



Koha 3.03
Documentation

Koha 3.0

This Reference Manual applies to: 3.0

Manual for Koha Version 3.0 (stable)

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Administration

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1. Global System Preferences

This section covers all of the preferences found under the Global System Preference menu. To set up Global System Preferences * Go to the 'Administration' module (under 'More' in your Global Nav)

1.1. Admin

Preferences found under Global System Preferences > Admin

IMPORTANT: Be cautious when making changes to any system preference, as editing these fields will affect your system. If you are unsure of what the value should be or whether it should be changed, contact your system administrator.

AutoLocation

Blocks unauthorized IP Addresses from accessing staff client.

Default Value: OFF

Values:

- ON = IP authentication is enabled, blocking access to the staff client from unauthorized IP addresses. When ON rather than set the branch by selecting it, you set it by your IP address.
- OFF = Anyone with a login can access the staff client no matter what IP they're coming from. When OFF the library branch can be changed using the 'set' link in the top right of the staff client menu.

To enter the IP addresses that are allowed you must edit that in the administration module

- *Get there:* More > Administration > Libraries, Branches, & Groups > Edit Branch

DebugLevel

This setting determines the amount of detail that is sent to the screen about an error when a user encounters an error using the system.

Default Value: 2

Values:

- 0 = shows no error info (other than the basic error message)
- 1 = some detail
- 2 = most detail

TIP: You will typically set this to '0' in production, but can briefly change it to '2' if you encounter a particular error in which you need more information to report the problem.

delimiter

Defines the default separator character for exporting reports to open in an external application.

When report data outputs in Koha to an external file, it is done so in a value separated flat file (common types of this are comma separated values .csv files, tab delimited files, etc.). This setting allows the library(s) to decide what character they want to use to separate the columns of output data in the value separated flat file.

Default Value: ;

Values:

- ;
- tabulation
- /
- \

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- #

TIP: In the U.S., ';' is most common and makes the reports compatible with Microsoft Excel.

FrameworksLoaded

Frameworks loaded through webinstaller.

Default Value:

```
userflags.sql|marc21_framework_DEFAULT.sql|stopwords.sql|sysprefs.sql|auth-
types.sql|marc21_holdings_coded_values.sql|library.sql|itemtypes_default.sql|borrower_categories.sql|auth_val.sql
```

This field contains a list of all MARC framework scripts, syspref scripts, and sample data prefs loaded during the web installation.

IMPORTANT: It is not recommend that this setting is changed after the initial installation of Koha.

GranularPermissions

Default Value:OFF

Values:

- ON = Adds the ability to provide more granular permissions to staff (such as allowing access to one or two tools instead of them all)
- OFF = Permissions are assigned by function instead of allowing staff access to parts of a function

TIP: If this preference is turned OFF after being ON, the system reverts to the original behavior, although the specific permissions are retained. This means if a staff member has been given granular permissions they will retain those even if this is turned OFF

IndependantBranches

Use this setting if independent libraries are sharing a single Koha installation (each are a 'branch' in Koha).

IMPORTANT: This setting is not intended to be used with normal library branches. This setting is meant for libraries who are independent organizations, meaning they do not share material or patrons.

IMPORTANT: The value (ON/OFF) should be set BEFORE going live and should NOT be changed. This setting is a precursor setting to the fuller system group work development forthcoming in Koha 3.2.

Default Value: OFF

If ON, Koha will increase security between the libraries (ie, 'branches') in your Koha system. When 'IndependentBranches' is ON, Koha...

- prohibits staff users from logging into another location from within the staff client, unless they have superlibrarian privileges.
- filters out patrons from patron searches that do not belong at the login location. (If a patron is registered at 'C' Branch, a search at 'A' Branch won't bring up that patron.)
- limits the location and sublocation choices to the login location, when adding or modifying an item record.
- prevents users from other library locations from checking out or placing holds on material held at a different library location.
- prevents staff from editing item records that do not belong to the login location.

All of this is with the exception of the superlibrarian. Superlibrarian is the highest level of privileges that can be granted to a staff user and entitles the user to do anything in the system.

insecure

Default Value: OFF

Values:

- ON = Bypasses all authentication (staff client and OPAC included). Be careful!
- OFF = Requires authentication on the staff client and the OPAC

IMPORTANT: it is not recommend that this setting is changed after the initial installation of Koha.

intranet_includes

Use 'includes' directory if you want specific look of Koha (includes or includes_npl, for example).

Default Value: includes

KohaAdminEmailAddress

Define the Koha Administrator email address.

Default Value: root@localhost

TIP: It is recommended that you use the email address of a superlibrarian (e.g. Library Director, Head of Circulation, etc) Only one email address can be entered, however it can be changed at any time.

This email address will receive patron modification requests, purchase suggestions (if you choose to have them emailed), and information regarding overdue notices.

libraryAddress

Define the address to use for printing receipts, overdues, etc.

Default Value: *no value*

IMPORTANT: You only need to enter an address here, if the address you want to use is different from the physical address you've assigned to the library in 'Libraries, Branches, & Groups'.

- *Get there:* More > Administration > Libraries, Branches, & Groups

MIME

Defines the default application Koha will use when exporting reports.

Default Value: EXCEL

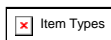
Values:

- EXCEL
- OPENOFFICE.ORG

noItemTypeImages

Determines whether itemtype images display in the OPAC and staff intranet.

Here is an example of itemtype images:



Default Value: OFF

Values:

- ON = itemtype images do not display
- OFF = itemtype images are displayed

TIP: You can assign itemtype images to your itemtypes through the administration 'Item Types and Circulation Codes'

- *Get there:* More > Administration > Item Types and Circulation Codes

OPACBaseURL

Here's where you specify the base URL for your OPAC.

Default Value: *no value*

For example, opac.mylibrary.com TIP: The 'http:/' will automatically be added by Koha.

IMPORTANT: It is not recommend that this setting is changed after the initial installation of Koha.

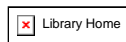
OpacMaintenance

Default Value: OFF

Values:

- ON = When on all functions in the OPAC will be disabled and replaced with a maintenance message
- OFF = When off the OPAC functions as expected

When ON the OPAC will look like this



TIP: The text for this warning cannot be edited at this time

SessionStorage

Use database or a temporary file for storing session data.

Default Value: MYSQL

Values:

- MYSQL
- Pg
- tmp

IMPORTANT: it is not recommend that this setting is changed after the initial installation of Koha.

singleBranchMode

Defines if Koha should operate in 'single-branch' mode.

Default Value: OFF

Values:

- ON = Koha hides the branch selection functionality in the OPAC.
- OFF = Koha displays the branch selection functionality in the OPAC.

staffClientBaseURL

Specify the base URL for your staff client.

Default Value: *no value*

IMPORTANT: Remember, if you have not chosen a 'hosted' solution through a Koha service provider, you need to buy and register your own domain name.

timeout

Inactivity timeout for cookies authentication (in seconds). This preference applies to both the staff client and the OPAC.

Default Value:12000000

IMPORTANT: It is not recommend that this setting is changed after the initial installation of Koha.

Version

This refers to the Koha database version your installation is running.

IMPORTANT: DO NOT change this after the initial installation of Koha. It is maintained by the webinstaller.

1.2. Acquisitions

This section will define all variables related to the acquisitions module.

acquisitions

Define if you would like Koha to use 'normal' budget-based acquisitions, or 'simple' bibliographic-data acquisitions.

Default Value: normal

Values:

- simple = bibliographic-data acquisitions
- normal = budget-based acquisitions

emailPurchaseSuggestions

BUG #2776 -- This preference defines how to handle patron purchase suggestions made via the OPAC.

Default Value: OFF

Values:

- ON = patron suggestions are emailed to the email address defined in 'KohaAdminEmailAddress' preference rather than being managed by the Acquisitions module
 - *Get there:* More > Administration > Global system preferences > Admin > KohaAdminEmailAddress
- OFF = Patron suggestions go into the Acquisitions module to be managed by staff
 - *Get there:* More > Acquisitions > Manage Suggestions

gist

BUG #2865 -- Defines the 'Default Goods and Services tax rate.

Default Value:

0

This is a free text field where you can enter Values:

- 0 = disables GST
- Enter the GST value NOT in %, but in numeric form (e.g., enter '0.12' for 12%)

IMPORTANT: Enter the GST value NOT in %, but in numeric form (For instance, enter '0.12' for 12%)

1.3. Enhanced Content

Contents

- acquisitions
- emailPurchaseSuggestions
- gist

These settings related to additional content for your Koha system. These include importing data from Amazon.com, Baker & Taylor, LibraryThing, Syndetics, Babeltheque, or Google Books as well as FRBR settings.

AmazonAssocTag

Applying for this tag provides your library with an associates account allowing you to earn a percentage of all purchases made on Amazon after patrons click through your site. Go to <http://aws.amazon.com> and apply for a tag, it's free.

Default Value: *no value*

IMPORTANT: This is required in order to have Amazon Content display in the system.

AmazonCoverImages

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.

IMPORTANT: Requires AmazonEnabled to be turned ON

IMPORTANT: If this is ON, make sure that GoogleJackets and BakerTaylorEnabled are OFF.

Amazon will pull content based on the first ISBN number in your MARC record.

Default Value: OFF

Values:

- ON = Amazon cover images will appear in your Staff Client
- OFF = Amazon cover images will not appear in your Staff Client

AmazonEnabled

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.

IMPORTANT: If this is ON, make sure that GoogleJackets and BakerTaylorEnabled are OFF.

Required to display Amazon content defined by AmazonCoverImages, AmazonSimilarItems, and AmazonReviews.

Default Value: OFF

Values:

- ON = Amazon content enabled. This preference does not display any content, just enables other system preference to work
- OFF = No Amazon content will be displayed in the Staff Client

TIP: This is just for the Staff Client. You will need to turn on the 'OPACAmazonEnabled' option to have Amazon content appear on the OPAC.

AmazonLocale

Use to set the Locale of your Amazon Web Services. Choose your Amazon country from the pull down and click 'Save'.

Default Value: US

Values:

- US
- CA
- DE
- FR
- JP
- UK

AmazonReviews

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.

IMPORTANT: Requires AmazonEnabled to be turned ON.

Contents

- AmazonAssocTag
- AmazonCoverImages
- AmazonEnabled
- AmazonLocale
- AmazonReviews
- AmazonSimilarItems
- AWSAccessKeyID
- Babeltheque
- BakerTaylorBookstoreURL
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- BakerTaylorPassword
- BakerTaylorUsername
- FRBRizeEditions
- GoogleJackets
- LibraryThingForLibrariesEnabled
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- OCLCAffiliateID
- OPACAmazonCoverImages
- OPACAmazonEnabled
- OPACAmazonReviews
- OPACAmazonSimilarItems
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- SyndeticsTOC
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- TagsExternalDictionary
- TagsInputOnDetail
- TagsInputOnList
- TagsModeration
- TagsShowOnDetail
- TagsShowOnList
- ThingISBN
- XISBN
- XISBNDailyLimit

IMPORTANT: If this is ON, make sure that GoogleJackets and BakerTaylorEnabled are OFF.

Default Value: OFF

Values:

- ON = Amazon reviews will appear in your Staff Client
- OFF = Amazon reviews will not appear in your Staff Client

AmazonSimilarItems

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.

IMPORTANT: Requires AmazonEnabled to be turned ON.

IMPORTANT: If this is ON, make sure that GoogleJackets and BakerTaylorEnabled are OFF.

Default Value: OFF

Values:

- ON = Amazon Similar Items will appear in your Staff Client
- OFF = Amazon Similar Items will not appear in your Staff Client

AWSAccessKeyID

Default Value: *no value*

Visit <http://aws.amazon.com> to sign up for an Access Key ID.

Enter that key in the field provided.

TIP: You may already have an Access Key ID. You can access your Access Key ID by going to <http://aws.amazon.com>, pointing to Your Web Services Account, then clicking View Access Key Identifiers. Depending on when you signed up for ECS 3.0, you may need to re-register for an AWS account, which includes an Access Key ID.

Babeltheque

IMPORTANT: Requires that you register for this service at www.babeltheque.com.

IMPORTANT: Available only in French

Default Value: OFF

Values:

- ON = Enables the 'Babeltheque' tab in the OPAC providing patrons with access to tags, reviews and additional title information from the Babeltheque service
☐ Babeltheque
- OFF = 'Babeltheque' will not appear in the OPAC

BakerTaylorBookstoreURL

IMPORTANT: Requires that you pay for this service with Baker & Taylor.

Default Value: *no value*

URL template for "My Library Bookstore" links, to which the "key" value is appended, and "https://" is prepended. It should include your hostname and "Parent Number". Make this variable empty to turn MLB links off.

Example: ocls.mylibrarybookstore.com/MLB/actions/searchHandler.do?nextPage=bookDetails&parentNum=10923&key=

BakerTaylorEnabled

IMPORTANT: Requires that you pay for this service with Baker & Taylor.

IMPORTANT: If this is ON, make sure that all Amazon preferences and GoogleJackets are OFF.

Default Value: OFF

Values:

- ON = Baker & Taylor content (reviews, descriptions, covers, etc) will appear in your Staff Client and OPAC
- OFF = Baker & Taylor content (reviews, descriptions, covers, etc) will not appear in your Staff Client and OPAC

BakerTaylorPassword

IMPORTANT: Requires that you pay for this service with Baker & Taylor.

Baker & Taylor Password for Content Cafe (external content)

Default Value: *no value*

BakerTaylorUsername

IMPORTANT: Requires that you pay for this service with Baker & Taylor.

Baker & Taylor Username for Content Cafe (external content)

Default Value: *no value*

FRBRizeEditions

Default Value: OFF

Values:

- ON = Koha will query one or more ISBN web services for associated ISBNs and display an Editions tab on an item's detail page
- OFF = 'Editions' tab will not display on item detail page

TIP: This is just for the staff client. You will need to turn ON the 'OPACFRBRizeEditions' option to have the Editions tab appear on the OPAC.

GoogleJackets

IMPORTANT: If this is ON, make sure that all Amazon preferences and BakerTaylorEnabled are OFF.

Default Value: OFF

Values:

- ON = Displays jacket covers from Google Books API
- OFF = Does not pull jackets from Google Books API

LibraryThingForLibrariesEnabled

IMPORTANT: Requires that you pay for this service with LibraryThing. See: <http://librarything.com/forlibraries/>

Default Value: OFF

Values:

- ON = Enables LibraryThing for Libraries features
- OFF = Disable LibraryThing for Libraries features

TIP: More info can be found on the LibraryThing wiki: <http://www.librarything.com/wiki/index.php/Koha>

LibraryThingForLibrariesID

IMPORTANT: Requires that you pay for this service with LibraryThing. See: <http://librarything.com/forlibraries/>

This information will be provided with your subscription to LibraryThing for Libraries

LibraryThingForLibrariesTabbedView

IMPORTANT: Requires that you pay for this service with LibraryThing. See: <http://librarything.com/forlibraries/>

Default Value: OFF

Values:

- ON = Put LibraryThing For Libraries content in tabs
- OFF = LibraryThing for Libraries content displayed withing tabs

OCLCAffiliateID

You can sign up for an AffiliateID here: <http://www.worldcat.org/wcpa/do/AffiliateUserServices?method=initSelfRegister>

Default Value: *no value*

If an ID is entered, Koha will try to use OCLC's XISBN service to FRBRize your results.

TIP: This field does not need a value unless you've turned 'FRBRizeEditions' and/or 'OPACFRBRizeEditions' and 'XISBN' on.

OPACAmazonEnabled

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.

IMPORTANT: If this is ON, make sure that GoogleJackets and BakerTaylorEnabled are OFF.

Required to display Amazon content defined by OPACAmazonCoverImages, OPACAmazonSimilarItems, and OPACAmazonReviews.

Default Value: OFF

Values:

- ON = Enables Amazon content in the OPAC. This preference does not display any content, just enables other system preferences to work
- OFF = No Amazon content will appear in your OPAC

TIP: This is just for the OPAC. You will need to turn ON the 'AmazonEnabled' option to have Amazon content appear on the Staff Client.

OPACAmazonCoverImages

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.

IMPORTANT: Requires OPACAmazonEnabled to be turned ON

Amazon will pull content based on the first ISBN number in your MARC record.

Default Value: OFF

Values:

- ON = Display Amazon cover images on OPAC
- OFF = Do not display Amazon cover images on OPAC

OPACAmazonReviews

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.
IMPORTANT: Requires OPACAmazonEnabled to be turned ON

Default Value: OFF

Values:

- ON = Display Amazon Editorial (in the description tab) and User reviews (in the Amazon reviews tab) on OPAC
- OFF = Do not display Amazon reviews on OPAC

OPACAmazonSimilarItems

IMPORTANT: You MUST set 'AWSAccessKeyID' and 'AmazonAssocTag' before turning this feature on.
IMPORTANT: Requires OPACAmazonEnabled to be turned ON

IMPORTANT: If this is ON, make sure that GoogleJackets and BakerTaylorEnabled are OFF.

Default Value: OFF

Values:

- ON = Amazon Similar Items will appear in your OPAC
- OFF = Amazon Similar Items will not appear in your OPAC

OPACFRBRizeEditions

Default Value: OFF

Values:

- ON = OPAC will query one or more ISBN web services for associated ISBNs and display an Editions tab on an item's detail page
- OFF = 'Editions' tab will not display on item detail page

TIP: This is just for the OPAC. You will need to turn ON the 'FRBRizeEditions' option to have the Editions tab appear on the Staff Client.

PINESISBN

Default Value: OFF

Values:

- ON = Koha will query the PINESISBN service for the Editions tab on an item's detail page
- OFF = Koha will not query the PINESISBN service for the 'Editions' tab on an item's detail page

TIP: This field does not need a value, unless you've turned 'FRBRizeEditions' and/or 'OPACFRBRizeEditions' ON

SyndeticsAuthorNotes

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Notes about the Author on OPAC from Syndetics
- OFF = Syndetics Notes about the Author will not be displayed in the OPAC

SyndeticsAwards

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Awards on OPAC from Syndetics
- OFF = Syndetics Awards will not be displayed in the OPAC

SyndeticsClientCode

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: 0

Enter your Client Code for using Syndetics Solutions content

TIP: This code is sometimes case-sensitive so it is important to make sure you enter the code exactly as Syndetics provided it to you.

SyndeticsCoverImages

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Cover Images from Syndetics
- OFF = Syndetics Cover Images will not be displayed in the OPAC

SyndeticsCoverImageSize

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: MC

Choose the size of the Syndetics Cover Image to display on the OPAC detail page

Values:

- MC = Medium Cover
- LC = Large Cover

SyndeticsEditions

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Editions from Syndetics
- OFF = Syndetics Edition will not be displayed in the OPAC

SyndeticsEnabled

IMPORTANT: Requires that you pay for this service with Syndetics.

Default Value: OFF

Values:

- ON = Turn on Syndetics Enhanced Content
- OFF = Syndetics Enhanced will not be displayed in the OPAC

SyndeticsExcerpt

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Excerpts and first chapters on OPAC from Syndetics
- OFF = Syndetics Excerpts and first chapters will not be displayed in the OPAC

SyndeticsReviews

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Reviews on OPAC from Syndetics
- OFF = Syndetics Reviews will not be displayed in the OPAC

SyndeticsSeries

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Series information on OPAC from Syndetics
- OFF = Syndetics Series Information will not be displayed in the OPAC

SyndeticsSummary

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Summary Information from Syndetics
- OFF = Syndetics Summary Information will not be displayed in the OPAC

SyndeticsTOC

IMPORTANT: Requires that you pay for this service with Syndetics.

IMPORTANT: Must have SyndeticsEnabled turned ON.

Default Value: OFF

Values:

- ON = Display Table of Content information from Syndetics
- OFF = Syndetics Table of Contents will not be displayed in the OPAC

TagsEnabled

This is the main switch for tags.

Default Value: ON

Values:

- ON = Enables all tagging features
- OFF = Disables all tagging features.

TagsExternalDictionary

This dictionary is used as a "whitelist" of pre-allowed tags.

Default Value: *no value*

Path on server to local ispell executable, used to set \$Lingua::IsPELL::path.

Example: /usr/bin/ispell

TagsInputOnDetail

Default Value: ON

Values:

- ON = Allow users to input tags from the detail page
- OFF = Prevent users from inputting tags from the detail page

TagsInputOnList

Default Value: OFF

Values:

- ON = Allow users to input tags from the search results list
- OFF = Prevent users from inputting tags from the search results list

TagsModeration

Turning this feature on will require that all tags go through the tag moderation tool before becoming visible.

- *Get there:* More > Tools > Tags

Default Value: OFF

Values:

- ON = Requires tags from patrons to be approved before becoming visible
- OFF = Tags from patrons become visible immediately

TagsShowOnDetail

Number of tags to display on detail page.

Default Value: 10

TIP: Set the value to 0 (zero) to turn this feature off.

TagsShowOnList

Number of tags to display on search results list.

Default Value: 6

TIP: Set the value to 0 (zero) to turn this feature off.

ThingISBN

Default Value: OFF

Values:

- ON = Koha will query the ThingISBN service for the Editions tab on an item's detail page
- OFF = Koha will not query the ThingISBN service for the Editions tab on an item's detail page

TIP: This field does not need a value, unless you've turned 'FRBRizeEditions' and/or 'OPACFRBRizeEditions' ON

XISBN

Default Value: OFF

Values:

- ON = Koha will query OCLC's XISBN service for the Editions tab on an item's detail page
- OFF = Koha will not query OCLC's XISBN service for the Editions tab on an item's detail page

TIP: This field does not need a value, unless you've turned 'FRBRizeEditions' and/or 'OPACFRBRizeEditions' on and entered you OCLC Affiliate ID in the 'OCLCAffiliateID' field.

See: <http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp>

XISBNDailyLimit

Default Value: 499

The xISBN Web service is free for non-commercial use, if usage does not exceed 500 requests per day. Set this field to 499 or less in order to comply with those requirements.

TIP: This field does not need a value, unless you've turned 'FRBRizeEditions' and/or 'OPACFRBRizeEditions' on and 'XISBN' on.

1.4. Authorities

These preferences refer to how your system handles authorities.

authoritysep

Defines the default separator character for separating a list of authorities in a display (Usually, '--')

Values: This is a free form field

IMPORTANT: Most libraries leave this at the default: '--'

Contents

- authoritysep
- BiblioAddsAuthorities
- dontmerge

BiblioAddsAuthorities

Defines if a new biblio will check for existing authority record and create one on-the-fly if one doesn't exist.

Values:

- ON = a new biblio will check for existing authority record and create one on-the-fly if one doesn't exist.
- OFF = a new biblio will NOT check for existing authority records and will NOT create one if one doesn't exist

dontmerge

Defines if an authority record will update all associated bibliographic records immediately.

Values:

- ON = modifying an authority record will NOT update all associated bibliographic records
- OFF = modifying an authority record WILL update all associated bibliographic records

IMPORTANT: Ask your system administrator to enable the `merge_authorities.pl` cron job

1.5. Cataloging

Cataloging preferences and default values.

1.5.1. Cataloging

These preferences refer to how your system handles cataloging actions.

advancedMARCEditor

Defines whether or not you want Koha's MARC editor ('Cataloging' Module) to display field/subfield descriptions.

Default Value: OFF

Values:

- ON = The MARC editor WON'T display field/subfield descriptions (for the advanced cataloger)
- OFF = The MARC editor WILL display field/subfield descriptions (for the novice cataloger)

TIP: Many advanced catalogers prefer to have this preference set to OFF.

Contents

- advancedMARCEditor
- autoBarcode
- DefaultClassificationSource
- hide_marc
- IntranetBiblioDefaultView
- ISBD
- item-level_itypes
- itemcallnumber
- LabelMARCView
- marc
- marclavour
- MARCOrgCode
- NoZebra
- NoZebraIndexes
- OpacSuppression
- RoutingSerials
- z3950AuthorAuthFields
- z3950NormalizeAuthor

autoBarcode

Used to autogenerate a barcode.

Default Value: OFF

Values:

- incremental = assigns an item barcode as a sequential number 1,2,3,4 etc. (each library would have its own separate sequential run)
- annual = the sequential number for each library is prefixed by the year code, i.e. 2007-1, 2207-2 etc.
- hbyymmncr = assign an item barcode of the form HBYYMMncr, where 'HB' stands for the item's home branch, 'YYMM' stands for the year and month, and 'ncr' is a sequential number
- OFF = barcodes are not auto-calculated

IMPORTANT: If JavaScript is off the only option that will work is 'incremental'. To use other options, you must have JavaScript on.

DefaultClassificationSource

Here you set the default classification scheme used by the collection. e.g., Dewey, LCC, etc.

Default Value: ddc

Values:

- ddc (Dewey)
- lcc (Library of Congress Classification)
- sudocs (SuDoc number, for United States government documents)
- udc (Universal Decimal Classification)
- z (Other, e.g., for accession numbers)

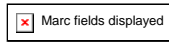
TIP: When in doubt, set this preference to 'ddc' (Dewey)

hide_marc

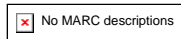
Default Value: OFF

Values:

- ON = disables display of MARC fields, subfield codes & indicators (still shows data)-- see below



- OFF = MARC fields, subfield codes & indicators will display-- see below



IntranetBiblioDefaultView

Controls what bibliographic detail display (normal, ISBD, or MARC) is chosen when you click on a record in a catalog search results list on the staff client.

Default Value: normal

Even though this is a free text field, you are expected to enter one of the following:

Values:

- normal
- isbd
- marc

TIP: To update what displays in the OPAC, update the 'BiblioDefaultView' system preference, which is the equivalent of this preference for the OPAC.

ISBD

Here is where you re-order the variables that dictate ISBD display in Koha.

The International Standard Bibliographic Description or ISBD is a set of rules produced by the International Federation of Library Associations and Institutions (IFLA) to describe a wide range of library materials within the context of a catalog.

Default Value: MARC21 Default -- UNIMARC Default

IMPORTANT: Most libraries leave this at the default. Do not delete values, rather re-order them to get a different display in Koha.

item-level_itypes

Here is where you decide if Koha will use item-level and itemtype issuing rules.

Default Value:

ON

Values:

- ON = Enables Item-level Itemtype / Issuing Rules
- OFF = No Item-level Itemtype / Issuing Rules

Koha is different from some other ILSs in that the item type or loan code can either be an attribute of the bib record or an attribute of the item record. The 'item-level_itypes' preference controls whether the item type stored at the bib or item level is used for circulation policies.

itemcallnumber

Defines the MARC field/subfield that is used to calculate the itemcallnumber.

Default Value: 082ab

Values:

- '082ab' or '092ab' = Dewey
- '050ab' or '090ab' = LOC

In Koha, libraries will specify and store their local item level call numbers in 952So which is the designated tag/subfield for storing an item level call number. They can have this 952So populated by the bib level call number by using this field to specify which other tag/subfield in the bib record will be used to pull default item call number information from.

LabelMARCVIEW

Defines how a MARC record will display.

Default Value: standard

Values:

- standard
- economical

TIP: If there is a repeatable table on your label (e.g., 650) only the first occurrence will be displayed.

marc

Back in the early days of Koha, there was the ability to have a totally non-marc db and that was what this setting was for. Most libraries use MARC of one form or another now for their bibliographic and authority records so this setting is actually becoming obsolete and will likely be removed in the future.

IMPORTANT: This is an ON/OFF setting that you will want to set ON and leave ON.

Default Value: ON

Values:

- ON = MARC is supported
- OFF = MARC is not supported

marcflavour

Defines global MARC flavor (MARC21 or UNIMARC) used for character encoding.

Default Value: MARC21

Values:

- MARC21
- UNIMARC

IMPORTANT: This option should not be changed after installation of your database.

MARCOrgCode

Defines your library's MARC Organization Code. Learn more about MARC Organization Codes:
<http://www.loc.gov/marc/organizations/orgshome.html>

Default Value: OSt

This is a free text field that should be updated with your organization code before you begin cataloging.

TIP: Search the list of codes (<http://www.loc.gov/marc/organizations/org-search.php>) if you're unsure of what your code is.

NoZebra

Here you decide to use the 'Zebra' or non Zebra version of Koha. Zebra is a high-performance indexing and retrieval engine. If ON, Zebra indexing is turned off and there is a simpler setup, but slower searches.

Default Value: OFF

Values:

- ON = No Zebra indexing (Consider using this only if your collection is very small-- under 25,000 items)
- OFF = Zebra indexing is on (All collections over 25,000 items will want to choose this setting)

IMPORTANT: If your library's collection is over 25,000 you must have this preference to OFF to get fast searching.

IMPORTANT: It is recommended that this setting NOT be changed after initial installation of Koha.

IMPORTANT: Using this feature on a busy Koha installation has proven to be rather resource intensive.

NoZebraIndexes

Includes the actual definitions to use for Koha's internal search engine if you're not using Zebra

IMPORTANT: Leave this value at the default provided.

Default Value:

```
\title\' => \130a,210a,222a,240a,243a,245a,245b,246a,246b,247a,247b,250a,250b,440a,830a\',\r\n\'author\' =>
\'100a,100b,100c,100d,110a,111a,111b,111c,111d,245c,700a,710a,711a,800a,810a,811a\',\r\n\'isbn\' => \'020a\',\r\n\'issn\' =>
\'022a\',\r\n\'lcn\' => \'010a\',\r\n\'biblionumber\' => \'999c\',\r\n\'itemtype\' => \'942c\',\r\n\'publisher\' => \'260b\',\r\n\'date\' =>
\'260c\',\r\n\'note\' => \'500a,
501a,504a,505a,508a,511a,518a,520a,521a,522a,524a,526a,530a,533a,538a,541a,546a,555a,556a,562a,563a,583a,585a,582a\',\r\n\'subject\'
=> \'600*,610*,611*,630*,650*,651*,653*,654*,655*,662*,690*\',\r\n\'dewey\' => \'082\',\r\n\'bc\' => \'952p\',\r\n\'callnum\' =>
\'952o\',\r\n\'an\' => \'6009,6109,6119\',\r\n\'homebranch\' => \'952a,952c\'
```

OpacSuppression

This system preference only applies to the 942\$*n* field.

Default Value: OFF

Values:

- ON = Makes it so that if the 942\$*n* field is set in the framework to be suppressed in the OPAC, it will not appear in the OPAC
- OFF = If the 942\$*n* field is set in the framework to be suppressed in the OPAC, it will still appear in the OPAC

TIP: Sometimes it's easier if you create an authorized value entitled 'SUPPRESS' with two values: 0 for don't suppress and 1 for suppress. Linking this authorized value to the 942\$*n* field will make it so that catalogers can pick one of these two values.

IMPORTANT: Unless you have at least one record with a 942\$*n*, turning 'OpacSuppression' ON will cause all OPAC searches to fail. This is caused by Zebra throwing errors if you search for an index that doesn't have at least one value.

RoutingSerials

Defines if serials routing lists are enabled or disabled in your system.

Default Value: ON

Values:

- ON = Serials routing is enabled
- OFF = Serials routing is disabled

TIP: Learn more by viewing the Serials: Routing Lists section in this manual.

z3950AuthorAuthFields

Defines the MARC biblio fields for Personal Name Authorities to fill biblio.author field.

Default Value: 701,702,700

IMPORTANT: You probably want to leave this set to the default. This option takes effect only if the 'z3950NormalizeAuthor' option is turned on; note that 'z3950NormalizeAuthor' should be used only by UNIMARC libraries.

z3950NormalizeAuthor

Here you can choose to have 'Personal Name Authorities' replace authors in biblio.author.

Default Value: OFF

Values:

- ON = Personal Name Authorities will replace authors in biblio.author
- OFF = Personal Name Authorities will NOT replace authors in biblio.author

IMPORTANT: This option is currently specific to UNIMARC, and should not be turned on by MARC21 libraries.

1.5.2. ISBD Default (MARC21)

Default value for the ISBD system preference.

```
#100||{ 100a }{ 100b }{ 100c }{ 100d }{ 110a }{ 110b }{ 110c }{ 110d }{ 110e }{ 110f }{ 110g }{ 130a }{ 130d }{ 130f }{ 130g }{ 130h }{ 130k }
{ 130l }{ 130m }{ 130n }{ 130o }{ 130p }{ 130r }{ 130s }{ 130t }|<br/><br/>
#245||{ 245a }{ 245b }{ 245f }{ 245g }{ 245k }{ 245n }{ 245p }{ 245s }{ 245h }
#246||{ : 246i }{ 246a }{ 246b }{ 246f }{ 246g }{ 246n }{ 246p }{ 246h }
#242||{ = 242a }{ 242b }{ 242n }{ 242p }{ 242h }|
#245||{ 245c }|
#242||{ = 242c }|
#250|- { { 250a }{ 250b }|
#254|, { { 254a }|
#255|, { { 255a }{ 255b }{ 255c }{ 255d }{ 255e }{ 255f }{ 255g }|
#256|, { { 256a }|
#257|, { { 257a }|
#258|, { { 258a }{ 258b }|
#260|- { { 260a }{ 260b }{ 260c }|
#300|- { { 300a }{ 300b }{ 300c }{ 300d }{ 300e }{ 300f }{ 300g }|
#306|- { { 306a }|
#307|- { { 307a }{ 307b }|
#310|- { { 310a }{ 310b }|
#321|- { { 321a }{ 321b }|
#340|- { { 3403 }{ 340a }{ 340b }{ 340c }{ 340d }{ 340e }{ 340f }{ 340h }{ 340i }|
#342|- { { 342a }{ 342b }{ 342c }{ 342d }{ 342e }{ 342f }{ 342g }{ 342h }{ 342i }{ 342j }{ 342k }{ 342l }{ 342m }{ 342n }{ 342o }{ 342p }
{ 342q }{ 342r }{ 342s }{ 342t }{ 342u }{ 342v }{ 342w }|
#343|- { { 343a }{ 343b }{ 343c }{ 343d }{ 343e }{ 343f }{ 343g }{ 343h }{ 343i }|
#351|- { { 3513 }{ 351a }{ 351b }{ 351c }|
#352|- { { 352a }{ 352b }{ 352c }{ 352d }{ 352e }{ 352f }{ 352g }{ 352i }{ 352q }|
#362|- { { 362a }{ 351z }|
#440|- { { 440a }{ 440n }{ 440p }{ 440v }{ 440x }|.
#490|- { { 490a }{ 490v }{ 490x }|.
#800|- { { 800a }{ 800b }{ 800c }{ 800d }{ 800e }{ 800f }{ 800g }{ 800h }{ 800j }{ 800k }{ 800l }{ 800m }{ 800n }{ 800o }{ 800p }
{ 800q }{ 800r }{ 800s }{ 800t }{ 800u }{ 800v }|.
#810|- { { 810a }{ 810b }{ 810c }{ 810d }{ 810e }{ 810f }{ 810g }{ 810h }{ 810k }{ 810l }{ 810m }{ 810n }{ 810o }{ 810p }{ 810r }{ 810s }
{ 810t }{ 810u }{ 810v }|.
#811|- { { 811a }{ 811c }{ 811d }{ 811e }{ 811f }{ 811g }{ 811h }{ 811k }{ 811l }{ 811n }{ 811p }{ 811q }{ 811s }{ 811t }{ 811u }{ 811v }|.
#830|- { { 830a }{ 830d }{ 830f }{ 830g }{ 830h }{ 830k }{ 830l }{ 830m }{ 830n }{ 830o }{ 830p }{ 830r }{ 830s }{ 830t }{ 830v }|.
```



```

#500|<br/><br/>|{ 5003 }{ 500a }|
#501|<br/><br/>|{ 501a }|
#502|<br/><br/>|{ 502a }|
#504|<br/><br/>|{ 504a }|
#505|<br/><br/>|{ 505a }{ 505t }{ 505r }{ 505g }{ 505u }|
#506|<br/><br/>|{ 5063 }{ 506a }{ 506b }{ 506c }{ 506d }{ 506u }|
#507|<br/><br/>|{ 507a }{ 507b }|
#508|<br/><br/>|{ 508a }{ 508a }|
#510|<br/><br/>|{ 5103 }{ 510a }{ 510x }{ 510c }{ 510b }|
#511|<br/><br/>|{ 511a }|
#513|<br/><br/>|{ 513a }{513b }|
#514|<br/><br/>|{ 514z }{ 514a }{ 514b }{ 514c }{ 514d }{ 514e }{ 514f }{ 514g }{ 514h }{ 514i }{ 514j }{ 514k }{ 514m }{ 514u }|
#515|<br/><br/>|{ 515a }|
#516|<br/><br/>|{ 516a }|
#518|<br/><br/>|{ 5183 }{ 518a }|
#520|<br/><br/>|{ 5203 }{ 520a }{ 520b }{ 520u }|
#521|<br/><br/>|{ 5213 }{ 521a }{ 521b }|
#522|<br/><br/>|{ 522a }|
#524|<br/><br/>|{ 524a }|
#525|<br/><br/>|{ 525a }|
#526|<br/><br/>|{ \n510i }{ \n510a }{ 510b }{ 510c }{ 510d }{ \n510x }|
#530|<br/><br/>|{ \n5063 }{ \n506a }{ 506b }{ 506c }{ 506d }{ \n506u }|
#533|<br/><br/>|{ \n5333 }{ \n533a }{ \n533b }{ \n533c }{ \n533d }{ \n533e }{ \n533f }{ \n533m }{ \n533n }|
#534|<br/><br/>|{ \n533p }{ \n533a }{ \n533b }{ \n533c }{ \n533d }{ \n533e }{ \n533f }{ \n533m }{ \n533n }{ \n533t }{ \n533x }{ \n533z }|
#535|<br/><br/>|{ \n5353 }{ \n535a }{ \n535b }{ \n535c }{ \n535d }|
#538|<br/><br/>|{ \n5383 }{ \n538a }{ \n538i }{ \n538u }|
#540|<br/><br/>|{ \n5403 }{ \n540a }{ 540b }{ 540c }{ 540d }{ \n520u }|
#544|<br/><br/>|{ \n5443 }{ \n544a }{ \n544b }{ \n544c }{ \n544d }{ \n544e }{ \n544n }|
#545|<br/><br/>|{ \n545a }{ 545b }{ \n545u }|
#546|<br/><br/>|{ \n5463 }{ \n546a }{ 546b }|
#547|<br/><br/>|{ \n547a }|
#550|<br/><br/>|{ 550a }|
#552|<br/><br/>|{ 552z }{ 552a }{ 552b }{ 552c }{ 552d }{ 552e }{ 552f }{ 552g }{ 552h }{ 552i }{ 552j }{ 552k }{ 552l }{ 552m }{ 552n }{ 552o }{ 552p }{ 552u }|
#555|<br/><br/>|{ 5553 }{ 555a }{ 555b }{ 555c }{ 555d }{ 555u }|
#556|<br/><br/>|{ 556a }{ 506z }|
#563|<br/><br/>|{ 5633 }{ 563a }{ 563u }|
#565|<br/><br/>|{ 5653 }{ 565a }{ 565b }{ 565c }{ 565d }{ 565e }|
#567|<br/><br/>|{ 567a }|
#580|<br/><br/>|{ 580a }|
#581|<br/><br/>|{ 5633 }{ 581a }{ 581z }|
#584|<br/><br/>|{ 5843 }{ 584a }{ 584b }|
#585|<br/><br/>|{ 5853 }{ 585a }|
#586|<br/><br/>|{ 5863 }{ 586a }|
#020|<br/><br/><label>ISBN: </label>|{ 020a }{ 020c }|
#022|<br/><br/><label>ISSN: </label>|{ 022a }|
#222| = |{ 222a }{ 222b }|
#210| = |{ 210a }{ 210b }|
#024|<br/><br/><label>Standard No.: </label>|{ 024a }{ 024c }{ 024d }{ 0242 }|
#027|<br/><br/><label>Standard Tech. Report. No.: </label>|{ 027a }|
#028|<br/><br/><label>Publisher. No.: </label>|{ 028a }{ 028b }|
#013|<br/><br/><label>Patent No.: </label>|{ 013a }{ 013b }{ 013c }{ 013d }{ 013e }{ 013f }|
#030|<br/><br/><label>CODEN: </label>|{ 030a }|
#037|<br/><br/><label>Source: </label>|{ 037a }{ 037b }{ 037c }{ 037f }{ 037g }{ 037n }|
#010|<br/><br/><label>LCCN: </label>|{ 010a }|
#015|<br/><br/><label>Nat. Bib. No.: </label>|{ 015a }{ 0152 }|
#016|<br/><br/><label>Nat. Bib. Agency Control No.: </label>|{ 016a }{ 0162 }|
#600|<br/><br/><label>Subjects--Personal Names: </label>|{ \n6003 }{ \n600a }{ 600b }{ 600c }{ 600d }{ 600e }{ 600f }{ 600g }{ 600h }{ --600k }{ 600l }{ 600m }{ 600n }{ --600p }{ 600r }{ 600s }{ 600t }{ 600u }{ --600x }{ --600z }{ --600y }{ --600v }|
#610|<br/><br/><label>Subjects--Corporate Names: </label>|{ \n6103 }{ \n610a }{ 610b }{ 610c }{ 610d }{ 610e }{ 610f }{ 610g }{ 610h }{ --610k }{ 610l }{ 610m }{ 610n }{ --610p }{ 610r }{ 610s }{ 610t }{ 610u }{ --610x }{ --610z }{ --610y }{ --610v }|
#611|<br/><br/><label>Subjects--Meeting Names: </label>|{ \n6113 }{ \n611a }{ 611b }{ 611c }{ 611d }{ 611e }{ 611f }{ 611g }{ 611h }{ --611k }{ 611l }{ 611m }{ 611n }{ 611o }{ --611p }{ 611r }{ 611s }{ 611t }{ 611u }{ --611x }{ --611z }{ --611y }{ --611v }|
#630|<br/><br/><label>Subjects--Uniform Titles: </label>|{ \n630a }{ 630b }{ 630c }{ 630d }{ 630e }{ 630f }{ 630g }{ 630h }{ --630k }{ 630l }{ 630m }{ 630n }{ 630o }{ --630p }{ 630r }{ 630s }{ 630t }{ --630x }{ --630z }{ --630y }{ --630v }|
#648|<br/><br/><label>Subjects--Chronological Terms: </label>|{ \n6483 }{ \n648a }{ --648x }{ --648z }{ --648y }{ --648v }|
#650|<br/><br/><label>Subjects--Topical Terms: </label>|{ \n6503 }{ \n650a }{ 650b }{ 650c }{ 650d }{ 650e }{ --650x }{ --650z }{ --650y }{ --650v }|
#651|<br/><br/><label>Subjects--Geographic Terms: </label>|{ \n6513 }{ \n651a }{ 651b }{ 651c }{ 651d }{ 651e }{ --651x }{ --651z }{ --651y }{ --651v }|
#653|<br/><br/><label>Subjects--Index Terms: </label>|{ 653a }|
#654|<br/><br/><label>Subjects--Facted Index Terms: </label>|{ \n6543 }{ \n654a }{ --654b }{ --654x }{ --654z }{ --654y }{ --654v }|
#655|<br/><br/><label>Index Terms--Genre/Form: </label>|{ \n6553 }{ \n655a }{ --655b }{ --655x }{ --655z }{ --655y }{ --655v }|
#656|<br/><br/><label>Index Terms--Occupation: </label>|{ \n6563 }{ \n656a }{ --656k }{ --656x }{ --656z }{ --656y }{ --656v }|
#657|<br/><br/><label>Index Terms--Function: </label>|{ \n6573 }{ \n657a }{ --657x }{ --657z }{ --657y }{ --657v }|
#658|<br/><br/><label>Index Terms--Curriculum Objective: </label>|{ \n658a }{ --658b }{ --658c }{ --658d }{ --658v }|
#050|<br/><br/><label>LC Class. No.: </label>|{ 050a }{ / 050b }|
#082|<br/><br/><label>Dewey Class. No.: </label>|{ 082a }{ / 082b }|
#080|<br/><br/><label>Universal Decimal Class. No.: </label>|{ 080a }{ 080x }{ / 080b }|
#070|<br/><br/><label>National Agricultural Library Call No.: </label>|{ 070a }{ / 070b }|
#060|<br/><br/><label>National Library of Medicine Call No.: </label>|{ 060a }{ / 060b }|
#074|<br/><br/><label>GPO Item No.: </label>|{ 074a }|
#086|<br/><br/><label>Gov. Doc. Class. No.: </label>|{ 086a }|
#088|<br/><br/><label>Report. No.: </label>|{ 088a }|
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```

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1.5.3. ISBD Default (UNIMARC)

Default value for ISBD system preference.

```
#200|<h2>Title : |{200a}{. 200c}{. 200e}{200d}{. 200h}{. 200i}|</h2>
#461|<label class="ipt">A part of : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=461t&idx=ti}">{461t}</a>{N∞
461h} {v. 461v}{(461d)}<br/>|
#200b|<label class="ipt">Material Designation : </label>| {200b }|<br/>
#101a|<label class="ipt">Language(s) : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=101a&idx=ln}">{101a}
</a>|<br/>
#200f|<label class="ipt">Authors : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=200f&idx=au}">{200f ; }
</a>|<br/>
#200g|<label class="ipt">Co-authors : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=200g&idx=au}">{200g ; }
</a>|<br/>
#210a|<br/>|<label class="ipt">Place of publication : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&idx=pl&q=
{210a}">{210a}</a>|<br/>
#210c|<label class="ipt">Publisher : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&idx=pb&q={210c}">{210c ; }
</a>|<br/>
#210d|<label class="ipt">Date of publication : </label>|{ 210d}|<br/>
#215|<label class="ipt">Description : </label>|{215a}{. 215c}{. 215d}{. 215e}|<br/>
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{601a}">{ 601a}</a></li>|<br/>
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#200|</ul>|

