 2012
ISBN: 9780205217670.
Subject(s): [business ethics](#) | [business theory](#) | [business law](#)
DDC classification: 174.4
OPAC view: [Open in new window](#).
MARC Preview: [Show](#)

Holdings [Acquisition details](#)

Leader 000 values – reference

- Serial/Article
 - Host record: position 7=s (Link text is ‘Show Analytics’)
 - Child record: position 7=b (Link text is ‘In:....’)
- Monograph/Chapter, CD/Track, Bound-with volumes
 - Host record: position 7=m (No link displayed*)
 - Child record: position 7=a (Link text is ‘In:....’)

For more details: <http://www.loc.gov/marc/bibliographic/bdleader.html>

* An adjustment can be made to xslt stylesheets to display a link as per 7=s



Setting the Leader 000 values

000 ? - LEADER 

▲ 00

fixed length control field *

nam a22 7a 4500



000 - Leader

0-4 Record size	(auto-filled)
5- Record status	c- Corrected or revised ▼
6- Type of record	a- Language material ▼
7- Bibliographic level	a- Monographic component part ▼
8- Type of control	a- Monographic component part
9- Character coding scheme	
10-16 indicator/subfields/size	b- Serial component part
17- Encoding level	c- Collection ▼
18 - Descriptive cataloguing form	d- Subunit
19 - Multipart resource record level	
20-24 entry map & lengths	i- Integrating resource
	m- Monograph/item
	s- Serial

OK

Cancel

Easy analytics

- Easy analytics can be used as an alternative to the Analytics Enhanced Workflow for creating parent/child records.
- Easy analytics must be used where linking is required between both the bibliographic title record AND an item attached to that title record, e.g 'bound-with' records.

Set system preferences as follows:

- UseControlNumber set to 'Don't use'
- EasyAnalyticalRecords set to 'Display'



Easy Analytics

Cataloguing process

- Create a new catalogue record in the usual way, check 000 Leader values are correct for a host record
- Go to New > Analyze items or click on the Analytics menu tab.
- In the holdings record for an item click on Create Analytics
- Create the new child catalogue record, check 000 values
- The linking information is added automatically to the 773 tag of the new child record



Easy Analytics – staff interface options

Home › Catalogue › Details for *Business review*

Normal

- Items
- Reservations (0)
- Analytics**
- Borrowing history
- Modification log

+ New ▾ **Edit** ▾ **Save** ▾ **Add to** ▾ **Print**

B
An
Pu
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OF
M

- New record
- New item
- New subscription
- Analyze items**

Updates.

Holdings **Acquisition details**

No physical items for this record

Easy Analytics – create analytics

- Click on Create analytics to create a child record attached to this host

[+ New](#) [Edit](#) [Save](#) [Add to](#) [Print](#) [Place reservation](#)

Business review
Material type: Continuing resource
Analytics: [Show analytics](#)
Publisher: Deddington : Philip Allan Updates.
ISSN: 13541110.
OPAC view: [Open in new window](#).
MARC Preview: [Show](#)

Holdings [Acquisition details](#)

[▼ Activate filters](#) | [✓ Select all](#) | [✕ Clear all](#)

	Item type	Current location	Home library	Class number	Status	Last seen	Barcode	Serial enumeration / chronology	Used in	
<input type="checkbox"/>	7 days	TEST	TEST Journals		Available	05/06/2018	J06567896	Vol 10, no 5	1 analytics	Create analytics Edit

Easy Analytics – child record view

- Note – this is a child record but the item record displayed here is the one belonging to the host record

+ New Edit Save Add to Print Place reservation

Journal article from Business Review Vol 10, no 5

Material type: Article

In: Business review

OPAC view: Open in new window.

MARC Preview: Show

Holdings







Acquisition details

Activate filters | Select all | Clear all

	Item type	Current location	Home library	Class number	Status	Last seen	Barcode	Serial enumeration / chronology	Host records	Used in	
<input type="checkbox"/>	7 days	TEST	TEST Journals		Available	05/06/2018	J06567896	Vol 10, no 5	Business review	1 analytics	Create analytics <input type="button" value="Edit"/>

Easy Analytics – 773 tag of the child record

- Note – this is a child record but the item record displayed here is the one belonging to the host record

773	?	0		- HOST ITEM ENTRY	 
▲	0	Host Biblionumber	<input type="text" value="3879"/>		
▲	9	Host Itemnumber	<input type="text" value="73261"/>		
▲	d	Place, publisher, and date of publication	<input type="text" value="Deddington : Philip Allan Updates."/>		
▲	o	Other item identifier	<input type="text" value="J06567896"/>		
▲	t	Title	<input type="text" value="Business review"/>		
▲	w	Record control number	<input type="text" value="117541"/>		
▲	x	International Standard Serial Number	<input type="text" value="13541110"/>		

Easy Analytics – link to host item

- With Easy analytics you also have an option from the Edit menu to ‘Link to host item’.
- Here you can link an existing catalogue record to a ‘host’ or parent and the 773 fields are completed automatically.
- This linking is similar to using the enhanced workflow described earlier but this time the starting point is the child record.

Easy Analytics – de-linking items

You may occasionally need to unlink your analytic records, for example when you need to delete items and/or catalogue records. To do this:

- Go to Edit items (top menu button) in the parent record
- Click on the Actions button on the left hand side of the relevant item
- Click Delink.

Set / Volume

Sets and volumes are a variation on parent/child linking and are dependent on the Leader position 19 in the host record:

- Host record: position 19=a (Link text is 'Show Volumes')
- Child record: position 7= NOT a or b (Link text is 'In:')

Using Enhanced workflow and Easy analytics together

- It is possible to have both system preferences enabled.
- If used in this way the links available are those used for Easy Analytics (New > Analyze items, etc).
- Control number linking based on 001 continues to work correctly.
- Settings:
 - UseControlNumber set to 'Use'
 - EasyAnalyticalRecords set to 'Display'



Further information

Koha community wiki pages:

- Multipart Bibliographics
https://wiki.koha-community.org/wiki/Multipart_Bibliographics
- Analytic Record support
https://wiki.koha-community.org/wiki/Analytic_Record_support



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