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#333|<li>Public : |{333a}</li>|
#200|</ul>|
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#330|{330a}|<br/>
#200|<br/>|<h2>Items</h2>|
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type</th><th>Barcode</th>|
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</td></tr>|</table>
```

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1.6. Circulation

These preferences will help define settings related to circulation.

AllowHoldPolicyOverride

Default Value: OFF

Values:

- ON = All staff to override the hold policies set in the circulation and fine rules when placing holds
- OFF = No one can override the hold policies set in the circulation and fine rules

AllowHoldsOnDamagedItems

Default Value: ON

Values:

- ON = Allow item-level hold requests to be placed on damaged items
- OFF = Do not allow item-level hold requests to be placed on damaged items

Contents

- AllowHoldPolicyOverride
- AllowHoldsOnDamagedItems
- AllowNotForLoanOverride
- AllowOnShelfHolds
- AllowRenewalLimitOverride
- AutomaticItemReturn
- BranchTransferLimitsType
- canreservefromotherbranches
- CircAutocompl
- CircControl
- emailLibrarianWhenHoldsPlaced
- finesCalendar
- finesMode
- globalDueDate
- holdCancelLength
- HomeOrHoldingBranch
- IssuingInProcess
- itemBarcodeInputFilter
- maxoutstanding
- maxreserves
- noissuescharge
- numReturnedItemsToShow

AllowNotForLoanOverride

Default Value: OFF

Values:

- ON = Librarians can loan items marked 'not for loan'
- OFF = Items marked 'not for loan' cannot be loaned

AllowOnShelfHolds

- **BUG #2339**

Default Value: OFF

Values:

- ON = Allow item-level hold requests to be placed on items that are not on loan
- OFF = Only allow holds on checked out items

AllowRenewalLimitOverride

Default Value: OFF

Values:

- ON = Allows renewal limits to be overridden on the circulation screen
- OFF = Do not allow renewal limits to be overridden on the circulation screen

AutomaticItemReturn

Defines if Koha will automatically transfer an item to its home branch, or not.

Default Value: ON

Values:

- ON = Items checked in at a location other than the home branch specified in their record will be set as in transit to their home location.
 - **IMPORTANT: This assumes you know what needs to be transferred, and initiates the transfer automatically without showing a notification message.**
- OFF = Items will not be set as in transit to their home location, instead staff will be asked whether or not the item will remain at the library that checked the item. The check in location will show on the item record as the 'holding' location (like a temp location)

BranchTransferLimitsType

When using branch transfer limits, choose whether to limit by itemtype or collection code.

Default Value: ccode

Values:

- itemtype = Limit transfers by item type
- ccode = Limit transfers by collection code

canreservefromotherbranches

- **BUG #2394**

With independent branches on, can a user from one library place a hold on an item from another library?

IMPORTANT: This preference is dependent on the 'Independent Branches' preference being turned ON.

- *Get there:* Administration > Global system preferences > Admin > Independent Branches

Default Value: ON

Values:

- ON = A user from one library can place a hold on an item from another library
- OFF = A user from one library cannot place a hold on an item from another library

- previousIssuesDefaultSortOrder
- printcirculationslips
- RandomizeHoldsQueueWeight
- ReservesMaxPickUpDelay
- ReservesNeedReturns
- ReturnBeforeExpiry
- SpecifyDueDate
- StaticHoldsQueueWeight
- todaysIssuesDefaultSortOrder
- TransfersMaxDaysWarning
- UseBranchTransferLimits
- useDaysMode
- WebBasedSelfCheck

TIP: This is especially useful in consortial situations, where independent libraries may be sharing a Koha installation, but want to disallow borrowing between the libraries.

ceilingDueDate

If set, date due will not be past this date. Enter date according to the dateformat System Preference

Default Value: *no value*

- If dateformat preference is set to 'iso' enter the date with the following format YYYY-MM-DD
 - Get there: More > Administration > Global system preferences > I18N/L10N > dateformat
- If dateformat preference is set to 'metric' or 'us' enter the date with the following format MM/DD/YYYY
 - Get there: More > Administration > Global system preferences > I18N/L10N > dateformat

CircAutocompl

Defines if autocompletion should be enabled for the Circulation input

For example, if you're typing a patron's name in an attempt to pull up their account, if CircAutocompl is set to on name suggestions will appear

☐ CircAutocompl

Default Value: ON

Values:

- ON = autocompletion is enabled for the circulation input
- OFF = autocompletion is disabled for the circulation input

CircControl

Specify the agency that controls the circulation and fines policy.

This control answers:

- When a patron checks out an item, does the user's home library determine the length of checkout and fines policy?
- Or, the library the patron picked the item up at?
- Or, the home location of the item being checked out?

Default Value: ItemHomeLibrary

Values:

- PickupLibrary = Circulation and fines for item determined by the library that the user picked the item up at
- PatronLibrary = Circulation and fines for item determined by user's home library (set in their patron record)
- ItemHomeLibrary = Circulation and fines for item determined by the home location of the item being checked out

emailLibrarianWhenHoldIsPlaced

Default Value:

OFF

Values:

- ON = Koha emails the librarian whenever a hold is placed
- OFF = Koha does not email the librarian whenever a hold is placed

TIP: The only reason to have this function ON is if your library is very small and items are rarely put on hold. Libraries with many holds will want to monitor holds via the web interface to avoid email overload.

finesCalendar

Specify whether to use Koha's 'Calendar' module in calculating due dates and fines.

- *Get there:* Tools > Calendar

Default Value: noFinesWhenClosed

Values:

- noFinesWhenClosed = no fines will be calculated for days marked as a 'holiday' in the 'Calendar' module
- ignoreCalendar = fines will be calculated with no consideration of the 'Calendar' module

IMPORTANT: If you choose 'noFinesWhenClosed', you must set holidays using the 'Calendar' module for this preference to be useful.

- *Get there:* More > Tools > Calendar

finesMode

- **BUG #2896**

Here's where you choose the fines mode Koha will use.

Default Value: test

Values:

- off = no fines are calculated, even if they have been defined in other modules
- test = emails admin report
- production = accrues overdue fines

This preference uses the email address defined in the 'KohaAdminEmailAddress' preference

- *Get there:* Administration > Global system preferences > Admin > KohaAdminEmailAddress

IMPORTANT: Requires `fines.pl` cronjob. Ask your system administrator for details.

globalDueDate

If set, allows a global static due date for all check-outs (issues).

Default Value: *no value*

- If dateformat preference is set to 'iso' enter the date with the following format YYYY-MM-DD
 - *Get there:* More > Administration > Global system preferences > I18N/L10N > dateformat
- If dateformat preference is set to 'metric' or 'us' enter the date with the following format MM/DD/YYYY
 - *Get there:* More > Administration > Global system preferences > I18N/L10N > dateformat

holdCancelLength

Specify how many days after a hold has been confirmed, pulled from the shelf and patron contacted before a hold is canceled.

Default Value: *no value*

The number you enter represents 'days'. For instance, if you enter '14', then Koha will cancel a hold and change the item's status to 'available' 14 days after the patron has been contacted to pick up the hold.

IMPORTANT: This does not take into account a person's place in the hold queue, if they're 200th on the list of holds, and this limit is reached, their hold will be dropped. If you have a big library with a lot of holds, you may want to set this to an insanely high number of days.

HomeOrHoldingBranch

When 'IndependentBranches' is turned ON, 'HomeOrHoldingBranch' specifies whether one library is able to check out another library's item when the item is returned... or whether it has to "go home" (to its 'home branch') first!

Put another way: This preference answers the question "What should our library do with another branch's returned book? Can we check it out again ourselves, or does it have to go back to its home branch?"

IMPORTANT: it is not recommend that this setting be changed after initial installation of Koh

IMPORTANT: This preference does nothing unless the 'Independent Branches' preference is turned ON.

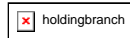
- *Get there:* Administration > Global system preferences > Admin > Independent Branches

Default Value: holdingbranch

Values:

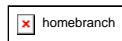
- holdingbranch = Koha will check the branch an item is being 'held' at
- homebranch = Koha will check to see which branch is an item's 'home branch' and request that a holding branch return that item to its home when attempting to 'check in' the item or 'check out' the item to another patron

If the value is set to 'holdingbranch', you will be able to check in a book from another library/branch. When you do so, a reminder to return the item to its home branch will appear:



You will also be ABLE to re-issue the item to another user at your library without first returning it to its home branch.

If the value is set to 'homebranch', you will NOT be able to check in a book from another library/branch. When you do so, a warning occurs with a reminder to return the item to its home branch:



You will also be UNABLE to re-issue the item to another user at your library without first returning it to its home branch.

IssuingInProgress

This preference lets you decide what Koha should do when a patron comes to the desk to check out a stack of items and one or more of those items incur fines which push the patron over the acceptable fines limit set in your Koha system during that session.

Default Value: OFF

Values:

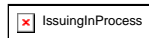
- ON= Koha ignores fines if the patron is issued an item that would incur fines that push patron over acceptable fines limit
- OFF= Koha does NOT ignore fines even if the item is being issued would incur fines that push patron over acceptable fines limit

Example: Your library has a \$5 limit set for 'fines' (ie, after incurring \$5 in fines, a patron can no longer check out items). A patron comes to the desk with 5 items to check out (4 books and a video) The patron has \$4 in charges already on their account. One of the videos has a rental charge of \$1, therefore making the total fines on the patron's account suddenly \$5 (the limit).

In this example...

- If the preference was ON, fines would be disabled for the checkout session in order to let the patron continue their checkout
- If the preference was OFF, fines would NOT be disabled and the patron would not be permitted to check out the video that has a rental charge because it would incur fines with push the patron over the acceptable fines limit

When this preference is set to ON a message will appear when checking out items asking you to confirm the checkout even with the fines:



itemBarcodeInputFilter

If set, allows specification of type of scanner called 'CueCat' to work with Koha. The CueCat scanner is a cheap but effective barcode scanner that plugs into your computer's USB port

Default Value: no value

Value:

- cuecat

TIP: Cuecat scanner is generally considered a hobbyist library tool, so most libraries do not use it. Currently the only value for this preference is 'cuecat', but this won't prevent other scanners from working with your Koha system. All modern scanners should work just fine.

maxoutstanding

'maxoutstanding' refers to the maximum amount of fines a user can have incurred (outstanding) before that user can no longer place holds.

Default Value:

5

Enter a number (the number refers to whatever currency you've defined for your Koha system... For U.S., it will usually be dollars. So, entering '50' in the field would represent '50 dollars')

IMPORTANT: The currency that has a rate of '1' is the currency that Koha uses for your system and the currency that is referenced in this preference.

- *Get there:* More > Administration > Currencies and exchange rates

maxreserves

'maxreserves' refers to the maximum number of holds a user can have placed at a given time.

Default Value: 50

Enter a number. (for example, '50' would mean the user can have up to 50 holds placed in Koha at any given time)

noissuescharge

'noissuescharge' refers to the maximum amount of fines a user can have incurred (outstanding) before that user can no longer check out items.

Default Value: 5

Enter a number (the number refers to whatever currency you've defined for your Koha system... For U.S., it will usually be dollars. So, entering '50' in the field would represent '50 dollars')

IMPORTANT: The currency that has a rate of '1' is the currency that Koha uses for your system and the currency that is referenced in this preference.

- *Get there:* More > Administration > Currencies and exchange rates

numReturnedItemsToShow

Number of returned items to show on the check-in page.

Default Value: 20

previousIssuesDefaultSortOrder

Specify the sort order of 'Previous checkouts' in the user account (Circulation Module)

Default Value: asc

Values:

- asc = ascending by date checked out (oldest to newest)
- desc = descending by date checked out (newest to oldest)

For example: Yesterday, I checked out two items to Edna Patroni. I checked out "Health education teacher resource handbook" to her, then "Harry Potter and the chamber of secrets".

If 'previousIssuesDefaultSortOrder' is set to 'asc', the display will look like this:

If 'previousIssuesDefaultSort Order is set to 'desc', the display will look like this:

TIP: Note that there is also a 'todaysIssuesDefaultSortOrder' preference to define similar functionality, but for today's checkouts rather than previous checkouts

printcirculationslips

Defines if you want to be able to print circulation receipts upon check out.

Default Value: ON

Values:

- ON = enables printing circulation receipts
- OFF = disables printing circulation receipts

When a user is logged into Koha and printing a receipt, Koha prints to the printer that is the default for the computer the user is logged in on.

RandomizeHoldsQueueWeight

If 'RandomizeHoldsQueueWeight' and 'StaticHoldsQueueWeight' are set, the list of library codes in the 'StaticHoldsQueueWeight' system preference are randomized rather than statically ranked. If RandomizeHoldsQueueWeight alone is set, the list of all available library codes is used to randomize the weight.

Default Value: OFF

Values:

- ON = The holds queue in circulation will be randomized, either based on all location codes, or by the location codes specified in 'StaticHoldsQueueWeight'
- OFF = The holds queue in circulation is statically ranked according to how they are pulled out of the system database if 'StaticHoldsQueueWeight' is not set

ReservesMaxPickUpDelay

Define the maximum number of days that a user gets to pick up an item on hold before Koha changes the item's status to 'available' (or assigns the hold to the next patron on the holds list)

Default Value: 7

Enter a number (the number represents 'days')

TIP: If you don't want Koha to automatically 'do' something to items on hold that haven't been picked up, set the value to '0' or leave blank.

ReservesNeedReturns

Decides how the system handles holds (whether they're marked as on hold automatically or whether they require checking in first). This preference only applies to "item specific" holds where an item is on the shelf.

Default Value: ON

Values:

- ON = When an item is placed on hold it will not be marked as 'Waiting' until the item is checked in (even if there are no other holds and the pickup branch and holding branch are the same)
 - If you set the preference to ON, staff must retrieve the reserved from the shelves and check it in order to change the status to "Waiting".
- OFF = When an item is placed on hold it will automatically be marked as 'Waiting' if the pickup branch and holding branch are the same and if there are no other holds on the item
 - If you set this preference to OFF and there is an item specific hold on an item belonging to Branch A and the pickup location is also Branch A, then the status of the item is automatically changed to "Waiting".

TIP: It is not wise to have this item set to OFF because this means that there is no confirmation that the item is on the shelf before notifying the patron that it's waiting

ReturnBeforeExpiry

If ON, checkout will be prevented if returndate is after patron card expiry

Default Value: OFF

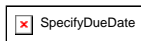
Values:

- ON = Checkout of item will be prevented if the return date set for the item is later than the date that the patron's card expires
- OFF = Checkout of item will be NOT be prevented even if the return date set for the item is later than the date that the patron's card expires

SpecifyDueDate

Define whether to display "Specify Due Date" form in Circulation.

The "Specify Due Date" form lets library staff override the normal due date for an item at the time of checkout. They can specify a new due date for either a single item--or all of those users checkouts-- by choosing a new due date in the calendar pop-up. See example below:



Default Value: ON

Values:

- ON = "Specify Due Date" form will display in Circulation module.
- OFF = "Specify Due Date" form will NOT display in Circulation module.

TIP: Turn this preference ON if you want your library staff to be able to override normally defined due dates for specific item types (for instance reference materials) or for specific patrons. The "Specify Due Date" form enables this flexibility at the time of checkout.

StaticHoldsQueueWeight

Allows the library to specify a list of library location codes -- if used alone, it will rank the list statically, selecting the top-ranking available location to be added to the picklist.

Default Value: OFF

If neither 'RandomizeHoldsQueueWeight' or 'StaticHoldsQueueWeight' is set, the holds queue is statically ranked according to how they are pulled out of the system database.

todayIssuesDefaultSortOrder

Specify the sort order of today's 'Checkouts' in the user account.

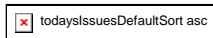
Default Value: desc

Values:

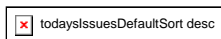
- asc = items display in 'ascending' order (from oldest checkout to most recent checkout)
- desc = items display in 'descending' order (from most recent checkout to oldest checkout)

For example: I'm checking out to Edna Patroni. I check out "Health education teacher resource handbook" to her, then "Harry Potter and the chamber of secrets".

If 'todayIssuesDefaultSort Order is set to 'asc', the display will look like this:



If 'todayIssuesDefaultSort Order is set to 'desc, the display will look like this:



TransfersMaxDaysWarning

Defines the maximum number of days that have to pass before Koha warns library staff that there might be a problem with the transfer (ie, it might be lost, etc.)

Default Value:

3

Basically this setting allows the libraries to specify a unit of time (3 days, 7 days etc.) before an "in transit" item (an item being sent from it's non-home location to its home location after being checked into the non-home location) is declared as potentially having a problem - gone missing .. hasn't arrived at home branch etc. It is a way to alert that items in transit have not reached their destination in a reasonable amount of time.

Where does this warning display? Warning displays in the circulation report 'transfers to receive'

- *Get there:* Circulation > Transfers to Receive

UseBranchTransferLimits

Default Value: OFF

Values:

- ON = Koha will use the rules set in Library Transfer Limits to decide if an item transfer should be allowed.
 - *Get there:* More > Administration > Library Transfer Limits
- OFF = All transfers will be allowed.

useDaysMode

Choose the method for calculating due date of items.

Default Value: Calendar

Values:

- Calendar = days marked as a 'holiday' in the 'Calendar' module will not be counted in the loan period
- Days = due date will be calculated with no consideration of the 'Calendar' module
- Datedue = the calendar only affects a due date if the due date would normally land on a closed date.

Example:

If the library is closed on Monday (and marked in the 'Calendar' module as closed) and the book would normally be due on Tuesday, what happens?

- if value is marked 'Calendar', the book is due Wednesday.
- If value is marked 'Datedue', the book is due Tuesday

IMPORTANT: If you set the value of this preference to 'Calendar', you must set holidays using the 'Calendar' module for this preference to be useful.

- *Get there:* Tools > Calendar

TIP: Most U.S. libraries would choose 'Datedue' for the value here

WebBasedSelfCheck

Defines if you wish to enable Koha's web-based Self Checkout Module.

Default Value: OFF

IMPORTANT: This system preference has not been inserted into the code yet. Eventually it will enable/disable the web-based self-checkout system.

IMPORTANT: Available in English only.

TIP: To access this module now, visit <http://YOURURL/cgi-bin/koha/sco/sco-main.pl>

1.7. I18N/L10N

These preferences refer to the Internationalization (I18N) and Localization (L10N) of your system.

dateformat

Contents

This controls how dates are displayed, not how they are stored in the database.

Choose 'us', 'metric', or 'iso' for the 'dateformat'

Default Value: us

Values:

- us = mm/dd/yyyy
- metric = dd/mm/yyyy
- ISO = yyyy/mm/dd)

- dateformat
- language
- opaclanguages
- opaclanguagesdisplay

language

This controls the default language for the staff client.

Default Value: en

opaclanguages

This controls the default language in the OPAC

Default Value: en

opaclanguagesdisplay

Default Value: OFF

Values:

- ON = Displays the 'Change Language' feature in your OPAC
- OFF = Hides the 'Change Language' feature in your OPAC

TIP: This feature should be ON if you have a multi-lingual patron-base.

1.8. Logs

Logs track actions as they happen in the staff client. Logs can be viewed using the Log Viewer Tool. * Get there: [More > Tools > Log Viewer](#)

BorrowersLog

Default Value: ON

Values:

- ON = Logs edit/create/delete actions on patron data
- OFF = Does not log edit/create/delete actions on patron data

Contents

- BorrowersLog
- CataloguingLog
- FinesLog
- IssueLog
- LetterLog
- ReturnLog
- SubscriptionLog

CataloguingLog

Default Value: OFF

Values:

- ON = Logs edit/create/delete actions on bibliographic data
- OFF = Does not log edit/create/delete actions on bibliographic data

IMPORTANT: Using this feature on a busy Koha installation has proven to be rather resource intensive.

FinesLog

Default Value: ON

Values:

- ON = Logs fines
- OFF = Does not log fines

IssueLog

Default Value: ON

Values:

- ON = Logs checkout activity
- OFF = Does not log checkout activity

LetterLog

Default Value: ON

Values:

- ON = Logs all notices sent
- OFF = Does not log notices sent

ReturnLog

Default Value: ON

Values:

- ON = Logs circulation (returns)
- OFF = Does not log circulation (returns)

SubscriptionLog

Default Value: ON

Values:

- ON = Logs subscriptions
- OFF = Does not log subscriptions

1.9. OAI-PMH

OAI-PMH is the Open Archives Initiative Protocol for Metadata Harvesting.

■

Learn more at <http://www.openarchives.org/>

IMPORTANT: This feature is still experimental and as such may require developer input before working with your system.

OAI-PMH

Default Value: OFF

Values:

- ON = OAI-PMH server is enabled
- Off = OAI-PMH server is disabled

Contents

- OAI-PMH
- OAI-PMH:archiveID
- OAI-PMH:MaxCount
- OAI-PMH:Set
- OAI-PMH:Subset

OAI-PMH:archiveID

Default Value: KOHA-OAI-TEST

OAI-PMH archive identification.

OAI-PMH:MaxCount

Maximum number of records by answer to ListRecords and ListIdentifiers queries

Default Value: 50

TIP: Learn more about ListRecords: <http://www.openarchives.org/OAI/2.0/openarchivesprotocol.htm#ListRecords>

TIP: Learn more about ListIdentifiers: <http://www.openarchives.org/OAI/2.0/openarchivesprotocol.htm#ListIdentifiers>

OAI-PMH:Set

OAI-PMH exported set, the set name is followed by a comma and a short description, one set by line.

Default Value: SET,Experimental set\r\nSET:SUBSET,Experimental subset

OAI-PMH:Subset

IMPORTANT: This is an experimental feature and should be left to default value.

Restrict answer to matching rows of the biblioitems table

Default Value:

itemtype='BOOK'

1.10. OPAC

These settings will allow you to make some customizations to the way your OPAC works.

AnonSuggestions

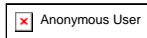
Allows anonymous purchase suggestions from your OPAC. This will allow users to submit suggestions without logging in to their account.

Default Value: 0

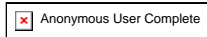
To enable, you must first create a patron for anonymous suggestions. Enter only the required fields:

Contents

- AnonSuggestions
- BiblioDefaultView
- hidelostitems
- kohaspsuggest
- LibraryName
- OpacAuthorities
- opacbookbag
- OpacBrowser



Make note of the Borrowernumber assigned to that user:



To allow anonymous suggestions, set to this field to the borrowernumber for your Anonymous user. In the example above that is 52.

BiblioDefaultView

Choose the default display patrons will see when they click on a link to the item detail page in your OPAC.

Default Value: normal

Values:

- normal = graphical interface
- marc = MARC21 view
- isbd = ISDB view

hidelostitems

When items are marked lost by librarians, this preference determines if those items display for patrons in the OPAC

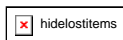
Default Value:

OFF

Values:

- ON = Disable display of "lost" items in OPAC
- OFF = Enable display of "lost" items in OPAC

If this preference is set to 'ON', lost items will display in the holding with a note stating that the item is lost.



kohaspsuggest

- [BUG #2539](#)

Allows you to track search queries.

Default Value: no value

IMPORTANT: To enable, ask your system administrator what values to enter.

LibraryName

Default Value: *no value*

Define library name as shown in the title bar in the browser.

TIP: See 'opacheader' if you'd like to add a library name above your search box

OpacAuthorities

The authority search in your OPAC is the link below the search box that reads 'Browse by Subject'. This preference defines whether or not to display this link on the OPAC.

Default Value: ON

- OpacCloud
- opaccolorstylesheet
- opaccredits
- OPACDisplayRequestPriority
- opacheader
- OPACHighlightedWords
- OPACItemHolds
- opaclayoutstylesheet
- OpacMainUserBlock
- OpacNav
- OpacPasswordChange
- opacreadinghistory
- OpacRenewalAllowed
- OPACShelfBrowser
- OPACShowCheckoutName
- opacsmallimage
- opacstylesheet
- opacthemes
- OpacTopissue
- OPACURLOpenInNewWindow
- OPACUserCSS
- opacuserjs
- opacuserlogin
- OPACViewOthersSuggestions
- RequestOnOpac
- reviewson
- SearchMyLibraryFirst
- SubscriptionHistory
- suggestion
- URLLinkText
- virtualshelves
- XSLTDetailsDisplay
- XSLTResultsDisplay

Values:

- ON = Displays the search authorities link on OPAC
- OFF = Hides the search authorities link on OPAC

TIP: This preference replaces the 'Disable_Dictionary' preference in older versions

opacbookbag

This variable defines whether or not you allow the use of the 'Cart' (also known as: biblio basket or book bag) in your OPAC.

Default Value: ON

Values:

- ON = Displays the cart
- OFF = Hides the cart

OpacBrowser

IMPORTANT: This is an experimental feature and should be left to OFF unless you are a system administrator who wants to run some scripts.

IMPORTANT: To enable, ask your system administrator to set `misc/cronjob/build_browser_and_cloud.pl`.

Default Value: OFF

Values:

- ON = Enables the subject authorities browser on OPAC
- OFF = Hides the subject authorities browser on OPAC

OpacCloud

IMPORTANT: This is an experimental feature and should be left to OFF unless you are a system administrator who wants to run some scripts.

IMPORTANT: Launch `buildopaccloud` before this feature can be used.

Default Value: OFF

Values:

- ON = Adds a link under the search box to the Subject Cloud
- OFF = Hides the link under the search box to the Subject Cloud

Instructions for system administrators who want to experiment with this feature:

- It requires, as usual, `KOHA_CONF` and `PERL5LIB` to be set
- it is `misc/migration_tools/build_browser_and_tags.pl` (**has this been changed to `/usr/share/koha/bin/cronjobs/build_browser_and_cloud.pl`?**)
- this script calculates the browser & tags for all the catalog.

Run the script without parameters to see it's parameters. Note that, at the time of writing this page, the browser works only for french dewey catalog. It has to be modified to work according to your structure. That's why it can be considered as experimental!

For update, see <http://wiki.koha.org/doku.php?id=opacbrowser&s=cloud>

opaccolorstylesheet

Default Value: *no value*

The name of this preference is deceptive because it is no longer used, in practice the way it is now. Koha used to separate the color and layout definitions into two preferences.

Nowadays this preference is used as a place to specify a secondary stylesheet that can override the default one in as many ways as the author wishes. This preference expects a pointer to a CSS file in the same directory as the default CSS. To do this, create the stylesheet, upload to the Koha server, and then enter the stylesheet's file name in this system preference.

opaccredits

Default Value: *no value*

Enter HTML that you would like to appear at the bottom of your OPAC. For example, you can use this field to put a copyright notice or additional links.

The text will appear at the bottom of your OPAC pages:

TIP: This is HTML text and is static information. It must be updated manually with HTML code.

OPACDisplayRequestPriority

Default Value: OFF

Values:

- ON = Show patron's priority on the holds queue in the OPAC
- OFF = Do not show the patron's priority on the holds queue in the OPAC

opacheader

Default Value: *no value*

Enter HTML that you would like to appear at the top of your OPAC.

The text will appear above your search box:

OPACHighlightedWords

Defines whether search terms are highlighted in the search results displayed on your OPAC.

Default Value: ON

Values:

- ON = Search terms are highlighted in your OPAC
- OFF = Search terms are not highlighted in your OPAC

OPACItemHolds

Allows you to decide whether patrons can place a hold on a specific item or only on the next available copy.

Default Value: ON

Values:

- ON = Allow OPAC users to place hold on specific items
- OFF = Users can only request next available copy

opaclayoutstylesheet

Use this field to point to the *.css file used to define your OPAC layout.

Default Value: opac.css

TIP: This is a file saved locally on your system. To point to a file on another system use 'opacstylesheet'.

IMPORTANT: It is not advisable to remove opac.css from this preference as it may be required to fall back on in case of problems with user created stylesheets.

OpacMainUserBlock

Default Value: Welcome to Koha...\r\n<hr>

Enter the HTML you would like to appear in the center of your main OPAC page.

The text will appear in the middle of the main OPAC page below news posts:

OpacNav

Default Value: Important links here.

Enter HTML that you would like to appear on the left hand navigation column for your OPAC.

The text will appear on the left side of your OPAC:

OpacPasswordChange

Determines whether patrons can change their passwords via the OPAC.

Default Value: ON

Values:

- ON = Allows patron to initiate a password change
- OFF = Does not allow patrons to initiate a password change

IMPORTANT: Set to OFF when using LDAP authentication.

TIP: If you're unsure if you're using LDAP, ask your system administrator.

opacreadinghistory

Default Value: ON

Values:

- ON = Displays Patron Circulation History in OPAC on My Account
- OFF = Does not display Patron Circulation History in OPAC on My Account

IMPORTANT: Even with this preference set to OFF, the patron's reading history will be stored in the database. To delete stored patron reading history, you must use the Anonymize Patron Data tool.

- *Get there:* More > Tools > Patrons (anonymize, bulk-delete)

OpacRenewalAllowed

Default Value: OFF

Values:

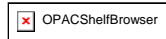
- ON = Users can renew books directly from their OPAC account
- OFF = Users cannot renew books from their OPAC account

OPACShelfBrowser

Default Value: ON

Values:

- ON = Enable Shelf Browser on item details page on the OPAC
- OFF = Disable Shelf Browser on item details page on the OPAC



IMPORTANT: Using this feature on a busy Koha installation has proven to be rather resource intensive.

OPACShowCheckoutName

IMPORTANT: Most sites should leave this off. It is intended for corporate or special sites which need to track who has the item.

Default Value: OFF

Values:

- ON = Displays in the OPAC the name of patron who has checked out the material.
- OFF = Only shows that an item is checked out (no name) in the OPAC

opacsmallimage

Enter a complete URL (including http://) to an image to replace the default Koha logo.

Default Value: *no value*

This field expects a specific image size: the "container" is defined in the stylesheet as 120px x 40px. A smaller image should display fine, but if you want to use a larger image you have to add some custom CSS--preferably by added a custom stylesheet and specifying it in the opaccolorstylesheet system preference

This preference is really only useful if you're swapping in an image that is the same size or smaller. If you're going to go larger, you'll be editing the stylesheet anyway, might as well specify the image source there.

```
h1#libraryname {
    background:transparent url(../images/my-custom-logo.gif) no-repeat scroll 0% 50%; /* change the url, leave other values intact */
    width:160px; /* width of your logo */
}

h1#libraryname a {
    padding:64px 0pt 0pt; /* the first value is the height of your logo */
    width:160px; /* width of your logo */
}
```

The url(...) value can point to a local or remote file.

opacstylesheet

This is a complete replacement for the default OPAC stylesheets. Enter a complete URL (including http://) to use an alternate layout stylesheet.

Default Value: *no value*

TIP: This file can be hosted on any system.

Example: Entering `http://poly.test.kohalibrary.com/opac-tmpl/prog/en/css/opac-polytech.css`

will make your OPAC look like that of Polytechnic's

IMPORTANT: This stylesheet overwrites any data in the default stylesheet defined in 'opaclayoutstylesheet'.

opacthemes

The value for this field checks the file system on your server for directories containing template files. If you are working with the default installation, there is only one template to choose.

Default Value: prog

TIP: Talk to your system administrator about creating new templates

OpacTopissue

This preference lets you decide whether or not to show the 'Most Popular Items' link at the top of your OPAC.

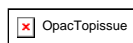
IMPORTANT: This feature is experimental and shouldn't be used on production systems due to the fact that it can slow down systems.

Default Value: ON

Values:

- ON = Displays a link to the 'Most Popular Items' in your OPAC
- OFF = Hides the link to the 'Most Popular Items' in your OPAC

'Most Popular Items' are determined by the number of times a title has been circulated. The 'Most Popular Items' page will display the top circulated titles in the library.



OPACURLOpenInNewWindow

This preference lets you decide where links in the 856 \$u field URLs and the "Search for this title in" links open.

Default Value:

OFF

Values:

- ON = URLs in the OPAC open in a new window
- OFF = URLs in the OPAC open in the active window

OPACUserCSS

Enter CSS to be used in your OPAC display.

Default Value: *no value*

Example:

```
body {
background: black;
}
```

will change your OPAC's background to black.

IMPORTANT: Styles entered in this field will overwrite any CSS files defined in 'opaclayoutstylesheet' or 'opacstylesheet'.

opacuserjs

Use this field to enter JavaScript that you'd like embedded globally across all pages of your OPAC.

Default Value: *no value*

Your code will be put in the template in place of this tag: <!-- TMPL_VAR NAME="opacuserjs" -->

```
<!-- TMPL_IF NAME="opacuserjs" -->
<script language="JavaScript" type="text/javascript">
//<![CDATA[
<!-- TMPL_VAR NAME="opacuserjs" -->
//]]>
</script>
<!-- /TMPL_IF -->
```

opacuserlogin

Default Value: ON

Values:

- ON = Enable display of user login features
- OFF = Disable display of user login features

If this preference is set to off, patrons will not be able to login and manage their accounts.

OPACViewOthersSuggestions

Default Value: OFF

Values:

- ON = Allows all patrons to see purchase suggestions made by other patrons
- OFF = Shows patrons only their own purchase suggestions

TIP: Having this feature on poses a privacy issue. Keep in mind that this will allow patrons to see everyone's purchase suggestions, as well as the name of the person requesting the item.

RequestOnOpac

Default Value: ON

Values:

- ON = Enables patrons to place holds via the OPAC
- OFF = Disables patron holds via the OPAC

TIP: If this preference is set to 'OFF' librarians can still place holds on items for patrons via the Staff Client.

reviewson

Default Value: ON

Values:

- ON = Allows patrons to submit comments on books in the collection
- OFF = Does not allow patrons to submit comments

If this system preference is set to ON, all comments will go into a moderation queue on the Staff Client before becoming visible on the OPAC.

SearchMyLibraryFirst

Default Value: OFF

Values:

- ON = OPAC searches return results limited by the user's library by default
- OFF = OPAC searches return results from all library branches

TIP: This feature assumes that the user is logged in. When users are logged out, the OPAC will search all branches.

IMPORTANT: Having this feature on means that the only way to search other libraries is via the Advanced Search page.

suggestion

Default Value: ON

Values:

- ON = Allows patrons to make purchase suggestions via the OPAC
- OFF = Does not allow patrons to make purchase suggestions via the OPAC

URLLinkText

Text to show in place the URL entered in 856 subfield u.

Default Value: *no value*

TIP: This will only appear if a subfield 3 is not entered by the cataloger.

virtualshelves

Default Value: ON

Values:

- ON = Enables 'Lists' within the OPAC
- OFF = Disables 'Lists' within the OPAC

To manage 'Lists' further, visit the 'Lists' module in the staff client.

- *Get there:* More > Lists

XSLTDetailsDisplay

IMPORTANT: MARC21 Only

Default Value: OFF

Values:

- ON = Enable XSL stylesheet control over details page display on OPAC
- OFF = Uses traditional CSS control on the details page on the OPAC

The XSL stylesheets are stored on the server, and can be customized by editing them directly, they aren't available for editing directly from the staff client. Ask your systems administrator to make changes to them in line with your desired outcome.

XSLTResultsDisplay

IMPORTANT: MARC21 Only

Default Value: OFF

Values:

- ON = Enable XSL stylesheet control over results page display on OPAC
- OFF = Uses traditional CSS control on the results page on the OPAC

The XSL stylesheets are stored on the server, and can be customized by editing them directly, they aren't available for editing directly from the staff client. Ask your systems administrator to make changes to them in line with your desired outcome.

1.11. Patrons

Control all functions related to patrons

AddPatronLists

Default Value: cateogry_code

Values:

- categorytype = Gives you a list of the defined categories when you click the 'New patron' button on the 'Patrons' page
- category_code = Gives you the category types; each type can have multiple categories. e.g., for the Adult type, categories of that type in the sample data are Patron, Home Bound, etc.

TIP: Older versions of Koha defaulted to the 'categorytype' behavior

Contents

- AddPatronLists
- AutoEmailOpacUser
- AutoEmailPrimaryAddress
- autoMemberNum
- BorrowerMandatoryField
- borrowerRelationship
- BorrowersTitles
- checkdigit
- EnhancedMessagingPreferences
- ExtendedPatronAttributes
- intranetreadinghistory
- MaxFine
- memberofinstitution
- minPasswordLength
- NotifyBorrowerDeparture
- patronimages
- PatronsPerPage

AutoEmailOpacUser

- SMSSendDriver
- uppercasesurnames

Default Value: OFF

Values:

- ON = Sends notification emails containing new account details to patrons - when account is created
- OFF = No email is sent to new patrons when their account is created

AutoEmailPrimaryAddress

Choose which email field to pull the primary email address for the patron from.

Default Value: OFF

Values:

- email = Patron email address
- emailpro = Business email address
- B_email = Alternate email address
- cardnumber = Patron card number (some libraries use email addresses for this field)
- OFF = Checks email, emailpro, and B_email (in that order) and uses the first one that has what looks like a valid email address

autoMemberNum

Default Value: ON

Values:

- ON = Patron barcode is auto-calculated
- OFF = Patron barcode needs to be entered manually

TIP: When this option is ON, if the 'checkdigit' preference is set to 'none', the new patron barcode is calculated by adding 1 to the maximum barcode already present in the database

BorrowerMandatoryField

Enter the fields your library would like required for patron accounts. Enter field names separated by | (bar) or , (comma).

Default Value: zipcode|surname|cardnumber

IMPORTANT: Ask you system administrator for help with this field. System administrators will have to look into the database to find field names.

IMPORTANT: Do not add the fields "categorycode" or "branchcode" because this will result in an error message when you try to save the patron record. The patron category code and library branch codes are required by Koha so there is no need to add these field to the list of mandatory fields. - [BUG #2974](#)

borrowerRelationship

Define valid relationships between a guarantor & a guarantee. Enter choices separated by | (bar) or , (comma).

Default Value: father|mother

IMPORTANT: Defining values for this field does not make the Guarantor field required when adding a guarantee type patron.

BorrowersTitles

Choose the titles you'd like to assign to patrons. Enter choices separated by | (bar) or , (comma).

Default Value: Mr|Mrs|Miss|Ms

checkdigit

Default Value: none

Values:

- katipo = Enables style checks on patron barcode based on the 'Katipo' style
- none = Does not do a style check on the patron barcode

This preference applies only when the 'autoMemberNum' preference is on.

IMPORTANT: Leave this option set to 'none', unless your system administrator says otherwise.

EnhancedMessagingPreferences

- **BUG #2455**

IMPORTANT: This feature is still experimental.

Default Value: OFF

Values:

- ON = Allows patrons to select to receive additional messages about items due, items nearly due or holds awaiting pickup.
- OFF = Patrons receive messages based on what the librarian set up in the notices tool

IMPORTANT: For SMS, your library needs to have some way to send SMS messages. For example, ipipi.com (a pay service).

IMPORTANT: Contact your system administrator to have your system point to the right driver. The driver that they want to use is specified in the SMSSendDriver system preference.

- *Get there:* More > Administration > Global system preferences > Patrons > SMSSendDriver

ExtendedPatronAttributes

This setting refers to added patron attributes set via the 'Patron attribute type' administration.

- *Get there:* More > Administration > Patrons and circulation > Patron attribute types

Default Value: OFF

Values:

- ON = Any patron attributes whose type is marked as displayable in the OPAC are now displayed in the 'my details' page in the OPAC (assuming that the patron is logged in). And patron attributes can be displayed and edited by staff members.
- OFF = Patron attributes are not used or visible

TIP: Currently, it is not possible for a patron to suggest changes to any of their extended attributes from the OPAC

The patron attributes are displayed and edited in a new section (step 4) of the patron details page. Each attribute is identified by its type (including type code and type description) and value (included value description if the attribute is controlled by an authorized value category).

TIP: If, for a repeatable attribute type, the staff member enters multiple copies of that type with the same value, duplicates are removed when the patron record is saved. Also, if the type is repeatable, a JavaScript link allows the staff member to create new attributes of that type.

intranetreadinghistory

This preference determines if the patron's circulation history is displayed on the staff client.

Default Value: ON

Values:

- ON = A patron's reading history will display on their account in the staff interface
- OFF = A patron's reading history will not display on their account in the staff interface

IMPORTANT: Even with this preference set to OFF, the patron's reading history will be stored in the database. To delete stored patron reading history, you must use the Anonymize Patron Data tool.

- *Get there:* More > Tools > Patrons (anonomize, bulk-delete)

MaxFine

Enter the amount of the maximum fine a patron can have for a single late return.

Default Value: 9999

memberofinstitution

Default Value: OFF

Values:

- ON = Patrons can be linked to institutions
- OFF = Patrons can not be linked to institutions

TIP: An institution account can be created and then members assigned to that institution. An example of use: teachers belonging to a school or professors to a university.

minPasswordLength

Specify the minimum length of a patron/staff password.

Default Value: 3

NotifyBorrowerDeparture

Define the number of days before circulation staff is warned about patron account expiry.

Default Value: 30

TIP: If the value is 2 and the expiry date is set to the 9th, a notification will appear on the 6th.

Default Value: relevance

Values:

- relevance = Uses the Zoom engine's relevance ranking
- popularity = Uses the number of times an item has been checked out and renewed
- call_number = Sorts on the call number
- pubdate = Sorts on the publication date
- acqdate = Sorts on the acquisitions date
- title = Sorts on the item title
- author = Sorts on the item author

defaultSortOrder

Defines the sort order applied to catalog searches done on the staff side.

Default Value: asc

Values:

- asc = Sort search results in ascending order
- dsc = Sort search results in descending order
- az = Sort alphabetically A-Z
- za = Sort alphabetically Z-A

expandedSearchOption

The advanced search page on the staff client can display all search options or just select search options.

Default Value: OFF

Values:

- ON = Set advanced search to be expanded (show all options) by default
- OFF = Set advanced search to be collapsed (show only some options) by default

IMPORTANT: Currently these options are hard-coded into the template, so they require template customization of opac-advsearch.tmpl

numSearchResults

Specify the maximum number of results to display on your staff client search results page.

Default Value: 20

OPACdefaultSortField

Defines the sort type applied to catalog searches done on the OPAC.

Default Value: relevance

Values:

- relevance = Uses the Zoom engine's relevance ranking
- popularity = Uses the number of times and item has been checked out
- call_number = Sorts on the call number
- pubdate = Sorts on the publication date
- acqdate = Sorts on the acquisitions date
- title = Sorts on the item title
- author = Sorts on the item author

OPACdefaultSortOrder

Defines the sort order applied to catalog searches done on the OPAC.

Default Value: asc

Values:

- asc = Sort search results in ascending order
- dsc = Sort search results in descending order
- az = Sort alphabetically A-Z
- za = Sort alphabetically Z-A

OPACItemsResultsDisplay

- **BUG #2354, #2488**

This preferences allows you to choose what item information you'd like to display on the search results page.

Default Value: statuses

Values:

- statuses = Show only the status of items in result list in the OPAC
- itemdisplay = Show full location of items (branch+location+callnumber) in the OPAC

TIP: The staff client will automatically use the itemdisplay for search results.

OPACnumSearchResults

Specify the maximum number of results to display on your OPAC search results page.

Default Value: 20

QueryAutoTruncate

Default Value: ON

Values:

- ON = Search strings will end in a wildcard by default
- OFF = Search strings will not include a wildcard at the end by default

TIP: To perform a wildcard search with this preference set to 'ON', end your search with a *

QueryFuzzy

Fuzzy searching is used for finding strings that approximately match the query. In Koha, fuzzy searching will find a word that is slightly misspelled. (e.g. steephens versus stephen).

Default Value: ON

Values:

- ON = Enables fuzzy option for searches
- OFF = Disables fuzzy option for searches

QueryRemoveStopwords

Stop words are words that are ignored in search queries.

Default Value: OFF

Values:

- ON = The stop words listed in 'Administration Stop Words' will be removed from queries
- OFF = The stop words listed in the 'Administration Stop Words' are used in queries

TIP: You can add additional stop words to the 'Administration Stop Words' list.

TIP: The stop words table exists in Koha to support the 'no-zebra' option. With Zebra providing the search functionality, removing these words before submitting the query will have no performance benefit, and will only harm the relevance ranking.

QueryStemming

Stemming is used to find alternate forms of a word. Turning QueryStemming on will find variations such as singular or plural versions of the query. (e.g. cat and cats).

Default Value: ON

Values:

- ON = Enables query stemming
- OFF = Disables query stemming

QueryWeightFields

Default Value: ON

Values:

- ON = Enables field weighting
- OFF = Disables field weighting

TIP: This is an on/off currently. The field-weighting will be exposed as a stylesheet in a future version so users can specify exactly which fields to weight and how

1.13. Serials

Preferences associated with serials

OPACDisplayExtendedSubInfo

- **BUG #1923**

Default Value: ON

Values:

- ON = Extended subscription information is displayed in the OPAC
- OFF = Extended subscription information is not displayed in the OPAC

OPACSerialIssueDisplayCount

Contents

- OPACDisplayExtendedSubInfo
- OPACSerialIssueDisplayCount
- RenewSerialAddsSuggestion
- StaffSerialIssueDisplayCount
- SubscriptionHistory

Number of serial issues to display per subscription in the OPAC

Default Value: 3

RenewSerialAddsSuggestion

Default Value: OFF

Values:

- ON = When renewing a serial it adds a purchase suggestion to make ordering easier.
- OFF = When renewing a serial acquisitions staff will have to place the order by creating a new record.

To order a serial with this system preference ON:

- *Get there:* More > Acquisitions
- Search for a vendor
- Click "New Order"
- Choose "From a Suggestion"

To learn more about ordering see 'Acquisitions: Placing Orders' in this manual.

StaffSerialIssueDisplayCount

Number of serial issues to display per subscription in the Staff client

Default Value: 3

SubscriptionHistory

- **BUG #1662**

Define the display preference for serials issue history in OPAC.

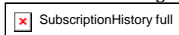
Default Value: simplified

Values:

- **simplified** = When clicking on 'Subscription' in the OPAC the first screen will be a one-sentence summary of the subscription



- **full** = When clicking on 'Subscription' in the OPAC the first screen will be several tables by year of the subscriptions



1.14. Staff Client

Define preferences related to your Staff Client or Intranet.

intranetcolorstylesheet

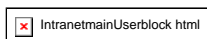
Enter the *.css file where the colors for your staff client are defined.

Default Value: *no value*

IntranetmainUserblock

Default Value: *no value*

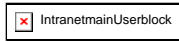
Add a block of HTML that will display on the staff client home page.



The code will appear below the main menu links

Contents

- intranetcolorstylesheet
- IntranetmainUserblock
- IntranetNav
- intranetstylesheet
- intranetuserjs
- template
- TemplateEncoding
- yuiopath



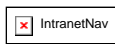
IntranetNav

Default Value: *no value*

Enter HTML to add navigational links to the navigational bar across the top of the staff client.



This code will appear before (to the left of) the 'More' option on the menu:



intranetstylesheet

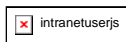
Enter a complete URL (including http://) to use an alternate layout stylesheet for your staff client.

Default Value: *no value*

intranetuserjs

Default Value: no value

Enter custom javascript code that will be used on your staff client pages.



IMPORTANT: This system preference is an advanced option. If you enter a value with incorrect syntax you can make it very difficult to access the staff interface.

template

The value for this field checks the file system on your server for directories containing template files. If you are working with the default installation, there will be only one template to choose.

Default Value: prog

TIP: Talk to your system administrator about creating new templates

TemplateEncoding

Globally define the default character encoding

Default Value: utf-8

Values:

- utf-8
- iso-8859-1

yuipath

Insert the path to YUI libraries.

Default Value: local

TIP: Use /intranet-tmpl/prog/en/lib/yui if you use Koha offline.

IMPORTANT: If you're unsure of what to enter ask your system administrator.

1.15. Local Use

Create system preferences specific to your own system.

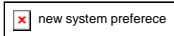
Enter your own preferences for use within your library.

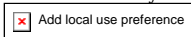
The ability to create local preferences is a convenience for people who are customizing their installations. In order to use a locally created preference, you have to edit at least one perl script, then you can use it in your template.

TIP: One would not create a local preference unless one were directly editing the templates.

IMPORTANT: Contact your system administrator for help with this preference.

- Click 'New Preference'
- Fill in the necessary fields
- Click 'Save'

 new system preference

 Add local use preference

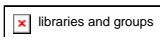
2. Basic Parameters

IMPORTANT: Configure all 'parameters' in the order they appear.

2.1. Libraries and Groups

Settings found under More > Administration > Basic Parameters > Libraries and groups

- Click on 'Libraries and groups'

 libraries and groups

TIP: The terms 'Library' and 'Branch' are interchangeable in Koha.

- You can click the 'Edit' link, next to each library, to make changes.

Add a new Group

- **BUG #2336**

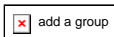
What is Group(s) and why would I want to use it?

A single branch library does not need to utilize the Group(s) feature.

Group(s) are used to divide your library system into categories. If, for example, you have one main library and several branch libraries, you might set up an "M" (Main) group and a "B" (Branch) group, with descriptions "Main Library" and "Branch Libraries." Another example is a library system which is divided into regions. You can create the "North Region" group, which contains libraries A, B, and C and the "South Region" group, which contains libraries D, E, and F.

TIP: Start by adding your Groups/Categories (if you have any) before adding Libraries.

- To add a new group click 'New Group'

 add a group

IMPORTANT: Right now category type is still in development.

- Enter the group information

Add a new Library/Branch

- To add a new library or branch click 'New Library'

- Enter the Library Code
 - TIP: Give each library a unique and easily-remembered code (maximum of four characters). This code will be used in Koha's database to identify each library.

- Enter all other information related to the library
- Click 'Submit'
- **Your library** will now be added to the list

2.2. Funds and Budgets

Found under More > Administration > Basic Parameters > Funds and budgets

TIP: Funds may be ignored if you are setting your Global System Preferences for 'Acquisitions' to "simple" acquisitions: the funds are only useful when using "normal" acquisitions.

Funds & Budgets

"Funds" are accounts that you establish to track your expenditures for library materials. They may be used for any kind of material and should match the lines in your materials budget. For instance, if your library establishes a budget line for books, another for audiovisual materials, a third line for magazines, and a fourth budget line for electronic databases, then you would have four funds.

TIP: The first time you access this page, you will be asked to add your first fund -- thereafter you will have the option of editing and deleting funds.

Adding a Fund

- Click 'New Fund'

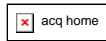
- Each fund has a unique fund code, limited to a maximum of five characters, which identifies it
- Enter in a fund name to provide more information for staff members about the fund
- Funds can be library/branch specific if needed, but this is an optional field
- Once a fund is created a budget can then be applied to it

- Click 'Add budget' next to the fund you want to edit
- **IMPORTANT:** Your dates will not save correctly unless you have set your date format ('dateformat') in the Global System Preferences under 'I18N/L10N' -- DO THIS BEFORE setting budgets

- Once budgets have been added you can see/search them all by clicking 'Show all budgets' under the list of funds

- Budget information will also be accessible via the 'Acquisitions' module

- From this module you can easily see what has been spent from each budget



2.3. Currencies and Exchange Rates

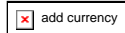
Found under More > Administration > Basic Parameters > Currencies and exchange rates

Use this section to define exchange rates for vendors in other countries.

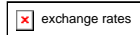
- Click on 'Currencies and exchange rates'



- The system comes with some rates pre-programmed. Click Edit or Delete to configure this list for your library.
- TIP: For up-to-date currency information XE.com's Currency Converter: <http://www.xe.com/ucc/>
- To add a new currency click 'New Currency'



- Fill in the fields based on the currency you'd like to add and click 'Submit'
- TIP: This information can also be updated from the Acquisitions home page

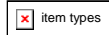


2.4. Item Types

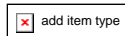
Found under More > Administration > Basic Parameters > Item Types

This parameter allows you to define what item types you have in your library as well as general circulation rules for these items.

- Click on 'Item types'



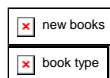
- Your system will come with some predefined item types. From this screen you can edit or delete these items
- To add a new item type click 'New Item Type'



- Enter a short code for the 'Item Type'
- Enter a longer explanation in the 'Description'
- Feel free to choose an image for each item type (or selected the 'No image' option)
- The 'Not for loan' option can be used for items that cannot be checked out of the library
 - TIP: If checked, no item of this type can be issued. If not checked, every item of this type can be issued unless notforloan is set for a specific item.
- 'Renewals' should include the number of times this item can be renewed
- If you charge a rental fee for items (such as DVDs) enter that amount in the 'Rental charge' field
- The summary field is used to edit the way this item displays on the search results page
 - TIP: For electronic resources you might want to enter `open site` to show the item link on the search results page
- When you're finished click 'Save Changes'

Can I have a different type for new releases and older titles?

Yes. Just enter an item type for new items and assign different circulation rules for this item type.



3. Patrons and Circulation

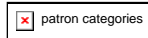
Settings for controlling circulation and patron information.

3.1. Patron Categories

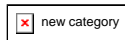
Accessed via More > Administration > Patrons and Circulation > Patron categories

The primary function of patron categories is to assist in setting patron loan, request, and fine policies.

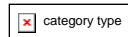
- Click on 'Patron categories'



- Koha comes with a series of built in categories. These can be edited and/or deleted per your library's needs.
 - TIP: You should define (at least) one patron category of type Adult and one of type Staff.
- To define a new category, click 'New Category'.



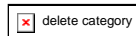
- Enter in the necessary information for your new category.
 - Keep your 'Category code' short and three or fewer letters and use the 'Description' to further explain what the code should be used for (this will display in the 'Category name' column)
 - 'Enrollment period' is how long the patron is valid for before they need to renew their card
 - The age requirements are not required, but are handy to distinguish between adults and children
 - If you charge a fee for the library card, this goes in the 'Enrollment fee' field
 - 'Overdue notice required' determines which patrons appear in the Overdue Notice/Status Triggers matrix
 - If you create a patron category that has "overdue notice required" set to "Yes," that means the category will appear in the "Overdue 'Notice/Status Triggers'" matrix. If your patron category has "overdue notice required" set to "No," that patron category will not appear in the triggers matrix.
 - 'Reserve fee' is a fee for placing holds on items
 - 'Category type' is programmed into the system as follows:



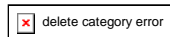
- Staff = A user that can be configured to perform functions in the staff client
- Adult = An average patron (can have child patrons under it)
- Child = A patron who must have an adult guarantor
- Organization = An organization that can have professional patrons under it
- Professional = A patron that can have an organization as a guarantor
- Statistical = A "fake" library card. When items are scanned onto a Statistical patron card, the items are not checked out, but recorded.
 - TIP: This can be used to record statistics of items that are used, but do not get checked out, such as reference items, magazines, etc. You can run a report to gather the statistics from this card.
- After entering the necessary information click 'Save'
- Your new patron category will now be listed with the others

What happens when I delete a category?

You will be brought to a confirmation page to make sure that you really want to delete that category:



If the category is used for any patrons, you will be unable to delete the category:



3.2. Cities and Towns

Access via **More > Administration > Patrons and circulation > Cities and towns**

This parameter helps you define the cities and towns that your patrons live in.

- Click on 'Cities and towns'



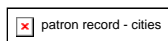
- Click 'New City'



- Enter the city or town name and the zipcode
- Click 'Submit'
- You can edit/delete your cities and towns from the main 'Cities and towns' page



- These fields will then appear when adding/editing a patron as a pull down to make it easier to enter data



3.3. Road Types

Accessed via More > Administration > Patrons and circulation > Road types

The values defined in this preference will show up in a pull down menu when entering patron information. These values can be used in geographic statistics.

- Click on 'Road types'

- Click 'New Road Type'

- Enter a value such as Blvd., Avenue, Street or St.
- Click 'Submit'
- Your values will appear on the Road Types page

- Your values will also appear as authorized values when entering or editing a patron

3.4. Patron Attribute Types

Accessed via More > Administration > Patrons and circulation > Patron attribute types

A patron attribute (or extended patron attribute) is an additional piece of information associated with a patron record. Each attribute has a type that specifies whether the attribute is repeatable, can serve as a unique identifier, can take a password, and whether it can be used to search for patron records in the staff interface.

The list of attribute types is controlled by staff with 'superlibrarian' permissions.

- Get there:* Patrons > Patron Record > More > Set Permissions

Once an attribute type is defined, values for that attribute can be added to the patron record via the staff interface or the batch patron import.

Two uses of extended attributes are:

- defining additional unique identifiers, such as a campus student ID number, a library staff HR number, and so on. These IDs can be used for searching or matching and overlaying records during a batch import.
- additional statistical categories. For example, a library could define an attribute type for tracking the academic major of a student patron. Any number of attributes of this sort could be defined.

The extended attributes feature is completely optional. If the 'ExtendPatronAttributes' system preference is OFF, customizable patron attributes will not be usable.

Add Patron Attribute

- Click 'Patron attribute types'
- IMPORTANT: You will need to have ExtendedPatronAttributes turned on**
 - Get there:* More > Administration > General system preferences > Patrons > ExtendedPatronAttributes
- To add a new Patron Attribute, click 'New Patron Attribute Type'

- The 'Patron attribute type code' should be unique and is the only required field
 - TIP: This field is not editable once it is set
- Fill in all of the fields you need for your attribute
 - TIP: The repeatability and unique_id settings of an attribute type cannot be changed after creation - this is to avoid having to deal with changing constraints if an attribute type is already in use by patron records

- Click 'Save'

- TIP: An attribute type cannot be deleted if it is used by any patron records

Adding & Editing Patron Attribute Types on Patron Records

- Search for the patron you'd like to edit (either by partial name or barcode) or browse by last name by clicking on a letter.

- Click on the name of the patrons you want to edit.

- Click 'Edit' below the 'Additional attributes and identifiers' heading

- All of the attributes you have in your system will appear on the following form

- This data will appear on the staff client

- And in the OPAC if you turned that option on

3.5. Circulation and Fines Rules

Access via **More > Administration > Patrons and circulation > Circulation and fine rules**

This matrix is to be used to create all of the rules associated with circulation and fines.

- Click on 'Circulation and fines rules'

- The rules are applied from most specific to less specific, using the first found in this order:
 - same library, same patron type, same item type
 - same library, same patron type, default item type
 - same library, default patron type, same item type
 - same library, default patron type, default item type
 - default library, same patron type, same item type
 - default library, same patron type, default item type
 - default library, default patron type, same item type
 - default library, default patron type, default item type
- TIP: To modify a rule, create a new one with the same patron type and item type
- These rules can be applied to individual branches by choosing them from the pull down at the top of the page, by default the rules are applied to all branches
 - **IMPORTANT: Never enter currency symbols when filling in monetary amounts, these may cause errors.**
- Below the general rules are a series of defaults for the library you have selected
- You can set a default total number of checkouts and default hold policy that will be used if none is defined per item type or patron type (which can be done below).

- From Any Library: Patrons from any library may put this item on hold. *(default if none is defined)*
- From Home Library: Only patrons from the item's home library may put this book on hold.
- No Holds Allowed: No patron may put this book on hold.
- If the total amount loanable for a given patron category is left blank, no limit applies, except possibly for a limit you define for a specific item type.

- The last default you can set is the hold policy based on item type.

- **IMPORTANT: This policy can be overridden by the staff when they place holds if the AllowHoldPolicyOverride system preference is turned ON**
 - Get there: More > Administration > Global System Preferences > Circulation > AllowHoldPolicyOverride
 - When this preference is set to ON the staff will be presented with warning images when placing holds - but will not be stopped from placing holds

Does Koha's fine grace period mean that, if a library fines .10/day, and defines a 4 day grace

period, does the fine on the fifth day accrue at .50, or at .10?

It's the latter - on the 5th day it's \$.10.

3.6. Library Transfer Limits

Access via More > Administration > Patrons and circulation > Library transfer limits

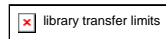
Limit the ability to transfer items between libraries based on the library sending, the library receiving, and the item type involved.

IMPORTANT: These rules only go into effect if the preference UseBranchTransferLimits is set to ON.

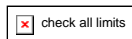
- *Get there:* More > Administration > General System Preferences > Circulation > UseBranchTransferLimits

Setting Limits

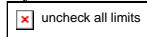
- Click 'Library Transfer Limits'
- Check the boxes for the items that should *not* be transferable
 - TIP: If you accidentally click all the items that can be transferred, you can click the 'Swap All' button to change your selection



- To prevent all transfers, click 'Check All'



- If you need to restart you can click 'Uncheck All'

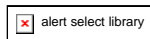


3.7. Item Circulation Alerts

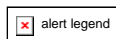
Access via More > Administration > Patrons and circulation > Item circulation alerts

This matrix is to be used to define rules for check-in and checkout notifications for combinations of libraries, patron categories, and item types

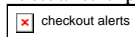
- Click on 'Item Circulation Alerts'
- You will be presented with the option of choosing a branch or applying rules to all branches ('Default')



- Clicking on the squares in the matrix will change the color and also the email alert rules

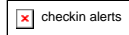


- To set whether patrons receive alerts for checking books out, click the squares in the 'Check out' matrix



- TIP: If you have the library select box set to 'Default' the matrix will apply to all libraries.

- To set whether patrons receive alerts for checking books in, click the squares in the 'Check in' matrix



- TIP: If you have the library select box set to a specific branch the matrix will apply just to that branch, showing the branch code in the message.

Can I customize the email sent to my patrons?

Yes, just go to Tools > Notices and edit the Check In and Check Out notices.

4. Catalog Administration

System settings for cataloging.

4.1. Authorized Values

Koha allows you to restrict the values that catalogers can place in some MARC subfields, allowing only certain pre-

defined "authorized" values. These authorized values are defined here.

Using authorized values

Koha allows you to restrict the values that catalogers can place in some MARC subfields, allowing only certain pre-defined "authorized" values. These authorized values are defined here.

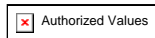
Existing Authorized Values

Koha comes with several other categories and pre-defined values your library is likely to use, for instance 'Lost'.

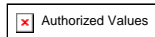
- Asort1
 - attached to acquisitions, that can be used for stats purposes
- Asort2
 - attached to acquisitions, that can be used for stats purposes
- Bsort1
 - attached to patrons, that can be used for stats purposes
- Bsort2
 - attached to patrons, that can be used for stats purposes
- CCODE
 - collection code (appears when editing at item)
- DAMAGED
 - descriptions for items marked as damaged (appears when editing an item)
- HINGS_AS
 - General Holdings: Acquisition Status Designator :: This data element specifies acquisition status for the unit at the time of the holdings report.
- HINGS_C
 - General Holdings: Completeness Designator
- HINGS_PF
 - Physical Form Designators
- HINGS_RD
 - General Holdings: Retention Designator :: This data element specifies the retention policy for the unit at the time of the holdings report.
- HINGS_UT
 - General Holdings: Type of Unit Designator
- LOC
 - shelving location (usually appears when editing an item)
- LOST
 - descriptions for the items marked as lost (appears when editing an item)
- NOT_LOAN
 - reasons why a title is not for loan
- RESTRICTED
 - ??
- STACK
 - ??
- SUGGEST
 - list of patron suggestion reject or accept reasons (appears when managing suggestions)
- WITHDRAWN
 - description of a withdrawn item (appears when editing an item)

View Authorized Values

- To view the authorized values defined for a category that already exists like 'Lost', choose 'Lost' from the category dropdown menu

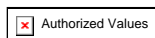


- Then, you can see the values defined for the category "Lost" and edit them if you like.

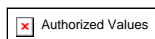


Add Authorized Value

- To add a new value under an existing category, click "New authorized value for"



- Enter the value and description and choose an icon if you'd like

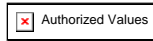


- Click on the tabs under 'Choose an Icon' to see different icon sets.
 - TIP: If you add new icon sets, a new tab will automatically appear
- When finished, click 'Save'
- TIP: The system interprets authorized values of 0 as equaling a null so when you edit a record in cataloging where the authorized

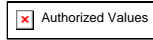
value in a field was assigned where the code was 0, the value displays as null in the item editor (or MARC editor). For this reason you should never set the value to 0 for one of your authorized values.

Edit authorized values

- Choose a category from the 'Show Category' dropdown menu



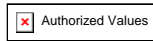
- Click 'Edit' beside the authorized value you wish to edit



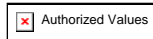
- Make the changes you'd like and click 'Save'
- TIP: Be careful about changing the 'Authorized value' as it may be associated with existing records.

Add a new Authorized Value Category

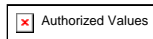
- To add a new category, click 'New Category'



- Fill in the 'Category', 'Authorized value' and 'Description' fields



- IMPORTANT: The category name must be 8 characters or less. Also, just input one authorized value for the category. You can edit and add more after you save the category.**
- Click 'Save'
- You've added a new category and can immediately start adding more authorized values to that category by clicking "New authorized value for..."



Questions

When editing an item, the new shelving location I created is not showing up by default in the items where I assigned it to.

This is because you created the new shelving location with a code value of 0 (zero)

Just FYI the system interprets authorized values of 0 as equaling a null so when you edit a record in cataloging where the authorized value in a field was assigned where the code was 0, the value displays as null in the item editor (or MARC editor) instead of the value the library meant it to be.

"Why would I want to define authorized values for MARC tags?"

Authorized Values create a 'controlled vocabulary' for your staff. As an example, let us assume that your Koha installation is used by several libraries, and you use MARC 21. You might want to restrict the 850a MARC subfield to the institution codes for just those libraries. In that case, you could define an authorized values category (perhaps called "INST") and enter the institution codes as the authorized values for that category.

TIP: Koha automatically sets up authorized value categories for your item types and branch codes, and you can link these authorized values to MARC subfields when you set up your MARC tag structure.

4.2. MARC Bibliographic Frameworks

Allows you to create custom frameworks for cataloging.

Create a Framework

- Go to the 'Administration' module.
- Select 'MARC bibliographic frameworks'

- Click 'New Framework'



- Choose a short 'Framework Code' (for instance, 'AV') and enter a 'Description' for your new framework



- Click 'Submit'

- Choose 'MARC structure' next to the framework you wish to edit or build

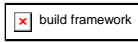


- Choose a framework to model your new framework off of (choose 'default' to get a full MARC record to start with)



- TIP: Using this option you can duplicate a framework and make only a few changes instead of starting from scratch

- Now, build your framework!

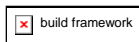


The columns on the screen above contain:

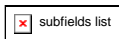
- the tag number
- the name of the tag
- whether or not the tag is repeatable (according to the rules of your chosen MARC dialect)
- whether or not you want the tag to be mandatory (according to your library's cataloging practice)
- columns for authorized values and editing subfields
- option to 'edit' (change the values--and labels-- for each MARC tag)
- option to 'delete' (delete a MARC tag from a framework)
 - **IMPORTANT: Never delete a field that is followed by (KOHA).**
 - TIP: If you are certain that you will never use a MARC tag, then you can delete it. However, since this will not result in any appreciable improvement in performance, it is probably better to leave it.

Editing Subfields

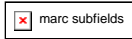
To edit subfields click the 'Subfields' link next to the field you'd like to alter



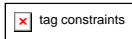
- You will be brought to a page listing all of the subfields for that field.



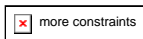
- To edit the subfields click the 'Edit Subfields' button at the bottom of your subfields list [BUG #2778](#)



- You will be brought to a tabbed editor where you can alter all of the subfields associated with the MARC field



- The two text fields will define what appears in the labeled MARC view in the staff client and the OPAC
 - The repeatable and mandatory checkboxes define whether this subfield can be repeated or if it's mandatory
 - The Managed in tab option defines where this MARC field will display in the cataloging tool
 - TIP: If you'd like to edit all of your MARC fields in one tab, you can change all of the fields to the same 'Managed in tab'
- If you click the 'display more constraints' link you will be provided with more options



- Default value: if you'd like this field to automatically be filled in with a default value, enter it here
 - Hidden : allows you to select from 19 possible visibility conditions, 17 of which are implemented. They are the following:

(! means 'not visible' or in the case of Collapsed 'not Collapsed')

-9 => Future use

-8 => Flag

-7 => OPAC !Intranet !Editor Collapsed

-6 => OPAC Intranet !Editor !Collapsed

-5 => OPAC Intranet !Editor Collapsed

-4 => OPAC !Intranet !Editor !Collapsed

-3 => OPAC !Intranet Editor Collapsed

-2 => OPAC !Intranet Editor !Collapsed

-1 => OPAC Intranet Editor Collapsed

0 => OPAC Intranet Editor !Collapsed

1 => !OPAC Intranet Editor Collapsed

2 => !OPAC !Intranet Editor !Collapsed

3 => !OPAC !Intranet Editor Collapsed

4 => !OPAC Intranet Editor !Collapsed

5 => !OPAC !Intranet !Editor Collapsed

6 => !OPAC Intranet !Editor !Collapsed

7 => !OPAC Intranet !Editor Collapsed

8 => !OPAC !Intranet !Editor !Collapsed

9 => Future use

- URL : if checked, the subfield is an URL, and can be clicked
- link : If you enter a field/subfield here (200b), a little glass appears after the subfield. If the user click on the glass, a search is done on the DB for the field/subfield with the same value. Can be used for 2 main topic :
 - on a field like author (200f in UNIMARC), put 200f here, you will be able to see all biblios with the same author
 - on a field that is a link (4xx) to reach another biblio. For example, put 011a in 464Sx, will find the serial that was previously with this issn. With the 4xx plugin, you get a powerful tool to manage biblios connected to biblios
- Koha link : Koha is multi-MARC compliant. So, it does not know what the 245\$a means, neither what 200sf (those 2 fields being both the title in MARC21 and UNIMARC !). So, in this list you can "map" a MARC subfield to it's meaning. Koha constantly maintains consistency between a subfield and it's meaning. When the user want to search on "title", this link is used to find what is searched (245 if you're MARC21, 200 if you're UNIMARC).
- Authorized value : means the value is not free, but in the authorized value list of the selected type
- Thesaurus : means that the value is not free, but can be searched in authority/thesaurus of the selected category
- Plugin : means the value is calculated or managed by a plugin. Plugins can do almost anything. For example, in UNIMARC there are plugins for every 1xx fields that are coded fields. The plugin is a huge help for cataloger ! There are also two plugins (unimarc_plugin_210c and unimarc_plugin_225a that can "magically" find the editor from an ISBN, and the collection list for the editor)

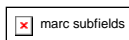
Can I add MARC tags?

Yes, you can add a tag to a MARC framework by choosing 'New Tag' If you are using older MARC tags that are not in the list of tags supplied with Koha, then use this page to add them. Similarly, you will probably need to add the holdings tag you currently use, or at least check the subfield structure of the 852 tag if you use it for holdings.

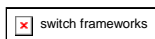
What does 'edit' do?

When you 'edit' a MARC tag, you get the following options:

- change the name of the tag as it will be displayed in the librarian's interface ("Lib for librarians")
- change the name of the tag as it will be displayed in the OPAC
- specify whether or not the tag can be repeated within a MARC record
- specify whether or not the tag is mandatory
- create a pull-down menu (initially empty) of "Authorized" values.



TIP: Use the pull-down menu to switch between frameworks and the search box to skip to a specific tag [see below]



4.3. Koha to MARC Mapping

Defines the mapping between the Koha transactional database (SQL) and the MARC Bibliographic records.

TIP: Note that the mapping can be defined through MARC Bibliographic Framework. This tool is just a shortcut to speed up linkage.

About Koha to MARC Mapping...

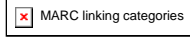


MARC Mapping Categories...

There are 3 categories of MARC links you can map to...

- biblio
- bibliioitems
- items

To switch between categories, choose one from the dropdown menu and click 'OK'



To map Koha fields to MARC tags...

There are 2 ways to map or edit a Koha to MARC relationship:

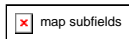
- Click on the name of the field you wish to edit in the 'Koha Field' column, OR...
- Click on 'edit' next to the field you wish to edit

You will see nine dropdown menus, with the word 'OK' next to each menu. Each dropdown menu corresponds with a MARC field range labeled. (For instance, the first dropdown menu is the 000 range, the second the 100 range, the third the 200 range, etc).

- Choose the MARC field and subfield you wish to map to and click 'OK'.

IMPORTANT: 'Koha to MARC Mapping' only presents information for the default framework, however a change to the mapping here modifies *all* frameworks (including those created in the 'MARC Bibliographic Frameworks' module).

IMPORTANT: Framework modification is an advanced feature. Koha is fully functional without any modifications using the default framework.



TIP: 'Click to "Unmap"' if you wish to entirely remove mapping for a Koha field.

TIP: Currently, you can only map one MARC field to a given Koha field.

To unmap Koha fields from MARC tags...

There are 2 ways to unmap (remove) a Koha to MARC relationship:

- Click on the name of the field you wish to edit in the 'Koha Field' column, OR...
- Click on 'edit' next to the field you wish to edit
- Then, click 'Click to "Unmap"'

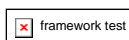
What's the relationship between 'Koha to MARC Mapping' and 'MARC Bibliographic Frameworks'?

Mapping can be defined through 'MARC Bibliographic Frameworks' OR 'Koha to MARC Mapping'. 'Koha to MARC Mapping' is just a shortcut to speed up linkage. If you change a mapping in one of these modules, the mapping will change in the other as well. (In other words, the two modules 'overwrite' each other in order to prevent conflicts from existing in Koha).

4.4. MARC Bibliographic Framework Test

Checks the MARC structure.

If you change your MARC Bibliographic framework it's recommended that you run this tool to test for errors in your definition.

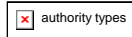


4.5. Authority Types

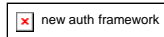
Create and manage Authorities frameworks that define the characteristics of your MARC Records (field and subfield definitions).

To create a new framework...

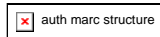
- Go to the 'Administration' module.
- Select 'Authority types'



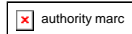
- Click 'New Authority Framework'



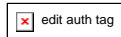
- Fill in the fields that describe your new authority type
 - TIP: In the 'Authority field to copy', enter the authority field that should be copied from the authority record to the bibliographic record. e.g., in MARC21, field 100 in the authority record should be copied to field 100 in the bibliographic record
- Click 'Submit'
- To update the MARC Framework for your new authority type, click 'MARC structure' next to the authority



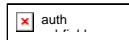
- From the following screen you can alter fields, subfields and add additional tags



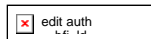
- By clicking on the 'edit' link you will be able to alter information related to the field



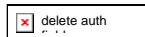
- By clicking the 'subfields' link you will be able to alter all of the subfields associated with that field



- By clicking 'Edit subfields' at the bottom of the screen you can alter the information for each subfield



- After making your changes, click 'Save Changes' at the top of the screen
- To delete a subfield, just click the 'delete' link next to the field you'd like to edit



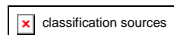
4.6. Classification Sources

Define classification sources (i.e., call number schemes) used by your collection.

About Classification Sources

Define classification sources (i.e., call number schemes) used by your collection. You can also define 'filing rules' used for sorting call numbers.

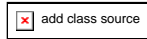
IMPORTANT: You do not have the option to 'define' a new filing rule. Currently, the filing rules and sorting routines are statically defined with options available in the dropdown menu when creating or editing a 'classification source' or 'filing rule'.



TIP: In the future, this features will be expanded to allow new filing rules to be created (defined) on the fly. In other words, in addition to choosing from a static sorting routine or filing rule, you will be able to actually to define new ones.

To add a new 'Classification Source'...

- Click 'New Classification Source'



- Enter a 'Classification source code'
- Enter a 'Description' for your new classification source
- Note if the classification source is in use (check the box for 'yes' and leave unchecked for 'no')
- Choose a 'filing rule' from the dropdown menu to associate with your new classification source
- Click 'Save'

IMPORTANT: 'Source in use?' controls whether source is available in item editor. For example, Koha ships with Dewey and LCC rules but a Dewey library may not want catalogers to mistakenly use LCC as an item callnumber type. To accomplish this, check box 'source in use?' only for the Dewey Classification Source and leave 'source in use' for all others unchecked.

To add a new 'Filing Rule'...

- Click 'New Filing Rules'
- Enter a 'Filing Rule Code'
- Enter a 'Description' for your new filing rule
- Choose a 'filing routine' from the dropdown menu to associate with your new filing rule
- Click 'Save'

To edit a new 'Classification Source' or 'Filing Rule'...

- Click 'edit' next to the 'classification source' or 'filing rule' you wish to edit
- Edit
- Click 'Save'

4.7. Record Matching Rules

Use this tool to create rules to apply during the data migration process. It will prevent duplicates from coming into the system when importing MARC records.

IMPORTANT: This is an advanced feature and should not be altered without knowing how it will effect data migration.

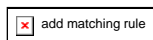
An import rule or matching rule consists of one or more 'match points' and zero or more 'match checks'. Each match point specifies a 'search index' and a MARC 'tag', 'subfield', or 'length' (fixed field position) when a record is imported. For each match point, a string is constructed from the tag specified in the match point and the related index is searched.

The set of matching records are assigned a score (the value of which is determined by the match point rule). Then, the rest of the match points are considered and the scores of each set of matches is added up. The set of matching records whose total score is over a threshold value defined in the matching rule are candidate matches.

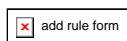
Match checks are applied for all candidate matches. Each match check specifies a tag in the incoming record and a tag in the possible matching record. The values must be the same for a match to be considered good (e.g., doing a match check on title, or publication date)

Adding a Matching Rule

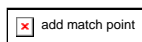
- Click 'Record matching rules'



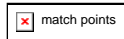
- The system has two rules programmed in. One for ISBN and one for ISSN.
- From this screen you can edit or delete these rules
- To add a new rule click 'New Record Matching Rule'



- Matchpoints will check to see if a field matches



- Tag: fill in the MARC tag number
- Subfields: fill in the letter or number associated with the MARC subfield you want to match
- Offset: fill in a numeric value representing the number of characters/bytes to skip before attempting to match
- Length: fill in a numeric value representing the number of characters/bytes to match in the string
- Normalization rule: which normalization rule to apply
- TIP: Clicking 'Add matchpoint' will repeat the matchpoint fields. Clicking 'Remove this matchpoint' will remove that set of matchpoint fields.



- Under 'Source (incoming) record check field', enter which field in the incoming record from the import to use for the comparison
- Under 'Target (database) record check field', enter the target record in the database to grab the value to compare from
- Match checks are used to further check to make sure that the record matches. If the matchpoint is for ISBN, the match check can be for title.
- TIP: Clicking 'Add match check' will repeat the match check fields. Clicking 'Remove this match check' will remove that set of match check fields.

Questions

Is there sample data I can look at?

MARC21 has a couple of sample import rules.

- See: `installer/data/mysql/en/marcflavour/marc21/optional/marc21_default_matching_rules.sql`

So if a rule set is defined, then I can find duplicates while importing data?

Yes.

If duplicate is found what happens?

Right now, if a match is found, it completely replaces the existing record (keeping items intact, of course).

The import rule mechanism is currently used by the staging MARC import so the matching results are staged in the reservoir (e.g., `import_batches` and related tables)

Can this system be used for bulkmarcimport?

During a record overlay, the previous version of the bib is stored, so that you can undo it later.

Yes, it would be possible to add it to bulkmarcimport. Basically, just have bulkmarcimport do the staging and committing of a batch of records in one fell swoop.

5. Additional Parameters

Additional administration parameters for your system.

5.1. Stop Words

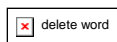
Stop words are words that are ignored when searching the catalog.

TIP: The zebra search engine works much better if you leave your stop words preference turned off. If this preference is off, there is no need to edit this list.

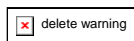
- *Get there:* More > Administration > Global System Preferences > Searching > QueryRemoveStopwords

IMPORTANT: If you make any changes to the stop words, ask your system administrator to run the `misc/rebuildnonmarc.pl` script.

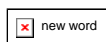
- To remove a stop word, click 'Delete' next to it



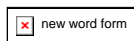
- You will be asked to confirm your choice



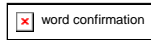
- To add a new stop word to the list, click 'New Stop Word' at the top of the screen



- Enter the word you'd like to have ignored in searches



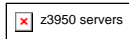
- Click 'Save'
- You will see a confirmation if your data is added correctly



5.2. Z39.50 Servers

Defines the Z39.50 servers you want Koha to search when finding catalog records to import directly into your catalog.

TIP: By default Koha comes with a connection to the Library of Congress catalog. To add this connection be sure to check the `sample_z3950_servers` box during installation.



TIP: It is a good idea to be selective in choosing servers. Defining more than five or six checked servers may slow down your Z39.50 search results, even if they are queried all together.

To add servers, you will need to know:

- the domain name or IP address of the server
- the port number to use
- the name of the database to access.

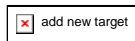
This information is available for many servers worldwide by visiting the IRSpy Z39.50 Target Directory at <http://targettest.indexdata.com/>

. All of the servers listed there accept anonymous connections. If you have a login name and password for other Z39.50 servers, Koha will save your user ID and password in addition to the other information it needs to make a connection.

IMPORTANT: Be sure to choose servers which deliver records in the proper MARC format for your Koha installation.

To add a new server:

- Click 'New Z39.50 Server'

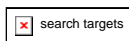


- TIP: For anonymous servers, leave the userid and password fields blank.
- If you would like this server to be searched by default when you're cataloging, check the 'Checked' box
 - TIP: You can have multiple servers checked for the default search
- The 'Rank' field will determine what order this server is searched in comparison to other servers.

IMPORTANT: The `z3950search` will NOT work until your system administrator has activated the `z3950` client daemon on your server. The daemon is in `KohaDirectory/script/z3950daemon`. It should be added to `rc.d` to be launched during server boot.

Search

At the top of your Z39.50 targets list, there is a search that will help you narrow your list to only the results you're looking for.



TIP: Only the first word in the search phrase is actually used, and only a left-anchored search is done.

Questions

How do I allow outside clients to access a Koha database via Z39.50?

Assuming you're using Koha 3 with Zebra and that Zebra is configured to expose a public Z39.50 service, you would need to report the following:

- server name
- Z39.50 port
- database name - by default, that will usually be 'biblios'

The default Zebra configuration for MARC21 uses the Bib-1 attribute set.

Could someone tell me the exact steps I need to take to configure Zebra to expose my Koha 3 db as a public Z39.50 service?

Edit the KOHA_CONF file that your Koha is using. Uncomment the publicserver line like:

```
<!-- <listen id="publicserver" >tcp:@:9999</listen> -->
```

to be:

```
<listen id="publicserver" >tcp:@:9999</listen>
```

Then restart zebasrv and connect on the port specified (9999).

Tools

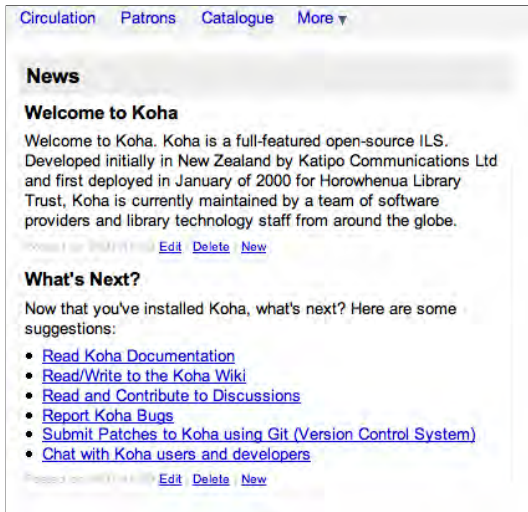
Manual for Koha Version 3.0 (stable)

1. News

News can be configured to show up either on the OPAC homepage or the staff client homepage.

Add news to the staff client

News in the staff client appears on the left column of the default template.



- To add/edit news go to the 'Tools' module (under 'More' in your Global Nav).
- Choose 'News'.

New Entry					
Language		Filter			
Language	Number	Creation Date	Expiration Date	Title	News
<input type="checkbox"/> koha	2	2007-10-29	2099-01-10	What's Next?	<p>Now that you've installed Koha, what's next? Here are some suggestions:</p> <ul style="list-style-type: none"> • Read Koha Documentation • Read/Write to the Koha Wiki • Read and Contribute to Discussions • Report Koha Bugs • Submit Patches to Koha using Git (Version Control System) • Chat with Koha users and developers
<input type="checkbox"/> koha	1	2007-10-29	2099-01-10	Welcome to Koha	<p>Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Katipo Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe.</p>

- You will see the existing news and have the ability to edit each entry using the 'Edit' link
- To add new News click 'New Entry'

OPAC and Koha News

Language Librarian interface

Title Learning Koha

Expiration date

Appear in position 1

News To learn Koha is best to review the manual and then play with the features yourself.

[Cancel](#)

- Choose 'Librarian Interface' for Language
- Type your title, news, optional expiration date, appear in position and click 'Submit'
- Your new News item will show up on the main page

News

Learning Koha

To learn Koha is best to review the manual and then play with the features yourself.

Posted on 2008-02-18 [Edit](#) [Delete](#) [New](#)

Welcome to Koha

Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Katipo Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe.

Posted on 2007-10-25 [Edit](#) [Delete](#) [New](#)

Add news to the OPAC

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'News'

Language

Language	Number	Creation Date	Expiration Date	Title	News	
<input type="checkbox"/> koha	2	2007-10-29	2099-01-10	What's Next?	Now that you've installed Koha, what's next? Here are some suggestions: <ul style="list-style-type: none"> Read Koha Documentation Read/Write to the Koha Wiki Read and Contribute to Discussions Report Koha Bugs Submit Patches to Koha using Git (Version Control System) Chat with Koha users and developers 	Edit
<input type="checkbox"/> koha	1	2007-10-29	2099-01-10	Welcome to Koha	Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Katipo Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe.	Edit

- You will see the existing news and have the ability to edit each entry using the 'Edit' link
- To add new News click 'New Entry'

OPAC and Koha News

Language:

Title:

Expiration date:

Appear in position:

News:

[Cancel](#)

- Choose 'en' (or your language) for Language
- Type your title, news, optional expiration date and click 'Submit'
- Your new News item will show up on the OPAC in the center column

Search:

[Advanced Search](#) | [Browse by Subject](#) | [Most Popular](#)

Welcome to LibLime

This is the LibLime demo of Koha. Please read our manual to learn how to use all of the tools available.
(published on 02/20/2008)

Questions

Can I use HTML in my news posts?

Yes, you can use HTML in your news posts, in fact, using HTML in the posts on your OPAC will make the look and feel more friendly to your patrons.

Why is my new News post showing up below an older one?

Each news item has an "Appear in position" number assigned to it. If two items have the same number (for example 1) then either item may appear first. To ensure that your news appears in the order you want, always edit existing news items so that their "Appear in position" number is as you'd expect it to be.

2. Label Creator

Create printable labels and barcodes from catalog data and patron cards from patron data

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Label Creator' - [BUG #2691](#)

[Home](#) > [Tools](#) > Labels

Set Active Layout

Layout	Barcode Type	Print Type	Fields to Print	Edit	Delete	Active
biblio and barcode	CODE39	BIBBAR	Author Title Item Type Call Number	Edit	Delete	<input type="radio"/>
alternating	CODE39	BAR	Author Title ISBN	Edit	Delete	<input checked="" type="radio"/>

Active Settings

Layout: biblio and barcode
Template: Avery 5160 | 1 x 2-5/8
Batch: [Create a new batch](#)

Layouts

Choose a Layout

- In the column labeled "Active", click the radio button next to the Layout you wish to set as the active Layout.
- Click "Save"

Create a New Layout

How do I... create a new layout?

1. Click "Create New Layout" from the "Label Layouts" page.
2. Enter a name for the new layout in the field labeled "Layout Name"
3. Choose a layout type from the "Choose Layout Type" dropdown menu. Options are:
 - "barcode" : will print barcode only (no text) though the barcode number will still print beneath the barcode
 - "biblio" : will print bibliographic information, but no barcode
 - "barcode/biblio" : will print the barcode first, then the bibliographic information you choose in Step 5
 - "biblio/barcode" : will print the bibliographic first, and barcode second
 - "alternating labels" : will print two labels for each item, one label with only the barcode and the next with only bibliographic information for the item. Alternating refers to 'alternating' between barcodes and biblio labels.



4. Choose a barcode type from the "Choose Barcode Type" dropdown menu.
 - 'Barcode type' refers to the encoding standard for creating the lines on the barcode so that it can be read by the library's scanner.
 - TIP: Most modern scanners can read any "barcode type"
5. Choose bibliographic fields you want to print for each item on the labels.

Do this by using the dropdown menus under "Choose Order of Text Fields to Print".

For instance, if you choose the value of "1" in the dropdown menu next to "Title", the value of "2" for Author", and the value of "3" for ISBN, the label will appear like this:

Title
Author
ISBN

TIP: If you select the same order number for two text fields, Koha will randomly choose which order those two fields will display

IMPORTANT: If you have chosen "barcode" under "Confirm Layout Type", the "Choose Order of Text Fields to Print" options will not appear. Why? The layout will print barcodes ONLY and no bibliographic information.

6. To finish, click on "Submit"

Active Settings

Layout:	No Layout Specified: Select a Label Layout
Template:	No Template Specified: Select a Label Template
Batch:	No Batch Specified: Select items to print

Create Layout

Layout Name:

Choose Order Of Fields to Print

1 Title	Subtitle	Author
ISBN	ISSN	Itemtype
Dewey	2 Barcode	Classification
Sub-Class	Call Number	

Choose Barcode Type:

Choose Layout Type:

Start printing from Label number:

Draw Guide Boxes: ☐

Label Templates

"Template" refers to:

- how many labels are on each sheet
- the size of each label
- the number of columns on each sheet of labels, etc.
- the size of the font that will print on the labels

Choose a Label Template

- In the column labeled "Active", click the radio button next to the Template you wish to set as the active template
- Click "Set Active Template"

Create a New Label Template

Create a new template in 5 easy steps:

1. Click "Create New Label Template" from the "Label templates" page.
2. Enter a name for the new template in the field labeled "Template Name"
 1. For instance: "Avery Multi-Use 5430"
3. Choose units of measurement you will use to describe your template using the "Units" dropdown menu. Options are:
 - inches
 - centimeters
 - millimeters
 - Postscript points
4. Describe the new template in the field labeled "Template Description".
 - For instance, you might say "Avery 4356", or "10 labels in 2 rows"
 - Enter numeric values for each field under "Template Description".
 - TIP: Do not indicate unit of measurement when entering values. For instance, if you want the page width of the template to be 8.5 inches, you can simply enter "8.5" in the field-- not "8.5 in" Units of measurement are specified instead in the dropdown menu labeled "Units"
 - TIP: Decimals can and should be used when entering numeric values. For instance, if your left page margin is a quarter of an inch, enter ".25" as the value.
5. Choose a font size by entering a number in the field labeled "Font Size".
 - The default unit of measurement for font size is points.
6. To finish, click "Create Template"

Template Settings	
Template ID:	2
Template Code:	Gaylord 8511 Spine Label
Template Description:	Prints only the left-hand column of a Gaylord 8511.
Page Width:	8.5
Page Height:	11
Label Width:	1
Label Height:	1.25
Top Page Margin:	0.6
Left Page Margin:	0.5
Number of Columns:	1
Number of Rows:	8
Gap between Columns:	0
Gap between Rows:	0
Units:	Inches
Profile:	None Defined
Font:	Times Roman
Font Size:	10
Active:	<input type="checkbox"/>

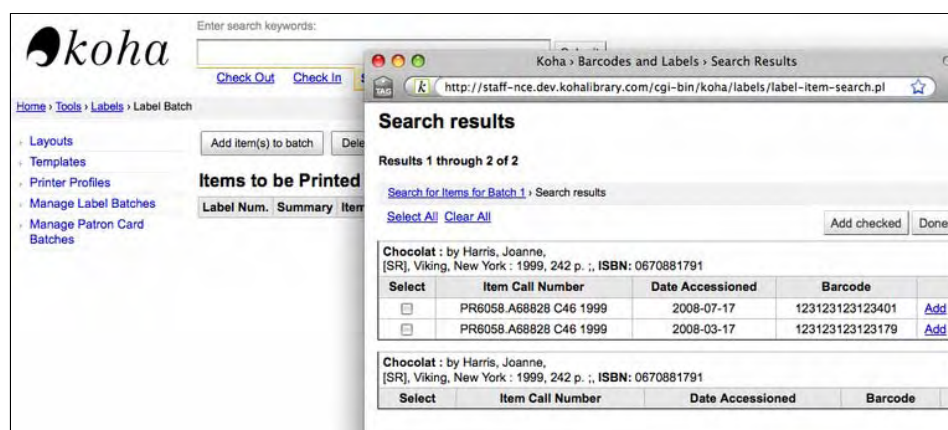
Creating a New Batch

1. Click "Create New Batch" from the "Create or Print Label Batches" page
2. Click "Add Item(s) to batch"
3. A window will pop up. From here, you can search by keyword.
 1. title
 2. ISBN
 3. ISSN
 4. Item Call number
 5. Date (choose a range of dates)
 6. Document Type
4. Click "Start Search"

TIP: Search by date to retrieve an entire list of items that have been added to the catalog in a given time period.

TIP: Order your results using the "Ordered by" dropdown menu. Options are: title, author, dewey, publication year, publisher, itemtype, item call number.

5. Koha will retrieve items based on your search in Step #3. You can add one or several items from this results page in one of two ways:
 1. Click inside the box located to the left of each item you wish to add to the batch. Then click "Add Checked" to add all items checked to the batch at once. *OR*
 2. Click "Add" next to each item you wish to add to the batch to add items one at a time.



6. Generate a PDF for that batch for printing.
 1. This step is optional at this stage. If you have already set your label layout and label template, you can click "Generate PDF for Batch". If you are unsatisfied with the layout and template that appear in the "Current Settings" box, you'll need to set the desired layout and template.

Label Manager: Create or Print Label Batches

- From within 'Label Creator' module, choose 'Create or Print Label Batches'

Add item(s) to batch
Delete current batch
Remove duplicates
Generate labels for Batch

Items to be Printed for Batch 1 (2 items)

Label Num.	Summary	Item Type	Barcode	Delete
1	Chocolat : : King, Stephen, : 014100018X	SR	123123123123401	Delete
2	Chocolat : : King, Stephen, : 014100018X	SR	123123123123179	Delete

Active Settings

Layout:	biblio and barcode
Template:	Avery 5160 1 x 2-5/8
Batch:	1

Setting up labels for printing

You can set up up spine labels in 4 easy steps:

1. Select the label layout
2. Select the label template
3. Select a group of added items, or "batch", you wish to print
4. Print labels from the "Add Items to Print" page by selecting the "Generate PDF for batch" button next to the batch (or group of added items) you wish to print labels for.
 - A PDF will be generated and can be printed from the PDF viewer you are using.

The system will split DDCNs using the *loosest* possible interpretation of DDCN rules. On the simple end, the DDCN split algorithm will handle being passed just a Dewey call number. However, there may be some unusually complex DDCNs that will not split properly. These will need to have a bug submitted for them including a specific example so that the regexp's can be adjusted.

The system will also split LCCNs. LCCNs that do not split correctly should have a bug opened and include an exact example so that the regexp's can be adjusted.

TIP: If a call number does not split, please update enhancement request 2500 with the requested information.

Questions

How do I print Labels using this feature?

The sequence of steps is:

1. Define a Layout
2. Define a Layout Template
3. Merge a Layout and Layout Template via the Label Batch

What is a "Layout"?

A layout is where you define what will print on the label. For example for a spine label you may choose the Classification Number.

What is a "Layout Template"?

A layout template is the dimensions of the sheet you are using. You will need to either acquire the dimensions from the label supplier, or measure them accurately.

Layout Templates will need to be defined for each type of Label sheet or page you wish to print to.

What is a "Label Batch"?

A label batch is where you take your Layout, Layout Template and merge with the items you wish to create the labels for.

Once the merge has been completed, a PDF will be generated that can be used to print the labels.

What does... "Start printing from label number" mean?

This option lets you tell Koha which label you want to treat as the first label. This is useful if you have previously used label sheets, and only want to print on the unused labels.

Koha counts the labels vertically from the top left.

Why do I have the option to choose a text field for "barcode" in "Choose Order of Text Fields to Print"?

You will not need to select (and order) the "barcode" text field unless you've chosen "Alternating Labels" as your layout type in Step #3. Barcode numbers automatically print beneath barcodes. However, if you are using "Alternating Labels", you're bibliographic labels will not automatically have the barcode number printed on them since the barcode is printed alone on a separate label.

What if the label template I want is not available for selection?

If the layout you want is not available, choose "edit" to edit an existing template or "New Label Template" to create a new one.

How do I add all items from a page of results to the batch at once?

- Click "Check all", then "Add checked"

How do I add all results from a search to the batch at once?

Sometimes, you will know you want to add all results from a search to the batch at once. For instance, if you are searching for all items added to the catalog during a certain time frame. Koha only lets "Check all" items on a page of results. If you know you want to add all items from a search at once to the batch, set "results per page" to a large number like "1000" when you formulate your search. This will pull all results up on one 'page' and let you then "Check all" items on that page at once.

What if I accidentally close the "Catalog Item Search" window before I'm finished adding items to the batch?

No problem! If you are still in the edit screen for that batch, simply click on "Add item(s) to batch" again to start a new search and continue adding items to the batch.

If you see more than one batch listed, you have returned to the batch summary screen. To add more items to a batch, click "edit" next to the batch you wish to edit.

How do I choose a label batch?

- In the column labeled "Print", click "Generate PDF for Batch" next to the batch of items you wish to print.

What if the label batch I want to print is not available for selection?

If the layout you want is not available, choose "edit" to edit an existing batch or "Create New Batch" to create a new one.

IMPORTANT: You'll notice that rather than setting a batch as active, this page only gives you the option to generate a PDF for the batch you wish to print. For this reason, selecting a batch for print should be the last step in printing labels.

IMPORTANT: When creating a new label layout or label template for the first time, you'll need to check the PDF to be sure that all label information fits within the boundaries of the label sheet.

How do I test my PDF to be sure all barcodes and/or bibliographic information will print

within the boundaries of the label?

- You can do a test by editing the layout you've selected (ie, set as active) and making sure "Draw Guide Boxes" is checked. By doing this, the PDF generated will draw lines indicating the boundaries of the labels. You can then confirm if the barcodes and bibliographic information falls inside the boundaries of the labels.
- If the barcodes and/or bibliographic information is spilling outside the boundaries of the labels, edit the template you have chosen from the "Label Templates" page. Enter a smaller number for "Font Size". Generate a PDF again to see if the problem was corrected.
- When you are confident that all information that needs to print is contained within the boundaries of the labels, edit the layout once again. Uncheck "Draw Guide Boxes". From the "Create and print label batches", you'll need to generate a new PDF.

TIP: You only need to 'test' your label layouts and templates the first time you create them. However, any time you set a newly created layout or template as active, you'll need to check that it is compatible with an existing layout or template. For instance, let's pretend you plan to use an existing label template to print a newly created label layout. If the new label layout contains more lines of bibliographic information than you've previously printed with that template, you'll need to check to be sure that the extra lines don't 'spill' outside the boundaries of the labels.

What does Koha mean by "Layout", "Template" and "Add Items to Print" ?

"Layout" includes:

- which fields (ie title, author, ISBN, barcode, etc) you wish to print on each label
- what order the selected fields should print
- What label on the sheet of labels the printer should "start" printing on

"Template" refers to:

- how many labels are on each sheet
- the size of each label
- the number of columns on each sheet of labels, etc.
- the size of the font that will print on the labels

"Add Items to Print"

refers to the group of items you wish to print

What does "Current Settings" mean?

The "Current Settings" box indicates what layout, template and batch are currently selected for printing.

If a value in the "Current Settings" box appears in red, that value has not yet been selected.

- To set or change the "label", click on the link labelled "Label Layouts".
- To set or change the "template", click on the link labeled "Label Template".
- To set or change the "Added Items (Batch)", click on the link labeled "Add Items to Print"

How do I choose a label layout?

- In the column labeled "Active", click the radio button next to the Layout you wish to set as the active layout
- Click "Set Active Layout"

What if the label layout I want is not available for selection?

If the label layout you want isn't available, you can edit an existing layout or create a new one.

- Click on the link labeled "Label Layout"
- If the layout you want is not available, choose "edit" to edit an existing layout or "Create New Layout" to create a new one.

Is there any way to include the library name in the barcodes?

If I use the home branch or holding branch, but that only prints the 4-character code we use for those. Or is there a way to have it print any text you want and we could just add our library name that way?

The second input method, where you list values to print, offers more flexibility, including adding static text strings. You can get your library's branchcode using the homebranch descriptor. It will also accept a single-quoted string for static text.

example:

label definition: title, homebranch, 'West Liberty'

should give:
Book Title
WLPL

West Liberty

3. Calendar and Holidays

Define days when the library is closed for circulation rules.

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Calendar'

Define the holidays for branch Liberty

- Search in the calendar the day you want to set as holiday.
- Complete the information in the right area.
- Once you finish the steps above, click Save.

Working day
Unique holiday
Repeatable holiday
Holiday exception

Calendar information

? **February, 2008**

« ‹ › » Today

wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
4						1	2
5	3	4	5	6	7	8	9
6	10	11	12	13	14	15	16
7	17	18	19	20	21	22	23
8	24	25	26	27	28	29	

Select date

- From the pull down you can choose which branch to apply holidays to.
 - TIP: At present you will have to enter holidays in for each branch, there is no way to apply holidays to all branches at once.
- To add a new holiday, click on the date you'd like to add a holiday to
 - Example, February 18, 2008 is President's Day and the library is closed.

Add new holiday

Library MAIN

Day name Monday

Day 18 Month 2 Year 2008

Description:

President's Day

☒ Holiday only on this day.
 ☐ Holiday repeated every same day of the week.
 ☐ Holiday repeated yearly on the same date.

Save Cancel

Calendar information

? **February, 2008**

« ‹ › » Today

wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
4						1	2
5	3	4	5	6	7	8	9
6	10	11	12	13	14	15	16
7	17	18	19	20	21	22	23
8	24	25	26	27	28	29	

Mon, Feb 18

- Click on the 18th of February 2008 and fill in the necessary fields for your library.
- Chose whether this holiday is repeated every day of the week or yearly.
 - In the case of President's Day it is not repeatable.
 - TIP: An example of a repeatable holiday would be Christmas, New Year's or a staff in-service day
- When you've entered the necessary data click 'Save'
- Once saved your holiday will be color-coded on the calendar

Working day Unique holiday Repeatable holiday Holiday exception

Calendar information

? February, 2008

Today

wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
4						1	2
5	3	4	5	6	7	8	9
6	10	11	12	13	14	15	16
7	17	18	19	20	21	22	23
8	24	25	26	27	28	29	

Select date

Questions

Why do I want to add holidays for my branch?

After holidays are entered on the calendar, circulation rules are then recalculated to taken in to account that library is closed and there will be no one present to return items.

How do I enable the Holiday Calendar?

You can make use of the Holidays Calendar by turning on the proper system preferences

- *Get there:* More > Administration > Global System Preferences > Circulation > useDaysMode
 - Choose the method for calculating due date: select Calendar to use the holidays module, and Days to ignore the holidays module
- *Get there:* More > Administration > Global System Preferences > Circulation > finescalendar
 - This will use the check the holiday calendar before charging fines

How is the dropbox date is determined?

Is it the last open date for the checkout branch? Is it today's date minus one? Can the dropbox checkin date be set? If the library is closed for four days for repairs, for example, there would be more than one day needed for the dropbox date.

You will only have one dropbox date and that will be the last day that the library open (determined by the holiday calendar) because there is no real way to know what day the books were dropped into the box during the 4 closed days. The only way to change the effective checkin date in dropbox mode is to modify the calendar.

4. Comments/Reviews

Manage comments made in the OPAC

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Comments'

Comments			
Authors	On biblio	Comment	
Acevedo Henry	Gilberto and the wind /	don't read this piece of *#*#*	Approve Delete
Acevedo Henry	Library journal.	I learn so much from this journal, I can't imagine living without it.	Approve Delete
Acevedo Henry	Harry Potter and the chamber of secrets.	I loved this book it was the best book in the world!!	Approve Delete

- From this menu you will see all comments/reviews awaiting approval.
 - If there are no comments, the page will inform you of such
- To approve a comment click 'Approve'
- To delete a comment click 'Delete'
- Once a comment has been approved, it will appear in the OPAC under the 'Comments' tab

Library journal.

[Audio Cassettes, CDs] : , v. 101, no. 9-; May 1, 1976- /

Published by : [Bowker](#) ([New York,])

Physical details: v. ill. 29 cm.

ISSN:0363-0277

Subject(s): [Library science -- Periodicals.](#) | [Libraries -- United States -- Periodicals.](#)

Item type : Audio Cassettes, CDs

[Holdings \(1 \)](#) [Descriptions](#) [Comments](#) [MARC View](#)

Comment by Henry Acevedo

2008-02-18
I learn so much from this journal, I can't imagine living without it.
[Post or edit your comments on this item.](#)

Questions

Can I turn off comment moderation?

At this time, this is not a feature of Koha. All comments go through moderation.

How do I turn on/off Comments in my OPAC?

You can alter this feature by changing the reviewson system preference.

- *Get there:* More > Administration > Global system preferences > OPAC > reviewson

5. Tags

This tool gives librarians the option to moderate patron added tags.

This moderation page will show up regardless of the system preference settings related to tagging.

IMPORTANT: Tagging will make use of AJAX capability in JavaScript-enabled browsers

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Tags'

[Home](#) > [Tags](#) > Review Tags

Tags

Terms Summary

[Approved:](#) 4
[Rejected:](#) 1
[Pending:](#) 2
[Total:](#) 7

Filters

Term	Status	Reviewer	Date
	pending		from <input type="text"/> to <input type="text"/>

Displaying Pending Terms

	Status	Term	Weight	Actions	Reviewer	Date
1	<input type="checkbox"/>	urban	2	<input type="button" value="approve"/> <input type="button" value="reject"/>		2008-06-02 16:15:18
2	<input type="checkbox"/>	education	1	<input type="button" value="approve"/> <input type="button" value="reject"/>		2008-06-02 16:16:06

Test Blacklist

Enter a word or phrase here to test against your whitelist/blacklist.

- From this menu you can approve or reject tags
 - TIP: Note that you are approving the terms used, but not the title the terms are applied to, moderation is for checking that terms are appropriate for your library
- The 'Weight' refers to the number of times the tag has been used within the system
- To approve a tag, click 'approve' in that line or check the box and click 'approve' at the top

- Approving a tag adds it to your whitelist
- To reject a tag, click 'reject' in that line or check the box and click 'reject' at the top
 - Rejecting a tag adds it to your blacklist
- The terms summary in the top left will allow you to filter your results by tag status

Terms Summary	
Approved:	4
Rejected:	1
Pending:	2
Total:	7

- The status of tags can always be edited by clicking on one of these filters and changing the status

Displaying ALL Terms						
<input type="button" value="approve"/> <input type="button" value="reject"/> <input type="button" value="check all"/> <input type="button" value="uncheck all"/>						
	Status	Term	Weight	Actions		Reviewer
1	<input type="checkbox"/> rejected	schools	1	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime
2	<input type="checkbox"/>	urban	2	<input type="button" value="approve"/>	<input type="button" value="reject"/>	
3	<input type="checkbox"/>	education	1	<input type="button" value="approve"/>	<input type="button" value="reject"/>	
4	<input type="checkbox"/> ✓	biography	2	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime
5	<input type="checkbox"/> ✓	school	2	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime
6	<input type="checkbox"/> ✓	martin luther king	1	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime
7	<input type="checkbox"/> ✓	organization	1	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime

- You can test terms against you whitelist or blacklist by using the test tool

Displaying ALL Terms						
<input type="button" value="approve"/> <input type="button" value="reject"/> <input type="button" value="check all"/> <input type="button" value="uncheck all"/>						
	Status	Term	Weight	Actions		Reviewer
1	<input type="checkbox"/> rejected	schools	1	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime
2	<input type="checkbox"/>	urban	2	<input type="button" value="approve"/>	<input type="button" value="reject"/>	
3	<input type="checkbox"/>	education	1	<input type="button" value="approve"/>	<input type="button" value="reject"/>	
4	<input type="checkbox"/> ✓	biography	2	<input type="button" value="approve"/>	<input type="button" value="reject"/>	Administrator, LibLime

Test Blacklist

Enter a word or phrase here to test against your whitelist/blacklist.

schools is prohibited!

- If a term has been rejected the test will tell you that that term is prohibited. If it has been approved it will show that that word is allowed.
 - TIP: The blacklist is already populated with some key terms depending on the dictionary you're using
- When a patron adds a tag to an item that a librarian has already rejected, it will automatically be rejected.

Questions

Will I be notified when new tags are added?

This feature is yet to be developed, but is in the works.

6. Stage MARC Records for Import

Start here to import your MARC records into Koha

- Choose 'Stage MARC Records For Import'

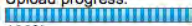
Stage MARC Records For Import

- 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:

- Select a MARC file to stage in the import reservoir by clicking 'Browse'
 - The reservoir is the holding place for records before they are added to the catalog.
 - TIP: Items will remain in the reservoir even after the import is complete.
 - Your MARC file will be parsed, and each valid record staged for later import into the catalog.
- Click 'Upload file'
- Once the file is uploaded you are provided with more options.

Upload progress: 
100%

Comments about this file:

Character encoding:

- You have the option to enter 'Comments about this file'
 - TIP: It may be useful, when uploading a file, to remember where the suggested MARC data comes from.
- Also choose the character encoding associated with the file you uploaded
 - TIP: US Libraries this is almost always MARC21.
- You can also choose to check for duplicates when importing.

Look for existing records in catalog?

Record matching rule:

Action if matching bibliographic record found:

Action if no match is found:

- IMPORTANT:** If you choose to look for a match, the system will only compare the first occurrence of each field. So if you choose to match on the 020 then it will only compare the first 020 in both records.
- Lastly, choose whether or not to import item records along with bib records

Check for embedded item record data?

☒ Yes
☐ No

How to process items:

- Click 'Stage for import'
- You will be brought to a confirmation page

Stage MARC Records For Import

MARC Staging results :

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

- After staging all of your records for import, you will want to manage the staged records
 - Follow the instructions in the 'Manage Staged Records' section of this manual.

7. Manage Staged MARC Records

After records have been imported, you can review the records before finalizing the import.

- A summary will show you the selections you made when importing the MARC record

Manage Staged MARC Records › Batch 16

File name bib-232.utf8

Comments

Staged 2008-10-15 08:38:31

Status staged

Matching rule No matching rule in effect applied

Action if matching record found create_new

Action if no match found create_new

Item processing ignore

- By default the records are matched using the field you specified when importing the data
 - You can change this before completing the import by choosing a new option from the pull down.

New matching rule Do not look for matching records

Action if matching record found Add incoming record

Action if no match found Add incoming record

Item processing Ignore items

Apply different matching rule

- You can review the imported records and possible duplicates at the bottom of the screen

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20																				
#	Citation																		Status	Overlay?
1	LibLime Test Biblio																		reverted	no_match
2	How I became a pirate / Long, Melinda. (0152018484)																		reverted	match_applied
	Matches biblio 2 (score = 1000): How I became a pirate / Long, Melinda.																			
3	Celebration Lopez, Alonzo. (088741897X)																		reverted	match_applied
	Matches biblio 3 (score = 1000): Celebration Lopez, Alonzo.																			
4	The biggest, smallest, fastest, tallest things you've ever heard of / Lopshire, Robert. (039561774X:)																		reverted	match_applied
	Matches biblio 4 (score = 1000): The biggest, smallest, fastest, tallest things you've ever heard of / Lopshire, Robert.																			
5	Stand tall, Molly Lou Melon / Lovell, Patty, (0399234160)																		reverted	match_applied
	Matches biblio 5 (score = 1000): Stand tall, Molly Lou Melon / Lovell, Patty.																			
6	The dragon kite / Luenn, Nancy.																		reverted	no_match

- After reviewing the records, click 'Import into catalog'
- After your import is complete, you will be given a summary of the import and the ability to undo your actions

Undo import

Completed import of records

Number of records added	1
Number of records updated	0
Number of items added	0
Number of items ignored because of duplicate barcode	1
Number of records ignored	0

- Next to each imported item you will find a link to the new bib record so that you can add items and make edits if necessary

Number of records added	5
Number of records updated	0
Number of records ignored	0
Number of items added	0
Number of items ignored because of duplicate barcode	0

#	Citation	Status	Match?	Bib
1	You've earned it, don't lose it : Orman, Suze (1557042853)	imported	no_match	772
2	Ender's game / Card, Orson Scott (1593974744 :)	imported	no_match	773
3	Fright Christmas (0671577174)	imported	no_match	774
4	Our dumb world (9781600240447 1600240445)	imported	no_match	775
5	World War II, Europe (0743525132)	imported	no_match	776

8. Export bibliographic and holdings (MARC Export)

This tool allows librarians to export both bibliographic records and holdings in either MARC format or MARCXML.

Select Records to Export

From biblio number:

To biblio number:

Item type:

Library:

From itemcallnumber:

To itemcallnumber:

Accession date (inclusive):

Start date:

End date:

Options

Don't export items ☐

Remove non-local items ☐

Don't export fields separate by a blank. (e.g., 100a 200 606)

Output format

File format:

File name:

- TIP: The only fields above that are required are the two under 'Output format'.
- If you'd like a limited number of records, enter in a filter for biblio numbers or item call numbers.
- If you'd like to only export items of one type or from one library, you can choose those from the pull downs
- By default all items are exported unless the 'Don't export items' box is checked.
 - **IMPORTANT:** 'Remove non-local items' refers to the library you're logged in as, not the library you chose to export from above.
- You can also choose to not export specific MARC fields
 - TIP: Separate these fields by a space.
- Choose which file format to export as (MARC or MARCXML)
- Click 'Export' and follow your browser's instructions for saving the file

9. Patron Import

Import patrons in bulk to Koha.

- Download the patron import template linked at the top right of the 'Patron Import' page

Notes:

- Download a starter CSV file with all the columns [here](#). Values are comma-separated.
 - OR format your file in CSV format with the following fields:
 - 'surname', 'firstname', 'title', 'othernames', 'initials', 'streetnumber', 'streettype', 'address', 'address2', 'city', 'zipcode', 'email', 'phone', 'mobile', 'fax', 'emailpro', 'phonepro', 'B_streetnumber', 'B_streettype', 'B_address', 'B_city', 'B_zipcode', 'B_email', 'B_phone', 'dateofbirth', 'branchcode', 'categorycode', 'dateenrolled', 'dateexpiry', 'gonenoaddress', 'lost', 'debarred', 'contactname', 'contactfirstname', 'contacttitle', 'guarantorid', 'borrowernotes', 'relationship', 'ethnicity', 'ethnotes', 'sex', 'password', 'flags', 'userid', 'opacnote', 'contactnote', 'sort1', 'sort2', 'altcontactfirstname', 'altcontactsurname', 'altcontactaddress1', 'altcontactaddress2', 'altcontactaddress3', 'altcontactzipcode', 'altcontactphone', 'smsalertnumber', 'patron_attributes',
- or ... Create a CSV file for your patron data
 - Format your file with the following fields:
 - 'cardnumber', 'surname', 'firstname', 'title', 'othernames', 'initials', 'streetnumber', 'streettype', 'address', 'address2', 'city', 'zipcode', 'email', 'phone', 'mobile', 'fax', 'emailpro', 'phonepro', 'B_streetnumber', 'B_streettype', 'B_address', 'B_city', 'B_zipcode', 'B_email', 'B_phone', 'dateofbirth', 'branchcode', 'categorycode', 'dateenrolled', 'dateexpiry', 'gonenoaddress', 'lost', 'debarred', 'contactname', 'contactfirstname', 'contacttitle', 'borrowernotes', 'relationship', 'ethnicity', 'ethnotes', 'sex', 'userid', 'opacnote', 'contactnote', 'password', 'sort1', 'sort2'
 - TIP: Consult your system administrator if you are unsure of how to fill in the above fields.
 - **IMPORTANT: Make sure the 'branchcode' and 'categorycode' are valid entries in your database.**
 - Passwords should be stored in plain text, and will be encrypted as they're imported
 - TIP: If your passwords are already encrypted, talk to your systems administrator about options.
 - **IMPORTANT: The cardnumber field must include a unique identifier for your import to process correctly.**
 - Select a file to import into the borrowers table and choose what field to match records on to prevent duplication

Import Patrons

- Select a file to import into the borrowers table
- If a cardnumber exists in the table, you can choose whether to ignore the new one or overwrite the old one.

Import into the borrowers table

Select the
file to
import:

Browse...

Field to use for record matching

Cardnumber ↕

- You can also set some default values for all patrons if you'd like:

Default values	
surname	<input type="text"/>
firstname	<input type="text"/>
title	<input type="text"/>
othernames	<input type="text"/>
initials	<input type="text"/>
streetnumber	<input type="text"/>
streettype	<input type="text"/>
address	<input type="text"/>
address2	<input type="text"/>
city	<input type="text"/>
zipcode	<input type="text"/>
email	<input type="text"/>
phone	<input type="text"/>
mobile	<input type="text"/>
fax	<input type="text"/>

emailpro	<input type="text"/>
phonepro	<input type="text"/>
B_streetnumber	<input type="text"/>
B_streettype	<input type="text"/>
B_address	<input type="text"/>
B_city	<input type="text"/>
B_zipcode	<input type="text"/>
B_email	<input type="text"/>
B_phone	<input type="text"/>
dateofbirth	<input type="text"/>
branchcode	<input type="text"/>
categorycode	<input type="text"/>
dateenrolled	<input type="text"/>
dateexpiry	<input type="text"/>
gonenoaddress	<input type="text"/>
lost	<input type="text"/>

debarred	<input type="text"/>
contactname	<input type="text"/>
contactfirstname	<input type="text"/>
contacttitle	<input type="text"/>
guarantorid	<input type="text"/>
borrowernotes	<input type="text"/>
relationship	<input type="text"/>
ethnicity	<input type="text"/>
ethnotes	<input type="text"/>
sex	<input type="text"/>
password	<input type="text"/>
flags	<input type="text"/>
userid	<input type="text"/>
opacnote	<input type="text"/>
contactnote	<input type="text"/>
sort1	<input type="text"/>

sort2	<input type="text"/>
altcontactfirstname	<input type="text"/>
altcontactsurname	<input type="text"/>
altcontactaddress1	<input type="text"/>
altcontactaddress2	<input type="text"/>
altcontactaddress3	<input type="text"/>
altcontactzipcode	<input type="text"/>
altcontactphone	<input type="text"/>
smsalertnumber	<input type="text"/>
patron_attributes	<input type="text"/>

- If a cardnumber exists in the table, you can choose whether to ignore the new one or overwrite the old one.

If matching record is already in the borrowers table:

☒ Ignore this one, keep the existing one

☐ Overwrite the existing one with this

- Click 'Import'
- You will be brought to a confirmation screen.

Questions

How will the import handle possible duplicates?

When an imported patron matches an existing one, keep data in the original record unless our import file includes that column.

10. Patrons (anonomize, bulk-delete)

This tool allows you to bulk anonymize circulation histories or bulk delete patron records. This means that the system keeps a link between old loans and their items but severs the link to the borrower.

- Once in the tool, you have two options

Delete some old patrons/Anonymize some check-out history

What do you want to do ?

☒ Delete borrower who has not borrowed since: 03/31/2007

☒ Anonymize check-out history older than 12/31/2007

Next >>

- Check the box next to the action(s) you'd like to perform
 - To delete borrowers, enter the date since the last time they borrowed
 - To anonymize circulation history enter the date before which you'd like that data deleted

Questions

Is there a way to run this tool automatically?

Not at this time.

Will running this report sever the connection between patrons and items that are checked out to them currently?

No, this report will only remove connections between patrons and items they have checked out in the past but have returned to the library.

11. Upload Patron Images

This tool allows you to upload multiple patron images as a batch.

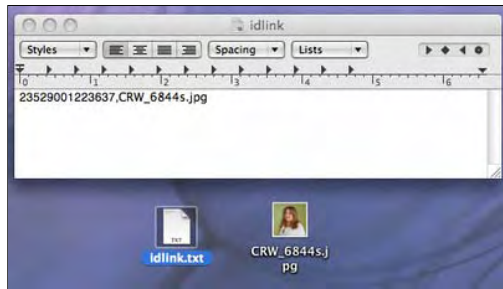
IMPORTANT: Requires that the 'patronimages' system preference is set to 'ON' to use this feature.

- *Get there:* More > Administration > Global System Preferences > Patrons > patronimages

To upload patron images:

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Upload patron images'
- You can choose to upload images in bulk by making a zip file with the images and a text file entitled "DATA LINK.TXT" or

"IDLINK.TXT"



- For each group of pictures that has the cardnumber of the patron and the file containing that patrons picture. One patron per line separated by either commas or tabs.
 - **IMPORTANT: Make sure that your TXT file is a plain text document, not RTF.**
 - **IMPORTANT: Make sure that you use either a comma or a tab to separate IDs from image names**
- Add the images and the TXT file to a .ZIP file
- Browse for the file from the Koha interface

Upload Patron Images

NOTE: Only PNG, GIF, JPEG, XPM formats are supported.

☒ zip file
☐ image file

Select the file to upload:

[Cancel](#)

- You can also upload just one patron image by entering in the filename and the patron's barcode

Upload Patron Images

NOTE: Only PNG, GIF, JPEG, XPM formats are supported.

☐ zip file
☒ image file

Select the file to upload:

Enter patron cardnumber:

[Cancel](#)

- Click 'Unpack' and you will receive a confirmation screen


Patron Images Successfully Uploaded

- Unpacking completed
- 2 directories scanned.
- 2 directories processed.
- 2 image(s) moved from /tmp/H0eMv3NK5c to /home/nce/koha/intranet/htdocs/intranet-tmpl/patronimages:
- CRW_6844s.jpg To 23529001223637.jpg
- 2 image(s) moved from /tmp/H0eMv3NK5c/_MACOSX to /home/nce/koha/intranet/htdocs/intranet-tmpl/patronimages:

[Upload More Images](#)
[Return to Tools](#)

- To see the image(s) you imported search for the patron(s) and view their profile

Nicole Engard
(23529001223637)



No address stored.
No city stored.
No phone stored.
No email stored.
Category: PT
Home Library: CPL

[Check Out](#)
[Details](#)
[Fines](#)

[Edit](#) [Add child](#) [Change Password](#) [Print](#) [More](#)

Nicole Engard (23529001223637)

19030

Initials: nce
Date of birth:
Sex: F

[Edit](#)

Manage Patron Image

To update the image for Engard, enter the name of the new image file to upload and click 'Upload.'
Click the 'Delete' button to remove the current image.

Select the file to upload:

[Browse...](#)

[Upload](#) [Delete](#)

- If you'd like to change the image, just upload a new image
- If you'd like to delete the patron image, click the 'Delete' button under 'Manage Patron Image'

Uploading Single Images

If you only have one patron image you might want to upload it via the patron information page instead of using this bulk tool.

- Go to the Patrons menu at the top of the staff client

[Circulation](#) [Patrons](#) [Search](#) [Biblos](#) [More](#)

koha

Enter patron card number or partial name:

order by: [Surname](#) [Search](#)

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

[Home](#) > [Patrons](#)

[New](#)

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#)

- Search for the patron you have the image for
- If there is more than one result, click on the name of the patron you'd like to add an image to

[Home](#) > [Patrons](#) > Search Results

[New](#)

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Results 1 to 2 of 2 found for 'e'

Card	Name	Cat	Branch	Expires on	OD/Issues	Fines	Notes	
23529000132291	Edwards, Roy 9929 Library Rd. Portland, OR	Patron (A)	MPL	12/31/2020	0/0	0.00		Edit
23529001223637	Engard, Nicole	Patron (A)	CPL	02/18/2009	0/0	0.00		Edit

- Scroll down to the image upload form

- Browse for the image on your computer and click 'Upload'

- If you'd like to change the image, just upload a new image
- If you'd like to delete the patron image, click the 'Delete' button under 'Manage Patron Image'

Questions

Why can't I upload patron images?

First you will need a `patronimages/`

directory. If you do not have this directory you will see the following error.

- Contact your system administrator to create this directory and you'll be set to go.

What size should my images be?

There is a limit of 100K on the size of the picture uploaded and it is recommended that the image be 120x200 pixels, but smaller images will work as well.

12. Task Scheduler

This tool enables you to schedule custom reports to run on a regular basis

- Once in the Tool:

Task Scheduler

Current server time is: Mon Jun 30 07:08:37 2008

Time:

Date: 1 Sep 2008

Report: missing address

Output Format: Text

Email:

Save

- enter the time (hh:mm) you'd like your report to run
- choose the date you'd like your report to run
- choose the report from the pull down
- choose to receive the report as Text or URL (a link to the report results on the web)
- email address to send the report to
- TIP: This tool can also be accessed via the 'Saved Reports' page.
 - Get there: More > Reports > Guided Reports > Used Saved.
 - Click 'Schedule this report' next to the report you want to schedule

Saved Reports							
Choose the report to run from the list							
Report Name	Type	Notes	Saved Results	Saved SQL			
blog				Show SQL	Run this Report	Schedule this Report	Delete
Patron Cats	1			Show SQL	Run this Report	Schedule this Report	Delete

- BUG #1993 - BLOCKER**

13. Notices

Notices are messages that can be sent to patrons when certain actions occur.

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Notices'

New Notice				
Module	Code	Name		
circulation	CHECKIN	Item Check-in	Edit	Delete
circulation	CHECKOUT	Item Checkout	Edit	Delete
circulation	DUE	Item Due Reminder	Edit	Delete
circulation	DUEDGST	Item Due Reminder (Digest)	Edit	Delete
circulation	EVENT	Upcoming Library Event	Edit	Delete
circulation	ODUE	Overdue Notice	Edit	Delete
circulation	PREDUE	Advance Notice of Item Due	Edit	Delete
circulation	PREDUEDGST	Advance Notice of Item Due (Digest)	Edit	Delete
claimacquisition	ACQCLAIM	Acquisition Claim	Edit	Delete
claimissues	CLSER	Serial Claim	Edit	Delete
reserves	HOLD	Hold Available for Pickup	Edit	Delete
serial	RLIST	Routing List	Edit	Delete

Add a new notice

- Click 'New Notice'
- Choose a 'Koha Module' to associate your notice with from the dropdown box

Modify notice

Koha module: Circulation

Code: Catalogue

Name: Serials (Routing List)

Message Subject: Claim Acquisition

Code: Claim Serial Issue

Code: Circulation

Code: Members

- Enter a 'Code' abbreviation for your new notice (for example: 'ODUE' for Overdue Notice)
- Enter a 'Name' for your new notice (for example 'Overdue Notice')
- Enter a 'Message Subject' (for example 'Item Overdue')
- Design your 'Message Body'

Dear <<borrowers.firstname>> <<borrowers.surname>>,

According to our current records, you have items that are overdue. Your library does not charge late fines, but please return ~~or~~renew them as soon as possible.

<<branches.branchname>><<branches.branchaddress1>><<branches.branchaddress2>><<you have registered a password with the library, you may use it with your library card number to renew online. If an item becomes more than 30 days overdue, you will be unable to use your library card until the item is returned. The following item is currently overdue:

<<biblio.title>> by <<biblio.author>>

- Choose a field from the scroll down menu on the left side
 - TIP: For help with what each field is, see the Notices: Database Fields section of this manual
- Click the '>>' button to insert that field into your text message where you'd like it to appear in the notice.
- Continue adding 'field's and clicking '>>' to insert them into the notice until your message is completed.
- Then, click 'Submit'

Edit an existing notice

- Click 'edit' next to the notice you want to edit

New Notice				
Module	Code	Name		
circulation	CHECKIN	Item Check-in	Edit	Delete
circulation	CHECKOUT	Item Checkout	Edit	Delete
circulation	DUE	Item Due Reminder	Edit	Delete
circulation	DUEGST	Item Due Reminder (Digest)	Edit	Delete
circulation	EVENT	Upcoming Library Event	Edit	Delete
circulation	ODUE	Overdue Notice	Edit	Delete
circulation	PREDUE	Advance Notice of Item Due	Edit	Delete
circulation	PREDUEGST	Advance Notice of Item Due (Digest)	Edit	Delete
claimacquisition	ACQCLAIM	Acquisition Claim	Edit	Delete
claimissues	CLSER	Serial Claim	Edit	Delete
reserves	HOLD	Hold Available for Pickup	Edit	Delete
serial	RLIST	Routing List	Edit	Delete

- Make your edits

Modify notice

Koha module:

Code: ODUE

Name:

Message Subject:

Message Body:

LibrarianFirstname
LibrarianSurname
LibrarianEmailaddress
---BRANCHES---
branches.branchcode
branches.branchname
branches.branchaddress1
branches.branchaddress2
branches.branchaddress3

>>

Dear <<borrowers.firstname>> <<borrowers.surname>>,

According to our current records, you have items that are charge late fines, but please return orrenew them as soon

<<branches.branchname>><<branches.branchaddress1>> you have registered a password with the library, you may to renew online. If an item becomes more than 30 days ov your library card until the item is returned. The following ite

<<biblio.title>> by <<biblio.author>>

- Click 'Submit' to save your changes

Questions

How do I schedule overdue notices?

To schedule overdue notices, you must use Koha's 'Notice/Status Trigger' tool.

- *Get there:* More > Tools > Overdue notice/status triggers

Why are patrons getting two overdue notices?

This tool takes all branches in the overdue rules and sent notifications to them. So, if you have a default rule & a branch rule, the notification will be generated twice.

A quick fix is to discard "default rule" for instance.

Where else do I use notices?

In addition to ODUE ('Overdue Notice'), there are other notices that come pre-defined in Koha. Three of which are:

- ACQCLAIM (Acquisition Claim): Used in the claimacquisition module
 - *Get there:* More > Acquisitions > Late issues

Late issues

Order Date	Vendor	Information	Total cost	Basket	
30 days	<input type="text" value=""/>			<input type="button" value="filter"/>	<input type="text" value="Acquisition Claim"/> <input type="button" value="Claim Order"/>
Total					<input type="button" value="Claim Order"/>

- RLIST (Routing List): Used in the serials module
 - *Get there:* More > Serials > New Subscription

Patron notification: none (selected), Routing List (highlighted)

notice and patrons on the routing list will be notified when new issues are received.

To notify patrons of new serial issues, you must [define a notice](#).

- You have the option to select the 'Routing List' notice when creating a new subscription (Choose from dropdown 'Patron notification').
 - TIP: Notice also that if you'd like to notify patrons of new serial issues, you can click on 'define a notice' which will take you to the 'Notices' tool
- HOLD (Hold Available for Pickup)
 - This notice is used if two criteria are met.
 1. The EnhancedMessagingPreferences is turned ON
 - *Get there:* More > Administration > Global System Preferences > Patrons > EnhancedMessagingPreferences
 2. The patron has requested to receive this notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Messaging

Sample Overdue Notice:

Nicole Engard
410 Library Rd.

Athens, OH
45701

Dear Nicole Engard,
23529000035726

According to our records, at the time of this notice, you have items that are overdue. Please return or renew them as soon as possible to avoid increasing late fines.

If you have registered a password with the library, you may use it with your library card number to renew online. If you believe you have returned the items below please call at and library staff will be happy to help resolve the issue.

The following item(s) are currently overdue:

07/08/2008 Creating drug-free schools and communities : 502326000054 Fox, C. Lynn.

06/27/2008 Eating fractions / 502326000022 McMillan, Bruce.

Sincerely,

Library Staff

14. Overdue Notice/Status Triggers

This tool lets you define triggers for overdue notices.

You can send a borrower up to three notices and also tell Koha how many days should pass between the day a book was due and the sending of each of these notices. Koha lets you define a different notice schedule for each branch, and different schedules for each patron type you've defined within those branches. Finally you can set a notice to trigger a 'debar' on the borrower's account during any of the three triggers.

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Overdue notice/status triggers'

Defining default overdue actions

Delay is the number of days after an issue is due before an action is triggered.

If you want Koha to trigger an action (send a letter or debar member), a delay value is required.

Columns must be filled left to right: if the first column is blank, other columns will be ignored.

Select a library: Default

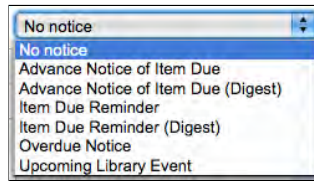
Rules for overdue actions: default library

	First			Second			Third		
	Delay	Letter	Debar	Delay	Letter	Debar	Delay	Letter	Debar
Home Bound		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
Juvenile		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
Kid		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
Library		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
Patron		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
School		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
Student		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>
Young Adult		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>		No notice	<input type="checkbox"/>

- TIP: The patron categories on the left hand side are determined by what you entered in the 'Overdue Notice Required' field when creating the patron categories
 - If you create a patron category that has "overdue notice required" set to "Yes," that means the category will appear

in the "Overdue Notice/Status Triggers" matrix. If your patron category has "overdue notice required" set to "No," that patron category will not appear in the triggers matrix.

- TIP: Even though the Advanced Notice templates are an option from this page, it's not recommended that you use them from this tool. Instead, use the enhanced messaging preference
 - *Get there:* More > Administration > Global system preferences > Patrons > EnhancedMessagingPreferences



- 'Select a library' to define an overdue schedule for

Defining default overdue actions

Delay is the number of days after an issue is due before an action

If you want Koha to trigger an action (send a letter or debar member)

Columns must be filled left to right: if the first column is blank, other

Select a library: Default Select

Rules for overdue actions: default library

	Delay	Letter	Debar
Board			
Home Bound			
Inter-Library Loan			
Juvenile			
Kid			

Library selection dropdown: Default, Midway, Union, Franklin, Fairfield, Liberty, RESERVE MATERIAL, Troy, Springfield, Centerville, Fairview, Main Library, Riverside, Pleasant Valley, Institut Protestant de Théologie

- For each patron type (left most column), enter a number under the columns labeled 'Delay'. The number you enter represents DAYS.

	Delay
Board	
Home Bound	
Inter-Library Loan	

- Each number you enter indicates the days after an issue is due before an action is triggered.
- For each 'Delay' you choose a notice type (or 'letter') that will go to the borrower.
 - TIP: You will need to set up your library's notices to populate this pull down
 - *Get there:* More > Tools > Notices
- When you are finished, click 'Save changes'

Setup Example:

In the example below, we are defining an overdue notice schedule for the patron type 'Board' (board members, in this case).

Rules for overdue actions: default library									
	Delay	First Letter	Debar	Delay	Second Letter	Debar	Delay	Third Letter	Debar
Board	7	Overdue Notice	<input type="checkbox"/>	14	Overdue Notice 2	<input type="checkbox"/>	21	Account Frozen	<input checked="" type="checkbox"/>

- '7' days after an item check out to a board member is due, the borrower will get an 'overdue notice'
- '14' days after an item check out to a board member is due, the borrower will get a second 'overdue notice'.
- '21' days after an item check out to a board member is due, the borrower will get an 'account frozen' notice and their account will automatically be debarred (frozen) by Koha.

Questions

How do I know that a patron has been debarred or frozen?

When viewing the patron's record there will be a note above the patron's name:

Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA (212) 555-1212 <small>No email stored</small> Category: Patron (PT) Home Library: Midway	<div> Edit Add child Change Password Print More </div> <div> Patron is restricted Lift Debarment </div> <div> Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA 44224 </div>
---	--

You can also see this information when editing a patron under the 'Patron Account Flags':

Patron Account Flags	
Gone no Address:	Yes <input type="radio"/> No <input checked="" type="radio"/>
Debarred:	Yes <input checked="" type="radio"/> No <input type="radio"/>
Lost Card:	Yes <input type="radio"/> No <input checked="" type="radio"/>

Help! I've gotten an error message!

If the numbers you've entered in a give row beneath the 'delay' columns are logically inconsistent, Koha will give you an alert, and explain the inconsistency:

Data error									
The following fields have a forbidden value. Correct them and press OK again :									
<ul style="list-style-type: none"> Delay1 should be less than Delay2 which should be less than Delay3 for borrower category 									
Rules for overdue actions: default library									
	Delay	First Letter	Debar	Delay	Second Letter	Debar	Delay	Third Letter	Debar
Board	7	Overdue Notice	<input type="checkbox"/>	7	Overdue Notice 2	<input type="checkbox"/>	7	Account Frozen	<input checked="" type="checkbox"/>

For instance, in the example above, I've set all three notices to be sent at the same time: 7 days after the item is overdue.

What happens if I leave the row for an patron type blank? (ie, no 'delays' have been defined)

If you want Koha to trigger an action (send a letter or debar member), a delay value is required. No delays means no actions will be performed.

Where do I define overdue schedules? (ie, how many days pass before an item becomes 'overdue')

When an item becomes overdue (ie, duration of checkout) is defined in Koha's 'Administration' module:

- *Get there:* More > Administration > Circulation Rules (under 'Patrons and Circulation')

Where do I define fines?

- *Get there:* More > Administration > Fines Rules (under 'Patrons and Circulation')

What type of notice gets sent when a 'trigger' occurs in the 'Notice/Status Triggers' module? Email? Printed Notice?

Koha handles overdue notices in one of two automated ways: by email or by printed labels.

If a borrower has an email defined in their patron account, overdue notices automatically get sent to the patron's email account according to the schedule defined in the 'Notice/Status Triggers' Tool.

TIP: Patrons can alter their notification setting using the Messaging tool on their account.

Borrowers that have no email defined will have their notices sent via email to the library for printing. The email is sent to the branch admin email, or failing that to the address set in the system preference as the 'KohaAdminEmailAddress'. This email is generated by the misc/cronjobs/overdue_notices.pl cron job. Contact your system administrator for help with this setting.

IMPORTANT: The email notice report that is compiled and sent to the admin (for borrowers with no email in Koha) rely on the 'delays' to determine when/how often that email gets sent as well.

Where are notices defined? (ie, what information will appear in the notice)

- *Get there:* More > Tools > Notices

Can I enter negative numbers to send out notices in advance?

No. Negative numbers will not work in this form. For advanced notices, please see the enhanced messaging preference.

- *Get there:* More > Administration > Global system preferences > Patrons > EnhancedMessagingPreferences

15. Log Viewer

View logs of activity on your system.

- Go to the 'Tools' module (usually under 'More' in your Global Nav)
- Choose 'Log Viewer'
- The log viewer will show you what actions are being taking in your ILS during a set time period
- Choose the start and end date you'd like to see and click 'Go' to see the results on your screen

Browse system logs

Additional parameters

Display from to

Export

☒ To screen in the browser

☐ To file into an application

22 lines found.

Date	Librarian	Module	Action	Object	Info
<input type="text" value="filter"/>	<input type="text"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text"/>	<input type="text"/>
2008-02-12 18:00:05	0	MEMBERS	MODIFY	member 19	
2008-02-15 12:49:28	19	SERIAL	ADD	1	
2008-02-18 09:04:14	19	CIRCULATION	ISSUE	member 19	biblio 507
2008-02-18 09:07:01	19	MEMBERS	MODIFY	member 39	
2008-02-18 09:07:48	19	CIRCULATION	ISSUE	member 24	biblio 117
2008-02-18 09:18:26	19	CATALOGUING	ADD	biblio 508	biblio

- You also have the option of exporting this data to use in a different format just by choosing to export to an application.
 - This will result in a comma separated value (csv) file.
- You can also choose to filter what you see by any of the fields visible.

Questions

Why aren't my cataloging actions being logged?

You may not have the 'Logs' system preference turned on

- *Get there:* More > Administration > Global System Preferences > Logs

When it asks for "Librarian" is that the patron's log in?

No. This field is looking for the borrowernumber assigned to the patron by Koha.

16. Inventory / Stocktaking

Take an inventory of your collection.

There are two ways to use the 'Inventory/Stocktaking' tool:

- Use Koha's guided form to define the items you want to take inventory OR
- Upload a barcode file and assign a last seen date to items in bulk (To obtain a barcode file, you will need to scan the barcodes using a handheld scanner with inventory capabilities)

Select items you want to check

- Complete Koha's guided form to define the itemset you wish to take inventory on.

Inventory/Stocktaking

Select items you want to check

Branch

Item type

Item location between: (items.itemcallnumber)

...and:

Item Location (items.location) is

Not seen since:

Show: items

Beginning at offset:

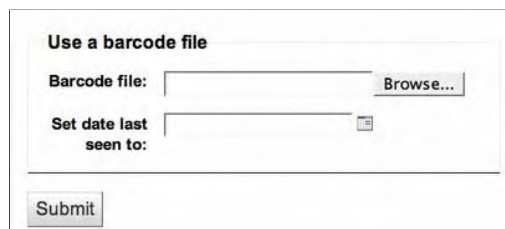
- 'Branch' (Choose which branch you want to take inventory on; Choose 'All Locations' to take inventory on all locations.)
- 'Item type' (Choose an itemtype to take inventory on.)
- 'Item location between ... and' (Choose a range of item call numbers to take inventory on.)
 - TIP: The format here is 'items.itemscallnumber' (for instance, 937.23)
 - TIP: You can be very generic. For instance, when searching for fiction call numbers, a range of 'A' to 'Z' is an acceptable range.
- 'Item location is' (Choose a 'collection'. This field searches the 'items.location'.)
- 'Not seen since:' (Choose a date from the calendar pop-up.)
- 'Show' (Define how many results you want to view on a page.)
- 'Beginning at offset' (Tells Koha where in the list of results to drop you. For instance, if this field is set to '0', the results set will start displaying at the beginning of the range defined. However, if the field is set to something like '50' then the results set will start displaying at the 50th item defined by the range you have set)
 - TIP: This field MUST be a numeric value
- Click 'Submit'

Seen	Barcode	Title	Unseen since
<input type="checkbox"/>	502326000061	RC565 .G638 - Alcoholism, the facts / Goodwin, Donald W.	2008-02-12
<input type="checkbox"/>	502326000058	RC565 .G638 - Alcoholism, the facts / Goodwin, Donald W.	2008-02-12
<input type="checkbox"/>	502326000307	RC607.A26 Q29 1988 - Does AIDS hurt? : Quackenbush, Marcia.	2008-02-12
<input type="checkbox"/>	502326000620	RJ506.A9 C85 2000 - Autism in the early years : Cumine, Val.	2008-02-12
<input type="checkbox"/>	502326000618	RJ506.A9 C85 2000 - Autism in the early years : Cumine, Val.	2008-02-12
<input type="checkbox"/>	502326000717	VK1140.B87 R66 1985 - Keep the lights burning, Abbie / Roop, Peter.	2008-02-12
<input type="button" value="Mark seen"/> <input type="button" value=""/> >>			

- To mark items as 'seen', check the box next to each item you want to add and click 'Mark seen'.
- **IMPORTANT:** You must check and click 'mark seen' for any items you want to mark as seen BEFORE using the arrows next to the 'mark seen' button to navigate to the next page of results. You cannot, for instance, check items on the first and second pages of results and then click 'mark seen' on the third page of results and have the previous two pages of results marked as seen.
- TIP: Set the 'Show' field to a high number (like 200) if you want to minimize the number of times you must click 'mark seen'.

Use barcode file

- Use 'Browse' to choose a barcode file to upload (this file is produced from your inventory scanner)
- 'Set date last seen to' using the Koha's calendar popup.
- Click 'Submit'



The screenshot shows a web form titled "Use a barcode file". It contains two input fields. The first is labeled "Barcode file:" and has a "Browse..." button to its right. The second is labeled "Set date last seen to:" and has a small calendar icon to its right. Below these fields is a "Submit" button.

- TIP: If you want to change the "last seen date" of only a few items, rather than maneuvering through the inventory module, you can 'check in' (return) books by scanning barcodes, which will update the last seen date.

Patrons

Manual for Koha Version 3.0 (stable)

1. Add a new patron

Instructions for adding patron records.

IMPORTANT: System preferences should be defined before adding new patrons.

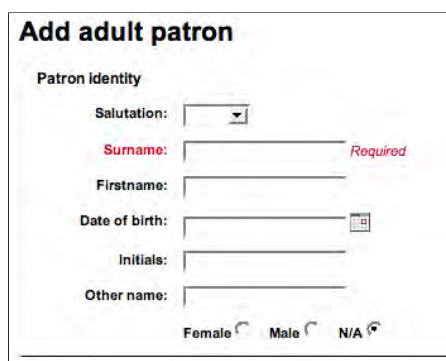
- *Get there:* More > Administration

Add a Patron

- Click the 'New' button



- Choose the type of patron you'd like to add:
 - Staff = A user that can be configured to perform functions in the staff client.
 - Adult = A regular patron (can have child patrons attached to it).
 - Child = A patron who can have an adult guarantor.
 - Organization = An organization that can have professional patrons attached to it.
 - Professional = A patron that can have an organization as a guarantor.
 - Statistical = A "fake" patron card. When items are scanned on to a Statistical patron card, the items are not checked out, but recorded.
 - TIP: This can be used to record statistics of items that are used, but do not get checked out, such as reference items, magazines, etc. You can then run a report to gather the statistics from this card.
 - See: *Tracking Inhouse Usage* in this manual
- Each patron type will have slightly different options.
- Fill in the fields related to your patron



- Note that the Surname (or Last Name) is required for each patron as a default setting. You can define which fields, if any, should be required.
 - *Get there:* Administration > System Preferences > Patrons > BorrowerMandatoryField.
 - TIP: 'Initials' and 'Other name' are great for internal use when recognizing patrons
- If you're adding a 'Child' you will see an additional field, asking you to define a Guarantor (the person who will be responsible for any charges this patron accrues and does not pay). - **BUG #2870, #1700**

- The same is true if you add a 'Professional' patron

- From this menu you must choose the patron record to link to the child or professional. - **BUG #2695**
 - Click 'Set to Patron' and pick a patron from the resulting list.
 - TIP: Only patrons of type "A" (adult) are searched for when you look for guarantors through the "find guarantor" interface. This means that (for example) library staff (type "S") and other children (type "C") cannot be found as guarantors
 - TIP: For child patrons, their account will not automatically become an adult account at a certain age without a script to do so. The only way to change a child to an adult is manually.
 - If the guarantor is not a patron, you can enter a guarantor by hand so that the name is recorded on the patron's record.
 - TIP: You can define the terms used in the Guarantor field. 'Mother' and 'Father' are default settings, but you can add "Grandparent" or "Legal Guardian" for instance
 - *Get there:* Administration > Global system preferences > Patrons > borrowerRelationship
- If you're adding an 'Organization' you will see fewer fields in this first section.

- Enter your patron's main address.

- The 'Street type' dropdown menu comes from your Patrons and Circulation parameters.
 - *Get there:* Administration > Patrons and Circulation > Road types
- The City, State dropdown menu comes from your Patrons and Circulation parameters.
 - *Get there:* Administration > Patrons and circulation > Cities
- Enter additional contact information for your patron.

- TIP: Encourage your patrons to provide an email address. Koha will use this email address to contact patrons when an item they reserved is available and to send overdue notices.
- Enter an alternate address (if you require one for your library).
 - TIP: This is handy if your patron has a PO Box and you want their home address as well.

Alternate address

Address:

City:

Zipcode:

Phone:

E-mail:

Contact note:

- Enter in an additional contact (if you require one for your library)

Alternate Contact

Firstname:

Surname:

Address line 1:

Address line 2:

City, State:

ZIP/Post code:

Phone:

- Enter information necessary for patron management in the library

Library Management

Card number: *Required*

Library:

Category:

Sort 1:

Sort 2:

- The card number can be auto-calculated, scanned in from a barcode scanner or entered in by hand. The auto-calculated card number can be turned ON and OFF in your system preferences.
 - *Get there:* Administration > System Preferences > Patrons > autoMemberNum.
 - Library branches are defined in your Basic Parameters.
 - *Get There:* Administration > Basic Parameters > Libraries, branches and groups
 - Patron Categories are defined in Patrons and Circulation.
 - *Get There:* Administration > Patrons and circulation > Patron categories
 - The sort fields are used for internal use and reports.
- Enter information specific to you library policies.

Library set-up

Registration date:

Expiry date:

OPAC note:

Library note:

- TIP: Use 'Library note' for notes you'd like your circulation staff to see.
 - TIP: Use 'OPAC note' for notes you'd like the patron to see.
 - **IMPORTANT:** Make sure your staff understands the difference between these fields. 'Library note' is a private note that ONLY staff can view. 'OPAC note' WILL be viewed by the patron.
- Provide patrons with a login for the OPAC.

OPAC login

OPAC Login:

Password:

- TIP: Patrons will be able to update/change their password via the OPAC.
- Click 'Save' to finish the process.

2. Add a Staff Patron

Staff patrons need different permissions than all others.

Staff members are entered a patrons with special permissions. See section 3.5. Patron Permissions of this manual after adding a record for your staff member.

IMPORTANT: System preferences should be defined before adding new patrons.

- *Get there:* More > Administration

Adding a Staff Patron

- Click the 'New' button



- Choose the type of patron you'd like to add:
 - Staff = A user that can be configured to perform functions in the staff client.
- Fill in the fields related to your patron

Add Staff patron

Patron identity

Salutation:

Surname: *Required*

Firstname:

Date of birth:

Initials:

Other name:

Female ☐ Male ☐ N/A ☐

- Note that the Surname (or Last Name) is required for each patron as a default setting. You can define which fields, if any, should be required.
 - *Get there:* Administration > System Preferences > Patrons > BorrowerMandatoryField.
- TIP: 'Initials' and 'Other name' are great for internal use when recognizing patrons
- Enter your patron's main address.

Main address

Street number:

Street type:

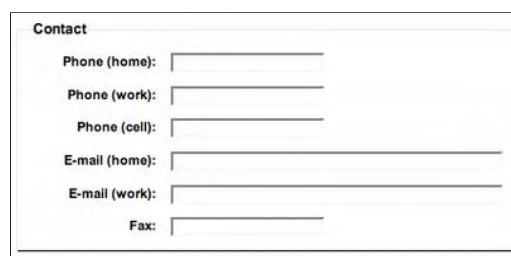
Address:

Address 2:

City, State: or choose

Zipcode: *Required*

- The 'Street type' dropdown menu comes from your Patrons and Circulation parameters.
 - *Get there:* Administration > Patrons and Circulation > Road types
- The City, State dropdown menu comes from your Patrons and Circulation parameters.
 - *Get there:* Administration > Patrons and circulation > Cities
- Enter additional contact information for your patron.



Contact

Phone (home):

Phone (work):

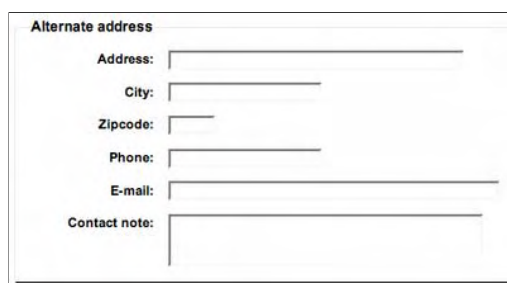
Phone (cell):

E-mail (home):

E-mail (work):

Fax:

- Enter an alternate address (if you require one for your library).
 - TIP: This is handy for entering employee's home and work addresses in two places.



Alternate address

Address:

City:

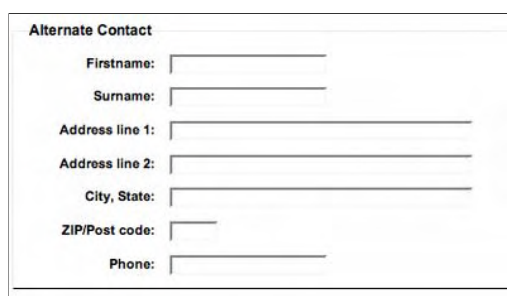
Zipcode:

Phone:

E-mail:

Contact note:

- Enter in an alternate contact
 - TIP: For staff this may be an emergency contact



Alternate Contact

Firstname:

Surname:

Address line 1:

Address line 2:

City, State:

ZIP/Post code:

Phone:

- Enter information necessary for patron management in the library



Library Management

Card number: Required

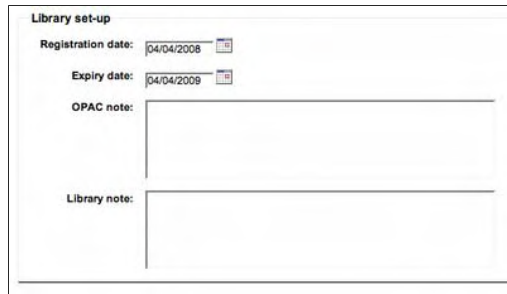
Library:

Category:

Sort 1:

Sort 2:

- **IMPORTANT:** It is necessary to set the 'library' for staff members to the library they work in because this will be the default library that will be recorded as they work in the staff client.
- The card number can be auto-calculated, scanned in from a barcode scanner or entered in by hand. The auto-calculated card number can be turned ON and OFF in your system preferences.
 - *Get there:* Administration > System Preferences > Patrons > autoMemberNum.
- Library branches are defined in your Basic Parameters.
 - *Get There:* Administration > Basic Parameters > Libraries, branches and groups
- Patron Categories are defined in Patrons and Circulation.
 - *Get There:* Administration > Patrons and circulation > Patron categories
- The sort fields are used for internal use and reports.
- Enter information specific to you library policies.



Library set-up

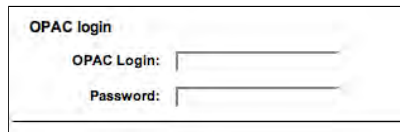
Registration date: 04/04/2008

Expiry date: 04/04/2009

OPAC note:

Library note:

- TIP: Use 'Library note' for notes you'd like your circulation staff to see.
- TIP: Use 'OPAC note' for notes you'd like the patron to see.
- Provide patrons with a login for the OPAC and the staff client (the same login is used for both the OPAC and the staff client).



OPAC login

OPAC Login:

Password:

- TIP: Patrons will be able to update/change their password via the OPAC.
- **IMPORTANT: This login will also be the staff member's staff client login so make sure it's secure**
- Click 'Save' to finish the process.

3. Add a Statistical Patron

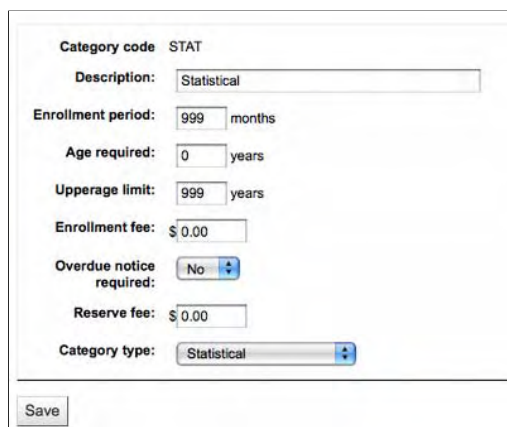
Statistical patrons are used for tracking in house use of items.

Every library has some items that are not allowed to be checked out. This doesn't mean that you don't want to track the usage of that item. Koha has simple way to track the use of non-circulating items, this guide will walk you through the many steps required.

Create a Statistical Patron

Statistical patrons are not real people. These are patrons you create just to keep track of usage of non-circulating items.

- Go to More > Administration > Patrons and Circulation > Patron categories
- Click 'New Category'



Category code: STAT

Description: Statistical

Enrollment period: 999 months

Age required: 0 years

Upperage limit: 999 years

Enrollment fee: \$ 0.00

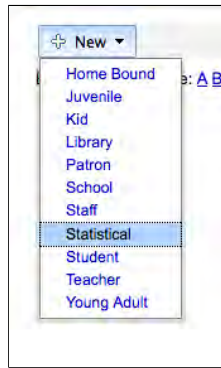
Overdue notice required: No

Reserve fee: \$ 0.00

Category type: Statistical

Save

- Choose a short 'Category code' (ex. STAT)
- Description is what will show in the patron type pull down
- Set the enrollment period to an unusually long time
- There don't need to be any age limits, enrollment fees, overdue notices, or reservation fees.
- Choose 'Statistical' from the 'Category type' pulldown
- Click 'Save'
- Click 'Patrons' on the main menu
- Click 'New' and choose 'Statistical' (or whatever you entered for the description of your patron category)



- Enter in the minimum patron information for your new patron

Add Statistical patron

Patron identity

Salutation:

Surname: *Required*

First name:

Date of birth:

Initials:

Other name:

Female ☐ Male ☐ N/A ☒

- Click 'Save'

For more information see the 'Record usage of Inhouse Items in this manual.

4. Editing Patrons

Instructions for making changes to patron records.

- Search for the patron you'd like to edit (either by partial name or barcode) or browse by last name by clicking on a letter.

Circulation Patrons Search Biblios More ▾

 Enter patron card number or partial name:

order by: Surname

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

[Home](#) > Patrons

▾

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

- Click on 'edit' to make changes to the patron record.

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Results 1 to 2 of 2 found for 'bur'

Card	Name	Cat	Branch	Expires on	OD/Issues	Fines	Notes	
23529000714163	Burgess, Dawn 7907 Library Rd. Springfield, MA	Patron (A)	MPL	12/31/2020	0/0	0.00		Edit
23529000651225	Burton, Mary 8131 Library Rd. Santa Cruz, CA	Patron (A)	MPL	12/31/2020	0/0	0.00		Edit

- In addition to the information you entered originally, you can flag the patron record.

Patron Account Flags	
Gone no Address:	Yes <input type="radio"/> No <input type="radio"/>
Debarred:	Yes <input type="radio"/> No <input type="radio"/>
Lost Card:	Yes <input type="radio"/> No <input type="radio"/>

- Each of these flags will cause a different message to appear on the patron's record and will prevent check outs
 - Gone no Address:

Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA (212) 555-1212 <small>No email stored</small> Category: Patron (PT) Home Library: Midway	<div> Edit Add child Change Password Print More </div> <ul style="list-style-type: none"> Patron's address is in doubt. Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA 44224
---	--

- Debarred:

Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA (212) 555-1212 <small>No email stored</small> Category: Patron (PT) Home Library: Midway	<div> Edit Add child Change Password Print More </div> <ul style="list-style-type: none"> Patron is restricted Lift Debarment Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA 44224
---	--

- Lost Card:

Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA (212) 555-1212 <small>No email stored</small> Category: Patron (PT) Home Library: Midway	<div> Edit Add child Change Password Print More </div> <ul style="list-style-type: none"> Patron's card has been reported lost. Sonia Frazier (23529000033739) 8165 Library Rd. Springfield, MA 44224
---	--

- When viewing a patron record, you have the option to add an image for the patron.

- See: Manual section 2.11. Upload Patron Images

- You make addition edits by clicking on the patron name.
- Click 'More'

Mary Burton (23529000651225) 	<div> Edit Add child Change Password Print More </div> Mary Burton (23529000651225) 8131 Library Rd. Santa Cruz, CA 21234	<div> Renew Patron Set Permissions Delete Update Child to Adult Patron </div>
--	---	--

- From here you can renew the patron, set permissions for the patron, or delete the patron's record.
 - TIP: When setting up staff accounts, this is where you will give staff permissions.
 - See 'Patrons: Permissions' in this manual for more information

Questions

I received an email from a patron who wants their information updated, what do I do?

The email will show you what changes the patron has made to their info. You then need to make those changes via the patron interface on the staff client.

What does the email with updated patron information look like?

Subject: User Request for update of Record.

Borrower 1

has requested to change her/his personal details.

Please check these new details and make the changes:

surname : Smyth --> Smith

firstname : Rachel --> Rachel

phone : -->

fax : 555-555-5555 --> 555-555-5444

address : 111 Main Street --> 123 Main Street

address2 :

city : Athens, OH --> West Newbury, MA

zipcode : 45701 -->

45701

phone : -->

mobile : -->

fax :

phonepro :

emailaddress : -->

B_streetaddress : -->

B_city : -->

B_zipcode : -->

dateofbirth : -->

sex : F --> F

5. Patron Permissions

Patron permissions are used to define the rights of staff members when in the intranet/staff client.

- To alter patron permissions, click on Patrons on the main menu at the top of the screen.
- Search or browse for the patron you'd like to edit

- Click on the patron's name from the results

Results 1 to 1 of 1 found for 'engard'							
Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Notes
23529001223637	Engard, Nicole 19030	Patron (A)	CPL	02/18/2009	1/3	0.00	Edit

- Click the 'More' button on the top right of the patron profile and choose 'Set Permissions'

- Choose the permissions you'd like this patron to have

Set Privileges for Engard, Nicole

- ☐ (*superlibrarian*) Access to all librarian functions
- ☐ (*circulate*) Circulate books
- ☐ (*catalogue*) View Catalogue (Librarian Interface)
- ☐ (*parameters*) Set Koha system parameters
- ☐ (*borrowers*) Add or modify borrowers
- ☐ (*permissions*) Set user permissions
- ☐ (*reserveforothers*) Reserve books for patrons
- ☐ (*borrow*) Borrow books
- ☐ (*editcatalogue*) Edit Catalogue (Modify bibliographic/holdings data)
- ☐ (*updatecharges*) Update borrower charges
- ☐ (*acquisition*) Acquisition and/or suggestion management
- ☐ (*management*) Set library management parameters
- ☐ (*tools*) Use tools (export, import, barcodes)
- ☐ (*editauthorities*) allow to edit authorities
- ☐ (*serials*) allow to manage serials subscriptions
- ☐ (*reports*) allow to access to the reports module
- ☐ (*staffaccess*) Modify login / permissions for staff users

[Cancel](#)

- IMPORTANT:** In order for a staff member to log into the staff interface they must have (at the very least) 'catalogue' permissions which allow them to view the staff interface.
- You can pick as many permissions as you'd like for each staff member
 - TIP: If a staff member is set to 'superlibrarian' they have access to all functions and do not need any other permissions checked
- To give staff members more granular permissions, you can turn on the GranularPermissions system preference
 - Get there: More > Administration > General preferences > Admin > GranularPermissions
 - If this setting is on the permissions menu will look more like this:

Set Privileges for Engard, Nicole

- ☐ (*superlibrarian*) Access to all librarian functions
- ☐ (*circulate*) Circulate books
- ☐ (*catalogue*) View Catalogue (Librarian Interface)
- ☐ (*parameters*) Set Koha system parameters
- ☐ (*borrowers*) Add or modify borrowers
- ☐ (*permissions*) Set user permissions
- ☐ (*reserveforothers*) Reserve books for patrons
- ☐ (*borrow*) Borrow books
- ☐ (*editcatalogue*) Edit Catalogue (Modify bibliographic/holdings data)
- ☐ (*updatecharges*) Update borrower charges
- ☐ (*acquisition*) Acquisition and/or suggestion management
- ☐ (*management*) Set library management parameters

(tools) Use tools (export, import, barcodes)

- ☐ (batch_upload_patron_images) Upload patron images in batch or one at a time
- ☐ (delete_anonymize_patrons) Delete old borrowers and anonymize circulation history (deletes borrower reading history)
- ☐ (edit_calendar) Define days when the library is closed
- ☐ (edit_news) Write news for the OPAC and staff interfaces
- ☐ (edit_notice_status_triggers) Set notice/status triggers for overdue items
- ☐ (edit_notices) Define notices
- ☐ (export_catalog) Export bibliographic and holdings data
- ☐ (import_patrons) Import patron data
- ☐ (inventory) Perform inventory (stocktaking) of your catalogue
- ☐ (label_creator) Create printable labels and barcodes from catalog and patron data
- ☐ (manage_staged_marc) Managed staged MARC records, including completing and reversing imports
- ☐ (moderate_comments) Moderate patron comments
- ☐ (schedule_tasks) Schedule tasks to run
- ☐ (stage_marc_import) Stage MARC records into the reservoir
- ☐ (view_system_logs) Browse the system logs
- ☐ (editauthorities) allow to edit authorities
- ☐ (serials) allow to manage serials subscriptions
- ☐ (reports) allow to access to the reports module
- ☐ (staffaccess) Modify login / permissions for staff users

Set Flags Cancel

- This allows staff members access to specific tools
 - TIP: If this preference is turned OFF after being ON, the system reverts to the original behavior, although the specific permissions are retained. This means if a staff member has been given granular permissions they will retain those even if this is turned OFF

Questions

What will each permission level do?

Depending on the permission certain menu items will be removed from the menus in Koha, preventing users from accessing them.

- superlibrarian
 - Access to all librarian functions
- circulate
 - Ability for logged in user to check books out and back in
- catalogue
 - Must be given to all staff members to allow them to log into the staff interface
 - This permission will allow staff members to search the catalog via the staff interface
- parameters
 - Provides access to all admin links and preferences
- borrowers
 - Add or modify patrons (with the exception of setting permissions)
- permissions
 - Ability to set patron permissions
- reserveforothers
 - Place holds on books for patrons via the staff interface
- borrow
 - Borrow books from the library with this staff account
- editcatalogue Modify bibliogra
 - Provides cataloging permissions such as altering and adding bibliographic and holdings data)
- updatecharges
 - Handle fines and charges for patrons (including paying, adding credits, and adding invoices)
- acquisition
 - Access to acquisition and patron purchase suggestions management
- management
 - Deprecated - no longer in use - **BUG #2426**
- tools - **BUG #2623**
 - Use tools (export, import, barcodes)
 - With GranularPermissions on this section will be expanded to allow access only to specific tools
 - *Get there:* More > Administration > General preferences > Admin > GranularPermissions
- editauthorities
 - Allow staff member to edit authorities
- serials
 - Allow staff member to manage serials subscriptions and claims
- reports
 - Allow staff member to access to the reports module
- staffaccess
 - Provides the ability to modify login / permissions for staff users

Example of Permissions for a Circulation Staff Member

[Edit](#)
[Change Password](#)
[Print](#)
[More](#)

Set Privileges for Circulation Staff,

- ☐ (superlibrarian) Access to all librarian functions
- ☒ (circulate) Circulate books
- ☒ (catalogue) View Catalogue (Librarian Interface)
- ☐ (parameters) Set Koha system parameters
- ☒ (borrowers) Add or modify borrowers
- ☐ (permissions) Set user permissions
- ☒ (reserveforothers) Reserve books for patrons
- ☒ (borrow) Borrow books
- ☐ (editcatalogue) Edit Catalogue (Modify bibliographic/holdings data)
- ☒ (updatecharges) Update borrower charges
- ☐ (acquisition) Acquisition and/or suggestion management
- ☐ (management) Set library management parameters
- ☐ (tools) Use tools (export, import, barcodes)
- ☐ (editauthorities) allow to edit authorities
- ☐ (serials) allow to manage serials subscriptions
- ☐ (reports) allow to access to the reports module
- ☐ (staffaccess) Modify login / permissions for staff users

6. Patron Information

A summary of the information found on the patron profile pages on the staff client.

- Search for the patron you'd like to see (either by partial name or barcode) or browse by last name by clicking on a letter

[Circulation](#)
[Patrons](#)
[Search](#)
[Biblios](#)
[More](#)


 Enter patron card number or partial name: order by:

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

[Home](#) > [Patrons](#)

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

- Click on the patron name to see to the patron record.

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Results 1 to 2 of 2 found for 'bur'

Card	Name	Cat	Branch	Expires on	OD/Issues	Fines	Notes	
23529000714163	Burgess, Dawn 7907 Library Rd. Springfield, MA	Patron (A)	MPL	12/31/2020	0/0	0.00		Edit
23529000651225	Burton, Mary 8131 Library Rd. Santa Cruz, CA	Patron (A)	MPL	12/31/2020	0/0	0.00		Edit

- On the left you can view the patron name and contact information.

Mary Burton
(23529000651225)
8131 Library Rd.
Santa Cruz, CA
(212) 555-1212
(No email stored)
Category: Patron (PT)
Home Library: Midway

[Check Out](#)

[Details](#)

[Fines](#)

[Circulation History](#)


[Modification Log](#)

[Messaging](#)

- Checked out items, fines, and holds can be found at the bottom of the patron record.
- You can also click on the tabs to the left for additional information.

[Checked Out](#) [Fines & Charges](#) [On Hold](#)

Checked Out

	Title	Barcode	Checked out on	Date due	Itemtype	Charge	Price	Renew	Return
	Chocolat ; by Harris, Joanne, ; Viking,	123123123123179	04/15/2008	05/06/2008	Books, Booklets, Workbooks	0.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Total replacement cost:						0.00	renewal due date : <input type="text"/>		

[Renew or Return checked items](#) [Renew all](#) [Return all](#) [Uncheck all Renew](#) [Uncheck all Returns](#)

- To see the patron's reading history, click on the 'Circulation History' tab on the menu to the left.

[Edit](#) [Add child](#) [Change Password](#) [Print](#) [More](#)

Reading Record

Showing Last 50 Items | [Show All Items](#)

Title	Author	Call No.	Return Date
Chocolat ;	Harris, Joanne,		Checked Out

- TIP: This will only show a reading history if you have the 'intranetreadinghistory' preference turned 'ON'
 - *Get there:* Administration > Global system preferences > Patrons > intranetreadinghistory
- To see the history of changes to the patron record click on 'Modification Log' on the menu to the left.

Browse system logs

Additional parameters

Display from to

Export

☒ To screen in the browser

☐ To file Export into an application

2 lines found.

Date	Librarian	Module	Action	Object	Info
2008-04-15 16:03:19	g	MEMBERS	MODIFY	member 49	UPDATE borrowers SET firstname = 'Mary',gonenoaddress = '0',categorycode = 'PT',othernames = '',B_address = '',contactnote = '',dateofbirth = '1977-12-25',email = '',altcontactaddress2 = '',debarred = '0',address = '8131 Library Rd.',streetnumber = '',branchcode = 'MPL',lost = '0',surname = 'Burton',cardnumber = '23529000651225',streettype = '',title = 'Miss',altcontactaddress3 = '',altcontactsurname = '',altcontactzipcode = '',altcontactfirstname = '',opacnote = '',userid = '23529000651225',B_zipcode = '',mobile = '',B_email = '',city = 'Santa Cruz, CA',B_phone = '',fax = '',altcontactphone = '',initials = 'mb',sort1 = '0.9773997783434',dateenrolled = '1985-05-30',phone = '(212) 555-1212',zipcode = '21234',guarantorid = '',sex = 'F',altcontactaddress1 = '',address2 = '',B_city = '',dateexpiry = '2020-12-31',borrowernotes = '',sort2 = '0.76972348221552',phonepro = '',emailpro = '' WHERE borrowernumber=? (executed w/ arg: 49)

- From this page you can limit the results to see only specific changes.
- If this patron has never been edited or if you have logs turned off you will see a message to that affect

No log found for [Mary Burton \(23529000651225\)](#).

Date	Librarian	Module	Action	Object	Info
<input type="text" value="filter"/>	<input type="text"/>	All	All	49	

- TIP: To turn on modification logs you will need to turn the 'BorrowersLog' system preference to 'ON'
 - *Get there:* Administration > System Preferences > Logs > BorrowersLog.
- To see and/or edit a patron's messaging preferences, click on 'Messaging' on the menu to the left.

Manage patron messaging settings

	Days in advance	Email	Digests only?	Do not notify
Item Checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Upcoming Events	0	<input type="checkbox"/>	-	<input type="checkbox"/>
Item DUE	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Item Check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Advance Notice	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Cancel](#)

- TIP: Item Checkout and Item Check-in will only be available if the alert is available per the settings in the Item Circulation Alerts.
 - *Get there:* More > Administration > Patrons & Circulation > Item Circulation Alerts
- If you would like to receive one message describing all items, instead of one message for each item, check the 'Digests only?' box.
 - This will combine all messages of the same time - so all overdue items will come in one email and all events will come in another. It will not combine all messages into one email.
- **IMPORTANT: Enhanced Messaging is still experimental and not fully functional**
 - Upcoming events is not implemented
- TIP: To turn on messaging options you will need to turn the 'EnhancedMessagingPreferences' system preference to 'ON'
 - *Get there:* Administration > System Preferences > Patrons > EnhancedMessagingPreferences.
- **IMPORTANT: To use SMS messaging services, you must first set the SMSSendDriver preference**
 - *Get there:* More > Administration > General preferences > Patron > SMSSendDriver
- When a message is waiting to be sent to a patron it will appear below the settings

Manage patron messaging settings

	Days in advance	Email	Digests only?	Do not notify
Item Checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Upcoming Events	0	<input type="checkbox"/>	-	<input type="checkbox"/>
Item DUE	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>
Item Check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Advance Notice	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Cancel](#)

- Once the message is sent it will say so in the status column

Message Queue			
Type	Subject	Status	Time Prepared
email	Hold Available for Pickup at Centerville	sent	2008-12-18 11:44:02

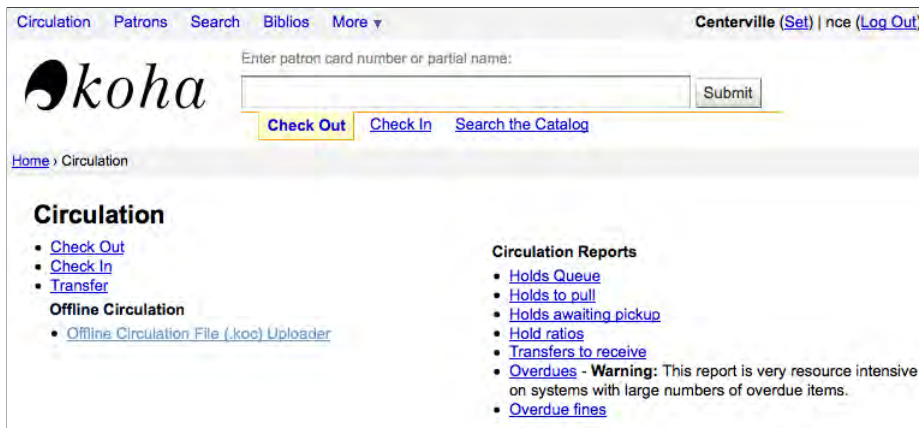
Circulation

Manual for Koha Version 3.0 (stable)

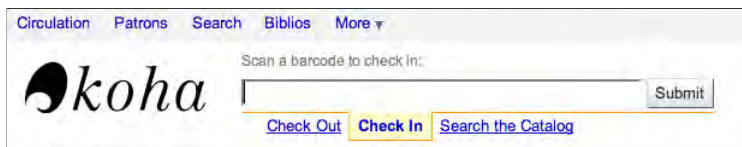
1. Checking in (Returning)

Handle returning items to your collection.

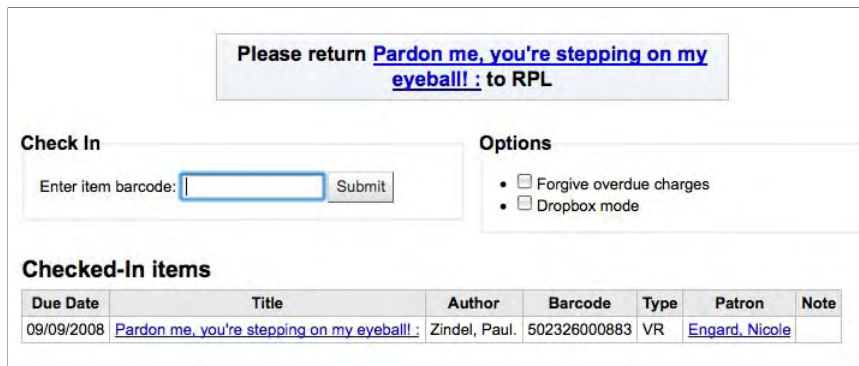
- Go to 'Circulation' module, found on your main navigation bar



- Click 'Check In' on your global navigation bar.




- TIP: Do not use this method to check items in if you want to forgive fines or use dropbox mode, instead use the check in form found under Circulation. - **BUG #2624**
 - Get there: Circulation > Check In
- Type or scan the item barcode into the 'check in' box.
 - IMPORTANT:** Depending on your barcode scanner's settings you may have to click 'Submit' after scanning the barcode
- You will be brought to a confirmation page for the checked in item.
 - TIP: When you have multiple branches in your system, Koha will notify you when a book needs returned to its home branch.



Due Date	Title	Author	Barcode	Type	Patron	Note
09/09/2008	Pardon me, you're stepping on my eyeball! :	Zindel, Paul.	502326000883	VR	Engard, Nicole	

- To check in additional items enter the barcodes into the field at the top of the screen or the field above your list of checked in items
 - TIP: The only difference between these fields is that the quick check-in box at the top will produce a confirmation for one book at a time, the box above the list of 'Checked-In items' will continue to update the list.
- If checking in a book from the 'Check In' page you will have two options to choose from before checking the item in



- Should you want to forgive any overdue fines on the item you're checking in, you can click the 'Forgive overdue charges' box.

- If you are checking in items returned after the library closed the previous night (or after a holiday closing) you can check the 'Dropbox mode' option to have the system ignore any fines that may have been accrued while the library was closed.
 - TIP: Dropbox mode will check the calendar and assume that the book was returned on the last day that the library was open.

Questions

What happens if I check in an item that was thought to be lost?

When you check it in you will get a message telling you that the book has been marked as found.



This means that the Lost status is changed on the item back to available.

How is the dropbox date is determined?

Is it the last open date for the checkout branch? Is it today's date minus one? Can the dropbox checkin date be set? If the library is closed for four days for repairs, for example, there would be more than one day needed for the dropbox date.

You will only have one dropbox date and that will be the last day that the library open (determined by the holiday calendar) because there is no real way to know what day the books were dropped into the box during the 4 closed days. The only way to change the effective checkin date in dropbox mode is to modify the calendar.

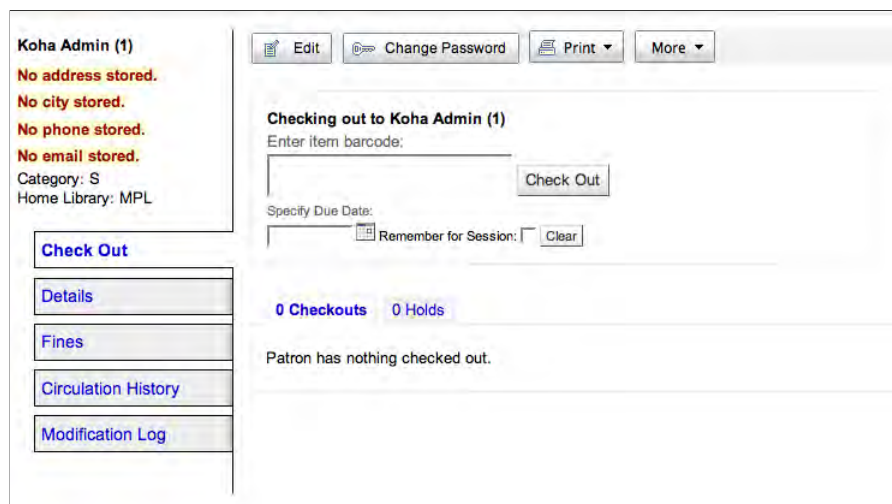
2. Checking out (Issuing)

Circulate items in your collection.

- Type or scan a patron's barcode or name in the 'Check out' box at the top of the Circulation page.



- **IMPORTANT:** Depending on your barcode scanner's settings you may have to click 'Submit' after scanning the barcode
- The patron's account will appear. Type or scan item barcodes in the 'Check out' field.



- **IMPORTANT:** Depending on your barcode scanner's settings you may have to click 'Submit' after scanning the barcode
- TIP: You can use the 'Specify Due Date' field to change the programmed due date if you want to offer an exception.
- Click 'Check out'
- If the patron has overdue items a note will appear on the patron record to that affect so that the circulation staff can manage the situation while the patron is present

Checking out to Nicole Engard (23529001223637)

Enter item barcode:

Check Out

Specify Due Date:

Remember for Session: ☐ Clear

Attention:

- Overdues: Patron has **ITEMS OVERDUE**. See highlighted items [below](#)

1 Checkout(s) 2 Holds(s)

Due date	Title	Item Type	Call no	Barcode	Renew?	Check In?
Previous checkouts						
04/23/2008	Harry Potter and the deathly hallows / Rowling, J. K.	BKS	[Fic]	123123123123143	<input checked="" type="checkbox"/>	Check In

- If the patron has any outstanding fines it will also appear on the patron record

Edit Add child Change Password Print More

Checking out to Aleph Albertson (23529001223638)

Enter item barcode:

Check Out

Specify Due Date:

Remember for Session: ☐ Clear

Attention:

- Overdues: Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- Fines: Patron has [Outstanding fines](#). Make [Payment](#)

- Once you have finished checking out items, you can print a receipt by clicking Print > Print Slip

Print M

Print Page

Print Slip

- TIP: Find out more about printing to your receipt printer here: http://wiki.koha.org/doku.php?id=receipt_printing
- If a patron has reached the max fine amount, check out will be disabled

Checking out to Sarah Jones (23529001223640)

Cannot Check Out!

- Fines: Patron has [Outstanding fines](#). Checkouts are blocked because fine balance is over the limit. Make [Payment](#)

0 Checkouts 0 Holds

Patron has nothing checked out.

- TIP: The noissuescharge system preference defines when checkouts will be disabled
 - Get there: More > Administration > Circulation > noissuescharge
- If a circulation librarian marks a patron as 'Gone no Address', then the patron will be unable to check items out

Patron Account Flags

Gone no Address: Yes ☒ No ☐

Debarred: Yes ☐ No ☒

Lost Card: Yes ☐ No ☒

Save Cancel

- A warning will appear if a librarian tries to check an item out to a patron who has been marked as 'Gone no Address'

Checking out to Sarah Jones (23529001223640)

Cannot Check Out!

- Address: Patron's address in doubt

0 Checkouts 0 Holds

Patron has nothing checked out.

- If a patron has been 'Debarred' you will not be able to check out items

Patron Account Flags

Gone no Address: Yes ☐ No ☒

Debarred: Yes ☒ No ☐

Lost Card: Yes ☐ No ☒

- A warning will appear if a librarian tries to check an item out to a patron who has been marked as 'Debarred'

Checking out to Sonia Frazier (2352900033739)

Cannot Check Out!

Restricted: Patron's account is restricted [Lift restriction](#)

0 Checkouts 0 Holds

Patron has nothing checked out.

- A warning will appear if a librarian tries to check an item out to a patron who has expired

Checking out to Cynthia L Abato (1003009000912)

Cannot Check Out!

Expiration: Patron's card has expired. Patron's card expired on 03/19/2008 [Renew](#) or [Edit Details](#)

Fines: Patron has [Outstanding fines](#). Make [Payment](#)

3. Holds

Place, cancel and manage holds on items in your collection.

- To place an item on hold for a patron, search the catalog for the item

Circulation Patrons Search **Biblios** More ▾

Enter search keywords:

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

- To place a hold, click the 'Place Hold' button in the top left.

New Edit Save Add to List Print Place Hold

Chocolat : a novel /

By [King, Stephen](#).

Published by: [Viking](#). (New York :)

Description: 242 p. ; , 23 cm.

ISBN: 014100018X

Subjects:

- Chocolate -- France -- Fiction.
- Lent -- France -- Fiction.
- Cities and towns -- France -- Fiction.
- Psychological fiction. -- lcsb.

Copyright: 1999

[Holdings](#) [Descriptions](#) [Related Titles](#)

Item type	Location	Collection	Call Number	Status	Last seen	Barcode	Volume
	Midway	Fiction	PR6058.A68828 C46 1999	Checked out to Mary Burton due 05/06/2008	04/15/2008	123123123123179	

- Enter the barcode or partial name for the patron you'd like to hold the book for.

Place a hold on [Chocolat](#) :

Patron:

Enter patron card number or partial name:

- You will be brought to a page where you can alter (if necessary) and/or confirm the hold

Place a hold on [Chocolat](#) :

Branch Mismatch

• Pickup library is different than [Nicole Engard](#)'s home library (Centerville / CPL)

Hold details

Patron: [Nicole Engard \(23529001223637\)](#)


Priority: 1

Notes:

Pickup at:

Place a hold on the next available copy ☒

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Last Location	Call number	Information
<input type="checkbox"/>		123123123123179	Fairfield	Midway	823/.914	Due 2008-05-06 Not on hold

- TIP: Note that in this case an error message appears notifying the circulation librarians that the patron might want to pick the book up at his/her home branch.
- From here you can pick to either hold the next available item or a particular item
 - Item level holds are available by checking the box next to a particular item

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Last Location	Call number	Information
<input type="checkbox"/>	CD-ROMs, DVD-ROMs, General Online Resources	502326000745	Riverside		PZ7.S34356 Th 1990	Not on hold
<input type="checkbox"/>	CD-ROMs, DVD-ROMs, General Online Resources	502326000744	Fairview		PZ7.S34356 Th 1990	Due 2007-09-01 Not on hold
<input type="checkbox"/>	CD-ROMs, DVD-ROMs, General Online Resources	502326000743	Centerville		PZ7.S34356 Th 1990	Unavailable (lost or missing) Not on hold
<input type="checkbox"/>	CD-ROMs, DVD-ROMs, General Online Resources	502326000742	Centerville		PZ7.S34356 Th 1990	Not on hold

- An item is available for an item level hold if
 - it is not lost AND,
 - it is not marked not for loan AND,
 - it is not withdrawn AND,
 - it is not damaged (unless the AllowHoldsOnDamagedItems system preference is ON), AND
 - it is not on loan (unless the AllowOnShelfHolds system preference is ON)
- TIP: If independent branches is on and the canreservefromotherbranches system preference is OFF, a staff operator is prevented from placing an item-level hold request on an item from a different branch
- To confirm the hold, click 'Place Hold'
- When an item is being checked in if it is on hold for another patron, a message will appear to remind librarians.

Hold Found: [Treasure Island /](#)

Hold for:

- [Admin, Koha \(1\)](#)
- 00000

Transfer to: Springfield

Check In

Enter item barcode: Forgive Overdue charges on this item ☐

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron
Not checked out	Treasure Island /	Stevenson, Robert Louis,	502326000815	SER	Not checked out

- To confirm the hold and start the transfer process (if the book is going to another branch), click 'Confirm hold and transfer.'
- When you look at the item record you will see an updated status on the item

Treasure Island /

By [Stevenson, Robert Louis](#).

- **Additional Authors:**
 - [Wyeth, N. C.-\(Newell Convers\).--1882-1945.--ill.](#)
- **Published by:** [Scribner](#), (New York :)
- **Description:** xvi, 273 p., [13] leaves of plates : col. ill. ; , 24 cm.
- **ISBN:** 0553212494 :
- **Subjects:**
 - [Buried treasure -- Fiction.](#)
 - [Pirates -- Fiction.](#)
 - [Adventure and adventurers -- Fiction.](#)
- **Copyright:** 1981

[Holdings](#) [Descriptions](#)

Item type	Location	Collection	Call Number	Status	Last seen	Barcode	Volume
DVDs, VHS	Centerville Reference		PZ7.S8482 Tr 1981	In transit from Midway, to Centerville, since 04/18/2008 On hold for Nicole Engard expected at Centerville since 04/18/2008	04/18/2008	502326000762	

Hold notifications

- When a hold is waiting for a patron a note will appear on their profile page when you go to check out an item.

Attention:

◁ **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)

Holds waiting:

◁ [A gathering of days :](#) (Serials), by Blos, Joan W. Reserved on 06/02/2008.
[Waiting at Main Library](#)

- If the patron has chosen to receive email notifications, they will also receive an email notice when their hold is ready for pickup
 - This option will only show up on the Patron's Messaging tab if the EnhancedMessagingPreferences preference is turned ON:
 - *Get there:* More > Administration > Global System Preferences > Patrons > EnhancedMessagingPreferences
 - You also need to set up a notice for hold notifications
 - *Get there:* More > Tools > Notices
- The patron record will also show all of the holds in the summary at the bottom of the patron record.

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Priority	Delete?
04/18/2008	Treasure Island / , by Stevenson, Robert Louis,	DVDs, VHS	PZ7.S8482 Tr 1981	<i>Item is waiting</i> 502326000762		No <input type="button" value="↑"/> <input type="button" value="↓"/>
04/18/2008	Chocolat : , by King, Stephen,	Audio Cassettes, CDs			1	No <input type="button" value="↑"/> <input type="button" value="↓"/>
07/17/2008	Christmas in the big house. Christmas in the quarters / , by McKissack, Pat,	DVDs, VHS	F213 .M36 1994	<i>Item is waiting</i> 502326000025		No <input type="button" value="↑"/> <input type="button" value="↓"/>
08/11/2008	Health education teacher resource handbook :	Serials			2	No <input type="button" value="↑"/> <input type="button" value="↓"/>
08/19/2008	When we were very young / , by Milne, A. A.	DVDs, VHS	PR6025 .I65 W5 1961	502326000134	1	No <input type="button" value="↑"/> <input type="button" value="↓"/>
08/19/2008	How to use standards in the classroom / Douglas E. Harris and Judy F. Carr with Tim Flynn. Marge Petit, and Susan Rigney.	Serials	LB3060.83 .H68 1996	<i>Item hasn't been transferred yet from Springfield</i> 502326000466	1	No <input type="button" value="↑"/> <input type="button" value="↓"/>

Reordering holds

- Hold priority can be altered by viewing the holds for the title
- To view holds on a title, click the 'Holds' tab on the left

Normal
MARC
ISBD
Items
Holds
Checkout history
Modification log

Place a hold on [How to use standards in the classroom / Douglas E. Harris and Judy F. Carr with Tim Flynn, Marge Petit, and Susan Rigney.](#)

Patron:
Enter patron card number or partial name:

Existing holds

Priority	Patron	Notes	Date	Pick up Library	Details
1	Nicole Engard		08/19/2008	Centerville	Only item 502326000466
2	Edna Acosta		08/19/2008	Midway	Next available
3	Frances Herring		08/19/2008	Centerville	Only item 502326000466
4	Sonia Frazier		08/19/2008	Midway	Next available

- By changing the priority number a patron can be moved up or down on the list of holds

Questions

What is the default hold priority?

The system will try to fill the hold locally first, then randomize (choose first available from other branches) if it can't fill it locally.

4. Transfers

This tool allows temporary reassignment of an item to another branch.

- Click 'Transfer' on the Circulation menu

Circulation

- [Check Out](#)
- [Check In](#)
- [Transfer](#)
- [Set library](#)

- Choose the library you want to transfer the book to from the pull down

Transfer

Destination library:

Midway

Midway
Union
Franklin
Fairfield
Liberty
Troy
Springfield
Centerville
Fairview
Test Library
Riverside
Pleasant Valley
Institut Protestant de Théologie

- Scan or type the barcode for the book you want to transfer into the barcode field

Transfer

Destination library:

Midway

Enter barcode:

- If you try to transfer an item to the library it's already at you will be presented with a message to the right of the transfer form

Messages

- Item is already at destination library.

- You will be presented with a confirmation of transfer requests below the transfer form after hitting 'Submit'

Transfer

Destination library:

Enter barcode:

Transferred Items

Bar Code	Title	To
123123123123143	Harry Potter and the deathly hallows / (Rowling, J. K.) FIC	Franklin

- When looking at the item record, the 'Home Library' will still remain, but the 'Current Location' has changed

Barcode 123123123123143

Item Information [\[Edit Items\]](#)

Home Library: Centerville
 Item type: Books, Booklets, Workbooks
 Collection: Fiction
 Item Callnumber: [Fic]
 Replacement Price: 0.00

Statuses

Current Location: Franklin
 Circulation Status: Not Checked out
 Lost Status:
 Damaged Status:
 Withdrawn?: No

5. Patron Fines

Manage your patron's accounting.

Patron fines are calculated based on your system preferences.

- Get there: More > Administration > Patrons and Circulation > Circulation and fines rules

Viewing Patron Accounts

- To view patron accounts, go to the patron record.
- Search or browse for the patron you'd like to see data for

Enter patron card number or partial name:

order by:

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


Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

- Click on the patron's name from the results

Results 1 to 1 of 1 found for 'engard'							
Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Notes
23529001223637	Engard, Nicole 19030	Patron (A)	CPL	02/18/2009	1/3	0.00	Edit

- Click on the 'Fines' tab under the patron information on the left

Nicole Engard
(23529001223637)



No address stored.
No city stored.
No phone stored.
nce@liblime.com
Category: Patron (PT)
Home Library: Centerville

[Check Out](#)

[Details](#)

Fines

[Circulation History](#)

[Modification Log](#)

- You will see the patron's account information

[Account](#) [Pay fines](#) [Create manual invoice](#) [Create manual credit](#)

Date	Description of charges	Amount	Outstanding
05/30/2008	Martin's big words : 09/05/2008	\$40.00	\$40.00
05/19/2008	Lost Item 502326000545	\$25.00	\$25.00
02/18/2008	Account Management fee	\$0.00	\$0.00
Total due			\$65.00

- In addition to overdue fines, replacement costs for lost items, account management fees and other library specific fees will show on the account
 - TIP: Marking an item Lost via the edit item page will automatically put a fine on the patron's record for the replacement cost of the item
- To pay fines, click the 'Pay fines' tab

[Account](#) [Pay fines](#) [Create Manual Invoice](#) [Create Manual Credit](#)

Fines & Charges	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Sub Total						0.00
Unpaid	Martin's big words : 09/05/2008	FU	0	0	40.00	40.00
Unpaid	Lost Item 502326000545	L	0	0	25.00	25.00
Sub Total						65.00
Total Due						65.00

[Make Payment](#) [Cancel](#)

- Each charge gives you a menu which lets you decide whether to mark items paid or not -- **BUG #2632**

Unpaid

Unpaid

Paid

Writeoff

- By choosing 'Paid' the system assumes that a full payment is being made
- Payments will appear on the Account tab

[Account](#) [Pay fines](#) [Create manual invoice](#) [Create manual credit](#)

Date	Description of charges	Amount	Outstanding
05/30/2008	Payment, thanks -	\$-25.00	\$0.00
05/30/2008	Martin's big words : 09/05/2008	\$40.00	\$40.00
05/19/2008	Lost Item 502326000545	\$25.00	\$0.00
02/18/2008	Account Management fee	\$0.00	\$0.00
Total due			\$40.00

- You can also create manual invoices/charges or apply manual credits to patron's accounts
 - TIP: If you create a manual credit, be aware that it won't be applied to any particular lost or late item
- To create a manual invoice, click the 'Create manual invoice' tab

Account Pay fines **Create Manual Invoice** Create Manual Credit

Manual Invoice

Type: Lost Item

Itemnumber: Lost Item

Description: Fine

Amount: Account Management Fee

New Card

Sundry

Save Cancel

- Enter in the information related to the charge you're adding

Account Pay fines **Create Manual Invoice** Create Manual Credit

Manual Invoice

Type: New Card

Barcode:

Description: Lost Membership Card

Amount: 5.00

Save Cancel

- **IMPORTANT:** Never enter currency symbols when filling in monetary amounts, these may cause errors.
- The new charge will appear on the 'Account' tab

Account Pay fines **Create manual invoice** Create manual credit

Date	Description of charges	Amount	Outstanding
05/30/2008	Lost Membership Card FeeNew Card	\$5.00	\$5.00
05/30/2008	Payment,thanks -	\$-25.00	\$0.00
05/30/2008	Martin's big words : 09/05/2008	\$40.00	\$40.00
05/19/2008	Lost Item 502326000545	\$25.00	\$0.00
02/18/2008	Account Management fee	\$0.00	\$0.00
Total due			\$45.00

- Manual invoices can be paid the same way as automatic fines, by clicking on 'Pay fines'

Account **Pay fines** Create Manual Invoice Create Manual Credit

Fines & Charges	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Unpaid	Lost Membership Card FeeNew Card	N	1	0	5.00	5.00
Sub Total						5.00
Unpaid	Martin's big words : 09/05/2008	FU	0	0	40.00	40.00
Sub Total						40.00
Total Due						45.00

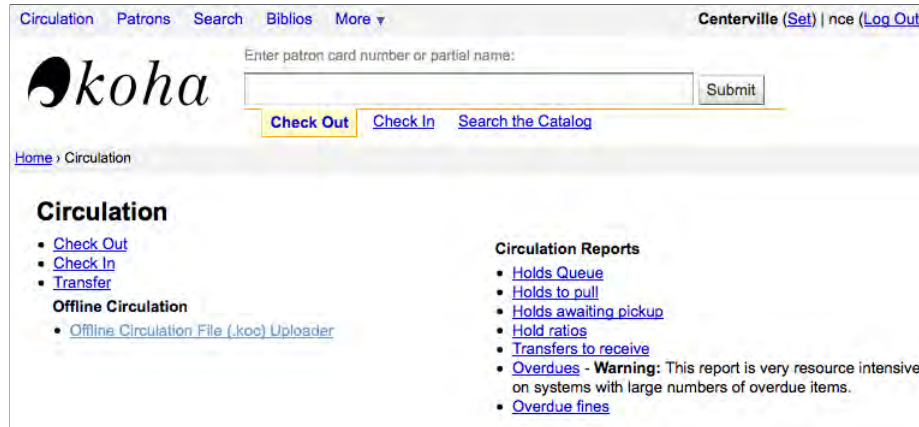
Make Payment Cancel

6. Reports

Circulation reports.

There are several built in reports to help circulation librarians perform daily operations.

- To see available reports, go to 'Circulation' module, found on your main navigation bar



Holds Queue

This report lists the next hold waiting (one per biblio) depending on how system preferences are set

- **StaticHoldsQueueWeight**
Allows the library to specify a list of library location codes -- if used alone, it will rank the list statically, selecting the top-ranking available location to be added to the picklist.
- **RandomizeHoldsQueueWeight**
If 'RandomizeHoldsQueueWeight' and 'StaticHoldsQueueWeight' are set, the list of library codes in the 'StaticHoldsQueueWeight' system preference are randomized rather than statically ranked. If RandomizeHoldsQueueWeight alone is set, the list of all available library codes is used to randomize the weight.

If neither 'RandomizeHoldsQueueWeight' or 'StaticHoldsQueueWeight' is set, the holds queue is statically ranked according to how they are pulled out of the system database.

- *Get there:* More > Administration > General Preferences > Circulation

TIP: You have to run the script `/misc/cronjobs/holds/build_holds_queue.pl` to generate the holds queue. See the Cron Jobs section of this manual for more information.

Holds to pull

Lists all items that are on hold and need to be pulled off of the shelf.

TIP: This report is only applicable if the ReserveNeedReturn system preference is on.

- *Get there:* More > Administration > General Preferences > Circulation

Holds awaiting pickup

- **BUG #2367**

List the holds that are ready & await for the patron to take them at the library

Hold ratios

This will show you the number of items you have to order for your library to meet your library's hold per item ratio. By default it will be set to the library needing 3 items per hold that has been placed. The report will tell you how many additional items need to be purchased to meet this quota.

Transfers to receive

Retrieves all items that are in transit to a given library including transit holds. It's broken down into sections based on where the items are coming from.

[Home](#) > [Circulation](#) > Transfers to your library

Transfers made to your library on : 07/07/2008

Your library is the destination for the following transfer(s)

Coming from Fairfield

Date of transfer	Title	Reserved by	Localisation
07/07/2008	Health is academic : (Audio Cassettes, CDs) Barcode : 502326000237	Acosta Edna (212) 555-1212	SPL LB3409.U5 H417 1998

Coming from Centerville

Date of transfer	Title	Reserved by	Localisation
07/07/2008	Lessons from high-performing Hispanic schools : (Audio Cassettes, CDs) Barcode : 502326000588	Engard Nicole	CPL LC2674.T4 L47 1999

To mark the item as transferred, check it in to your system. This report depends on the system preference 'TransfersMaxDaysWarning'. If items are not transferred by the number of days defined in this preference a warning will be issued via the 'check this transfer' link.

- *Get there:* More > Administration > General Preferences > Circulation > TransfersMaxDaysWarning

Overdues

IMPORTANT: This report is very resource intensive on systems with large numbers of overdue items.

This page will show you all items that are overdue as of today:

Filter On:

Name or cardnumber:

Patron category:

Patron flags:

Item type:

Library of the patron:

Sort By:

Show any items currently issued:

Items Overdue as of 05/30/2008

[Download file of all overdues](#) (for all branches. Other filters are ignored)

Due Date	Patron	Library	Title
05/06/2008	Burton Mary [email] ((212) 555-1212)	MPL	Chocolat : , by King, Stephen,
05/09/2008	Engard Nicole [email] ()	CPL	Martin's big words : , by Rappaport, Doreen.
05/28/2008	Acosta Edna ((212) 555-1212)	MPL	The one best system : , by Tyack, David B.
05/28/2008	Acosta Edna ((212) 555-1212)	MPL	The great fire / , by Murphy, Jim,

This report offers a couple options for handing overdues:

- You can click the [email] link next to the patron's name to send an email notification about the overdue item
- You can export this data as a CSV file by clicking 'Download file of all overdues'

Overdue fines

This report will not show items that are so long overdue that the system has marked them 'Lost'

Circulation: Overdues at Midway					
Select a location: All locations OK					
Date_due	Title	Patron	Library	Overdue status	Notified by
05/28/2008	The one best system. (Books, Booklets, Workbooks) Barcode : 502326000475	Acosta Edna (212) 555-1212	LC5131 .T92		
05/28/2008	The great fire / (Audio Cassettes, CDs) Barcode : 502326000179	Acosta Edna (212) 555-1212	F548.42 .M87 1995		
05/06/2008	Chocolat. (Books, Booklets, Workbooks) Barcode : 123123123123179	Burton Mary (212) 555-1212 mary@test.com	PR6058.A68828 C46 1999		


Once open the report can be filtered by the shelving location.

7. Tracking Inhouse Use

Using the statistical patron to track the use of non-circulating items.

Once you have a patron to keep track of usage statistics (see section 3.3. Add Statistical Patron in this manual), you can easily keep track of these items (reference books, staff materials, etc) but checking them out to the statistical patron.

- Go to Circulation > Check out
- Search for your statistical patron
- Scan the barcode on the item you want to keep track of
- Click 'Check out'
- You will receive a confirmation that local use has been recorded

Statistical (23529001223640)


Edit
Change Password
Print
More

Local Use Recorded

- There is no reason to check the item back in, this is solely for statistical purposes

Questions

Does it let you distinguish between how many times something has been checked out vs used inhouse? per item?

Yes. It comes out of the Circulation statistics wizard report.

[Home](#) > [Reports](#) > Checkout statistics

Guided Reports

- [Guided Reports](#)

Statistics wizards

- [Acquisitions](#)
- [Patrons](#)
- [Catalogue](#)
- [Circulation](#)

Top Lists

- [Patrons with the most checkouts](#)
- [Most-Circulated Items](#)

Inactive

- [Patrons who haven't checked out](#)
- [Items with no checkouts](#)

Other

- [Lost Items](#)

Checkout statistics

Title	Row
Period	<input type="radio"/>
Type: Checkout	group by
Patron	<input type="radio"/>
Item Ty	<input type="radio"/>
Library	<input type="radio"/>
Collection	<input type="radio"/>
Shelving Location	<input type="radio"/>
Item Call Number	<input type="radio"/>
Patron sort1	<input type="radio"/>
Patron sort2	<input type="radio"/>

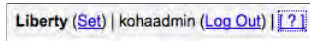
8. Set Library

If necessary you can change the library you're logged in at.

There are three ways to set your home branch.

IMPORTANT: You will not be able to perform circulation functions without first setting a library.

- Most commonly the home branch is set when adding a staff patron. (See the Adding Staff Patrons part of this manual). When staff members login their home branch will be set automatically. You can see that branch in the top right of the staff client.



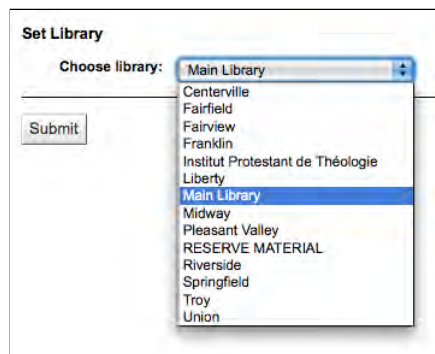
- If a library is not set you will see a notice to that affect.



- To set the library you can click '(Set)' to the right of the 'NO_LIBRARY_SET' label
- The other way to set the library is to click 'Set library' on the main circulation page



- TIP: The 'Set library' link will not show up if either the AutoLocation or the IndependentBranches system preference is on.
- Choose your home branch from the menu you are presented with



- Click 'Submit'

Questions

What is a home branch?

The home branch is the branch you want recorded as the origination of circulation functions while you are logged in.

For example, if your home branch is set to 'Main Library', any items checked out to a patron on your terminal will be considered by Koha to be checked out from the 'Main Library' branch. An item transferred on that computer will be recorded as transferred from the 'Main Library' branch.

Why would I want to set a home branch?

Setting your home branch is critical. It enables Koha to accurately record statistics, circulation (what branch an item has been checked out from or returned to), and transfers.

9. Self Checkout

To use this module you have to log in as a staff member with circulation permissions.

Koha comes with a very basic self checkout module. To use this module you have to log in as a staff member with circulation permissions. See the Patron Permissions section of this manual for more information.

- TIP: Create an anonymous staff patron for this action so that you don't leave a real staff client logged into a computer all day

There is no link to this module from the OPAC or Staff Client at this time, but it can be linked to in the templates or accessed via: http://YOUR_KOHA_URL/cgi-bin/koha/sco/sco-main.pl

Self Checkout

Please enter your card number:

- Patrons can enter their card number here

You are logged in as Nicole Engard.

Check out or return an item:

Scan a new item or enter its barcode:

Scan next item, or

Issues for Nicole Engard (4 total)

Title	Call No.	Due	Renew
Martin's big words : Rappaport, Doreen. (502326000484)	E185.97.K5 R36 2001	2008-10-28	Not renewable
The adventures of Tom Sawyer / Twain, Mark. (502326000796)	PZ7.T88 Ad 2001	2008-10-24	Not renewable
Scorpions / Myers, Walter Dean. (502326000159)	PZ7.M992 Sc 1988	2008-10-24	Not renewable
Making connections with writing : Kitagawa, Mary M. (502326000230)	LB1577.J3 K527 1987	2008-11-19	Not renewable

- Scan or type the barcode on the item being checked out

Check out or return an item:

Scan a new item or enter its barcode:

- IMPORTANT:** If the patron has any debt on their account they will not be able to check out using this module. They will see the following error forcing them to go to the desk and see a circulation librarian

Item cannot be checked out.

Sorry, This item cannot be checked out at this station.

Error type: DEBT

- The item will then show on the list of checked out items

Title	Call No.	Due	Renew
Martin's big words : Rappaport, Doreen. (502326000484)	E185.97.K5 R36 2001	2008-10-28	Not renewable
The adventures of Tom Sawyer / Twain, Mark. (502326000796)	PZ7.T88 Ad 2001	2008-10-24	Not renewable
Scorpions / Myers, Walter Dean. (502326000159)	PZ7.M992 Sc 1988	2008-10-24	Not renewable
Making connections with writing : Kitagawa, Mary M. (502326000230)	LB1577.J3 K527 1987	2008-11-19	Not renewable
A taste of blackberries / Smith, Doris Buchanan. (502326000735)	MLCS 2006/41797 (P)	2008-12-29	Not renewable

- Click the 'Click here if done' button to let the next person start their check outs

Scan next item, or

10. Offline Circulation Utility

The offline circ utility is Windows only.

Kyle Hall has developed an offline circulation utility that works with Koha 3.0. Libraries can use this utility to record circulation transactions (issues and returns) if they are unable to connect to their Koha database. Once the database is available they can upload and process the transactions using the Koha staff client.

Downloading the utility

The first step is to connect to Kyle's website at the following address and download the files needed to install the utility:

- <http://kylehall.info/index.php/projects/koha-tools/koha-offline-circulation/>

On this page you will see the instructions for downloading the utility and the PHP/GTK2 software.

Here are the instructions for installing the Windows version:

- Download the offline circulation client.
 - You can get the latest copy from the koha-tools Subversion repository with the command "svn co https://koha-tools.svn.sourceforge.net/svnroot/koha-tools/kohaOfflineCirculation/trunk/client kohaOfflineCirculation".

2. Or download it using the "Koha Offline Circulation Client" link on the website.
 1. Either method will produce a file called "koc_client_1.558.zip" which must save on your computer and unzip.
2. Download and install PHP/GTK2.
 1. For the Windows version you need to download and install Gnope. (<http://www.gnope.org/>).
 2. Follow the download instructions to produce a file called "GnopeSetup-1.5.1.exe". To install Gnope on your workstation click Start then Run and select the file "GnopeSetup-1.5.1.exe".

Running the utility

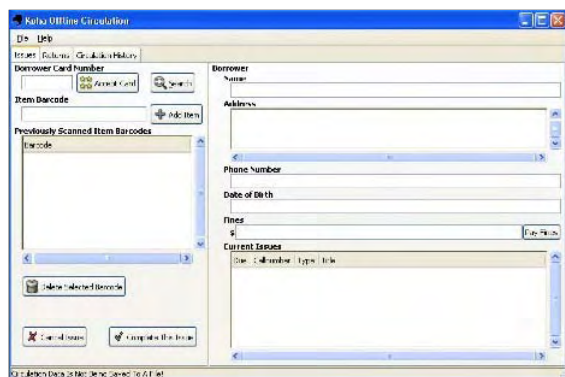
1. If you check the directory where you unzipped the offline utility, you will see the following file:



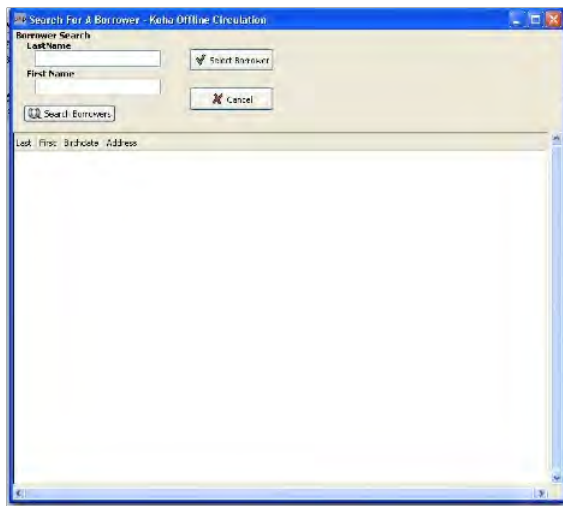
2. Just click on the file to run the utility.
 - TIP: You can create a shortcut on the desktop so that circulation staff can quickly find and start the utility.
 - **IMPORTANT: If a library uses barcode padding for items and/or patrons, offline circulation does not offer that function and so doesn't read the barcodes correctly.**
3. The first thing you see is a window asking if you would like to create a new circulation (.koc) file to store the circulation transactions, or open an existing file.
 - TIP: Using the date as the file name (or as part of the file name) makes it easier to identify files later.



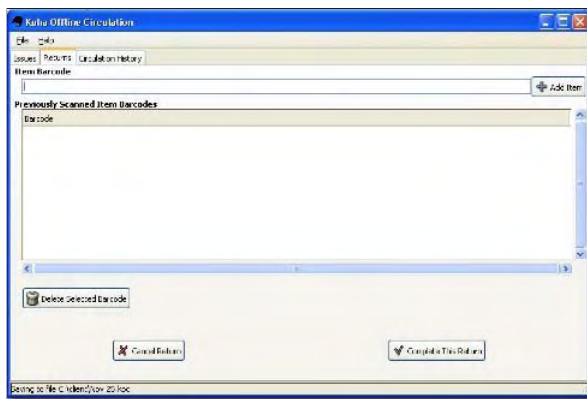
- **IMPORTANT: Once you upload and process the circulation transactions you must remember to delete or rename the file.**
 - **Uploading and processing the transactions does not delete the contents of the file.**
 - TIP: It is advisable to keep a copy of the file because there is no report of items that were not checked out. The following items will not be checked out even if they are uploaded and processed:
 - Items are checked out to an invalid patron barcode
 - Item barcode is invalid
 - Item barcode fills a request
 - Patron has exceed the maximum number of renewals
- 4. Once you have specified a circulation file the offline window opens and places your cursor in the Borrower Card Number Field on the Issues tab.



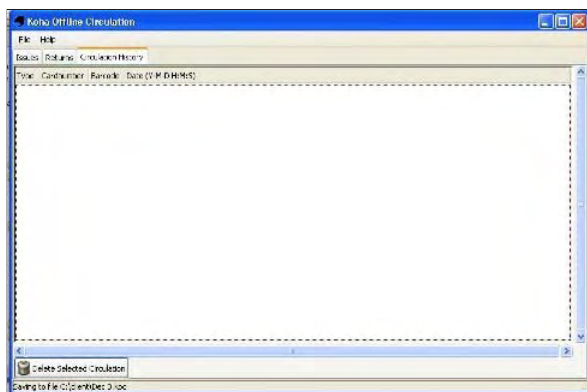
5. It is then possible to search for patrons by first and last name if you have loaded the patron data on each circulation workstation.



- TIP: To get this data you must schedule an overnight cronjob to run a script called "create_koc_db.pl". The script creates a patron file that can then be downloaded on each workstation.
 - TIP: If the patron database has more than a few hundred records, this script can produce a rather large file so it's not really suitable to run it "on the fly". Contact your support rep or system administrator for further assistance in this area.
6. You can click on the Returns tab to check in items.



7. Click on the Circulation History tab if you wish to see a list of the items that have been checked out and checked in. If you open an existing circulation (.koc) file, you will see all checkouts and checkins.



Uploading the circulation (.koc) file

Once you regain access to your Koha database you can upload the data you collected in the Offline tool.

1. Go to Circulation
2. Click on the "Offline Circulation File (.koc) Uploader" option.

Circulation Patrons Search Biblios More ▾ Centerville (Set) | nce (Log Out)

Enter patron card number or partial name:

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

[Home](#) > Circulation

Circulation

- [Check Out](#)
- [Check In](#)
- [Transfer](#)
- Offline Circulation**
 - [Offline Circulation File \(.koc\) Uploader](#)

Circulation Reports

- [Holds Queue](#)
- [Holds to pull](#)
- [Holds awaiting pickup](#)
- [Hold ratios](#)
- [Transfers to receive](#)
- [Overdues - Warning: This report is very resource intensive on systems with large numbers of overdue items.](#)
- [Overdue fines](#)

3. In the pop up window, specify the file you wish to upload and click the "Upload file" button.

Upload Offline Circulation Data

Choose .koc File:

4. When the upload process is complete you will see a window similar to this:

Upload Offline Circulation Data

Choose .koc File:

Upload progress: 100%

[Process offline circulation file](#)

5. Click the "Process offline circulation file" button to process the data. You will see a report similar to this:

Koha Offline Circulation

Your data was processed. Here are the results.

Renewed Footprints of thunder / (26) to Ronnie (23529000139858) :

Issued () to Ronnie (23529000139858) :

Returned Beethoven : (999999999) From borrower number 87 :

Returned Collateral damage (T0000067) From borrower number 76 :

- **IMPORTANT:** If any of the barcodes are invalid there will be an empty set of parentheses.

Questions

Why do I want to keep a copy of my offline circ file?

Once a file has been uploaded the data remains in the file. The library may want to keep a copy of the file in another directory, or change the file extension from .koc to .txt. The utility only looks at files with a .koc extension. If this isn't done, staff may accidentally add new data to an old file.

Cataloging

Manual for Koha Version 3.0 (stable)

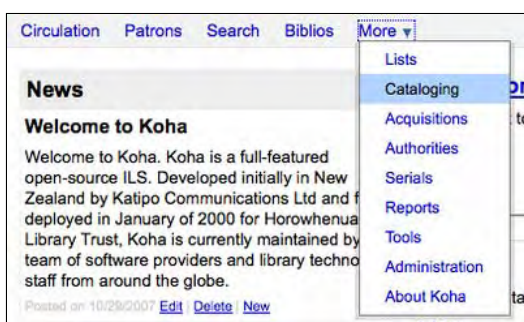
1. Adding Records

Instructions for original and copy cataloging.

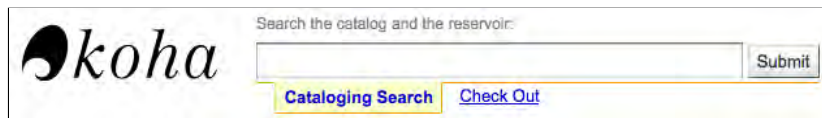
Cataloging in Koha can be done one of two ways. This manual will explain how to use the labeled MARC view for cataloging. The other way to catalog is to use the `liblouis` cataloging plugin.

Adding a Bib Record

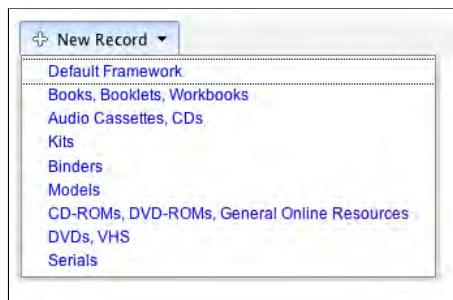
To catalog a new record, you need to be in Koha's 'Cataloguing' module. You can find this module in your global nav at the top of the screen, under the 'More' dropdown list.



- Start by searching the catalog to see if your item is already in the system



- If 'no results found', click on 'New Record' and choose a 'framework' from the dropdown box.



- TIP: Choose 'default' if you have not yet created a new framework
 - To create a framework you must go into the administration section
 - Get there:* More > Administration > MARC Bibliographic Framework
- From the 'Add MARC Record' page, you have two options for cataloging new records
 - Original cataloging OR
 - Copy cataloging using the Koha's Z39.50 search
 - IMPORTANT: You must first set up Z39.50 Search Targets**
 - Get there:* More > Administration > Additional parameters > Z39.50 Client Targets

Original Cataloging

- Use the numerical tabbed interface to go through your MARC record
 - TIP: 1xx fields will be found under tab 1, 2xx fields will be found under tab 2, etc

- To help with your original cataloging, Koha has some built in plugins denoted by an ellipsis (...) at the end of the field.
 - Some of these will automatically enter the data just by clicking in the text field, others require that you click on the '...'

Leader Plugin

- The Leader is a fixed field at the beginning of each MARC record that contains coded information for the processing of the record.
- Koha has no need for Leader information and does not use it. However, Koha can store Leader data, and can help you build your own Leader data.

- When you create (or edit) bibliographic records, clicking on the '...' to the right of the Leader field will open a pop-up window to guide you through the creation of your MARC Leader.

- Make the appropriate choices from the pull-down menus, and Koha will create the encoded Leader data and insert it into your 000@ subfield.
- You now have Leader data stored with your records, should you ever need it for some other application.

Adding Additional Fields

- When editing MARC fields you can duplicate fields (that are repeatable) by clicking the plus (+) next to the field or subfield

- When clicking plus (+) it will automatically duplicate the data in the field into a new field
 - When clicking minus (-) it will delete the field or subfield if there is another of the same field or subfield. If you click minus (-) when there are no other repeats of the field or subfield it will delete the field contents.
- By default subfields will appear in alphabetical order. You can move these fields to the right order by clicking the ^ to the left of the subfield

Authority Plugin

- Some fields (such as the 100) offer Authority Plugins
- Click the '...' to the left of the field

100 ☐ ☐ -MAIN ENTRY-PERSONAL AUTHOR-

g 9 (RLIN)

a Personal name

b Numeration

c Titles and other words associated with a name

d Dates associated with a name

e Relator term

q Fuller form of name

- Search for the authority

Authority search results

Authority type: PERSO_NAME

Main entry (\$a only): contains

Main entry: contains

Anywhere: contains

Sort by: Heading Ascendant

[Cancel](#)

Results 1 to 1 of 1

Summary	Used	Get It!	Other action
Personal Names: King, Stephen, 1947- used for/see from: King, Stiven 1947- used for/see from: King, Stivn 1947- see also: nnnn Druse, Eleanor see also: nnnn Bachman, Richard	0 times	Clear choose	Edit authority

- Click 'choose' next to the matching record and it will auto fill the fields in your MARC record

100 ☐ ☐ -MAIN ENTRY-PERSONAL AUTHOR-

g 9 (RLIN) 1

a Personal name King, Stephen,

b Numeration

c Titles and other words associated with a name

d Dates associated with a name 1947-

e Relator term

q Fuller form of name

Using Z39.50 for Copy Cataloging

To perform a Z39.50 search

- Enter data into at least one of the following MARC fields
 - Title - 245
 - ISBN - 020
 - ISSN - 022
 - Author - 100
- Click 'Z39.50 Search'

Add MARC Record

Save z39.50 Search Change framework: Books, Booklets, Workbooks

0 1 2 3 4 5 6 7 8 9

240 ☐ ☐ - UNIFORM TITLE

243 ☐ ☐ - COLLECTIVE UNIFORM TITLE

245 0 4 - TITLE

a Title The Eyre Affair /

b Remainder of title

c Statement of responsibility, etc by Jasper Fforde.

h Medium

246 ☐ ☐ - VARYING FORM OF TITLE +

250 ☐ ☐ - EDITION STATEMENT

260 ☐ ☐ - PUBLISHER--PUBLICATION, DISTRIBUTION, ETC. (IMPRINT) +

- Alter your search and choose Z39.50 targets from the pop-up window

Z39.50 Search Points

Title: The Eyre Affair Author:

ISBN/ISSN: Subject

LC Call Number: Dewey:

Search targets [Select All](#) [Clear All](#)

☐ NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]

☐ NEW YORK PUBLIC LIBRARY [catnyp.nypl.org]

☐ COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]

☐ SMITHSONIAN INSTITUTION LIBRARIES [sirius-libraries.si.edu]

☒ LIBRARY OF CONGRESS [z3950.loc.gov]

Search

- TIP: First make sure you have set up your Z39.50 search targets
 - Get there: More > Administration > Additional Parameters > Z39.50 Client Targets
- Click on 'import' to import the record of your choice.

Results

Server	Title	Author	ISBN	LCCN	Preview
z3950.loc.gov	The Eyre affair /	Fforde, Jasper.	0340820470	2004426381	MARC Card Import
z3950.loc.gov	The Eyre affair :	Fforde, Jasper.	0670030643(alkpaper)	2001043775	MARC Card Import

- Koha will auto-fill the fields in your new MARC record with the values supplied by the record you've just imported from the Z39.50 search.
- You can now add/edit fields to the record.
- Click 'Save' when you are done.

2. Editing Records

Editing cataloging records in Koha.

Editing a record is mostly the same as adding a record except that you will find that your fields will only display the subfields that you entered data in. When adding a new record you will see this for a 650 field.

650 <input type="text"/> - SUBJECT--TOPIC + -	
2	Source of heading or term
9	9 (RLIN)
a	Topical term or geographic name as entry element
b	Topical term following geographic name as entry element
c	Location of event
d	Active dates
e	Relator term
v	Form subdivision
x	General subdivision
y	Chronological subdivision
z	Geographic subdivision

When editing you will only see

650 <input type="text"/> 0 - SUBJECT--TOPIC + -	
a	Topical term or geographic name as entry element Cities and towns
z	Geographic subdivision France
v	Form subdivision Fiction.

To show all possible subfields in the framework, click on the text of the MARC field

650 <input type="text"/> 0 - SUBJECT--TOPIC + -	
a	Topical term or geographic name as entry element Cities and towns
z	Geographic subdivision France
v	Form subdivision Fiction.
2	Source of heading or term
9	9 (RLIN)
b	Topical term following geographic name as entry element
c	Location of event
d	Active dates
e	Relator term
x	General subdivision
y	Chronological subdivision

Deleting Records

- TIP: To delete a BIB Record, first delete all holdings (items) attached to the bib.
- Select Delete from the Edit dropdown menu in the normal view of the record.
 - Note: the delete option on the Edit dropdown menu will be grayed out when holdings exist. It will only allow you to delete the bib record after all the holdings (items) have been deleted.

Questions

"I searched on the MARC record I just added, and no results were found"

If your catalog changes aren't visible in search results, it is because of the indexing process. Indexing can take anywhere from 1 minute to 4 hours, depending on the load. If you do not see the new records by the following day, (24hrs) contact your system administrator.

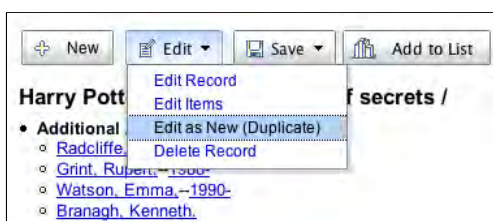
How to reorder my subject heading subfields so they appear in the proper order?

By default Koha alphabetizes your 6xx subfields, but you can easily move them around by clicking on the arrow on the left hand side of the subfield. This will allow you to put the headings in the order that best suits your item.

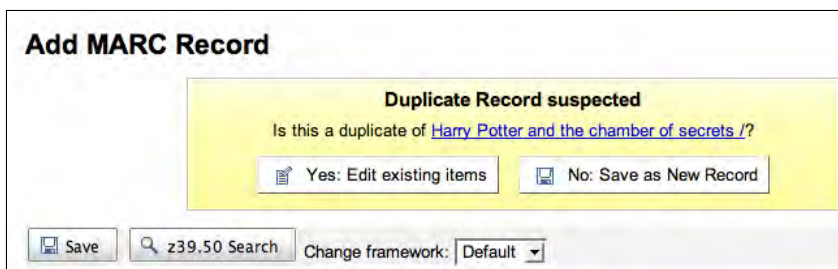
Can I duplicate a record in my system to do some copy cataloging?

Yes!

- Search for the record you'd like to copy
- Choose the record by clicking on the title
- Click on 'Edit'
- Choose to 'Edit as New (Duplicate)'



- After editing your record, click 'Save'
- You will be warned that this record was a duplicate



- Choose 'No' to save this as a new record

How do I overlay a full bib record over the brief one that was added at acquisitions?

The librarian added orders using the form in Koha, then 'received' them on that brief record. Is there a way to download the full record right in acquisitions so that the item gets attached to that full record? Or if not that, a way to replace the brief record with a complete one?

Search for the partial record in your catalog and then go to Edit > Edit Record and from there you can do a Z39.50 search to pull in a more full record or you can do your full cataloging there.

3. Adding and Deleting Items

Handle all actions associated with your item records.

After saving a MARC record, you are presented with a screen to add item details (or, local holdings). This is where you define the location of the item (home branch), the cost of the item, the barcode, URL, etc.

Items for Chocolat : by Harris, Joanne, (Record #724)

Add Item

0 - Withdrawn status	
1 - Lost status	
2 - Source of classification or shelving scheme	Dewey Decimal Classification
3 - Materials specified (bound volume or other part)	
4 - Damaged status	
5 - Use restrictions	
7 - Not for loan	
8 - Koha collection	
a - Location (home branch)	Centerville
b - Sublocation or collection (holding branch)	Centerville
c - Shelving location	
d - Date acquired	
e - Source of acquisition	
f - Coded location qualifier	
g - Cost, normal purchase price	
h - Serial Enumeration / chronology	
j - Shelving control number	
o - Koha full call number	PR6058.A68828 C46 1999
p - Piece designation (barcode)	
t - Copy number	
u - Uniform Resource Identifier	
v - Cost, replacement price	
w - Price effective from	
y - Koha item type	Audio Cassettes, CDs
z - Public note	

- Click 'Add Item' after entering the data for your item
- A confirmation will appear with the item information

Items for The Eyre affair / by Fforde, Jasper. (Record #727)

	Withdrawn status	Lost status	Damaged status	Not for loan	Koha collection	Location (home branch)	Sublocation or collection (holding branch)	Shelving location	Date acquired	Koha full call number	Piece designation (barcode)	Koha item type
Edit Delete					Fiction	Centerville	Centerville	Fiction	2008-05-07	823/ 92	123123123123398	Books, Booklets, Workbooks

- From here you can edit the item or add another item

Deleting an item

- Click Edit Items from the Edit dropdown menu in a record
- Select Delete next to the copy you wish to delete.
- TIP: To delete a BIB Record, first delete all holdings (items) attached to the bib.

4. ‡biblios

Learn how to use the integrated ‡biblios cataloging tool in Koha.

5. Authorities

Authority control is used to standardize data in your library catalog.

A MARC Authority Record are used to ensure consistency across catalog records by providing a way to define the standard form of names for:

- People (Authors, Editors, Publishers, Illustrators etc)
- Titles
- Subjects
- Series
- Organizations (Companies, Academic Institutes etc)

For more information about Authority Records with MARC 21 see the tutorial from the Library of Congress (<http://www.loc.gov/marc/authority/ecadhome.html>). The Library of Congress Authorities search can be found here: <http://authorities.loc.gov/>.

This guide will assist in handling authorities in your system.

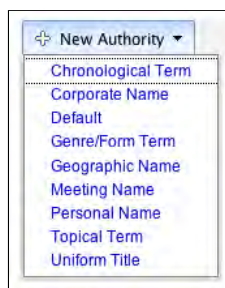
- Go to the 'Authorities' module (under 'More' in your Global Nav)



Adding an Authority Record

IMPORTANT: To add authority records in bulk, contact your system administrator and tell them that they can use this script: misc/migration_tools/bulkauthimport.pl

- Click 'New Authority'



- Choose the type of authority record you would like to add to your system
 - TIP: To alter this list you need to make changes to your system parameters
 - Get there:* Home > Administration > MARC Authorities framework
- Continue with cataloging your authorities

Altering Authorities Records

- Search for the Authority

Summary	Used in	Delete
Personal Names: King, Stephen, 1947- used for/see from: King, Stiven 1947- used for/see from: King, Stivn 1947- see also: Druse, Eleanor nnnn	3 biblio(s)	

- Click on the summary for the record you want to edit

- Click 'Edit' at the top left

Adding Authorities to a record

There are three ways to add authorities to a record:

- query authority file when adding/editing a record (during cataloging)
- enable Koha to auto-detect authority records when a record is saved
- library maintains its own authority records based on the dataset

Here are details on these options:

Query authority file when adding/editing a record (during cataloging)

The Bibliographic editor allows queries to the authority file at the add/edit stage of a record, so that cataloging staff can create the links between a bibliographic and authority record when they are cataloging.

If you wish to provide access to authority records for a given subfield -- MARC 21's 700a subfield, for instance, to make sure an author's name is available in an added entry in its approved form -- you will need to create a subfield "9" for that tag (e.g. tag 700, subfield 9). This is done by adding the subfield via the 'Authority types' administration module.

- *Get there:* More > Administration > Authority types
 - *TIP:* Make sure this subfield is managed in the same tab as the other managed subfields for this tag, and then click the "hidden" checkbox so it will not be displayed with the rest of the record.

Koha uses subfield 9 to store the link between a bibliographic record and an authority record.

When the catalogers are adding a record, they will see three dots (...) after the textbox of the 700a subfield (or any field you have chosen to add a subfield 9 to). Clicking on these dots will open a pop-up window allowing the cataloger to search your authority records for a standardized version of the author's name. If the desired name is found in your authority records, it can be automatically copied into the 700a subfield. (If the desired name is not found, the cataloger can enter the name manually.)

Auto-detection of authority records when a record is saved

Alternatively, the library can opt into the auto-detection of authority records when a record is saved. This is done by turning the 'BiblioAddsAuthorities' system preference on.

- *Get there:* More > Administration > Global preferences > Authorities > BiblioAddsAuthorities

Library-maintained authority records

A third option allows libraries to maintain their own authority records based on the dataset; many libraries prefer not to enable that option because it creates 'ghost' authority records in the system. It's up to the library (or group) which options to enable, or disable.

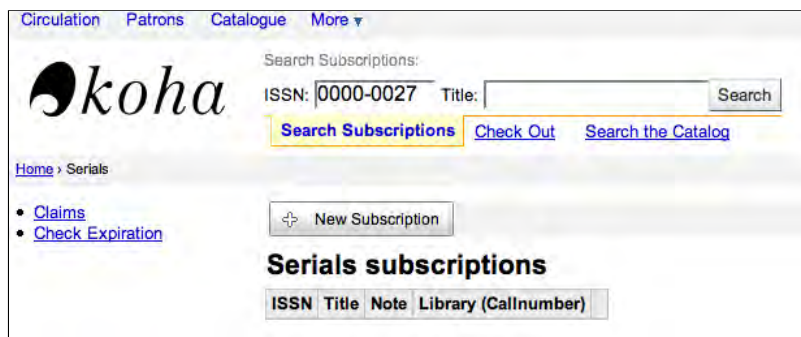
Serials

Manual for Koha Version 3.0 (stable)

1. Create Subscription

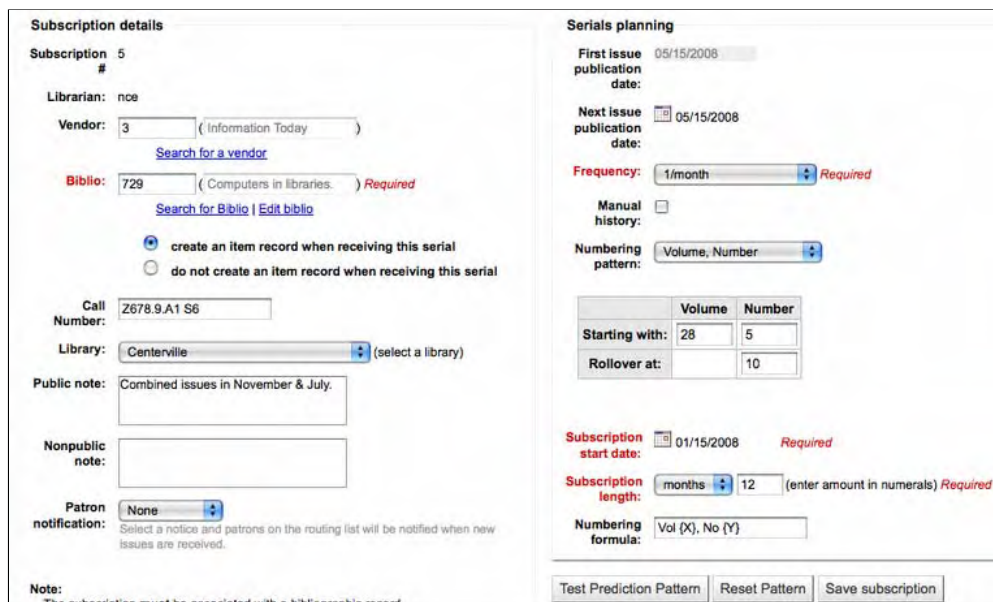
Instructions for creating a serial subscription.

- Search for the subscription you want by using the 'Subscription Search' at the top.



The screenshot shows the Koha Serials page. At the top, there are navigation links: Circulation, Patrons, Catalogue, and More. Below these is the Koha logo and a search bar for subscriptions. The search bar has fields for ISSN (0000-0027) and Title, with a Search button. Below the search bar are links for Search Subscriptions, Check Out, and Search the Catalog. On the left, there are links for Home > Serials, Claims, and Check Expiration. In the center, there is a New Subscription button. Below this is a table header for Serials subscriptions with columns: ISSN, Title, Note, and Library (Callnumber).

- If 'no results found', click on 'New Subscription'.
- Fill in the fields with the information related to your subscription



The screenshot shows the Koha Subscription details form. It is divided into two main sections: Subscription details and Serials planning. The Subscription details section includes fields for Subscription # (5), Librarian (ncc), Vendor (3), Biblio (729), Call Number (Z678.9.A1 S6), Library (Centerville), Public note (Combined issues in November & July), Nonpublic note, Patron notification (None), and a Note at the bottom stating 'The subscription must be associated with a bibliographic record.' The Serials planning section includes fields for First issue publication date (05/15/2008), Next issue publication date (05/15/2008), Frequency (1/month), Manual history (checkbox), Numbering pattern (Volume, Number), Starting with (28, 5), Rollover at (10), Subscription start date (01/15/2008), Subscription length (months, 12), and Numbering formula (Vol {X}, No {Y}). There are buttons for Test Prediction Pattern, Reset Pattern, and Save subscription.

- On the left hand side you're going to enter the information related to your library.
 - 'Librarian' will show the logged in librarian
 - 'Vendor' can be found by either searching or entering the vendor ID number
 - IMPORTANT: You must select a vendor if you wish to generate claims.**
 - 'Biblio' is the MARC record you'd like to link this subscription to. You can search for an existing record (or enter the ID number) or enter a new one.
 - Item Records
 - You can choose whether you want to create an item record for the serial every time you mark an issue received by checking the 'create' or 'do not create' radio button
 - 'Call Number' is your library's call number.
 - 'Library' is the library this particular subscription belongs to
 - TIP: If more than one library subscribes to this serial, you will want to create a subscription to for each library
 - TIP: You can easily duplicate a subscription by choosing to 'Edit as New (Duplicate)' on the subscription



- 'Public note' will appear on the OPAC for patrons to see
- 'Nonpublic note' is for the librarian's eyes only.
- 'Patron notification' allows you to choose a notice that will be sent to patrons on the serial routing list when a new issue is checked in
 - TIP: You will need to set up a notice before you can set this up
 - *Get there:* More > Tools > Notices
 - TIP: Learn about setting up Routing Lists by reading the 'Serials: Routing Lists' section of this manual
 - *Get there:* More > Serials > TITLE > Edit Routing List
- The 'First issue publication date' is the date from which the prediction pattern starts. This is probably the issue you have in hand.
- When choosing Frequency you have several options, some are pretty self explanatory, but others need some explanation

- Without periodicity: some very specific (usually high level science) don't have a true periodicity. When you subscribe to the title, you subscribe for 6 issues, which can arrive in 1 year... or 2... There is no regularity or known schedule.
- Unknown select this if none of the other choices are relevant
- Irregular: The journal is not "regular" but has a periodicity. You know that it comes out on January, then in October and December, it is irregular, but you know when it's going to arrive.
- 2/day: Twice daily
- 1/day: Daily
- 3/week: Three times a week
- 1/week: Weekly
- 1/ 2 weeks: Twice monthly (fortnightly)
- 1/ 3 weeks: Tri-weekly
- 1/month: Monthly
- 1/ 2 months (6/year): Bi-monthly
- 1/ 3 months (1/quarter): Quarterly
- 1/quarter (seasonal) : Quarterly but related to seasons
 - TIP: Choose this if the publication pattern is only represented by seasons (ie. Summer, Autumn, Winter, Spring)
- 2/year: Half yearly
- 1/year: Annual
- 1/ 2 years: Bi-annual
- Checking the 'Manual history' box will allow you to enter serials outside the prediction pattern.
- 'Numbering pattern' will help you determine how the numbers are printed for each issue

	Volume	Number
Starting with:	28	5
Rollover at:		10

- Start with the numbering on the issue you have in hand
- In the 'Rollover at' field, enter the last number before the volume number changes
- You can choose to create your own numbering pattern by choosing 'None of the above' and scrolling down to the 'Show/Hide Advanced Pattern' button

Numbering formula: Month: {Y} / Issue: {X}

Test Prediction Pattern Reset Pattern Save subscription

Show/Hide Advanced Pattern

Advanced Prediction Pattern			
	X	Y	Z
Add	1	1	
once every	1	2	
When more than	24	12	
inner counter	1	1	
Set back to	1	1	
Begins with	10	10	

- TIP: This pattern-maker tool requires a lot of trial and error to perfect your numbering. Create a fake subscription and play with the numbering to get a good feel for how it works
- Add: The number here is added to X Y Z.
- Once every: The number before can be added on every issue or less often.
- When more than: If the calculated number is more than the value here.
- Set back to: If the previous condition is valid, the calculated number is set to this one instead.
- Last value / begins with: The last value calculated or the 1st value (when adding a subscription).
- The above example will print a pattern like this:

Number of issues: 24

Serial issues

Issue number	Planned date	Published date	Status
Month: 12 / Issue 24	12/15/2007	12/15/2007	Expected
Month: 12 / Issue 23	12/01/2007	12/01/2007	Arrived
Month: 11 / Issue 22	11/15/2007	11/15/2007	Arrived
Month: 11 / Issue 21	11/01/2007	11/01/2007	Arrived
Month: 10 / Issue 20	10/15/2007	10/15/2007	Arrived

- TIP: Keep in mind that this numbering isn't perfect when it comes to weeks per month because a month can have 3, 4, or 5 weeks
- The 'Numbering formula' is editable to match the way you'd like your numbering to print.
 - TIP: By default it will show 'Vol {X}' for volume number, but you may want to change it to 'Volume {X}'. Feel free to edit the text in this box to match your library's needs.
- Clicking the 'Test Prediction Pattern' button will show you possible irregularities in your planning

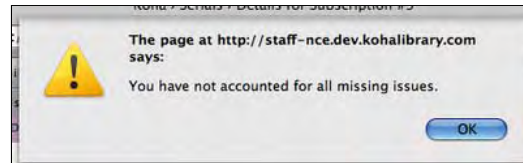
Warning irregularity detected
 12 issues expected, 10 were entered.
 Please indicate which date(s) an issue is not expected

January	
February	
March	
April	
May	
June	
July	
August	August
September	
October	
November	
December	December

Based on the information entered, the Numbering Pattern will look like this:

Vol 28, No 5
 Vol 28, No 6
 Vol 28, No 7
 Vol 28, No 8
 Vol 28, No 9
 Vol 28, No 10
 Vol 29, No 1
 Vol 29, No 2
 Vol 29, No 3
 Vol 29, No 4
 Vol 29, No 5
 Vol 29, No 6

- Choose multiple issues by using CTRL+Click in Windows and Command+Click in Mac.
 - Deselect using the same keyboard shortcuts
- TIP: If you're working with a serial that rolls over mid-year, the 'Test Prediction Pattern' will fail, but the subscription will work properly.
- If you do not check for irregularity, you will be warned after saving



- TIP: If you have a weekly subscription, note that the prediction routine uses week numbers based on the calendar year, not on the first issue date. So for weekly publications, all irregularities are saved as the week number in the year.
- Once you've entered all of the information for your subscription, you want to click 'Save Subscription'

- You will be brought to a subscription summary page

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 5
- Librarian identity: nce
- Vendor: [Information Today](#)
- Biblio: (729) [Computers in libraries](#).

• Library: CPL

• Serial receipt creates an item record.

• Call Number: Z678.9.A1 S6

• Notes: Combined issues in November & July.

Planning

Beginning date: 01/15/2008

Frequency (*): 1/Month Manual history : ☐

Number pattern: Volume, Number

Starting with:	28	5
Rollover:		10

Irregularity:

First arrival: 05/15/2008

Number of months: 12

Serial issues

Issue number	Planned date	Published date	Status
Vol 28, No 5	05/15/2008	05/15/2008	Expected

Subscription summary

Start date	01/15/2008
End date	01/15/2009
History start date	01/15/2008
History end date	
Received issues	
Missing issues	
Nonpublic note	
Public note	

Creating a Subscription for an existing biblio

- When you're on the summary page for a subscription there is a 'New Subscription' button at the top

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 8
- Librarian identity: nce
- Vendor: [Information Today](#)
- Biblio: (729) [Computers in libraries](#).

- Clicking the 'New Subscription' button will automatically fill in the biblio number with the one you're viewing

Add a new subscription

Subscription details

Subscription #

Librarian: nce

Vendor: ()

[Search for a vendor](#)

Biblio: 729 (Computers in libraries.) *Required*

[Search for Biblio](#) | [Create Biblio](#)

Questions

If I choose a date when choosing an irregularity in a subscription pattern and didn't mean to, how do I undo my selection?

- Command+click on Mac
- CTRL+click on Windows

2. Sample Subscriptions

Sample serial subscriptions.

The following will help you understand how to set up the planning for some popular serials.

Computers in Libraries (1041-7915)

- Published 10 issues a year with a combo issue in July (July/Aug) and November (Nov/Dec).
- The first issue we have in hand is the July/August 2008 issue that is published on the 15th of July.

Serials planning

First issue publication date: 07/15/2008

Frequency: 1/month

Manual history: ☐

Numbering pattern: Volume, Number

	Volume	Number
Starting with:	28	7
Rollover at:	Irregularity?	10

Warning irregularity detected
 12 issues expected, 10 were entered.
 Please indicate which date(s) an issue is not expected

August December

Based on the information entered the Numbering Pattern will look like this

Vol 28, No 7
 Vol 28, No 8
 Vol 28, No 9
 Vol 28, No 10
 Vol 29, No 1
 Vol 29, No 2
 Vol 29, No 3
 Vol 29, No 4
 Vol 29, No 5
 Vol 29, No 6
 Vol 29, No 7
 Vol 29, No 8

Subscription start date:
 (*)

Subscription length: (*) (enter amount in numerals)

Numbering formula:

Reader's Digest (0034-0375)

- Published 12 times a year (monthly)
- The Volume number changes every 6 months and the the numbers continues on (requires an advanced pattern).

Serials planning

First issue publication date:

Frequency: Required

Manual history: ☐

Numbering pattern:

	Volume	Number
Starting with:	173	1035
Rollover at:		1040

Subscription start date: Required

Subscription length: (enter amount in numerals) Required

Numbering formula:

Show/Hide Advanced Pattern

	X	Y	Z
Add	1	1	
once every	1040	1	
When more than	9999999	1040	
inner counter	173	1035	
Set back to	0	1	
Begins with	173	1035	

People Weekly (1076-0091)

- Published weekly
 - The website says "on Saturday except the first week of August, Thanksgiving week, the first and last weeks of the year" but this does not match the pattern for 2007 or 2008
- In the Jul-Dec there are 26 issues
- In the Jan-Jun there are 25 issues (no issue for the first week of January)

Since the irregularity on the first # 26 does not skip a week, this would be set up as to roll over on issue 25. The 26th issue in the second half of the year would have to be received as a supplemental.

The irregularity check will complain that 52 issues were expected, but 25 entered. The current irregularity check can only check that the first position of the numbering pattern matches the expected issue count of the periodicity. But we do need to trigger the rollover on the volume, so we need to define the last two weeks of the year as irregularities. So we receive 50 issues the first 50 weeks, then one supplemental issue in week 51, which we have to define the enumeration for, then the next predicted issue will be the following year's first week.

3. Cataloging a Serial

Instructions for cataloging a serial record.

Cataloging a serial is no different than cataloging a regular bibliographic record. The easiest way to catalog a serial is to run a Z39.50 search to find an already cataloged record to copy:

Search for:

ISSN: 0000-0027

Search these servers:

☐ NEW YORK UNIVERSITY LIBRARIES
 ☐ NEW YORK PUBLIC LIBRARY
 ☒ COLUMBIA UNIVERSITY
 ☐ SMITHSONIAN INSTITUTION LIBRARIES
 ☐ LIBRARY OF CONGRESS

Submit

- Click on 'import' to import the record of your choice.

Search for:

Results

Server	Title	Author	ISBN	LCCN	
clio-db.cc.columbia.edu	Library journal.			76645271	Import
clio-db.cc.columbia.edu	Library journal.			04012654//r54	Import
clio-db.cc.columbia.edu	Library journal				Import
clio-db.cc.columbia.edu	LJ, Library journal.			75648584	Import
clio-db.cc.columbia.edu	LJ, Library journal.			75648584//r76	Import

- Koha will auto-fill fields in the MARC record with the values supplied by the record you've just imported from the Z39.50 search.
- You can now add/edit fields to the record.
- Click 'Save' when you are done.

Adding item details

After saving a MARC record, you are presented with a screen to add item details (or local holdings).

Home > Cataloging > Edit Library journal. (Record #502) > Items

Normal
MARC
ISBD
Items
Holds
Checkout history
Modification log

Items for Library journal. (Record #502)

Add Item

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme

4 - Damaged status

5 - Use restrictions

7 - Not for loan

8 - Koha collection

a - Location (home branch)

b - Sublocation or collection (holding branch)

c - Shelving location

d - Date acquired

e - Source of acquisition

f - Coded location qualifier

g - Cost, normal purchase price

o - Koha full call number


p - Piece designation (barcode)

If you will be using the serials module to receive items, there is no need to fill in item information. If you would like to have only one item attached to the serial record, you can enter that info here.

4. Recieving a Serial

Instructions for adding serial records.

- Search for the serial that you want to mark received.

 Search Subscriptions: ISSN: 0000-0027 Title: Search

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

Home > Serials

- [Claims](#)
- [Check Expiration](#)

[New Subscription](#)

Serials subscriptions

ISSN	Title	Note	Library (Callnumber)	
0000-0027	Library journal.		CPL	Issue History Serial receive

- IMPORTANT:** You must first catalog the serial before you can receive it. See 'Serials: Cataloging' in this manual.
- Click on the 'Serial receive' link next to the item you would like to mark received.

Serial Edition *Library journal.*

- [Serial collection](#)
- [Subscription #8](#)
- [Show Biblio](#)

	Numbered	Published on	Expected on	Status	Notes
Issue	17	10/15/2007	10/15/2007	Expected	
Supplemental Issue					

[Save](#)

Expected
Arrived
Late
Missing
Claimed
Not Available
Delete

- Change the status to 'Arrived' and add any necessary notes.
- If you checked the 'create an item record when receiving this serial' option when adding your subscription you will have an item record pop up when you change the status to receive
 - See section '6.1. Create Subscription' in this manual for more information

Serial Edition *Computers in libraries.*

Numbered	Published on	Expected on	Status	Notes
Issue Vol 28, No 7	07/15/2008	07/15/2008	Arrived	

Item

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme

4 - Damaged status

5 - Use restrictions

7 - Not for loan

8 - Koha collection

a - Location (home branch)

b - Sublocation or collection (holding branch)

c - Shelving location

d - Date acquired

e - Source of acquisition

f - Coded location qualifier

g - Cost, normal purchase price

o - Koha full call number

p - Piece designation (barcode)

t - Copy number

u - Uniform Resource Identifier

v - Cost, replacement price

w - Price effective from

z - Public note

- Enter the item information and click 'Save'

Questions

What if I have to receive a combined issue?

If your serial has decided to combine issue 1000 and 1001 into one issue you can simply delete the expected issue dated 1001 and alter the issue for 1000 to show that it's a combined issue. After deleting an issue the system should continue with its prediction pattern by stating that the next expected issue is 1002.

5. Editing Subscriptions

Instructions for editing a serial subscription.

- To edit a serial, perform a search for the serial in question

Search Subscriptions:

ISSN: Title:

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

Serials subscriptions

ISSN	Title	Note	Library (Callnumber)	
1041-7915	Computers in libraries.		CPL	Issue History Serial receive

- Click on the subscription title to see the serial summary

[New Subscription](#)
[Edit](#)
[Renew](#)
[Receive](#)

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 10
- Librarian identity: nce
- Vendor: [Information Today](#)
- Biblio: (729) [Computers in libraries.](#)
- Library: TPL
- Serial receipt creates an item record.
- Call Number: Z678.9.A1 S6
- Notes: Combined in July & November

Planning

Beginning date: 01/15/2008

Frequency (*): 1/Month Manual history: ☐

Number pattern: Volume, Number

Starting with:	28	7
Rollover:		10

Irregularity: 2 issues

First arrival: 07/15/2008

Number of months: 12

- To edit a subscription, click Edit and choose Edit Subscription

[Edit](#)
[Renew](#)

[Edit Subscription](#)
[Edit as New \(Duplicate\)](#)
[Delete Subscription](#)

- This will open a form where you can edit the details of your subscription

Modify subscription for Computers in libraries.

Subscription details

Subscription # 10

Librarian: nce

Vendor: 3 (Information Today) [Search for a vendor](#)

Biblio: 729 (Computers in libraries.) [Search for Biblio](#) [Edit biblio](#) **Required**

☒ create an item record when receiving this serial
☐ do not create an item record when receiving this serial

Call Number: Z678.9.A1 S6

Library: Troy (select a library)

Serials planning

First issue publication date: 07/15/2008

Next issue publication date: 07/15/2008

Frequency: 1/month **Required**

Manual history: ☐

Numbering pattern: Volume, Number

	Volume	Number
Starting with:	28	7
Rollover at:		10

- Subscription editing allows you to edit the next expected date, but not the first acquisition date (unless you haven't received any issues yet), thus allowing for adjustments in the prediction pattern.
- When editing the Numbering Formula, note that it will not change the next expected issue, but the following issue will be changed

Numbering formula: Vol {X}, No {Y}

- TIP: If you want to change your next expected issue to the new Numbering Formula, this can be done manually when receiving the issue.

Editing Received Issues

- To edit a serial, perform a search for the serial in question

Search Subscriptions:

ISSN: Title:

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

Serials subscriptions

ISSN	Title	Note	Library (Callnumber)	
1041-7915	Computers in libraries.		CPL	Issue History Serial receive

- Click on the subscription title to see the serial summary

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 10
- Librarian identity: nce
- Vendor: [Information Today](#)
- Biblio: (729) [Computers in libraries.](#)
- Library: TPL
- Serial receipt creates an item record.
- Call Number: Z678.9.A1 S6
- Notes: Combined in July & November

Planning

Beginning date: 01/15/2008

Frequency (*): 1/Month Manual history : ☐

Number pattern: Volume, Number

Starting with:	28	7
Rollover:		10

Irregularity: 2 issues

First arrival: 07/15/2008

Number of months: 12

- To edit received issues, click 'Serial Collection' on the menu on the left

[Home](#) > [Serials](#) > Details for Subscription #8

[Serial Collection](#)

- [Edit Routing List](#)
- [Claims](#)
- [Check Expiration](#)

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 8
- Librarian identity: nce
- Vendor: [Information Today](#)
- Biblio: (729) [Computers in libraries.](#)

- From here you can pick which received items you'd like to edit

Serial Collection information for *Computers in libraries.*

Subscription Summary

Subscription Num.	Frequency	Numbering pattern	Library	Call Number	Notes	Routing	Renew
# 6	1/Month	Volume, Number	CPL	Z678.9.A1 S6	Combined issues in July/August and November/December	Edit Routing List	

2008

Date published	Date received	Number	Status	Notes	branch	Edit
09/15/2008	09/15/2008	Vol 28, No 8	Expected		CPL	<input checked="" type="checkbox"/>
07/15/2008	07/15/2008	Vol 28, No 7	Arrived	July/August	CPL	<input type="checkbox"/>
06/15/2008	06/15/2008	Vol 28, No 6	Arrived		CPL	<input type="checkbox"/>
05/15/2008	05/15/2008	Vol 28, No 5	Arrived		CPL	<input type="checkbox"/>

[Edit serials](#)

6. Routing Lists

Instructions for setting up routing lists for your serials.

- Search for the serial for which you want to create a routing list.

Search Subscriptions:

ISSN: Title:

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

[Home](#) > [Serials](#)

- [Claims](#)
- [Check Expiration](#)

Serials subscriptions

ISSN	Title	Note	Library (Callnumber)	
0000-0027	Library journal.		CPL	Issue History Serial receive

- Click on the serial title (ex. Library journal).
- Choose 'Create Routing List' from the menu on the left.

[Home](#) > [Serials](#) > [Edit Routing List](#)

- [Serial Collection](#)
- [Create Routing List](#)
- [Claims](#)
- [Check Expiration](#)

Create Routing List

Serial Title: Library journal.

Issue:

List Member:	Name	Location	Rank	Delete
			1	<input type="button" value="Delete"/>

[Add List Member](#) [Delete All](#)

Notes:

- Click 'Add List Member' and search for the members.

Edit Routing List

Serial Title: Library journal.

Issue:

List Member:	Name	Location	Rank
	Edna Acosta		1

[Add List Member](#) [Delete All](#)

Notes:

- Rank each member and add any necessary notes.
- Click 'Save'.
- In the next window, you will be able to preview and print the routing slip by clicking 'OK, Preview Routing Slip'.

Preview Routing List

Serial Title: Library journal.

Issue:

List Member:	Name	Location
	Edna Acosta	
	Dawn Burgess	
	Bob Singleton	

Notes:

Questions

What is a routing list and why would I want one?

A routing list is a list of people who should receive a serial when it arrives in the library. This is an easy way to pass a popular library related journal from staff member to staff member without writing a list of names and stapling it to the journal (a common method used in many libraries).

7. Managing Serial Claims

Claims are needed when an issue of a serial has not been received by the library on time.

The claims interface helps the librarian provide the expected issue information for a notice to be sent to the supplier.

- Click the 'Claims' link on the left hand side of the screen
- If you have any items marked as 'late' or 'missing' then you can choose to submit a claim for that item by choosing the supplier from the menu and clicking 'OK'

Claims

View:

Missing Issues

Claim	Supplier	Title	Issue number	Status	Since	Begin Claim
<input type="checkbox"/>	Information Today	Computers in libraries.	Month: 10 / Issue: 10	Missing	05/15/2008	Export item data
<input type="checkbox"/>	Information Today	Computers in libraries.	Vol 28, No 7	Expected	07/15/2008	Export item data
<input type="checkbox"/>	Information Today	Computers in libraries.	Vol 28, No 7	Expected	07/15/2008	Export item data
<input type="checkbox"/>	Information Today	Computers in libraries.	Volume 28, Number 6	Expected	06/15/2008	Export item data

Select notice:

- IMPORTANT:** A claims letter need to be defined for this function

- *Get there:* Tools > Notices
- There are two ways to lodge a claim with the supplier:
 - Using a letter defined in 'Notices'.
 - Can be chosen from the 'Select Letter' pull down
 - Exporting the claims information for each individual missing item.
 - This downloads a CSV file to your local machine with all the claim data ready for additional formatting before sending to the supplier.

UNFINISHED

8. Check Expiration

Check for expiration dates of your serial subscriptions.

This tool will let you search for all serials that will expire before a specific date. This is a handy tool when it comes time to budget for new serials.

Searching

- Enter in your search criteria
 - TIP: Only expiration date is required
- Your results will appear below the search boxes

ISSN	Title	Note	Expiration date
1041-7915	Computers in libraries.		05/15/2017

- From here you can click on the serial title and edit the record with new subscription information

9. Serials in the OPAC

Information on the display of serials in the OPAC

When a serial is viewed in the OPAC there will be a 'Subscription' tab that needs to be clicked to view additional serial subscription information.

Computers in libraries.

Type: Serial

Publisher: Meckler, c1988-

Description: v. : ill. ; 28 cm.

ISSN: 1041-7915.

Related Subjects: [Libraries -- Automation -- Periodicals](#) | [Library science -- Computer programs -- Periodicals](#) | [Minicomputers -- Periodicals](#) | [Information technology -- Periodicals](#) | [Information Systems -- Periodicals](#) | [Libraries -- Periodicals](#) | [Computers -- Periodicals](#) | [Bibliotheken -- Micro-ordinateurs -- Périodiques](#) | [Bibliothèques -- Automatisation -- Périodiques](#) | [COMPUTER APPLICATIONS](#) | [LIBRARY AUTOMATION](#) | [LIBRARIES](#) | [MICROCOMPUTERS](#) | [Automatisation](#) | [Bibliothèque](#) | [Micro-ordinateur](#)

No tags for this title. [Add](#)

This is a serial subscription

(There are 4 subscriptions associated with this title).

At branch: CPL

Combined issues in July/August and November/December

The 3 latest issues for this subscription:

Issue #	Date	Status	Note
Vol 29, No. 3	03/15/2009	Missing	
Vol 29, Issue 2	02/15/2009	Arrived	
Vol 29, Issue 1	01/15/2009	Arrived	

To determine how many issues display in the OPAC by default you must set the OPACSerialIssueDisplayCount system preference.

- *Get there:* More > Administration > Global System Preferences > Serials > OPACSerialIssueDisplayCount

Below the list of recent issues is a link to 'More details.' Clicking this link will show additional information on the subscription.

- Depending on what you set the SubscriptionHistory preference to you will either see detailed information or just a summary
- If SubscriptionHistory is set to simplified you will see only a one sentence summary

CPL

Available Issues

,Vol 28, No 7,Vol 28, No 8,Vol 28, No 9

- If SubscriptionHistory is set to full there will be a table for each year with detailed information

[2008 Compact view](#)

Date	Library	Notes	Date received	Number	Status
11/15/2008	CPL	Nov/Dec	11/15/2008	Vol 28, No 10	Waited (Nov/Dec)
10/15/2008	CPL		10/15/2008	Vol 28, No 9	Arrived
09/15/2008	CPL		09/15/2008	Vol 28, No 8	Arrived
07/15/2008	CPL	July/August	07/15/2008	Vol 28, No 7	Arrived (July/August)

- *Get there:* More > Administration > Global System Preferences > OPAC > SubscriptionHistory

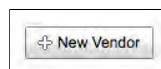
Acquisitions

Manual for Koha Version 3.0 (stable)

1. Create a Vendor


Keep track of your book vendors for ordering.

- Search for the vendor you want by using the 'Vendor Search' at the top.
- If 'no results found', click on 'New Vendor'.



- Enter the information for your vendor
 - TIP: Only the 'Company Name' is required but the more contact information you provide, the easier it will be to contact vendors when necessary

Company details	Contact details
Company Name * <input type="text" value="Borders"/>	Contact Name <input type="text" value="John Smith"/>
Postal Address <input type="text" value="555 Book Street"/>	Position <input type="text"/>
Physical Address <input type="text"/>	Phone <input type="text"/>
Phone <input type="text"/>	Alternative phone <input type="text"/>
Fax <input type="text"/>	Fax <input type="text"/>
Website <input type="text" value="http://borders.com"/>	E-mail <input type="text"/>
	Notes <input type="text"/>

Ordering information
Vendor is: <input checked="" type="radio"/> Active <input type="radio"/> Inactive 
Preferred publishers <input type="text"/>
List Prices are <input type="text" value="AUD"/>
Invoice Prices are <input type="text" value="AUD"/>
Discount <input type="text"/> %
Notes <input type="text"/>
<input type="button" value="Save"/> Cancel

- Active/Inactive
 - Orders can only be placed against Active vendors.
 - TIP: Mark vendors inactive if you no longer order from them or if they merged with another vendor, but you want to keep the data of your orders with them
- Preferred publishers
 - This is for information only and is a space where you can record what the vendor sells
- List Prices/Invoice Prices
 - If using multiple currencies you will need to pick which currency the totals are in when listed by the vendor and on the invoice.
 - TIP: Some vendors will list the prices in their own currency, but bill in your currency
- Discount
 - Some vendors will offer a blanket discount to all orders placed with them, this will be calculated from their list price.
- Notes
 - Include any notes that you may want to record for internal purposes.

2. Managing Suggestions

Manage patron purchase suggestions via Acquisitions.

IMPORTANT: To use this feature, purchase suggestions need to be turned on in system preferences.

- *Get there:* More > Administration > Global System Preferences > OPAC > suggestion

IMPORTANT: Suggestions are only managed here if the emailPurchaseSuggestions preference is turned off.

- *Get there:* More > Administration > Global System Preferences > Acquisitions > emailPurchaseSuggestions

Manage Suggestions

To manage suggestions, go to More > Acquisitions

- Click 'Manage suggestions'
- If you have suggestions to manage they will appear here

- **IMPORTANT:** You need to have authorized values for 'Reason' already set before working with suggestions
 - TIP: Reasons are the librarian's reason for accepting/rejecting request
 - If reasons are not set the Suggestions page will look like this:

Suggestion	Suggested by	Date	Reason	Accept	Reject	Delete
Chocolat, by Joanne Harris ; Published by Viking	Engard, Nicole	09/16/2008	No reasons defined in authorized values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- If you get this error, click 'authorized values'
 - TIP: You can also edit these values by going to More > Administration > Authorized Values
- Choose SUGGEST from the pull down

- Enter a short 'Authorized value' and a longer 'Description' (this second field is optional)

New authorised value

Category: SUGGEST

Authorized value:

Description:

- This will result in a list of values that can be added to or edited at any time

Show Category:

The list of patron suggestion reject or accept reasons

Category	Authorized value	Description	Edit	Delete
SUGGEST	DAMAGED	The copy on the shelf was very damaged	Edit	Delete
SUGGEST	FORCLASS	Needed for a class	Edit	Delete
SUGGEST	ILL	Available via ILL	Edit	Delete
SUGGEST	MISSING	Library's copy missing	Edit	Delete
SUGGEST	POPULAR	Bestseller	Edit	Delete

- It will also add these values to the pull down on the manage suggestions page

Indo, by Elizabeth Gilbert
© 2006 ;
Published by
Bloomsbury

Engard , Nicole 04/24/2008 -- Choose a reason --

- Choose a reason --
- Needed for a class
- The copy on the shelf was very damaged
- Bestseller
- Library's copy missing
- Available via ILL
- Others...

Choose a reason for all marked entries: -- Choose a reason -- [Mark all with this reason](#)

- If there are no errors, continue to approving or rejecting the request and submitting a reason

[Accepted](#) [Pending](#) [Rejected](#)

Suggestion	Suggested by	Date	Reason	Accept	Reject	Delete
Cathedral and the Bazaar, by Eric S. Raymond © 2001 ; Published by O'Reilly	Engard , Nicole	04/24/2008	Needed for a class	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eat, Pray, Love: One Woman's Search for Everything Across Italy, India and Indo, by Elizabeth Gilbert © 2006 ; Published by Bloomsbury	Engard , Nicole	04/24/2008	Bestseller	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- TIP: By choosing 'Others...' from the reason pull down you will be able to enter a free text reason.

[back to list](#)

- After choosing your reason, click 'Change Status'
- TIP: Statuses can be updated in bulk by choosing from the pull down at the bottom and clicking 'Mark all with this reason'

Suggestions

Accepted Pending Rejected

Suggestion	Suggested by	Date	Reason	Accept	Reject	Delete
Cathedral and the Bazaar, by Eric S. Raymond © 2001 ; Published by O'Reilly	Engard , Nicole	04/24/2008	Available via ILL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Eat, Pray, Love: One Woman's Search for Everything Across Italy, India and Indo, by Elizabeth Gilbert © 2006 ; Published by Bloomsbury	Engard , Nicole	04/24/2008	Available via ILL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Choose a reason for all marked entries: Available via ILL [Mark all with this reason](#)

- The item will be moved to the 'Accepted' or 'Rejected' menu
- If you accidentally pick the wrong option (accept or reject) you can always edit your selection by visiting the appropriate tab

Suggestions

Accepted Pending Rejected

Suggestion	Suggested by	Date	Reason	Reason Update	Accept	Reject	Delete
Cathedral and the Bazaar, by Eric S. Raymond © 2001 ; Published by O'Reilly	Engard , Nicole	04/24/2008		Needed for a class	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Ordering from a Suggestion

Instructions for placing acquisitions orders from patron purchase suggestions.

See section 7.2. Managing Suggestions to learn how to manage patron suggestions prior to reading this section of the manual.

- If a purchase suggestion is 'Accepted' it will be ready for order
- To order from a patron suggestion you will need to be in Koha's 'Acquisitions' module. You can find this module in your global nav at the top of the screen, under the 'More' dropdown list



- In order to start any order you must first pick a vendor

Acquisitions

Start, receive, or modify any order

Vendor:

- You will be brought to a page where you can view or add orders for that vendor

New Supplier	New Order	Edit Supplier	Manage Orders	Receive Parcel
--------------	-----------	---------------	---------------	----------------

Borders

Order	Order receive	Company
Add order	Receive order	Borders
No pending baskets		

- Click 'Add order'
- Choose 'From a suggestion'

New Basket for [Borders](#)

Order Details

Basket empty

Add To Order

- From an existing record:
- [From a Suggestion](#)
- [From a new \(empty\) record](#)

- Click 'Order' next to the suggestion you'd like to order

Suggestions

Suggestion	Suggested by	Accepted by	
Eat, Pray, Love - Elizabeth Gilbert copy. year:2006 published by:Viking (ISBN: 0670034711)	Acevedo, Henry	Acevedo, Henry	Order

- The order form will have some information filled in. The librarian can fill in the rest of the necessary information for that order before clicking 'Save'

New order (defined from suggestion #4)

Catalogue details

Title:

Author:

Publisher:

Copyright date:

Item type:

ISBN:

Series:

Library:

Accounting Details

Quantity: 2

Fund: Children's Materials
General Stacks
Reference Materials

Vendor price: 14.99

Replacement cost : 14.99

Budgeted Cost: 14.99

Total: 29.98

Actual cost:

Purchase order: BOR12345

Invoice number: (Fill when receiving)

Notes: ordered because of patron request

The 2 following fields are available for your own usage. They can be useful for statistical purposes

Sort field 1:

Sort field 2:

[Save](#) [Cancel](#)

- Note that librarians can change information entered by patrons if they know better (above the ISBN and publisher are different)
 - TIP: After entering a quantity and vendor price, the other fields will be calculated automatically.
- After clicking 'Save' you will be brought to an order summary

Basket 3 for [Borders](#)

Basket Details

Basket number: 3
Managed by:
Open on: 03/21/2008
For vendor ID: 2
Invoice number:
[Close this basket](#)

Order Details

Order	Title	Publisher	RRP	Est.	Qty.	Total	Fund	Modify	Delete
3	Eat, Pray, Love Elizabeth Gilbert ordered because of patron request	Penguin	14.99	14.99	2	29.98	General Stacks	Modify	Delete
SubTotal			29.98		2	29.98			
GST (0.00%)			0.00			0			
TOTAL (USD)			29.98		2	29.98			

4. Placing Orders

Instructions for placing acquisitions orders in Koha.

- In order to start any order you must first pick a vendor

[New Supplier](#)

Acquisitions

Start, receive, or modify any order

Vendor:

- You will be brought to a page where you can view or add orders for that vendor

Borders

Order	Order receive	Company	Basket	Items	Created by	Date	
Add order	Receive shipment	Borders	2	1		03/17/2008	closed on 07/18/2008 View
			3	1		03/21/2008	closed on 03/21/2008 View
			5	1		06/02/2008	modify

- Click 'New Order'

New Basket for [Borders](#)

Order Details

Basket empty

Add To Order

- From an existing record:
- [From a Suggestion](#)
- [From a new \(empty\) record](#)

- You can add a new order from a book you already have in your catalog, a suggestion from a patron or an empty form.
 - TIP: For instructions on ordering from a suggestion see 'Managing Suggestions' in this manual
- To order from an existing record, search for the record in your system
- To order a new book, click 'From a new (empty) record'

New order

Catalogue details

Title:
Author:
Publisher:
Copyright date:
Item type:
ISBN:
Series:
Library:

Accounting Details

Quantity:
Fund:
Vendor price:
Replacement cost :
Budgeted Cost:
Total:
Actual cost:

- Fill in the fields for your order.
 - TIP: After entering a quantity and vendor price, the other fields will be calculated automatically.
 - Actual Cost will be used to subtract from your budgets (whereas the other fees will be used when calculating replacement costs)
 - IMPORTANT: Never enter currency symbols when filling in monetary amounts, these may cause errors.**
- After clicking 'Save' you will be brought to an order summary

Basket 13 for [Borders](#)

Basket Details

Basket number: 13
 Managed by: Nicole Engard
 Open on: 02/05/2009
 For vendor ID: 2
 Invoice number:
 Closed On: 02/05/2009

Order Details

Order	Title	ISBN	Publisher	RRP	Est.	Qty.	Total	Fund
18	The girl with no shadow : Harris, Joanne, pass on to cataloging ASAP	9780061431623	William Morrow,	11.00	11.00	2	22.00	General Stacks
		SubTotal	22.00		2	22.00		
		GST (0.00%)	0.00			0		
		TOTAL (USD)	22.00		2	22.00		

- If you are done adding to that order, click the 'Close this basket' link
 - TIP: This is not necessary, you will still be able to mark items received without closing a basket. Closing a basket is good practice for keeping track of late orders which is discussed in this manual.

5. Receiving Orders

Instructions for receiving orders placed via acquisitions.

After your orders have been entered into the system and sent off to the vendors, you will need to mark them received.

TIP: To receive serials see the 'Receiving Serials' part of this manual.

- To start you must first pick a vendor

[New Supplier](#)

Acquisitions

Start, receive, or modify any order

Vendor: [Search](#)

- After searching for a vendor you will see all open orders on a summary page

[New Vendor](#) [New Order](#) [Edit Vendor](#) [Manage Orders](#) [Receive Shipment](#)

Borders

Order	Order receive	Company	Basket	Items	Created by	Date	
Add order	Receive shipment	Borders	2	1		03/17/2008	closed on 07/18/2008 View
			3	1		03/21/2008	closed on 03/21/2008 View
			5	1		06/02/2008	modify

- To receive an order click the 'Receive shipment' button or link

Receive shipment from vendor [Borders](#)

2 shipments found

Invoice / Code: <input type="text"/>	From: <input type="text"/>	Sort by : Code	<input type="button" value="Filter"/>
To: <input type="text"/>	Results per page : 20		

Line	Date Received	Invoice Number	Item Count	Biblio count	Items expected
1	07/11/2008		1	1	1
2	03/21/2008	123456	4	2	4

Receive a new shipment

Vendor Invoice

Shipment date:

[Cancel](#)

- Enter the invoice number in 'Vendor invoice' and the date the shipment was received in 'Shipment date'
- Click 'Save'

Receipt Summary for *Borders* [123456AB] on 07/22/2008

Invoice number: 123456AB

Received by: nce

On: 07/22/2008

Items in shipment

Quantity	Basket/Order	Summary	View Record	Est cost	Actual cost	TOTAL
					0.00	0.00
						0.00

Search orders to add to this shipment

Search ISBN or Title:

or select a pending orders

BASKET	Summary	View Record	Still on order	Unit cost	Order cost	
1	Accidental Library Manager	MARC Card	1	14.25	14.25	Receive order
2	Too many tamales /	MARC Card	1	12.00	12.00	Receive order
3	Eat, Pray, Love	MARC Card	2	14.99	29.98	Receive order
5	The Companions	MARC Card	2	15.00	30.00	Receive order
		TOTAL	6		86.23	

- You'll need to choose which items arrived in this shipment
- Either search by title or ISBN or click 'Receive order' next to the item you'd like to mark as received

Receive items from : Borders [123456AB] (order #1)

Catalogue Details Title: Accidental Library Manager Author: Rachel Singer Gordon Copyright: ISBN: Series:	Accounting details Date received: 07/22/2008 Quantity ordered: 1 Quantity received: 1 Replacement cost: 15.00 Budgeted cost: 14.25 Actual cost: 15.000000
--	--

Item details (n): (add to catalogue)

Volume/Copy (for serials):

Item barcode:

Home library:

Shelf location:

Item type:

Collection:

+ [Cancel](#)

- Be sure to update the 'Quantity received' as well as any other information you need for your records
 - TIP: To add another received item, click the '+' (plus) icon at the bottom left. If you add too many click the '-' (minus) to the right of the '+' (plus)
- Click 'Save'
- You will now see the received items in the summary of 'Items in this shipment'

Items in shipment						
Quantity	Basket/Order	Summary	View Record	Est cost	Actual cost	TOTAL
1	1 / 1	Accidental Library Manager	View MARC	14.25	15.00	15.00
1	5 / 6	The Companions	View MARC	15.00	13.50	13.50
SUBTOTAL					28.50	28.50
TOTAL						28.50

- When you've added all of the items to your shipment you can browse away from the page.
 - To make edits to your shipment return to Acquisitions and search for the vendor in question.
 - Click the 'Receive Shipment' button
 - Your previous orders will be searchable and editable from here

Receive shipment from vendor [Borders](#)

6 shipments found

Invoice / Code: <input type="text"/>	From: <input type="text"/>	Sort by: <input type="text" value="Code"/>	<input type="button" value="Filter"/>
To: <input type="text"/>	Results per page: <input type="text" value="20"/>		

Line	Date Received	Invoice Number	Item Count	Biblio count	Items expected
1	08/26/2008		1	1	1
2	08/19/2008		1	1	1
3	07/25/2008	453453434	2	1	2
4	07/22/2008	123456AB	2	2	2
5	07/11/2008		1	1	1
6	03/21/2008	123456	4	2	4

Receive a new shipment

Vendor Invoice:

Shipment date:

[Cancel](#)

6. Late Orders

Late orders is a report that checks for orders that were placed X days ago and still haven't been marked as received.

- Click on 'Late Orders' on the menu on the left

- You will be presented with a list of orders with baskets that have been closed for 30+ days

Order Date	Vendor	Information	Total cost	Basket
03/21/2008 (59 days)	Borders	Accidental Library Manager Author: Rachel Singer Gordon Published by: Information Today	15.00x1 = 15.00	1
03/21/2008 (59 days)	Borders	Eat, Pray, Love Author: Elizabeth Gilbert Published by: Penguin	14.99x2 = 29.98 General Stacks	3
Total			44.98	Claim Order

7. Budgets

Learn how ordering affects budgets.

Every order placed using the Acquisitions module is recorded in the budgets and funds set up by the library. See the 'Accounts & Budgets' section of this manual. This document will walk you through the affect that orders have on your budgets.

- When placing an order you're asked to choose a 'Fund' and enter the 'Vendor price'. From this price the 'Replacement cost', 'Budgeted cost' and 'Total' will automatically fill in. If these prices do not match what the library is charged (because of discounts or credits), enter in an 'Actual cost' as well.

- The 'Replacement cost' will be entered into the record when the item is marked as received by the library and will be charged to patrons should the item be marked lost.
 - **IMPORTANT: Never enter currency symbols when filling in monetary amounts, these may cause errors.**
- Your order details will not show the 'Actual cost' data, but this information has been saved.

Order Details									
Order	Title	Publisher	RRP	Est.	Qty.	Total	Fund	Modify	Delete
7	Tar Beach / Ringgold, Faith.	Crown Publishers,	12.00	12.00	1	12.00	Children's Materials	Modify	Delete
SubTotal			12.00		1	12.00			
GST (0.00%)			0.00			0			
TOTAL (USD)			12.00		1	12.00			

- Your Funds & Budgets summary on the Acquisitions home page will show that the 'Vendor price' has been committed

Funds and Budgets				
[Manage]				
Budgets	Total	Spent	Comtd	Avail
Children's Materials	5000.00	0.00	12.00	4988.00
General Stacks	20000.00	56.99	89.96	19853.05
Reference Materials	5000.00	0.00	0.00	5000.00
Total	30000.00	56.99	101.96	29841.05

Use your reload button [ctrl + r] to get the most recent figures. Comr approximate only, as exchange rates will affect the amount actually

- When receiving the item the 'Actual cost' will appear again

Accounting details	
Date received:	07/11/2008
Quantity ordered:	1
Quantity received:	<input type="text" value="1"/>
Replacement cost:	<input type="text" value="12.00"/>
Budgeted cost:	<input type="text" value="12.00"/>
Actual cost:	<input type="text" value="10.000000"/>

- After receiving an order the budget will show that the amount spent is the 'Actual cost' not the 'Vendor price' as it previously showed.

Funds and Budgets				
[Manage]				
Budgets	Total	Spent	Comtd	Avail
Children's Materials	5000.00	10.00	0.00	4990.00
General Stacks	20000.00	56.99	89.96	19853.05
Reference Materials	5000.00	0.00	0.00	5000.00
Total	30000.00	66.99	89.96	29843.05

Use your reload button [ctrl + r] to get the most recent figures. Comr approximate only, as exchange rates will affect the amount actually

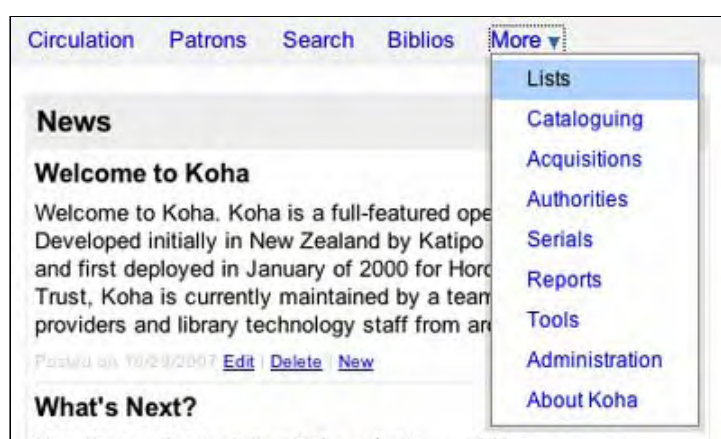
Lists

Manual for Koha Version 3.0 (stable)

1. Managing Lists

The 'Lists' module lets you manage lists created by your staff and patrons.

- Go to the 'Lists' module (usually under 'More' in your Global Nav)



About Lists

Lists are permanent lists of items, similar to 'favorites'. Lists can be used to keep track of 'favorites' or to create reading lists as a readers' advisory tool. Items in a list link directly to your catalog.

There are three kinds of 'lists'

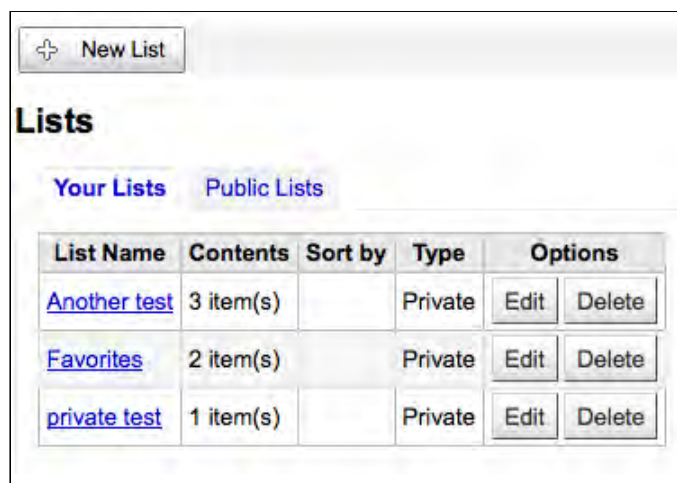
- 'private': private lists can only be viewed and edited by the user who created the list.
 - TIP: Any logged in patron can create a private list
- 'public': public lists can be viewed by the public (anyone) but only edited by the user who created the list.
 - TIP: Any logged in patron can create a public list
- 'free': free lists can be viewed or edited by any user
 - TIP: Only staff can create free lists, but any patron can edit them via the OPAC once created
 - **IMPORTANT: Keep in mind that any visitors to your OPAC can alter this list.**

IMPORTANT: To use lists this function must be enabled in your system preferences

- *Get there:* Administration > System Preferences > OPAC > virtualshelves

To add (create) a new list

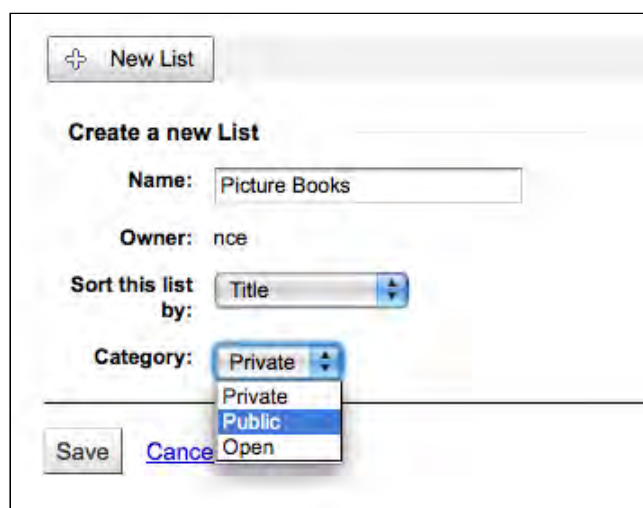
- Click on 'New List'



The screenshot shows a button labeled '+ New List' at the top. Below it is the heading 'Lists'. Under 'Lists', there are two tabs: 'Your Lists' (selected) and 'Public Lists'. Below the tabs is a table with the following data:

List Name	Contents	Sort by	Type	Options
Another test	3 item(s)		Private	Edit Delete
Favorites	2 item(s)		Private	Edit Delete
private test	1 item(s)		Private	Edit Delete

- Enter a 'Name' for your list in the field provided
- The 'Owner' should automatically be the individual logged into the Koha staff interface
- Choose a 'Category' for your new list (options are 'private', 'public' or 'free' as explained above)



The screenshot shows the 'Create a new List' form. It includes a '+ New List' button at the top. The form fields are:

- Name:** A text input field containing 'Picture Books'.
- Owner:** A text input field containing 'nce'.
- Sort this list by:** A dropdown menu with 'Title' selected.
- Category:** A dropdown menu with 'Private' selected. The dropdown is open, showing options: 'Private', 'Public', and 'Open'.

At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Open'.

- Click 'Save'

Edit Lists

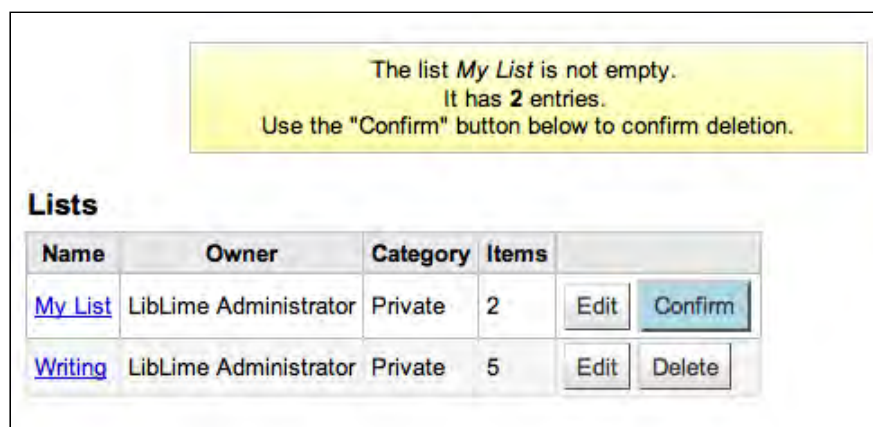
- Click on 'edit' next to the list you wish to edit OR click on the name of the list and then click 'Edit List'
- Edit details
- Click 'Save'

TIP: For instance, let's say you were putting together a reading list. You could make

that list 'private' until items had been added, then 'edit' the list to change the 'category' to public when you were ready for the list to be seen by other users.

Deleting a List

- Click on 'Delete' next to the list you wish to delete OR click on the name of the list and then click 'Delete List'
- You will be asked "Are you sure you want to delete this List?"
- If yes, click 'OK'. If no, click 'Cancel'
- If your list is populated, you will be prompted one more time to confirm whether you want to delete the list



- Click 'Confirm' next to the list you want to delete to delete it permanently

Questions

Can I add items to a staff list right from the 'Lists' module?

- BUG #2036

Yes! To add an item to a list from the 'Lists' management module...

- Click on the name of the list you wish to add items to
- Scan or paste the barcode/s of the item you wish to add
- Click 'Add'

IMPORTANT: You currently cannot 'browse' items to add to a list from within the 'Lists' module. If you want to browse (perform a search and add items that way)...

- Click on 'Search the catalog' in your contextual search bar'
- Perform a search
- Click on the title of the item you wish to add to a list
- From the details page, click 'Add to List' [see below]

[New](#) [Edit](#) [Save](#) [Add to List](#) [Print](#) [Place Hold](#)

The girl who owned a city /

By [Nelson, O. T.](#)

- Published by: [Lerner Publications Co., \(Minneapolis :\)](#)
- Description: 179 p. ; , 23 cm.
- ISBN: 0440928931:
- Subjects:
 - ◊ [Survival -- Fiction.](#)
 - ◊ [Science fiction.](#)
- Copyright: 1975

[Holdings](#) [Descriptions](#)

Why can I add items to other users' 'private' lists when I'm logged in as staff?

No, private lists will remain private. You can see your own private lists from the staff client by clicking on the 'Your Lists' tab.

[New List](#)

Lists

[Your Lists](#) [Public Lists](#)

List Name	Contents	Sort by	Type	Options
Another test	3 item(s)		Private	Edit Delete
Favorites	2 item(s)		Private	Edit Delete
private test	1 item(s)		Private	Edit Delete

As a staff member, what can I do with public lists created by patrons?

Anyone with superlibrarian permission to edit/delete public patron lists. Editing is limited to editing the title or sorting order.

I have the 'virtualshelves' setting 'disabled' why can I still see the 'lists' menu in my staff client

Even if lists are 'disabled' for the OPAC, staff users still have access to them from the staff side. The 'virtualshelves' preference only affects whether or not the feature is available from the OPAC.

Reports

Manual for Koha Version 3.0 (stable)

1. Report Wizards

Learn how to use canned statistical reports.

1.1. Report Wizards Overview

General information about statistical wizards.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)



'Wizards'

- **BUG #2648**

Koha's reporting module includes four powerful reporting 'wizards' (catalog, patrons, circulation and acquisitions). There are three elements of a standard 'guided' report: columns, rows and filters. For issues and acquisitions, desired data is placed in each cell (count or amount, or loan length). The resulting report is exported for display in a Web browser, or in a spreadsheet (MS-Excel & OpenOffice.org work fine).

IMPORTANT: The pre-packaged 'Wizards' are designed to be a simple statistical snapshot. In each wizard, you will choose a single category for to represent 'rows' and another to represent 'columns'. For more complex reports, you will use the 'Guided Reports' wizard

TIP: The statistic reports are exclusive, so, if you want a report to show data for the month of November you should pick October 31 to December 1.

Statistics Wizards

In addition to the built in statistic reports, there are some samples that can be viewed and used in the cronjobs folder:

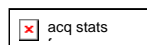
- misc/cronjobs/stats/monthly_circulation_statistics.pl
- misc/cronjobs/stats/monthly_new_items_statistics.pl
- misc/cronjobs/stats/monthly_new_patron_statistics.pl

1.2. Acquisitions Statistics

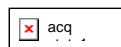
Learn how to use the Acquisition statistical wizard.

IMPORTANT: The Acquisitions 'Wizard' is designed to be a simple statistical snapshot. In each wizard, you will choose a single category to represent 'row' and another to represent 'column'.

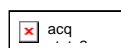
- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Acquisitions' under 'Statistics Wizards'
- Enter in the information you'd like to see in your report



- Click 'Submit'



- By changing the report from 'Count items' to 'Amount' you will see the total spent

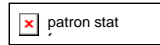


1.3. Patron Statistics

Learn to use the patron statistical wizard.

IMPORTANT: The Patron 'Wizard' is designed to be a simple statistical snapshot. In each wizard, you will choose a single category to represent 'row' and another to represent 'column'.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Patrons' under 'Statistics Wizards'

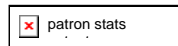

 A screenshot of a web form with a radio button selected next to the text 'patron stat'.

- Use the radio button to choose a category for 'row' (In the case above, we've selected 'Patron category' for the row)
 - Use dropdowns to apply filters to this category
- Use the radio button to choose a category for 'column' (In the case above, we've selected 'Library' for the column)
 - Use dropdowns to apply filters to this category
 - Options without radio buttons such as 'Patron status', 'Patron activity', and 'Date of Birth' are limits you can place on the report.

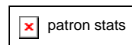
For instance, in the example above, I could choose to limit my patrons counted to only those that are 'debarred' or 'lost'.

TIP: To place no limits for a category, choose the blank field. When blank field is chosen all categories will be included in the statistical count.

- Choose a method for 'outputting' (viewing) the report: Options are 'browser' or saving as a file viewable in a program like Excel.


 A screenshot of a web form with a radio button selected next to the text 'patron stats'.

- Click 'Submit'


 A screenshot of a web form with a radio button selected next to the text 'patron stats'.

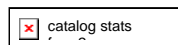
- For each patron category (rows), there is a count given by library. Rows and columns are also totaled

1.4. Catalog Statistics

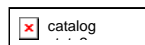
Learn to use the catalog statistics wizard.

IMPORTANT: The Catalog 'Wizard' is designed to be a simple statistical snapshot. You will choose a single category to represent 'row' and another to represent 'column'.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Catalog' under 'Statistics Wizards'


 A screenshot of a web form with a radio button selected next to the text 'catalog stats'.

- Use the radio button to choose a category for 'row' (In the case above, we've selected 'item type' for the row)
 - Use dropdowns to apply filters to this category
- Use the radio button to choose a category for 'column' (In the case above, we've selected 'home library' for the column)
 - Use dropdowns to apply filters to this category
- Choose a method for 'outputting' (viewing) the report: Options are 'browser' or saving as a file viewable in a program like Excel.
- Click 'Submit'


 A screenshot of a web form with a radio button selected next to the text 'catalog'.

1.5. Circulation Statistics

Learn to use the circulation statistics wizard.

IMPORTANT: The Circulation 'Wizard' is designed to be a simple statistical snapshot. You will choose a single category to represent 'row' and another to represent 'column'.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)

- Choose 'Circulation' under 'Statistics Wizards'

- Use the radio buttons under 'Row' and 'Column' to choose which data set will appear where

- The above will output something like this

1.6. Serials Statistics

Learn to use the serials statistical wizard.

IMPORTANT: The Serials 'Wizard' is designed to be a simple statistical snapshot.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Serials' under 'Statistics Wizards'

- Choose your vendor and branch (or leave them both set to 'Any' to get information on all subscriptions) and whether to include expired subscriptions
- Your results will appear as a list of subscriptions

1.7. Patrons with the most checkouts

This guided report will show you which patrons have checked out the most items.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Patrons with the most checkouts' under 'Top Lists'

- Choose any filters from the top section
 - **IMPORTANT:** Choose something other than 'None' from the 'By' field to see results

- Once you have your fields fill in, click 'Submit'

1.8. Most Circulated Items

This guided report will show you which items have circulated the most.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Most-Circulated Items' under 'Top Lists'

- Choose any filters from the top section
 - **IMPORTANT:** Choose something other than 'None' from the 'By' field to see results

- Once you have your fields fill in, click 'Submit'

1.9. Patrons with no checkouts

This guided report will give you a snapshot of which items have not been checked out at all.

You can limit these items by branch

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Patrons who haven't checked out' under 'Inactive'

- If you do not choose any filters or limits, you will see all patrons who have not checked anything out of your library

1.10. Items with no checkouts

This guided report will give you a snapshot of items have not been checked out at all.

You can limit these items by branch

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Items not checked out' under 'Inactive'

- If you do not choose any filters or limits, you will see all items that have not been checked out of any library in your system

- By choosing a limit you will change the output
- Choose a limit of 'Library'

- And your results will provide a summary table at the top and an individual table for each branch

1.11. Catalog by Item Type

This one-step report will show you how many items of each item type are currently in your branch library or libraries.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Catalog by Item Type' under 'Other'

- Choose a branch (or choose the blank field at the top of the dropdown menu to choose all branches)
- Click 'Submit'

1.12. Lost Items

This report lists items marked as lost within your library.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Lost Items' under 'Other'

- Choose category to 'Order by' (the 'order by' field effects what ordering method is used when displaying the lost items)
- Enter a 'Barcode' if searching for a single item; if not leave this field blank
- Choose a 'Branch' to perform the report on (or choose 'All' field at the top of the dropdown menu to choose all branches)
- Choose an 'Item Type' to perform the report on (or, leave at the default 'All' to perform the report on all item types)
- Choose a 'Lost Status' to search only for items that are assumed lost (long overdue), missing, or lost (or, leave this set to 'All' to see all lost items)
- Click 'Submit'

1.13. Average Loan Time

This report will show you the average time items were out for loan.

- Go to the 'Reports' module (usually under 'More' in your Global Nav)
- Choose 'Average loan time' under 'Other'
- Choose one field to appear in the rows and another to appear in the column. If you choose either of the date fields remember to choose to show data by 'Day', 'Month', or 'Year'

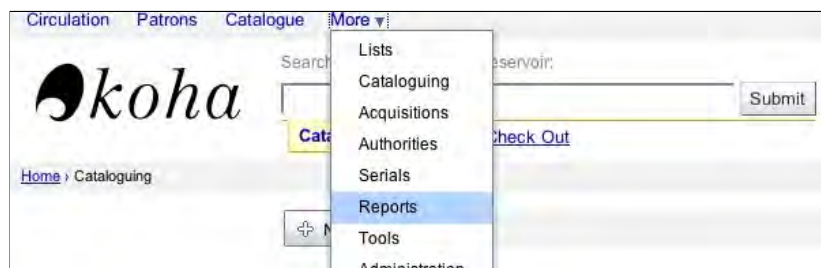
- Your choices will determine what the results look like

2. Custom Reports

If the report you need is not already available, the 'Guided Reports' Wizard will walk anyone through creating a custom report.

There are three elements of a standard 'guided' report: columns, rows and filters. For issues and acquisitions, desired data is placed in each cell (count or amount, or loan length).

- Go to the 'Reports' module (usually under 'More' in your Global Nav)



- Choose 'Guided Reports' under 'Guided Reports Wizard'

Now, you can build a report in 6 easy steps!

Step 1: Choose a Module to Report on

Build A Report

Step 1 of 6: Choose a Module to Report on

Choose: Circulation

- Circulation
- Catalog
- Patrons
- Acquisitions
- Accounts

Next >>

- Choose a module to build a report on
- Click 'Next'

Step 2: Pick a Report Type

IMPORTANT: Only Tabular should be chosen with this option - **BUG #3324**

Step 3: Select Columns for Display

Step 4: Select Criteria to Limit

Step 5: Pick which columns to total

Build and Run Reports

- [Build New](#)
- [Use Saved](#)
- [Create from SQL](#)

Reports Dictionary

- [View Dictionary](#)

Step 5 of 6: Pick which columns to total

<input type="checkbox"/> items.datelastseen	sum
<input type="checkbox"/> items.itemlost	sum

Next >>

sum
min
max
avg
count

Step 6: Choose how you want the report ordered

Build and Run Reports

- [Build New](#)
- [Use Saved](#)
- [Create from SQL](#)

Reports Dictionary

- [View Dictionary](#)

Step 6 of 6: Choose how you want the report ordered

<input type="checkbox"/> items.datelastseen	asc
<input type="checkbox"/> items.itemlost	asc

Finish

asc
desc

Questions

Can I have reports run on a schedule?

Yes, you can use the Task Scheduler tool.

- *Get there:* More > Tools > Task Scheduler

For more: see the Task Scheduling section of this manual.

Is there a repository for reports?

There is a page on the Koha Wiki: http://wiki.koha.org/doku.php?id=sql_library with reports written by Koha libraries around the world.

NEKLS also has a great page (<http://www.nexpresslibrary.org/training/reports-training/>) with a list of reports they have written.

3. Dictionary

The dictionary provides a way that you can define custom criteria for reporting by combining existing criteria.

Adding A New Definition

Step 1: Name

At this step you will need to fill out the following details:

- Definition Name: Short name that is used for display and selection
- Definition Description: Used within the dictionary only to provide further detail about the definition

Step 2: Area

Now you will need to select the area that you are binding the definition to.

IMPORTANT: Definitions can only be bound to one area.

TIP: If you wish to use a similar definition in say, Circulation and Patrons, you will need to create two definitions - one for each area

Step 3: Columns

Now select the criteria that you wish to use to build your definition.

- Click on the database column name and then press the 'add' button.

- Once you have selected all your desired columns, press Next.

TIP: Definitions can be deleted easily, and if you are still learning the structure of the Koha data, it may take a little while to sort out which fields you require. Some trial and error may be required

Step 4: Values

Now you need to select the values for each column that will make up your new criteria. There are different ways to define the values, based on the type of data in the column you have selected

- **Search String Matches** For free text fields in that database, enter a string/phrase for the criteria to match on
- **Date** For date fields you can either select:
 1. Date Range: enter values in both date fields
 2. All Data Before A Given Date: enter a value in the XXX field only
 3. All Data After A Given Date: enter a value in the XXX field only
- **Select From Database Value** For data that is given an authorized value in the Koha database, you the drop down list to select one value

For our example we have a select box

Dictionary
Add New Definition

Step 1: Name Step 2: Area Step 3: Columns **Step 4: Values**

borrowers.zipcode

Next

- 44224
- 44236
- 44240
- 21234
- 44262
- 44306
- 44310
- 00000
- 19030
- 11111
- 12345

Step 5: Confirmation

You will be presented with a confirmation once you have finished step 4

Dictionary
Confirm Definition

Name: Zipcode

Description:

Area: Circulation

Columns	Values
borrowers.zipcode	44240

Save

Click 'Save'

New Definition

Dictionary

Use the dictionary to define custom criteria for reporting.

Current Terms

Filter by area: All Go

Name	Description	Area	Definition
Zipcode		Circulation	AND borrowers.zipcode='44240'

Delete Definition

Using A Definition

Once you have created your new definition and it shows on in the Dictionary, you can use the definition for reporting.

When you go to create a new report, the criteria for the area you are reporting on will automatically show as limits in the Guided Reports wizard

Step 4 of 6: Select Criteria to Limit on

<input type="checkbox"/> Item-level Item Type	SR
<input type="checkbox"/> Type	issue
<input type="checkbox"/> Borrowers Category	IL
<input type="checkbox"/> Branch Code	MAIN
<input type="checkbox"/> Publication Date	
<input type="checkbox"/> Accession Date	

Dictionary Definitions

☐ Zipcode

Next >>

OPAC

Manual for Koha Version 3.0 (stable)

1. Your Account

Managing the patron's account from the OPAC.

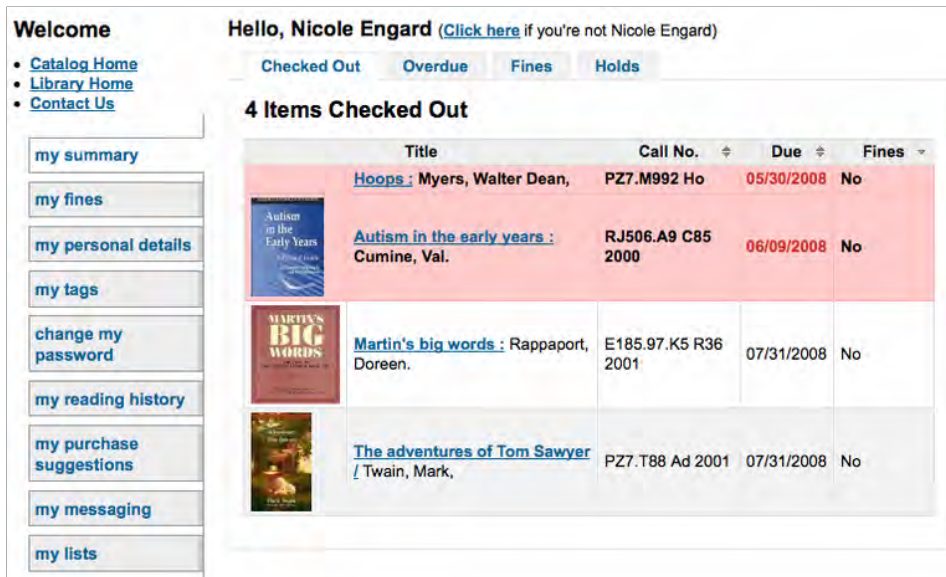
You must be logged in in order to view information about your account.



When logged in, you can...

- View and renew items checked out
- View and renew items overdue
- View status of and cancel holds you have placed
- View fines you owe
- Submit changes to your personal details (like name or address)
- Submit a change to your password
- View your Reading History (also known as 'Checkout History')
- Manage your purchase suggestions (view status and add)
- Manage how you're notified by the library of events and due dates
- Review and edit your lists

Example of account homepage is below...



Welcome

- [Catalog Home](#)
- [Library Home](#)
- [Contact Us](#)

my summary

my fines

my personal details

my tags

change my password

my reading history

my purchase suggestions

my messaging

my lists

Hello, Nicole Engard ([Click here](#) if you're not Nicole Engard)

Checked Out Overdue Fines Holds

4 Items Checked Out

Title	Call No.	Due	Fines
Hoops : Myers, Walter Dean,	PZ7.M992 Ho	05/30/2008	No
Autism in the early years : Cumine, Val.	RJ506.A9 C85 2000	06/09/2008	No
Martin's big words : Rappaport, Doreen.	E185.97.K5 R36 2001	07/31/2008	No
The adventures of Tom Sawyer / Twain, Mark,	PZ7.T88 Ad 2001	07/31/2008	No

Here's what the tabs do...

My Summary

'Checked Out'

- Click on the 'my summary' tab
- Click on the tab 'Checked Out' to view the items you currently have checked out.

NOTE: This is the default view from the account homepage.

TIP: You can see and renew both overdue and non-overdue items from this page. In this case, overdue items are highlighted in pink and have a red 'due date'.

To renew, click 'Renew' next to the item you wish to renew. If you have reached the maximum number of renewals, you will need to return the item on or before its due date.

- **IMPORTANT: To allow renewals in the OPAC you need to turn on the 'OpacRenewalAllowed' preference**
 - Get there: More > Administration > Global System Preferences > OPAC > OpacRenewalAllowed

'Overdue'

- Click on the 'my summary' tab
- Click on the tab 'Overdue' to view ONLY the items you currently have overdue.
- To renew, click 'Renew' next to the item you wish to renew.

'Holds'

- Click on the 'my summary' tab
- Click on the 'Holds' tab

Checked Out

Holds

Holds (2 total)

Title	Placed On	Pick Up Location	Status	Modify
Treasure Island /	04/18/2008	Centerville	Item waiting to be pulled	Cancel
Chocolat :	04/18/2008	Midway	Item waiting to be pulled	Cancel

- This will list all items you have on hold and their statuses
 - TIP: To show the patron's priority in the holds queue, turn ON the OPACDisplayRequestPriority preference.

- [Catalog Home](#)
- [Library Home](#)
- [Contact Us](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

[Checked Out](#)
[Overdue](#)
[Credits](#)
[Holds](#)

Holds (7 total)

Title	Placed On	Pick Up Location	Priority	Status
Chocolat :	04/18/2008	Midway	1	Item waiting to be pulled
Christmas in the big house, Christmas in the quarters /	07/17/2008	Midway		Item waiting at Midway
Health education teacher resource handbook :	08/11/2008	Centerville	2	Item waiting to be pulled
How to use standards in the classroom / Douglas E. Harris and Judy F. Carr with Tim Flynn, Marge Petit, and Susan Rigney.	08/19/2008	Centerville	1	Item waiting to be pulled
The magic wings :	09/29/2008	Centerville	3	Item waiting to be pulled

- To cancel a hold, just click the 'Cancel' button next to the hold in question
 - You will be asked to confirm if you are sure

'Fines'

- Click on the 'my summary' tab
- Click on the 'Fines' tab

[Checked Out](#)
[Overdue](#)
[Fines](#)
[Holds](#)

Fines and Charges

Amount

You currently owe fines and charges amounting to: **45.00**

- For libraries that charge files, this will show you your total balance.
 - TIP: To see you entire account information click on the 'my fines' tab

My Fines

- Click on the 'my fines' tab

Date	Description	Fine Amount	Amount Outstanding
05/30/2008	Lost Membership Card FeeNew Card	\$5.00	\$5.00
05/30/2008	Payment,thanks -	\$-25.00	\$0.00
05/30/2008	Martin's big words : 09/05/2008	\$40.00	\$40.00
05/19/2008	Lost Item 502326000545	\$25.00	\$0.00
02/18/2008	Account Management fee	\$0.00	\$0.00
Total Due			\$45.00

- This will list your account information (including credits and charges)

My Personal Details

- Click on the 'my personal details' tab
- You profile information will be available for you to update
- Submitting the form will notify a library staff member, who will make the changes permanent.
 - An email will be sent to the address set at the branch level on the staff client
 - Get there:* More > Administration > Libraries, branches and groups
 - The librarian can then make the requested changes to the patron record by copying the info out of the email and into the staff client

My Tags

IMPORTANT: This feature is still experimental

- Click on the 'my tags' tab

Welcome

- [Catalog Home](#)
- [Library Home](#)
- [Contact Us](#)

- [my summary](#)
- [my fines](#)
- [my personal details](#)
- [my tags](#)
- [change my password](#)
- [my reading history](#)
- [my purchase suggestions](#)
- [my messaging](#)
- [my lists](#)

My Tags

Term	Title	Date Added	Delete
chocolate	Chocolat : by King, Stephen.	05/09/2008	Delete
magic	Chocolat : by King, Stephen.	05/09/2008	Delete
magic	Harry Potter and the deathly hallows / by Rowling, J. K.	05/09/2008	Delete
wizard	Harry Potter and the deathly hallows / by Rowling, J. K.	05/09/2008	Delete
wizard	Harry Potter and the sorcerer's stone / by Rowling, J. K.	05/09/2008	Delete

All Tags

Show up to tags from other users. [OK](#)

magic wizard chocolate

- From this menu you will see all of the tags you've added to items as well as the numbers of tags from other patrons.

Change My Password

- Click on the 'change my password' tab

Your password must be at least 3 characters long.

Current Password:

New Password:

Re-Type New Password:

[Submit Changes](#) [Cancel](#)

- From here you can change your login information for the OPAC
- TIP: Library staff cannot see or retrieve passwords for patrons. If a patron loses their password the only option is to have the library staff change the password from the staff client.

My Reading History

IMPORTANT: requires opacreadinghistory to be turned ON






- *Get there:* More > Administration > General preferences > OPAC > opacreadinghistory

To view your reading history:

- Click the 'my reading history' tab

[Nicole Engard's account](#) → Checkout History

- [Show All Items](#)
- [Showing Last 50 Items](#)

	Title	Call No.	Date
	Autism in the early years : Cumine, Val.	RJ506.A9 C85 2000	(Checked out)
	The adventures of Tom Sawyer / Twain, Mark,	PZ7.T88 Ad 2001	(Checked out)
	Hoops : Myers, Walter Dean,	PZ7.M992 Ho	(Checked out)
	Martin's big words : Rappaport, Doreen.	E185.97.K5 R36 2001	(Checked out)
	Harry Potter and the deathly hallows / Rowling, J. K.	[Fic]	04/24/2008

- This will show you everything you've checked out from the library

My Purchase Suggestions

This will list all of the title suggestions and their order status

- Click the 'my purchase suggestions' tab

My Purchase Suggestions				
	Summary	Note	Managed by	Status
<input type="checkbox"/>	Accidental Library Manager Rachel Singer Gordon, - Information Today			Ordered by the library
<input type="checkbox"/>	Cathedral and the Bazaar Eric S. Raymond, - 2001, - O'Reilly			Accepted by the library (Needed for a class)
<input type="checkbox"/>	Eat, Pray, Love Elizabeth Gilbert, - 2006, - Viking			Available in the library
<input type="checkbox"/>	Eat, Pray, Love Elizabeth Gilbert, - 2006, - Viking			Ordered by the library
<input type="checkbox"/>	The Success of Open Source Steven Weber, - 2004, - Harvard University Press	ISBN-10: 0674012925		Suggestion declined

[Add a purchase suggestion](#)

- From here you can view the status of each suggestion
- If you'd like to delete a suggestion, check the box and click the 'Delete Checked Items' button
- You can also add a new suggestion right from this page by clicking 'Add a purchase suggestion'

My Messaging

This will allow patrons to decide on special messaging options.

IMPORTANT: requires EnhancedMessagingPreferences to be turned ON

- *Get there:* More > Administration > General preferences > Patron > EnhancedMessagingPreferences

IMPORTANT: This feature is still experimental and not fully functional

- Upcoming events is not implemented

IMPORTANT: To use SMS messaging services, you must first set the SMSSendDriver preference

- *Get there:* More > Administration > General preferences > Patron > SMSSendDriver

	Days in advance	Email	Digests only?	Do not notify
Item Checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Upcoming Events	0	<input type="checkbox"/>	-	<input type="checkbox"/>
Item DUE	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>
Item Check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Advance Notice	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Item Checkout
 - Will send a receipt to the patrons when they check out an item
- Upcoming Events
 - Not implemented yet
- Item Due
 - Will send a notice the day the item is due
- Hold Filled
 - Will send a notice when a hold is waiting at the library
- Item Check-in
 - Will send a receipt to the patrons when they items in
- Advance Notice
 - Will send an item due notice X days before the due date
- If you would like to receive one message describing all items, instead of one message for each item, check the 'Digests only?' box.
 - This will combine all messages of the same time - so all overdue items will come in one email and all events will come in another. It will not combine all messages into one email.

My Lists

Patrons can keep their own private lists or create public lists to share with all visitors to the OPAC. This tab allows patrons to maintain their lists.

IMPORTANT: requires virtualshelves to be turned ON

- *Get there:* More > Administration > General preferences > OPAC > virtualshelves

Lists				
Your Lists Public Lists				
List Name	Contents	Sort by	Type	
Favorites	2 item(s)		Private	Edit Delete
private test	1 item(s)		Private	Edit Delete
New List				

TIP: When deleting your lists you will be asked to confirm deletion of any list with items in it.

2. Lists

Koha 'Lists' (previously known as 'Virtual Shelves') enable staff and patrons to create permanent booklists which can be shared with others. All items in a 'List' link directly to your library's catalog.

IMPORTANT: To enable lists, the virtualshelves preference must be turned on

- *Get there:* More > Administration > Global System Preferences > OPAC > virtualshelves

Use 'Lists' to...

- create online Reading Lists for patrons (for instance, by age, or perhaps something like 'Newberry Winners' or 'Oprah Club Books')
- create lists of 'Favorites'
- enable your community of users to contribute to readers' advisory by creating their own lists and sharing them with the public

Lists come in three varieties:

- private: Private Lists are just that- only able to be viewed and edited by the creator, but not by the public.
- public: Public Lists can be viewed by all, but edited only by the list's creator.
- open: Open Lists can be viewed by all and edited by all (logging in is not necessary). Open Lists will appear under the Public Lists heading on the OPAC.

IMPORTANT: library staff can only see public and free/open lists via the staff client, as well as any private lists they may have created

Create a New List

User must be logged in order to create a list through Koha's OPAC.

- If you aren't already, log in to your account using the login box provided
 - **IMPORTANT:** User must have requested password with library staff before attempting login. They can also change their 'login' at the time they tell staff their preferred password. Staff enters the information into Koha.
- Visit your account (click your name in the top right)
- Click on 'My Lists'

<p>Welcome</p> <ul style="list-style-type: none"> Catalog Home Library Home Contact Us <p>my summary</p> <p>my fines</p> <p>my personal details</p> <p>my tags</p> <p>change my password</p> <p>my reading history</p> <p>my purchase suggestions</p> <p>my messaging</p> <p>my lists</p>	<p>Lists</p> <p>Your Lists Public Lists</p> <table border="1"> <thead> <tr> <th>List Name</th> <th>Contents</th> <th>Sort by</th> <th>Type</th> <th></th> </tr> </thead> <tbody> <tr> <td>Favorites</td> <td>2 item(s)</td> <td></td> <td>Private</td> <td>Edit Delete</td> </tr> <tr> <td>private test</td> <td>1 item(s)</td> <td></td> <td>Private</td> <td>Edit Delete</td> </tr> </tbody> </table> <p>New List</p>	List Name	Contents	Sort by	Type		Favorites	2 item(s)		Private	Edit Delete	private test	1 item(s)		Private	Edit Delete
List Name	Contents	Sort by	Type													
Favorites	2 item(s)		Private	Edit Delete												
private test	1 item(s)		Private	Edit Delete												

- Click 'New List'

- Enter the information for your list and click 'Save'
- To add items to your list, search the OPAC

From the results page, you can add items to a list in one of two ways...

From the details screen

- Click on the TITLE or BOOK IMAGE of the item in the results list that you would like to add to a list
- Click 'Save to Your Lists' from the details page if the item

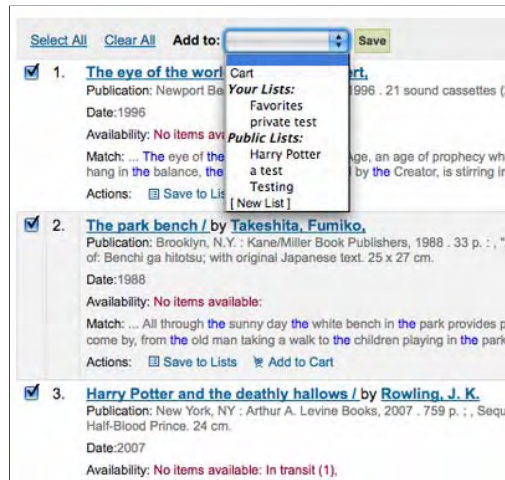
- You can choose to add the item to an existing list or to a new list from the pop up window

- Click 'Save' under the section you used.

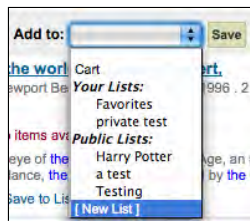
TIP: This is best for adding items one at a time.

From the results screen

- From the results screen, check the box next to each item you'd like to add to a List



- You can easily select all books on a results page by clicking 'Select All' at the top of the results list
 - TIP: This will only select all items on the page, you cannot select items from multiple pages to add to the list
 - TIP: To add results from multiple pages, select all from the first page and add them to the list, then browse to the second page and repeat
- Choose the list you'd like to add your items to from the 'Add to:' pull down at the top of the screen.
 - If the list you want doesn't exist, you can create a new list by choosing '[New List]' from the pull down



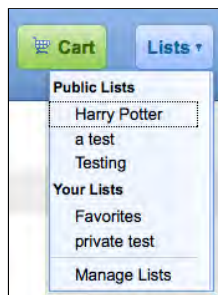
- After saving you will be prompted to enter a list name and type

Add to a New List:

List Name:

Category:

- TIP: When creating a new list this way, it may not appear on the Lists pull down without refreshing the page

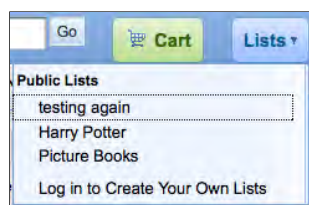


- Click 'Save'

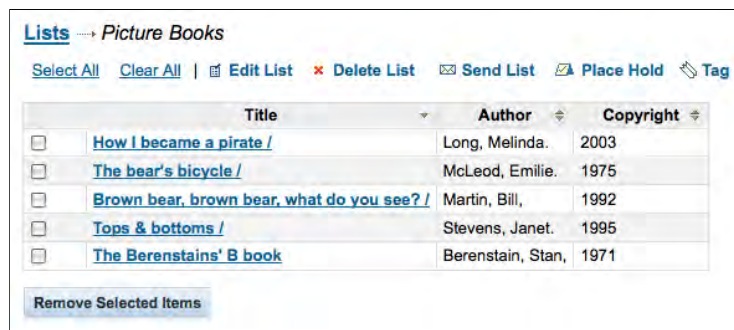
Viewing Lists

You must be logged into your account in order to view your private lists, but all public and open lists will appear to all visitors.

- If you aren't already, log in to your account using the login box
- OR, if you click on the 'Lists' button you will be prompted to log in in order to create a view Lists



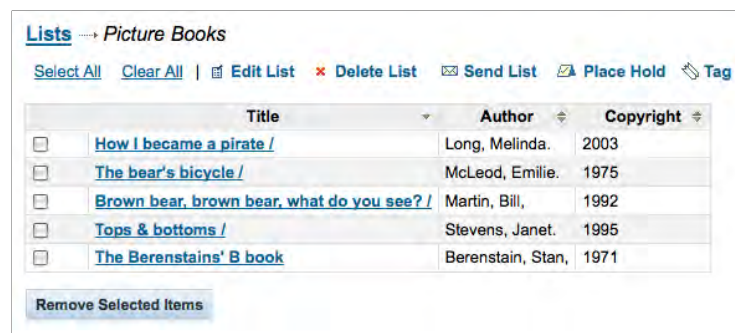
- Once you are logged in the 'Lists' button will include your private lists.
- To view a list, click the list title
- If you clicked on the 'Picture Books' list, you'd then get a list of all items in that list



- To look at the details of an item--or place a hold on it-- just click on the title of the item.
 - TIP: You can also send this list to yourself via email just by clicking the 'Send List' link
- Koha takes you directly to the details page of that item in your library's catalog

Managing Lists

When you click on a list you've created, you have the option to manage that list in several ways.



- You can
 - 'Select All' items and then 'Remove Selected Items'
 - Select items individually by checking the box next to the item and then 'Remove Selected Items'
 - 'Clear all' to clear all items you have selected
 - 'Edit List' to change the name of your List or change the sort order for your list
 - 'Delete List' to delete the entire List
 - 'Send List' via email to yourself or a friend
 - 'Place Hold' on checked items
 - 'Tag' selected items in bulk

TIP: If you click 'Clear All' when no items are selected, it won't do anything because no items are selected to clear.

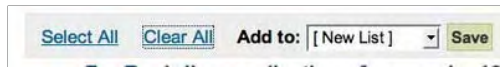
TIP: To quickly return to view all lists, click on "Lists" next to the title of the current list you are viewing (in this case '-> Heart Health')

Questions

I added items to a list from the results page and the boxes beside the items are still checked! Why?

After adding items to a list, you have to manually click 'Clear All' at the top of the results page in order to remove checks from the boxes of the items you've selected.

See example below...



How do I view just MY Lists?

Login to your account and visit your account page. Click the My Lists tab on the left to see just your lists.

3. Cart/Book Bag

Koha's 'Cart' is a shopping cart for users' selections.

Users can select and temporarily (for their session) save a list of items they find in the library catalog, then email or print the list to make searching the shelves easier.

IMPORTANT: Unlike 'Lists', the 'Cart' is NOT a permanent list of items. It is session-based and the cart can be emptied (or 'cleared') by the user at any time.

IMPORTANT: There is NO need to be logged in to use the 'Cart' feature.

TIP: The 'Cart' can be an invaluable tool for educators, students and staff. From the 'Cart' you can...

- Email cart items to yourself or others (for instance, a group of students or colleagues)
- OR... print out titles and call numbers for easy shelf browsing

Add items to the Cart

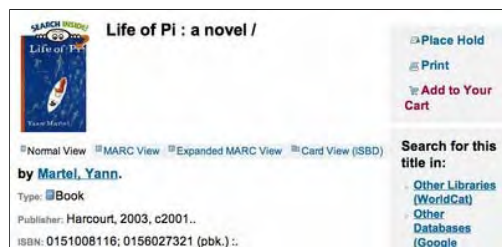
- Enter a search term (using either the simple or advanced search)

From the results page, you can add items to a list in one of two ways:

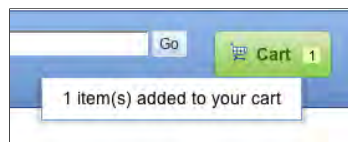
Add items to the Cart from the details screen

Best for adding **one** item at a time.

- Click on the TITLE or BOOK IMAGE of the item in the results list that you would like to add to the 'Cart'
- Click 'Add to Cart' from the details page if the item



- A pop-up message will let you know that the item has been added to the cart. The number displayed in the box inside the 'Cart' button updates to show the total number of items now in the cart after your addition.



Add items to the 'Cart' from the results screen

TIP: Best for adding several items at a time to the Cart.

- From the results screen, check the box next to each item you'd like to add to the 'Cart'
- Click 'Add to:' (probably at the top of your search results page) and select 'Cart' from the drop-down menu

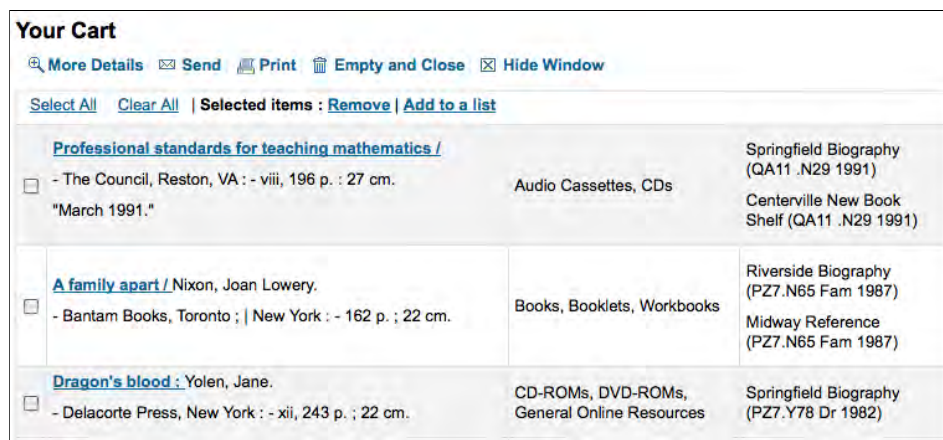


- A pop-up message will let you know that the item has been added to the cart. The number displayed in the box inside the 'Cart' button updates to show the total number of items now in the cart after your addition.



Working with items in the Cart

- Click on the 'Cart' button



When you click on the Cart, you have the option to do several things.

Send items by email

To send items by email from the cart..

- 'Select All' items in the Cart OR check boxes next to specific items you want to send by email
- Click 'Send'

Sending your cart

E-mail Address:

Comment:

Send

Cancel

- Enter an 'E-mail Address'
- Add a comment if you wish
- Click 'Send'

Print items

- 'Select All' items in the Cart and then 'Print' the items

Your Cart

[More Details](#)
[Send](#)
[Print](#)
[Empty and Close](#)
[Hide Window](#)

[Select All](#)
[Clear All](#)
| Selected items : [Remove](#) | [Add to a list](#)

Professional standards for teaching mathematics / <input type="checkbox"/> - The Council, Reston, VA : - viii, 196 p. : 27 cm. "March 1991."	Audio Cassettes, CDs	Springfield Biography (QA11 .N29 1991) Centerville New Book Shelf (QA11 .N29 1991)
A family apart / Nixon, Joan Lowery. <input type="checkbox"/> - Bantam Books, Toronto ; New York : - 162 p. ; 22 cm.	Books, Booklets, Workbooks	Riverside Biography (PZ7.N65 Fam 1987) Midway Reference (PZ7.N65 Fam 1987)
Dragon's blood : Yolen, Jane. <input type="checkbox"/> - Delacorte Press, New York : - xii, 243 p. ; 22 cm.	CD-ROMs, DVD-ROMs, General Online Resources	Springfield Biography (PZ7.Y78 Dr 1982)

Get More Details on the items listed

- Click 'More Details' to see a view of the items with record details
- To get back to a brief display, click 'Brief Display'

Your Cart

[Brief Display](#)
[Send](#)
[Print](#)
[Empty and Close](#)
[Hide Window](#)

[Select All](#)
[Clear All](#)
| Selected items : [Remove](#)

☐ **An American story**

COInS

ISBN	1574922734 :
Authors	
Publisher	United States : Hallmark Home Entertainment,
Details	1 videocassette (97 min.) : sd., col. ; 1/2 in.
Collection	Hallmark hall of fame
Subjects	
Copyright	1998
Notes	- Brad Johnson, Kathleen Quinlan, Tom Sizemore, Josef Sommer, G.W. Bailey, Patricia Clarkson, Lisa Blount, David Labiosa, John M. Jackson. - Music, Mark Snow ; editor, Robert Florio ; production designer, Ed Wittstein ; director of photography, Johnny E. Jensen ; executive producer, Robert Halmi, Sr. ; directed by John Gray. - Originally produced for television broadcast in 1992. - VHS format. - Hi-fi. - Rated PG. - Six soldiers return from WWII to find their small Texas town poisoned with greed and corruption, and risk their very lives in their greatest battle for freedom. - Closed-captioned for the hearing impaired.
Serial	1
Location	Springfield 2 (Extended Stacks)

☐ **Battle of Britain**

COInS

ISBN	0792855574
-------------	------------

Empty and Close Cart

- Click 'Empty and Close' to remove all items from the Cart and close the Cart window
- You'll probably be prompted to confirm you want Koha to perform this action. If yes, click 'OK'

Hide Window

- 'Hide Window' to close the Cart from view

To bring the Cart window up again, just click the 'Cart' button.



Questions

Can I place a hold from the Cart?

Yes. Simply check the items in your cart that you want to place on hold and click 'Place Hold'

Your Cart

[More Details](#)
[Send](#)
[Print](#)
[Empty and Close](#)
[Hide Window](#)

[Select All](#)
[Clear All](#)
 | Selected items : [Remove](#) | [Add to a list](#) | [Place Hold](#)

<input checked="" type="checkbox"/> Chocolat : King, Stephen, - Viking, New York : - 242 p. ; 23 cm.	Audio Cassettes, CDs	Centerville (PR6058.A68828 C46 1999) Midway (PR6058.A68828 C46 1999)
<input checked="" type="checkbox"/> Chocolat : Harris, Joanne, - Viking, New York : - 242 p. ; 23 cm. This is an awesome book	Audio Cassettes, CDs	Liberty New Book Shelf Liberty New Book Shelf Liberty New Book Shelf
<input type="checkbox"/> The girl with no shadow : Harris, Joanne, - William Morrow, New York : - 444 p. ; 24 cm. Sequel to: Chocolat. *Originally published in the United Kingdom in 2007 by Doubleday... under the title The lollipop shoes"--T.p. verso.	Audio Cassettes, CDs	Centerville Fiction (PR6058.A6828 G57 2008)

I don't see Cart option in my OPAC. How do I turn this feature on?

You can turn 'on' the Cart feature in 'Global System Preferences'

- *Get there:* More > Administration > Global System Preferences > OPAC > opacbookbag

4. Detail Page

Find information about the bib record on the detail page.

IMPORTANT: Remember that this page is customizable for each library and this manual only points out the location of fields in the default view.

The detail view is the page with all of the details about the title.

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#)

Published by : [Viking](#), (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources:
• [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1 \)](#)
[Descriptions](#)
[Comments](#)
[Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

[Place Hold](#)
[Print](#)
[Save to Your Lists](#)
[Add to Your Cart](#)

Search for this title in:

- Other Libraries ([WorldCat](#))
- Other Databases ([Google Scholar](#))
- Online Stores ([Bookfinder.com](#))

Save Record:
-- Choose Format --
[Go](#)

- The detail page gives you several view options. These are all tabbed across the top

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#).

Published by : [Viking](#) (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources: [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1 \)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
 - Choose Format -
 Go

- It also provides you with a way to browse the library shelves right from the OPAC:

Chocolat : a novel / [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#).

Published by : [Viking](#) (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources: [Official Book Page](#)

No tags for this title. Log in to add tags.

[Holdings \(1 \)](#) [Descriptions](#) [Comments](#)


Location	Collection	Call Number	Status	Date Due
Midway	Fiction	PR6058.A68828 C46 1999 (Browse Shelf)	Checked out	05/06/2008

- Clicking 'Browse Shelf' will open a shelf browser below the record


[Holdings \(2 \)](#) [Descriptions](#) [Comments](#)

Location	Call Number	Status	Date Due
Springfield	E185.97.K5 R36 2001 (Browse Shelf)	Item lost	
Centerville New Book Shelf	E185.97.K5 R36 2001 (Browse Shelf)	Checked out	05/09/2008


Browsing Springfield Library
[Close Shelf Browser](#)




BF723.E6 B46
[I have feelings](#)




D810.J4 R42
[The upstairs room](#)



E185.97.K5 R36 2001
[Martin's big words](#)



HQ35 .R44 1988
[Teen sexuality](#)



HV1780.2 .M66 1996
[Buddy, the first seeing eye dog](#)

- IMPORTANT:** requires the shelf browser to be enabled in the preferences
 - Get there: More > Administration > General preferences > OPAC > OPACShelfBrowser

MARC Fields

The following guide will go over where your MARC fields are being displayed:

- 020 - Your ISBN will appear beside an 'ISBN' label

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#)

Published by : [Viking](#), (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources:
• [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Save Record:
-- Choose Format --
[Go](#)

- TIP: If your ISBN is being truncated, you will want to turn on the XSLTDetailsDisplay system preference
 - *Get there:* More > Administration > Global System Preferences > OPAC > XSLTDetailsDisplay

- 100 - The statement of responsibility will display directly under the title

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#)

Published by : [Viking](#), (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources:
• [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Save Record:
-- Choose Format --
[Go](#)

- 245 - Your title will be across the top of the detail page

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#).

Published by : [Viking](#), (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources:
• [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
-- Choose Format --
[Go](#)

- 260 - Subfields \$a and \$b will appear next to the 'Published by' label and subfield \$c will appear beside the 'Year' label

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#).

Published by : [Viking](#), (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources:
• [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
-- Choose Format --
[Go](#)

- 300 - Physical details about your item will appear beside the 'Physical details' label

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#).

Published by : [Viking](#), (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolate -- France -- Fiction.](#) | [Lent -- France -- Fiction.](#) | [Cities and towns -- France -- Fiction.](#) | [Psychological fiction.](#) -- [Jcsh.](#)

Year : 1999

Online Resources:
• [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
-- Choose Format --
[Go](#)

- 440/490 - Your series data will appear beside a 'Series' label

Chilton's Chrysler LH-series 1998-01 repair manual /
 by **Godfrey, Eric.**
 Type: Book
 Series: Chilton's total car care.
 Publisher: Haynes Pub. ; Haynes North America, c2002..
 ISBN: 1563924668.
 Related Subjects: [Chrysler LH cars Maintenance and repair Handbooks, manuals, etc](#) | [Chrysler LHS automobile Maintenance and repair Handbooks, manuals, etc](#) | [Chrysler automobile Maintenance and repair Handbooks, manuals, etc](#)

No tags for this title. [Add](#)

Holdings (1) **Descriptions** **Comments** **Amazon Reviews**

Item type	Location	Call Number	Serial Data	Published	Status	Date Due
	Midway Reference	629.28722 21 (Browse Shelf)			Available	

- 5xx - Your notes fields will appear under the 'Descriptions' tab

Chocolat : Normal View MARC View ISBD View
 by **Harris, Joanne.**
 Published by : [Viking](#). (New York :)
 Physical details: 242 p. ; 23 cm.
 ISBN: 014100018X
 Subject(s): [Chocolate -- France -- Fiction](#) | [Lent -- France -- Fiction](#) | [Cities and towns -- France -- Fiction](#) | [Psychological fiction](#) -- [Jcsh](#)
 Year : 1999
 Online Resources:
 • [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

Holdings (1) **Descriptions** **Comments**

Chocolat begins with the arrival in a tiny French village of Vianne Rocher, a single mother with a young daughter, on Shrove Tuesday. As the inhabitants of Lansquenot-sous-Tannes clear away the remains of the carnival which heralds the beginning of Lent.
<http://www.joanne-harris.co.uk/pages/bookpages/chocolat.html>
 France
 1999 Whitbread Novel of the Year Award

Place Hold
Print
Save to Your Lists
Add to Your Cart

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
 -- Choose Format --
 Go

- 6xx - Your subject headings will appear beside a 'Subject(s)' label

Chocolat : Normal View MARC View ISBD View
 by **Harris, Joanne.**
 Published by : [Viking](#). (New York :)
 Physical details: 242 p. ; 23 cm.
 ISBN: 014100018X
 Subject(s): [Chocolate -- France -- Fiction](#) | [Lent -- France -- Fiction](#) | [Cities and towns -- France -- Fiction](#) | [Psychological fiction](#) -- [Jcsh](#)
 Year : 1999
 Online Resources:
 • [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

Holdings (1) **Descriptions** **Comments** **Amazon Reviews**

Item type	Collection	Location	Call Number	Status	Date Due
 Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

Place Hold
Print
Save to Your Lists
Add to Your Cart

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
 -- Choose Format --
 Go

- 856 - Online Resources will display as a bulleted list - **BUG #2951**
 - If you have filled in subfield Sy that will display, if not then the text in subfield Su will be printed

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#)

Published by : [Viking](#) (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolat -- France -- Fiction](#) | [Lent -- France -- Fiction](#) | [Cities and towns -- France -- Fiction](#) | [Psychological fiction -- Jcsh](#)

Year : 1999

Online Resources:

- [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

[Place Hold](#)
[Print](#)
[Save to Your Lists](#)
[Add to Your Cart](#)

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
 -- Choose Format --
[Go](#)

- Tags - Your tags will appear last on the list of details

Chocolat : [Normal View](#) [MARC View](#) [ISBD View](#)

by [Harris, Joanne](#)

Published by : [Viking](#) (New York :)

Physical details: 242 p. ; 23 cm.

ISBN: 014100018X

Subject(s): [Chocolat -- France -- Fiction](#) | [Lent -- France -- Fiction](#) | [Cities and towns -- France -- Fiction](#) | [Psychological fiction -- Jcsh](#)

Year : 1999

Online Resources:

- [Official Book Page](#)

Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

[Holdings \(1\)](#) [Descriptions](#) [Comments](#) [Amazon Reviews](#)

Item type	Collection	Location	Call Number	Status	Date Due
Audio Cassettes, CDs	Fiction	Midway	823/.914	Checked out	05/06/2008

[Place Hold](#)
[Print](#)
[Save to Your Lists](#)
[Add to Your Cart](#)

Search for this title in:

- [Other Libraries \(WorldCat\)](#)
- [Other Databases \(Google Scholar\)](#)
- [Online Stores \(Bookfinder.com\)](#)

Save Record:
 -- Choose Format --
[Go](#)

5. Holds in the OPAC

Placing and managing holds via the OPAC.

Patrons must be logged in in order to place a hold on an item for themselves through Koha's OPAC.

- Log in to your account using the login box provided

Log in to Your Account:

Login:

Password:

[Log In](#)

- Search for an item in the OPAC (using simple or advanced search)

Search

- You now have a list of results.
- You can place a hold on multiple items in the search results by checking the box next to them and clicking the 'Place Hold' link at the top of the results list.

Select All Clear All Add to: Save Place Hold

☒ 1. [Writing on-line : using computers in the teaching of writing](#)
by Collins, James L; Sommers, Elizabeth A.
Type: ☐ Book; Format: print ☐ ; Literary form: not fiction
Publisher: Boynton/Cook Publishers, c1985.
Availability: No copies available **Checked out (1)**.
Match: ... using **computers** in the teaching of writing / ... **Computer**-assisted instruct
Actions: [Place Hold](#) [Save to Lists](#) [Add to Cart](#)

☐ 2. [The Snarkout Boys & the avocado of death](#)
by Pinkwater, Daniel Manus.
Type: ☐ Book; Format: print; Literary form: fiction; Audience: Juvenile;
Publisher: Lothrop, Lee & Shepard, c1982.
Availability: No copies available
Match: ... Walter and Winston set out to rescue the inventor of the Alligator, a **com**
Actions: [Save to Lists](#) [Add to Cart](#)

☒ 3. [Computers in libraries](#)
Type: ☐ Continuing Resource; Format: print remote; Type of continuing resou
Publisher: Meckler, c1988-
Availability: **Copies available for loan**: Institut Protestant de Théologie[ab133] (1),
Match: ... **Computers** in libraries ... **Computers** in libraries. ... **Computer** programs ..

- To place a hold on one title you can click on the **TITLE** of the item in the results list that you would like to place a hold on.
- Or click 'Place Hold' below the record you want to place a hold on

[Treasure Island.](#)

by Stevenson, Robert Louis; Wyeth, N. C. (Newell Convers).

Type: ☐ Book; Format: print; Literary form: fiction; Audience: Juvenile;
Publisher: Scribner, 1981.

Availability: **Copies available at** Springfield (1).

Match: ... **Treasure** Island / ... While going through the possessions of a deceased guest who owed them money, the mistress of the inn and her son find a **treasure** map that leads to a pirate fortune as well as great danger. ... Buried **treasure** ...

Actions: [Place Hold](#) [Save to Lists](#) [Add to Cart](#)

- Click 'Place Hold' from the details page of the item

 **Treasure Island /**
by [Stevenson, Robert Louis](#); [Wyeth, N. C. \(Newell Convers\)](#).
☐ Normal View ☐ MARC View ☐ Expanded MARC View ☐ Card View (ISBD)
Type: ☐ Book

[Place Hold](#)
[Print](#)
[Save to Your Lists](#)
[Add to Your Cart](#)

- Complete the hold request by selecting a pick-up location from the dropdown menu under 'Pickup Location'

Confirm holds for: Nicole Engard (23529001223637)

Hold	Title	Priority	Place On:	Pickup Location
<input checked="" type="checkbox"/>	The prince and the pauper / , by Twain, Mark,	1 out of 0	<input checked="" type="radio"/> Next available copy <input type="radio"/> A specific copy	Centerville <input type="text"/>

[Place Hold](#)

- Select if you want to place a hold on next available copy OR a specific copy from a specific library by choosing the right radio button
- Click 'Place Hold'
- After hold has been placed, Koha takes you to your account view, showing you all the holds you currently have placed

Checked Out **Holds**

Holds (2 total)

Title	Placed On	Pick Up Location	Status	Modify
Treasure Island /	04/18/2008	Centerville	Item waiting to be pulled	Cancel
Chocolat :	04/18/2008	Midway	Item waiting to be pulled	Cancel

- TIP: To have the OPAC show the patron their priority in the list of holds, you must first turn on the OPACDisplayRequestPriority system preference
 - *Get there:* More > Administration > Global System Preferences > OPAC > OPACDisplayRequestPriority

Holds from Lists

Patrons can place holds on items found in lists just as easily as they can place holds on items found in search results.

- Click on the list you'd like to see
- Check the items you want to place on hold

Lists → [Picture Books](#)

[Select All](#) [Clear All](#) | [Edit List](#) [Delete List](#) [Send List](#) [Place Hold](#) [Tag](#)

	Title	Author	Copyright
<input type="checkbox"/>	How I became a pirate /	Long, Melinda.	2003
<input checked="" type="checkbox"/>	The bear's bicycle /	McLeod, Emilie.	1975
<input checked="" type="checkbox"/>	Brown bear, brown bear, what do you see? /	Martin, Bill,	1992
<input type="checkbox"/>	Tops & bottoms /	Stevens, Janet.	1995
<input type="checkbox"/>	The Berenstains' B book	Berenstain, Stan,	1971

[Remove Selected Items](#)

- Click 'Place Hold' at the top of the list

Confirm holds for: Nicole Engard (23529001223637)

Hold	Title	Priority	Place On:	Pickup Location
<input type="checkbox"/> No available items.	The bear's bicycle / , by McLeod, Emilie.	1 out of 0	<input type="radio"/> Next available copy <input type="radio"/> A specific copy	Centerville
<input checked="" type="checkbox"/>	Brown bear, brown bear, what do you see? / , by Martin, Bill,	2 out of 1	<input checked="" type="radio"/> Next available copy <input type="radio"/> A specific copy	Centerville

[Place Hold](#)

- A confirmation screen will appear with more information regarding the items you would like to put on hold - including their availability. (in the above image, only 1 of the 2 items I wanted is available for hold)
- If you would like a specific copy you can change the radio button from 'Next available' to 'A specific copy'

<input checked="" type="checkbox"/>	Brown bear, brown bear, what do you see? / , by Martin, Bill,	2 out of 1	<input type="radio"/> Next available copy <input checked="" type="radio"/> A specific copy	Centerville		
Select a specific copy:						
Copy	Item Type	Barcode	Home Library	Last Location	Call Number	Information
		502326000070	Centerville		PZ8.3.M418 Br 1992	Unavailable (lost or missing) Not on hold
		502326000069	Riverside		PZ8.3.M418 Br 1992	On hold for patron expected at RPL since 07/24/2008.

- When finished, click 'Place Hold' at the bottom and you will be added to the holds queue.

Hold Statuses

User must be logged in order to place a hold on an item for themselves through Koha's OPAC.

- Log in to your account using the login box provided

If already logged in...

- Click on your name (probably next to 'Logout' in the top right corner of the screen)
- Once in your account, click on the 'Holds' tab to see items on hold

Title	Placed On	Pick Up Location	Priority	Status
Chocolat :	04/18/2008	Midway	1	Item waiting to be pulled
Christmas in the big house, Christmas in the quarters /	07/17/2008	Midway		Item waiting at Midway
Health education teacher resource handbook :	08/11/2008	Centerville	2	Item waiting to be pulled
How to use standards in the classroom / Douglas E. Harris and Judy F. Carr with Tim Flynn, Marge Petit, and Susan Rigney.	08/19/2008	Centerville	1	Item waiting to be pulled
The magic wings :	09/29/2008	Centerville	3	Item waiting to be pulled

- To cancel a hold... click 'Cancel' next to the hold you wish to cancel

Questions

Can I place hold on multiple items at once in Koha?

Not yet, but soon. 'Bulk holds' will soon be available through the Koha 'cart', enabling you to check boxes next to items you want to hold, add them to the 'cart' and then place holds on all with one click.

What if I forget to log in before I've located a book I want to place a hold on?

No problem. If you click on 'Place Hold' on an item and are not yet logged in, Koha will prompt you to log in at that time. Once logged in, Koha takes you to the screen where you can place a hold on the item.

How will I know when my hold is waiting for me, ready for pick up?

If Koha has an email registered for your card number, you can automatically receive an email notification when a hold is ready for pick-up by updating your messaging preferences.

	Days in advance	Email	Digests only?	RSS	Do not notify
Upcoming Events	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item DUE	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advance Notice	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Submit Changes](#) [Cancel](#)

This option will only show up if the EnhancedMessagingPreferences preference is turned ON:

- *Get there:* More > Administration > Global System Preferences > Patrons > EnhancedMessagingPreferences

Additionally, if you log in to your account through the OPAC, the item status of a hold will change from 'Item waiting to be pulled' or 'Item in transit' to 'Item waiting at...' when the item is ready for pick-up.

Holds (2 total)

Title	Placed On	Pick Up Location	Status	Modify
Life of pi	04/28/2008	Midway	Item waiting at Midway	Cancel
Possession :	04/28/2008	Midway	Item waiting to be pulled	Cancel

6. Comments

Manage and add comments and reviews via the OPAC.


Comments are notes that can be added by visitors to the OPAC. Comments may also be referred to as reviews.

IMPORTANT: The reviewson system preference must be set to ON for this feature to show in the OPAC.

- *Get there:* More > Administration > Global system preferences > OPAC > reviewson

Adding Comments

Comments can be added from the detail view of any record in the catalog.



Harry Potter and the sorcerer's stone /
[Normal View](#) [MARC View](#) [Expanded MARC View](#) [Card View \(ISBD\)](#)
 by [Rowling, J. K.](#); [GrandPrê, Mary.](#)
 Type: [Book](#)
 Publisher: A.A. Levine Books, 1998..
 ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
 Related Subjects: [Wizards Fiction](#) | [Magic Fiction](#) | [Schools Fiction](#)
 Tags: [wizard](#) (2) [Add](#)

[Holdings \(0 \)](#)
[Descriptions](#)
[Comments](#)

There are no comments for this item.

[Post or edit your comments on this item.](#)

To add a comment:

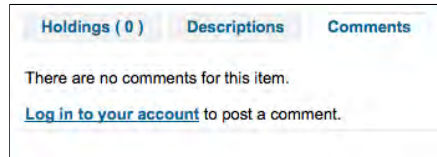
- Click the 'Comments' tab

[Holdings \(0 \)](#)
[Descriptions](#)
[Comments](#)

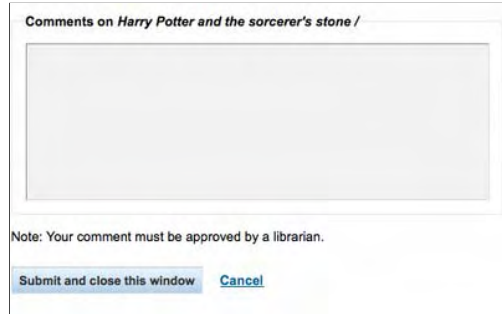
There are no comments for this item.

[Post or edit your comments on this item.](#)

- If you're logged in you will have the option to 'Post or edit' your comments
- If you're not logged in you will be prompted to log in



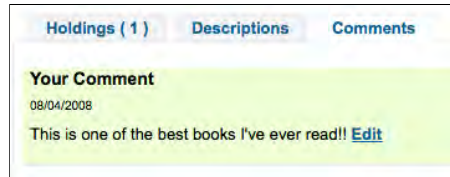
- To post your comment, click 'Post or edit your comments on this item'



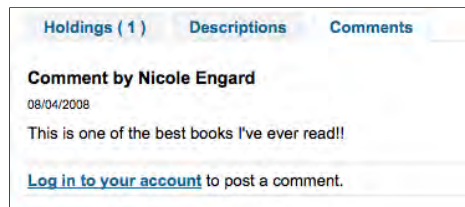
- Once you submit your comment you will notified that your comment is awaiting moderation



- By clicking 'Edit' you can alter your comment. - **BUG #2431**
- Once your comment has been approved you will see it on the record



- If you're not logged in the comment will show your name (as it appears on your patron record)



7. RSS Feeds

RSS Feed are a way to deliver information to patrons. There are several ways to do this in Koha.

7.1. Subscribing to RSS Feeds

Learn how to subscribe to RSS feeds in multiple browsers.

This video <http://www.youtube.com/watch?v=0klgLsSxGsU> is a great introduction to what RSS (Real Simple Syndication) is.

Subscribing via Email

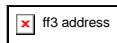
To receive updates via email you can paste the RSS feed address into an RSS to email service such as those listed in this guide by RSS Compendium (<http://allrss.com/rssreaderemail.html>).

Subscribing via IM

To receive updates via the instant messenger of your choice, you can sign up with a service such as notify.me (<http://notify.me/>).

Subscribing in Firefox 3.x

When you're on a search results page in Firefox you will notice a small blue icon to the right of your address bar.



Clicking this icon will bring up a subscription page



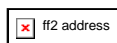
From this page you can choose what tool you'd like to use for your subscription. In Firefox you can alter this subscription page by going to Preferences > Applications > Web Feed:



TIP: Firefox has several add ons that you can use to read your feeds right in the browser.

Subscribing in Firefox 2.5.x

When you're on a search results page in Firefox you will notice a small orange icon to the right of your address bar.



Clicking this icon will bring up a subscription page



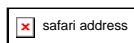
From this page you can choose what tool you'd like to use for your subscription. In Firefox you can alter this subscription page by going to Preferences > Feeds:



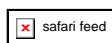
TIP: Firefox has several add ons that you can use to read your feeds right in the browser.

Subscribing in Safari

When you're on a search results page in Safari you will notice a small blue rss icon to the right of your address bar.



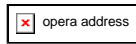
Clicking the icon will bring up the feed:



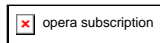
Under 'Actions' on the bottom right you will see your subscription options.

Subscribing in Opera

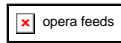
When you're on a search results page in Opera you will notice a small orange icon to the right of your address bar.



Clicking the icon will ask if you'd like to add the feed to your reader



The feed will then be accessible via the 'Feeds' menu in Opera



Subscribing in Internet Explorer 6

When you're on the search results page in IE6, you will notice an orange icon above your results list.



Clicking the orange icon will open the XML file in your window. Copy the URL from the address bar and paste it into your favorite RSS feed reader following their subscription rules.

Subscribing in Internet Explorer 7

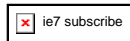
When you're on a search results page in IE7 you will notice a small orange icon to the bottom right of your address bar.



If you click on the RSS icon you will see the feeds available on the page



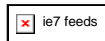
Click on the feed you want to subscribe to and it will open the feed in a the window



Click the +* icon to the left of the tab, or the 'Subscribe to this feed' link



Click 'Subscribe'



See the feeds you're subscribed to by clicking the +* icon to the left of the tab and under the 'Feeds' tab you will see your subscription

7.2. Search Results Feed

RSS feeds for OPAC search results.

Koha offers built in RSS feeds for search results pages. This allows patrons and librarians to subscribe to their searches and receive alerts when a new item is added to the collection. This means that every time a new item is added to the collection that matches your search terms your feed will be updated.

This video <http://www.youtube.com/watch?v=0klgLSxGsU> is a great introduction to what RSS is.

IMPORTANT: To get your RSS feeds working you will need to set your OPACBaseURL system preference with the URL of your OPAC

- *Get there:* More > Administration > Global system preferences > Admin preferences > OPACBaseURL

TIP: To find the RSS Feed URL for any search results page, just append &format=rss2 to the end. If your search results URL is <http://opac.liblime.com/cgi-bin/koha/opac-search.pl?q=school+violence> the RSS URL is <http://opac.liblime.com/cgi-bin/koha/opac-search.pl?q=school+violence&format=rss2>. You can use this URL to subscribe using the aggregator of your choice.

TIP: To find the Atom Feed URL for any search results page, just append &format=atom to the end. If your search results URL is <http://opac.liblime.com/cgi-bin/koha/opac-search.pl?q=school+violence> the RSS URL is <http://opac.liblime.com/cgi-bin/koha/opac-search.pl?q=school+violence&format=atom>. You can use this URL to subscribe using the aggregator of your choice.

7.3. Custom RSS Feeds

Create RSS Feeds for any of your content.

Using `misc/cronjobs/rss/rss.pl` you can generate an RSS feed for any SQL query (for example a new acquisitions RSS feed). `rss.pl` is run on the command line to produce an RSS XML document.

The output should be placed in a directory accessible to the OPAC (or staff) web interface so that users can download the RSS feed.

An example of usage can be found at: `misc/cronjobs/rss.pl lastAcquired.conf`

Normally `rss.pl` should be run periodically (e.g., daily) to keep the feed up-to-date.

The configuration file (e.g., `lastAcquired.conf`) lists

- name of the template file to use
- path of output file
- SQL query

`rss.pl` runs the SQL query, then feeds the output of the query through the template to produce the output file.

IMPORTANT: To use custom RSS feeds you need to turn on the cron job.

8. Purchase Suggestions

Patrons can make suggestions to the acquisitions department regarding titles for the library.

When patrons are logged into the OPAC they have the option to make purchase suggestions for items they cannot find in the library catalog.

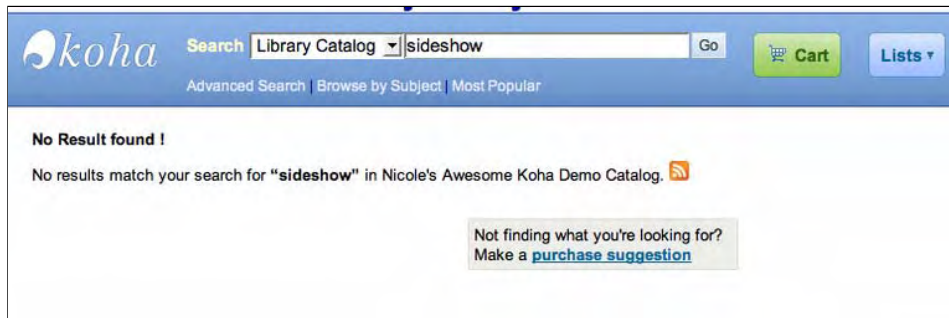
IMPORTANT: In order to turn this feature on, you must set the 'suggestion' preference to 'ON'

- *Get there:* More > Administration > Global System Preferences > OPAC > suggestion

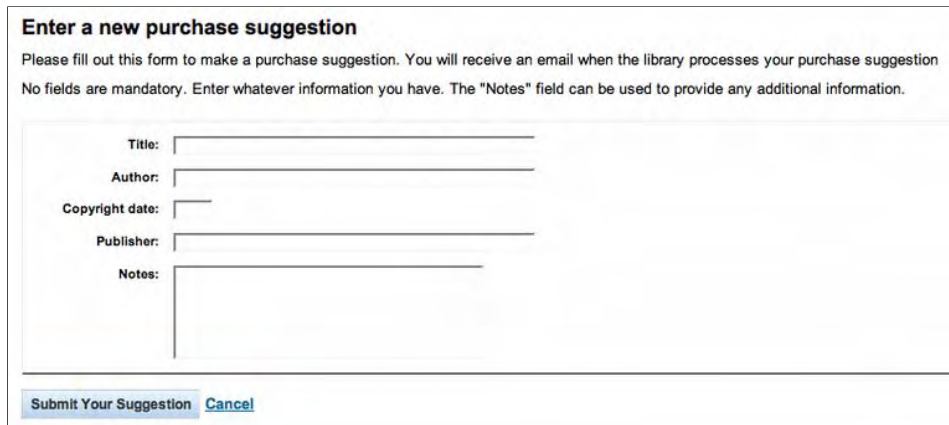
Suggestions from Search Results

When logged in patrons perform a search that does not return the result they were looking for, they are presented with the option to make a purchase suggestion.

- Perform a search



- Click 'purchase suggestion'



- Fill in as much information as you can and click 'Submit Your Suggestion'
- Patrons can view the status of their suggestions or place additional suggestions from their profile

Welcome

- [Catalog Home](#)
- [Library Home](#)
- [Contact Us](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

My Purchase Suggestions

[Select All](#)
[Clear All](#)
[New purchase suggestion](#)

	Summary	Note	Managed by	Status
<input type="checkbox"/>	Accidental Library Manager Rachel Singer Gordon, - Information Today			Ordered by the library
<input type="checkbox"/>	Cathedral and the Bazaar Eric S. Raymond, - 2001, - O'Reilly			Accepted by the library (Needed for a class)
<input type="checkbox"/>	Eat, Pray, Love Elizabeth Gilbert, - 2006, - Viking			Available in the library
<input type="checkbox"/>	Eat, Pray, Love Elizabeth Gilbert, - 2006, - Viking			Ordered by the library
<input type="checkbox"/>	The Companions Sheri S. Tepper,			Ordered by the library

- TIP: Learn more by reading the OPAC: Your Account section of this manual

9. Tagging in the OPAC

Managing tags in the OPAC.

Tags are an uncontrolled classification method. Tags can be entered by logged in patrons.

IMPORTANT: Tagging will make use of AJAX capability in JavaScript-enabled browsers

IMPORTANT: To allow patrons to add tags, you must turn on the TagsEnabled system preference

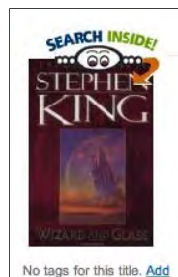
- *Get there:* More > Administration > Enhanced Content > TagsEnabled

IMPORTANT: To display tags either one or both of the tag display preferences must be set

- *Get there:* More > Administration > Enhanced Content > TagsInputOnDetail
- *Get there:* More > Administration > Enhanced Content > TagsInputOnList

Adding Tags

- When viewing a title's detail page you will either see that a title has no tags



- **IMPORTANT:** To have the 'Add' link appear on the item detail page you must first have the system preference turned on
 - *Get there:* More > Administration > Enhanced Content > TagsInputOnDetail
- Or that the title has tags



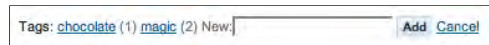
Chocolat : Norm
by [Harris, Joanne](#).
Published by : [Viking](#), (New York)
Physical details: 242 p. ; 23 cm.
ISBN: 0670881791
Subject(s): [Chocolate -- France](#)
Year : 1999
Online Resources:
* <http://www.joanne-harris.co.uk>
Tags: [chocolate](#) (1) [magic](#) (2) [Add](#)

- **IMPORTANT:** To have the 'Add' link appear on the item detail page you must first have the system preference turned on
 - *Get there:* More > Administration > Enhanced Content > TagsInputOnDetail
- **IMPORTANT:** Tags will only display here if the system preference is set to show them
 - *Get there:* More > Administration > Enhanced Content > TagsShowOnDetail
- If a title has tags it will display in the search results as well



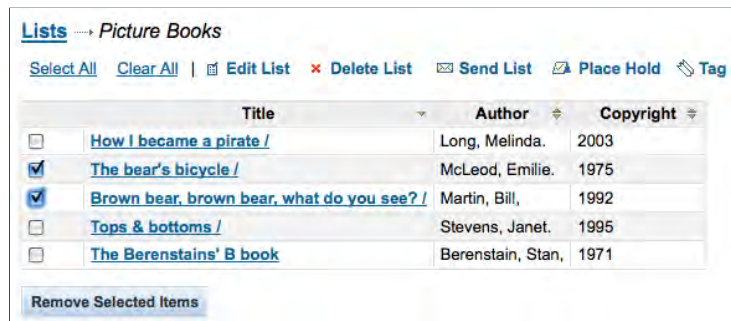
1. **Chocolat** : by [Harris, Joanne](#).
Publication: New York : Viking, 1999 - 242 p. ; 23 cm.
Date: 1999
Availability: No items available: Checked out (1).
Actions: [Place Hold](#) [Save to Lists](#) [Add to Cart](#)
Call Number:
Tags: [chocolate](#) (1) [magic](#) (2)
Match: [Chocolat](#) : [Chocolat](#) ... <http://www.joanne-harris.co.uk/pages/bookpages/chocolat.html>

- **IMPORTANT:** Tags will only display here if the system preference is set to show them
 - *Get there:* More > Administration > Enhanced Content > TagsShowOnList
- To add new tags, click 'Add' on the details page



Tags: [chocolate](#) (1) [magic](#) (2) New: [Add](#) [Cancel](#)

- **TIP:** Add multiple tags separated by commas
- You can also add tags in bulk by viewing a list and clicking 'Tag' in the top right

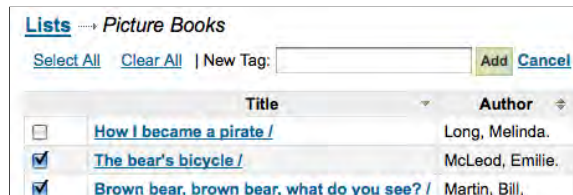


Lists → *Picture Books*
[Select All](#) [Clear All](#) | [Edit List](#) [Delete List](#) [Send List](#) [Place Hold](#) [Tag](#)

	Title	Author	Copyright
<input type="checkbox"/>	How I became a pirate /	Long, Melinda.	2003
<input checked="" type="checkbox"/>	The bear's bicycle /	McLeod, Emilie.	1975
<input checked="" type="checkbox"/>	Brown bear, brown bear, what do you see? /	Martin, Bill,	1992
<input type="checkbox"/>	Tops & bottoms /	Stevens, Janet.	1995
<input type="checkbox"/>	The Berenstains' B book	Berenstain, Stan,	1971

[Remove Selected Items](#)

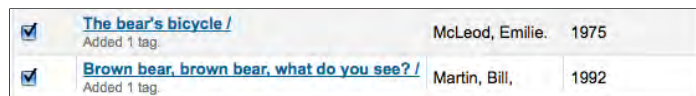
- A box will appear at the top to put your tag(s) in



Lists → *Picture Books*
[Select All](#) [Clear All](#) | New Tag: [Add](#) [Cancel](#)

	Title	Author
<input type="checkbox"/>	How I became a pirate /	Long, Melinda.
<input checked="" type="checkbox"/>	The bear's bicycle /	McLeod, Emilie.
<input checked="" type="checkbox"/>	Brown bear, brown bear, what do you see? /	Martin, Bill,

- Enter your tag(s) and click 'Add'
- You will see a confirmation below each item the tags were added to



<input checked="" type="checkbox"/>	The bear's bicycle / Added 1 tag.	McLeod, Emilie.	1975
<input checked="" type="checkbox"/>	Brown bear, brown bear, what do you see? / Added 1 tag.	Martin, Bill,	1992

- You can view all of the tags you've added by going to your account and clicking on the 'my tags' tab

Welcome

- [Catalog Home](#)
- [Library Home](#)
- [Contact Us](#)

my summary

my fines

my personal details

my tags

change my password

my reading history

my purchase suggestions

my messaging

my lists

My Tags

Term	Title	Date Added	Delete
chocolate	Chocolat : by King, Stephen,	05/09/2008	Delete
magic	Chocolat : by King, Stephen,	05/09/2008	Delete
magic	Harry Potter and the deathly hallows / by Rowling, J. K.	05/09/2008	Delete
wizard	Harry Potter and the deathly hallows / by Rowling, J. K.	05/09/2008	Delete
wizard	Harry Potter and the sorcerer's stone / by Rowling, J. K.	05/09/2008	Delete

All Tags

Show up to tags from other users. [OK](#)

[magic](#)
[wizard](#)
[chocolate](#)

- By clicking on the tags you can run a search for titles where that tag has been applied.

Questions

Can I search for tags using the keyword search?

At this time the only way to search for tags is from the 'my tags' tab on Your Account.

- Get there: OPAC > *your name* > my tags

10. Zotero Integration

Koha has built in Zotero integration.

About Zotero

Zotero [zoh-TAIR-oh] is a free, easy-to-use Firefox extension to help you collect, manage, and cite your research sources. It lives right where you do your work — in the web browser itself.

Zotero can import and export files in the following bibliographic file formats:

- Zotero RDF
- MODS (Metadata Object Description Schema)
- BibTeX
- RIS
- EndNote/Refer/BibIX
- Unqualified Dublin Core RDF

Users can also transfer records between Zotero to and from RefWorks and EndNote.

Koha comes with built in Zotero recognition. This guide will assist in using Zotero in the Koha environment, to learn more about Zotero visit the official page: <http://www.zotero.org/>

Zotero Recognition

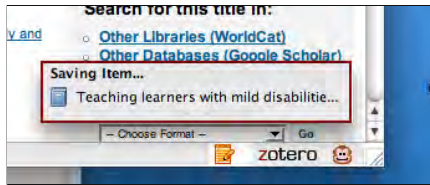
- [BUG #2432](#)

IMPORTANT: You will need to use Firefox (<http://www.mozilla.com/firefox/>) with Zotero (<http://www.zotero.org/>) for this feature to work.

When viewing a bib record in the OPAC a blue book icon will appear in your address bar (if Zotero is installed).



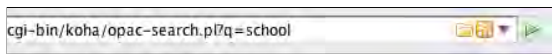
By clicking the Blue book you will automatically save the item record to your instance of Zotero



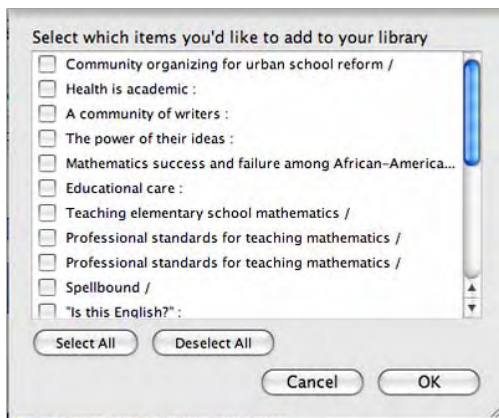
When you open Zotero you will then see the item you saved in your collection



When viewing the search results page or a list you can select multiple results to add to Zotero. On the search results page there will be a folder to the right of the URL:



Click that folder and you will be presented with a list of titles from the page:



Check the items you'd like to add and click OK.

Questions

Why can't I click View from my Zotero library to view the catalog record?

This is a noted problem that developers can work on with the folks at Zotero if they'd like to see a change. See: <http://forums.zotero.org/discussion/2897/url-field-not-filled-in-from-opacs/>

11. XSLT

Instructions and definitions related to the XSLT stylesheets used on the OPAC.

11.1. Item Type Display

This document describes what values in the MARC record control the icon display when the XSLT preferences are turned on for the results and/or detail page in the OPAC.

Search Results Display

These will display if XSL is turned on for the results pages

- *Get there:* More > Administration > Global System Preferences > OPAC > XSLTResultsDisplay

- **Book (BK)**



- leader6='a'
 - leader7='a'
 - leader7='c'
 - leader7='d'
 - leader7='m'
- leader6='t'

- **Continuing Resource (CR)**



- leader7='b'
- leader7='i'
- leader7='s'

- **Mixed (MX)**



- leader6='p'

- **Computer File (CF)**



- leader6='m'

- **Map (MP)**



- leader6='e'
- leader6='f'

- **Visual Material (VM)**



- leader6='g'
- leader6='k'
- leader6='o'
- leader6='r'

- **Sound (MU)**



- leader6='c'
- leader6='d'
- eader6='i'
- leader6='j'

View the XSL file here: http://git.koha.org/cgi-bin/gitweb.cgi?p=Koha;a=blob_plain;f=koha-tmpl/opac-tmpl/prog/en/xslt/MARC21slim2OPACResults.xsl;hb=HEAD

Detail Page Display

These will display if XSL is turned on for the detail pages


- *Get there:* More > Administration > Global System Preferences > OPAC > XSLTDetailsDisplay

- **Book (BK)**




- leader6='a'
 - leader7='a'


- leader7='c'
- leader7='d'
- leader7='m'
- leader6='t'
- Continuing Resource (CR)

 continuing resource


 - leader7='b'
 - leader7='i'
 - leader7='s'
- Mixed (MX)

 mixed


 - leader6='p'
- Computer File (CF)

 computer file


 - leader6='m'
- Map (MP)

 map

 - leader6='e'
 - leader6='f'
- Visual Material (VM)

 visual

 - leader6='g'
 - leader6='k'
 - leader6='o'
 - leader6='r'
- Sound (MU)

 sound

 - leader6='c'
 - leader6='d'
 - leader6='i'
 - leader6='j'

View the XSL file here: http://git.koha.org/cgi-bin/gitweb.cgi?p=Koha;a=blob_plain;f=koha-tmpl/opac-tmpl/prog/en/xslt/MARC21slim2OPACDetail.xsl;hb=HEAD

12. Self Checkout

Instructions for Koha's basic self checkout module.

Koha comes with a very basic self checkout module. To use this module you have to log in as a staff member with circulation permissions. See the Patron Permissions section of this manual for more information.

- TIP: Create an anonymous staff patron for this action so that you don't leave a real staff client logged into a computer all day

There is no link to this module from the OPAC or Staff Client at this time, but it can be linked to in the templates or accessed via: http://YOUR_KOHA_URL/cgi-bin/koha/sco/sco-main.pl

Self Checkout


Please enter your card number:

- Patrons can enter their card number here

You are logged in as Nicole Engard.

Check out or return an item:

Scan a new item or enter its barcode:

Scan next item, or 

Issues for Nicole Engard (4 total)

Title	Call No.	Due	Renew
Martin's big words : Rappaport, Doreen. (502326000484)	E185.97.K5 R36 2001	2008-10-28	Not renewable
The adventures of Tom Sawyer / Twain, Mark. (502326000796)	PZ7.T88 Ad 2001	2008-10-24	Not renewable
Scorpions / Myers, Walter Dean. (502326000159)	PZ7.M992 Sc 1988	2008-10-24	Not renewable
Making connections with writing : Kitagawa, Mary M. (502326000230)	LB1577.J3 K527 1987	2008-11-19	Not renewable

- Scan or type the barcode on the item being checked out

Check out or return an item:

Scan a new item or enter its barcode:

- **IMPORTANT:** If the patron has any debt on their account they will not be able to check out using this module. They will see the following error forcing them to go to the desk and see a circulation librarian

Item cannot be checked out.

Sorry, This item cannot be checked out at this station.

Error type: DEBT

[Return to Account Summary](#)

- The item will then show on the list of checked out items

Title	Call No.	Due	Renew
Martin's big words : Rappaport, Doreen. (502326000484)	E185.97.K5 R36 2001	2008-10-28	Not renewable
The adventures of Tom Sawyer / Twain, Mark, (502326000796)	PZ7.T88 Ad 2001	2008-10-24	Not renewable
Scorpions / Myers, Walter Dean, (502326000159)	PZ7.M992 Sc 1988	2008-10-24	Not renewable
Making connections with writing : Kitagawa, Mary M. (502326000230)	LB1577.J3 K527 1987	2008-11-19	Not renewable
A taste of blackberries / Smith, Doris Buchanan. (502326000735)	MLCS 2006/41797 (P)	2008-12-29	Not renewable

- Click the 'Click here if done' button to let the next person start their check outs

Scan next item, or

13. Icons

You can chose an icon out of any of multiple sets in Koha to display next to your item types and other items.

Currently, you don't actually pick any set of icons to use. They're all available all of the time. You can just chose an icon out of any of multiple sets that we have. Also, they can add more sets of icons.

Here's how to see the icon sets:

- Go to the 'Administration' module (under 'More' in your Global Nav)
- choose 'Item types and circulation codes'
- pick any item type that you want to change the icon for. For example, click "BKS" for books.

You will be presented with a page where you can edit this item type. One aspect that you can edit is the icon that shows up.

The icon you chose will be shown whenever "BKS" items are displayed, just as they used to be. You can now have many collections of icons to choose from.

To add additional icons to your system you simply add a new directory to koha-tmpl/intranet-tmpl/prog/img/itemtypeimg/ and to koha-tmpl/opac-tmpl/prog/itemtypeimg and put your icons in the new directory. Your icons will show up in a new tab as soon as they are in the folders.

- **TIP:** Remember to put the icons in both places (on the OPAC and the intranet).

New authorized value

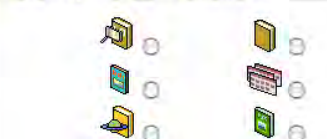
Category LOST

Authorized value

Description

Choose an icon:

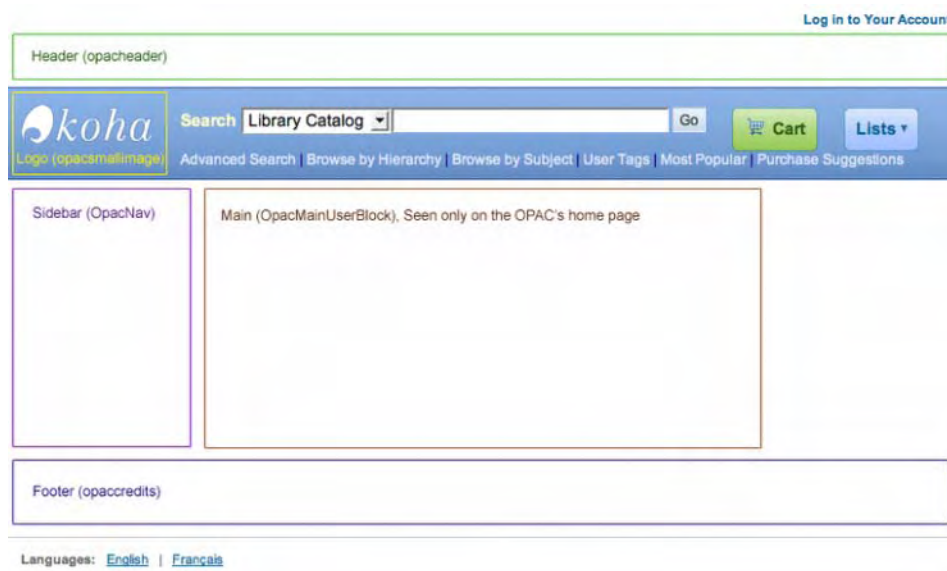
None npl bridge liblime-kids



14. Customizable Regions

An illustration of how to customize your OPAC.

The OPAC has many areas that can be edited using system preferences, below is an illustration that will help you identify those sections.



Searching

Manual for Koha Version 3.0 (stable)

1. Advanced Search Prefixes

Explains what various prefixes can be added to do advanced searching.

ti: title search

ti:hamlet

su: subject search

su:cookery

pb: publisher search

pb:penguin

au: author search

au:rowling

su-geo: geographic subjects

su-geo:wales and kw:description and kw:travel

bc: barcode

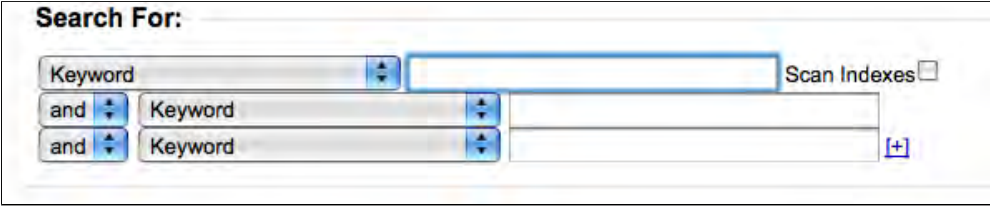
bc:502326000912

2. Boolean Searching

Instructions for boolean searching.

Boolean and/or/not : these terms cannot be used in the keyword search as Booleans because they will find the text strings.

Boolean can be used only on the staff side by going to Search and clicking 'More Options'



Search For:

Keyword Scan Indexes ☐

and

and

If a library would like to have these Booleans on the OPAC they can edit the template files to add them.

The decision to remove the Boolean terms was made by several librarians who thought it was too much for library patrons.

3. Zebra Help Snippets

Snippets of help for using Zebra.

- x^* Matches x zero or more times. Priority: high.
- x^+ Matches x one or more times. Priority: high.
- $x?$ Matches x zero or once. Priority: high.
- xy Matches x , then y . Priority: medium.
- $x|y$ Matches either x or y . Priority: low.
- () The order of evaluation may be changed by using parentheses.

"steph.* king" matches stephen king

Via: <http://www.indexdata.dk/zebra/doc/querymodel-zebra.tkl#querymodel-regular>

query ::= top-set query-struct.

top-set ::= ['@attrset' string]

query-struct ::= attr-spec | simple | complex | '@term' term-type query

attr-spec ::= '@attr' [string] string query-struct

complex ::= operator query-struct query-struct.

operator ::= '@and' | '@or' | '@not' | '@prox' proximity.

simple ::= result-set | term.

result-set ::= '@set' string.

term ::= string.

proximity ::= exclusion distance ordered relation which-code unit-code.

exclusion ::= '1' | '0' | 'void'.

distance ::= integer.

ordered ::= '1' | '0'.

relation ::= integer.

which-code ::= 'known' | 'private' | integer.

unit-code ::= integer.

term-type ::= 'general' | 'numeric' | 'string' | 'oid' | 'datetime' | 'null'.

example:

```
Z> find @prox 0 3 0 2 k 2 information retrieval
```

Via <http://www.indexdata.dk/yaz/doc/tools.tkl#PQF>

4. Guide to Searching

This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

4.1. Indexing and Searching

Description

The indexing described in this document is the set used by SouthEastern University. Your local indexing may vary.

Koha's databases are indexed by the Zebra open-source software. The overview to the documentation describes Zebra as:

"...Zebra is a high-performance, general-purpose structured text indexing and retrieval engine. It reads records in a variety of input formats (eg. email, XML, MARC) and provides access to them through a powerful combination of Boolean search expressions and relevance-ranked free-text queries.

Zebra supports large databases (tens of millions of records, tens of gigabytes of data). It allows safe, incremental database updates on live systems. Because Zebra supports the industry-standard information retrieval protocol, Z39.50, you can search Zebra databases using an enormous variety of programs and toolkits, both commercial and free, which understands this protocol..." Zebra - User's Guide and Reference, p. 1, <http://www.indexdata.dk/zebra/doc/zebra.pdf>

This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

The indexing described in this document is the set used by SouthEastern University. Your local indexing may vary.

4.2. Indexing Configuration

There are three configuration files that Koha uses while indexing.

The first configuration file contains the Z39.50 bib-1 attribute list, plus the Koha local use attributes for Biblio Indexes, Items Index, and Fixed Fields and other special indexes. The Z39.50 Bib-1 profile is made up of several different types of attributes: Use, Relation, Position, Structure, Truncation, and Completeness. The bib-1 'Use' attribute is represented on the chart; the other attributes are used primarily when doing searches. While there are over 150+ use attributes that could be used to define your indexing set, it's unlikely that you will choose to use them all. The attributes you elect to use are those that become the indexing rules for your database. The other five attribute sets define the various ways that a search can be further defined, and will not specifically be addressed in this document. For a complete list of the standard Bib-1 attributes, go to <http://www.loc.gov/z3950/agency/bib1.html>.

The second file contains the abstract syntax which maps the MARC21 tags to the set of Use Attributes you choose to use. The rules established in this file provides a passable Bath level 0 and 1 service, which includes author, title, subject, keyword and exact services such as standard identifiers (LCCN, ISBN, ISSN, etc.)

The third file is the Common Command Language (CCL) field mappings. This file combines the bib-1 attribute set file and the abstract file and adds the qualifiers, usually known as index names. The qualifiers, or indexes, for this database are: pn, cpn, cfn, ti, se, ut, nb, ns, sn, lcn, callnum, su, su-to, su-geo, su-ut, yr.pubdate, acqdate, ln, pl, ab, nt, rtype, mc-rtype, mus, au, su-na, kw, pb, ctype, and an.

The Koha Indexing Chart summarizes the contents of all three of these files in a more readable format. The first two columns labeled *Z39.50 attribute* and *Z39.50 name* matches the Z39.50 bib-1 attributes file. The third column labeled *MARC tags indexed* is where you find which MARC tags are mapped to an attribute. The fourth column labeled *Qualifiers* identifies the search abbreviations used in the internal CCL query. The following description provides a definition for the word 'qualifiers'.

Qualifiers are used to direct the search to a particular searchable index, such as title (ti) and author indexes (au). The CCL standard itself doesn't specify a particular set of qualifiers, but it does suggest a few shorthand notations. You can customize the CCL parser to support a particular set of qualifiers to reflect the current target profile. Traditionally, a qualifier would map to a particular use-attribute within the BIB-1attribute set. It is also possible to set other attributes, such as the structure attribute.

In the *MARC tags indexed* column, there are some conventions used that have specific meanings. They are:

- A three digit tag (100) means that all subfields in the tag can be used in a search query. So, if you enter a search for 'Jackson' as an author, you will retrieve records where Jackson could be the last name or the first name.
- A three digit tag that has a 'S' followed by a letter (600\$a) means that a search query will only search the 'a' subfield.
- A three digit tag that is followed by a ':' and a letter (240:w) means that a search query can be further qualified. The letter following the ':' identifies how to conduct the search. The most common values you'll see are 'w' (word), 'p' (phrase), 's' (sort), and 'n' (numeric).

The contents of the MARC tags, subfields, and/or fixed field elements that are listed in this chart are all indexed. You'll see that every attribute line is not mapped to a specific qualifier (index)—LC card number, line 9 is one example. However, every indexed word (a string of characters preceded and succeeded by a space) can be searched using a keyword (kw) search. So, although an LC card number specific index doesn't exist, you can still search by the LCCN since tag 010 is assigned to the LC-card-number attribute. To verify this, enter 72180055 in the persistent search box. You should retrieve *The gods themselves*, by Isaac Asimov.

Examples of fixed field elements indexing can be seen on the chart between Attribute 8822 and Attribute 8703. These attributes are most commonly used for limiting. The fixed field attributes currently represent the BK codes. Other format codes, if needed, could be defined.

4.3. Basic Searching

Instructions for basic keyword searching.

The search box that library staff and library patrons will see most often is the persistent search box at the top of the page. Koha interprets the searches as keyword searches.



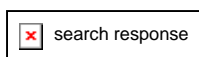
To start a search, you enter a word or multiple words in the search box. When a single word is entered, a keyword search is performed. You can check this out by typing one word into the form and note the number of results located. Then, repeat the search with a minor change. In front of the search word, type 'kw=' followed by the same search term. The results will be identical.

When you have more than one word in the search box, Koha will still do a keyword search, but a bit differently. Each word will be searched on its own, then the Boolean connector 'and' will narrow your search to those items with all words contained in matching records.

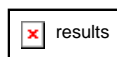
Suppose you want to find material about debate and how it affects communication. You'll select the major words and enter them into the persistent search box.



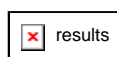
The response to this search is:



The order of the words does not affect the retrieval results, so you could also enter the search as “communication debate”. The response to this search is



Too many words in the search box will find very few matches, as the following example illustrates:



4.4. Advanced Searching

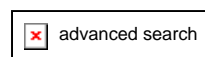
Instructions for advanced searching in the staff client.

When you can't find the most appropriate material with a general search, you can move to the Advanced Search page by clicking on the Search option on the persistent toolbar.



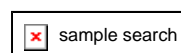
The Advanced Search page offers many ways to limit the results of your search. You can search using the Boolean operators AND, OR, and NOT; limit by item type; limit by year and language; limit by subtypes audience, content, format, or additional content types; by location and by availability.

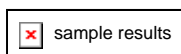
The first limiting section on the Advanced Search page provides a quick and simple way to use the Boolean operators in your search. Note that this display depends on a system preference setting. This option can be found on the Administration > System Preferences > Searching page. The option called **expandedSearchOption** must be set **ON** to see the following display.



In this section you can choose among the many indexes by clicking on the arrow in the first box. The blank box that follows is where you enter your first search term or terms. On the second line, you can choose the Boolean operator you want to use in your search. The options are 'and', 'or', and 'not'. Then, you would again choose the index to search, followed by the second term or terms. If you have more concepts you want to include in your search, you can click the [+] to add another line for your search.

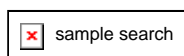
A sample search is shown next, followed by its results:



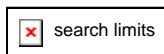


When you use the Boolean operators to broaden or narrow a search, remember the action of each operator. The 'and' operator narrows the results you'll retrieve because the search will retrieve the records that include all your search terms. The 'or' operator expands the results because the search will look for occurrences of all of your search terms. The 'not' operator excludes records with the term that follows the operator.

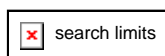
Note: If you leave this **expandedSearchOption** set to OFF, this is the display you will see:



The Advanced Search page then shows the multiple kinds of limits that can be applied to your search results. Either check a box or select from the drop down menus to narrow your search. You will type the year, year range, or a 'greater than (>)' or 'less than (<)' year.



Finally, you can choose how the results will be sorted. The pre-defined sort options are in the final area of the Advanced Search screen.



The default sort is by relevance, although you can choose to sort by author, by title, by call number, by dates, or by popularity. If you would prefer a different default sort, you can set **defaultSortField** to one of the other choices in Administration|System Preferences|Searching.

4.5. Common Command Language Searching

Instructions for using CCL in searching Koha.

Koha uses the Common Command Language (CCL) (ISO 8777) as its internal search protocol. Searches initiated in the graphical interface use this protocol as well, although the searcher doesn't know which indexes, operators and limiters are available and being used to conduct their search. The searcher can use the Advanced Search when more precise results set are desired and where the search indexes are somewhat known. However, some library users and many library staff prefer using a command based structure. This part of the document will present and explain the use of the Koha command based structure. The indexes, operators, and limiters used are identical to those used in the graphical interface.

Indexes

The CCL standard itself doesn't specify a particular set of qualifiers (indexes), but it does suggest a few short-hand notations such as 'ti', 'au', and 'su'. Koha has a default set of indexes; it's possible to customize that set by adding needed indexes based on local requirements. A qualifier (index) maps to a particular use-attribute within the Z39.50 BIB-1 attribute set. The complete Z39.50 Bib-1 Attribute can be viewed at <http://www.loc.gov/z3950/agency/bib1.html>.

The standard Koha set of indexes is a fairly common example of MARC21 indexing rules. The indexes that are defined in Koha are indexes typically used by other integrated library systems. The defined Z39.50 Bib-1 Attribute mapped to the indexes are:

<u>Bib-1 Attribute</u>	<u>Qualifier (index)</u>
Personal-name	pn
Corporate-name	cpn
Conference-name	cfn
Title	ti
Title-series	se
Title-uniform	ut
ISBN	nb
ISSN	ns
Local number	sn
Local-classification	lcn and callnum
Subject	su, su-to, su-geo, su-ut
Pubdate	yr,pubdate
Date-of-Acquisition	acqdate
Language	ln
Place-of-publication	pl
Abstract	ab
Notes	nt
Record-type	rtype, mc-rtype, mus
Author	au, aut
Subject-person-name	su-na
Any (keyword)	kw
Publisher	pb
Content-type	ctype

Koha-Auth-Number an

Author-personal-bibliography aub

Author-in-order auo

The three lines above with green type are used primarily as limiters. Refer to the *Koha Indexing Chart* for the MARC21 tags mapped to each Bib-1 Attribute and index combination.

Search syntax

In the persistent search box, single words generally retrieve large sets. To narrow a search, you can use multiple words. Koha automatically uses the 'and' Boolean operator to create a set of records matching your input. When you want to narrow the search to an author or a title or a subject or some other specific field or use a Boolean operator, there isn't an obvious way to accomplish that specificity. The library user can, of course, go to the Advanced Search page; however, if you know how to construct a CCL search, you can achieve more specificity while using the persistent search box on any page.

There is a specific order to the CCL search syntax. Although it can be used for simple searches, it is an especially effective way to perform complex searches, as it affords you a great deal of control over your search results. To construct a CCL search, first enter a desired index code, then an equal sign, followed by your search word(s). Following are examples of simple CCL searches.

- ti=principles of accounting
- au=brown joseph
- su=poetry
- su-na=Shakespeare
- kw=marlin

You can refine your search by combining search terms with Boolean operators 'and', 'or', or 'not'. Following are examples of searches using Boolean operators.

- ti=principles of accounting and au=brown joseph
- su=poetry not su-na=Shakespeare
- kw=communication and su=debate

Using specific indexes and Boolean operators are not the only way a search can be refined. You can also refine your search as a phrase when looking for a title, author, or subject. The syntax for this search is **index.phr=search words**.

To illustrate the results of various search types, a search was done for the words 'supreme court'. The results illustrate that the search index and the word order make a difference in search results. Only the results count and the search itself is in these examples. The search executed will always be between the single quotes.





You can also choose to use limiters in your search query. Some common limiters include dates, languages, record types, and item types. In the Advance Search, you can either click a box or key in data to limit your search. You can also apply the same limits with CCL by using the syntax in the following examples. In all

By Date: su=supreme court and yr,st-numeric=>2000



When you limit by date, you can use the '>' (greater than), '<' (less than), '=' (equal), or 'yyyy-yyyy' (range) symbols.

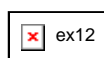
By Item Type: su=nursing and itype:BK



Each library will have a different set of item types defined in their circulation configuration. When you set up item types, you define a code and a name for each one. The name will appear on the Advance Search page. The code you assigned is used as a CCL search limit, formatted as 'itype:x', where 'x' is the assigned code. The initial set of item types in Koha will usually be edited to reflect your collections, so your item type limiters may be different than the initial ones. The initial item type limiters follow.

- itype:BKS Books, Booklets, Workbooks
- itype:SR Audio Cassettes, CDs
- itype:IR Binders
- itype:CF CD-ROMs, DVD-ROMs, General Online Resources
- itype:VR DVDs, VHS
- itype:KT Kit
- itype:AR Models
- itype:SER Serials

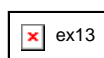
By format: su=supreme court not l-format:sr



The format limiters are derived from a combination of LDR, 006 and 007 positions. The formats that are currently defined are the following.

- l-format:ta Regular print
- l-format:tb Large print
- l-format:fk Braille
- l-format:sd CD audio
- l-format:ss Cassette recording
- l-format:vf VHS tape
- l-format:vd DVD video
- l-format:co CD software
- l-format:cr Website

By content type: su=supreme court not ctype:l



The content types are taken from the 008 MARC tag, positions 24-27.

There are two other limiter types that are not described in this document. They are: Audience and Content. The only difference in the syntax of the CCL is the actual limiter. They are reproduced here just in case you would like to use these limiters.

Audience

- aud:a Easy
- aud:cc Juvenile
- aud:d Young adult
- aud:e Adult

Contents

- fic:1 Fiction
- fic:0 Non Fiction
- bio:b Biography
- mus:j Musical recording
- mus:I Non musical record

4.6. CCL Indexing Chart

This chart defines which MARC fields are mapped to which CCL fields.

.	Z39.50 attribute	Z39.50 name	MARC tags indexed	Qualifiers
.				
.	att 1	Personal-name	100, 400, 600\$a, 600, 700, 800	pn
.	att 2	Corporate-name	110, 410, 610, 710, 810	cpn
.	att 3	Conference-name	111, 411, 611, 711, 811	cfn
.	att 4	Title	130, 210, 211, 212, 214, 222, 240:w, 240:p, 243:w, 243:p, 245\$a:w, 245\$a:p, 245\$a:s, 245:w, 245:p, 246, 246:p, 247, 247:p, 400\$t, 410\$t, 490, 505\$t, 600\$t, 610\$t, 611\$t, 700\$t, 710\$t, 711\$t, 730, 740, 780\$t, 780, 800\$t, 810\$t, 811\$t, 830, 840	ti
.	att 5	Title-series	400\$t, 410\$t, 411\$t, 440, 440:w, 440:p, 440\$a:w, 440\$a:p, 490, 490\$a:w, 490\$a:p, 800\$t, 810\$t, 811\$t, 830, 840	se
.	att 6	Title-uniform	130, 240, 700\$t, 710\$t, 711\$t, 730	ut
.	att 7	ISBN	020\$a:w, 020, 022\$a	nb
.	att 8	ISSN	022\$a:w, 022	ns
.	att 9	LC-card-number	010, 011	
.	att 10	BNB-Card-number	015	
.	att 11	BGF-number	015	
.	att 12	Local-number		sn
.	att 13	Dewey-classification	082:w, 082:s	
.	att 14	UDC-classification	080	
.	att 15	Bliss-classification		
.	att 16	LC-call-number	050\$b:w, 050\$b:p, 050:s, 050:w, 050:p, 050:s	
		NLM-call-		

. att 17	number	060	
. att 18	NAL-call-number	070	
. att 19	MOS-call-number		
. att 20	Local-classification	952\$o:w, 952\$o:p, 952\$o:s	lcn, callnum
. att 21	Subject	600\$a, 600\$t, 600, 610, 611, 630, 650, 650:p, 651, 651:p, 653, 653:p, 654, 655, 656, 657, 690, 690:p	su, su-to, su-geo, su-ut
. att 22	Subject-Rameau		
. att 23	BDI-index-subject		
. att 24	INSPEC-subject		
. att 25	MESH-subject		
. att 26	PA-subject		
. att 27	LC-subject-heading		
. att 28	RVM-subject-heading		
. att 29	Local-subject-index		
. att 30	copydate	260\$c:s	
. att 31	Date-of-Publication	008:7-11	pubdate, yr
. att 32	Date-of-acquisition	952\$d, 952\$d:d, 952\$d:s	acqdate
. att 33	Title-key	222	
. att 34	Title-collective	243	
. att 35	Title-parallel		
. att 36	Title-cover	245\$a:w, 245\$a:p, 245\$a:s	
. att 37	Title-added-title-page		
. att 38	Title-caption		
. att 39	Title-running		
. att 40	Title-spine		
. att 41	Title-other-variant	212, 247. 740	
. att 42	Title-former	246, 247, 780	
. att 43	Title-abbreviated	210, 211, 246	
. att 44	Title-expanded	214, 246	
. att 45	Subject-precis		
. att 46	Subject-rswk		
. att 47	Subject-subdivision		
. att 48	Number-natl-biblio	015	
. att 49	Number-legal-deposit	017	
. att 50	Number-govt-pub	086	
. att 51	Number-music-publisher	028	
. att 52	Number-db	015	

•	att 53	Number-local-call		
•	att 54	language	041	ln
•	att 55	Code-geographic	043	
•	att 56	Code-institution	040	
•	att 57	Name-and-Title	100, 110, 111, 400\$a, 400\$t, 410\$a, 411\$a, 600\$a, 600\$t, 610\$a, 610\$t, 611\$a, 611\$t, 700\$t, 710\$t, 710\$a, 711\$a, 800\$a, 810\$a, 810\$t, 811\$a, 811\$a	
•	att 58	Name-geographic	651	
•	att 59	Place-publication	pl:w, pl:p, 260\$a, 260	pl
•	att 60	CODEN	030	
•	att 61	Microform-generation	007:11	
•	att 62	Abstract	520:w, 520:p	ab
•	att 63	Note	505:w, 505:p	nt
•	att 1000	Author-title	100, 110, 111, 400\$t, 410\$t, 411\$t, 700\$, 710\$t, 711\$t, 800\$t, 810\$t, 811\$t	
•	att 1001	Record-type	See Note 1 below	rtype, mc-type, mus
•	att 1002	Name	100, 110, 111, 400, 410, 411, 600\$a, 600, 610, 611, 700, 710, 711, 800, 810, 811	
•	att 1003	Author	100\$a, 100:p, 100:s, 100, 110, 111, 245\$c, 400, 410, 411, 505\$r, 700\$a, 700\$a:p, 700, 710, 800, 810, 811	au
•	att 1004	Author-name-personal	100, 400, 700, 800	
•	att 1005	Author-name-corporate	110, 111, 410, 411, 700, 711, 810, 811\$a	
•	att 1006	Author-name-conference		
•	att 1007	Identifier-standard	010, 011, 015, 017, 018, 020\$a:w, 020, 022, 023, 024, 025, 027, 028, 030, 037	
•	att 1008	Subject-LC-childrens		
•	att 1009	Subject-name-personal	600\$a, 600	su-na
•	att 1010	Body-of-text		
•	att 1011	date-entered-on-file	008:0-5	
•	att 1012	Date/time-last-modified	005	
•	att 1013	Authority/format-id		
•	att 1014	Concept-text		
•	att 1015	Concept-reference		
•	att 1016	Any		kw
•	att 1017	Server-choice		
•	att 1018	Publisher	260\$b:w, 260\$b:p	pb
•	att 1019	Record-source	008:39, 040	
•	att 1020	Editor	100\$a, 700	
•	att 1021	Bib-level	Leader:7	
•	att 1022	Geographic-class	052	
•	att 1023	Indexed-by	510	
•	att 1024	Map-scale	034	
•	att 1025	Music-key	130\$r, 240\$r, 243\$r, 630\$r, 700\$r, 730\$r	

. att 1026	Related-periodical	247, 780, 785	
. att 1027	Report-number	027	
. att 1028	Stock-number	037	
. att 1030	Thematic-number	130\$n, 240\$n, 243\$n, 630\$n, 700\$n, 730\$n	
. att 1031	Material-type	007:0-2, 502	
. att 1032	Doc-id		
. att 1033	Host-item	773\$t	
. att 1034	Content-type	See Note 2 below	ctype
. att 1035	Anywhere		

. att 1036	Author-Title-Subject		
. att 1079	Subject-topical		
.			
.	Koha Local-Use Biblio Indexes		
.			
. att 9001	Control-number	001	
. att 9002	bibliotitemnumber	999\$d:n, 999\$d:w, 999\$d:s	
. att 9003	totalissues	942\$0:n, 942\$0:s	
. att 9004	cn-bib-source	942\$2	
. att 9005	cn-bib-sort	942\$6:n, 942\$6	
. att 9006	itemtype	942\$c:w	
. att 9007	cn-class	942\$h	
. att 9008	cn-item	942\$i	
. att 9009	cn-prefix	942\$k	
. att 9010	cn-suffix	942\$m	
. att 9011	Suppress	942\$n:w, 942\$n:n	
.			
.	Items Index		
.			
. att 8001	withdrawn	952\$0:n, 952\$0:w	

. att 8002	lost	952\$1, 952\$1:w	
. att 8003	classification-source	952\$2	
. att 8004	materials-specified	952\$3	
. att 8005	damaged	952\$4:n, 952\$4:w	
. att 8006	restricted	952\$5:n, 952\$5:w	
. att 8007	cn-sort	952\$6:n, 952\$6:w	
. att 8008	notforloan	952\$7:n, 952\$7:w	
. att 8009	ccode	952\$8	
. att 8010	itemnumber	952\$9:n, 952\$9:s, 999\$d:n, 999\$d:s, 999\$d:w	
. att 8011	homebranch	952\$a	branch
. att 8012	holdingbranch	952\$b	
. att 8013	location	952\$c	
. att 8015	acqsource	952\$e	
. att 8016	coded-location-qualifier	952\$f	
. att 8017	price	952\$g	
. att 8018	stack	952\$j:n, 952\$j:w	
. att 8019	issues	952\$l:n, 952\$l:w, 952\$l:s	
. att 8020	renewals	952\$m:n, 952\$l:w	
. att 8021	reserves	952\$n:n, 952\$n:w	
. att 8022	Local-classification	952\$o:w, 952\$o:p, 952\$o:s	lcn, callnum

.	att 8023	barcode	952\$p, 952\$p:n	bc
.	att 8024	onloan	952\$q:n, 952\$q:w	
.	att 8025	datelastseen	952\$r	
.	att 8026	datelastborrowed	952\$s	
.	att 8027	copynumber	952\$t	
.	att 8028	uri	952\$u:u	
.	att 8029	replacementprice	952\$v	
.	att 8030	replacementpricedate	952\$w	
.	att 8031	itype	952\$i:w	mc
.				
.	Fixed Fields and other special indexes			
.				
.	att 9901	Extent	300:w, 300:p	
.			100\$9, 110\$9, 111\$9, 130\$9, 245\$9, 400\$9, 410\$9, 440\$9, 490\$9, 600\$9, 610\$0, 611\$9, 630\$9, 650\$9, 651\$9, 652\$9, 653\$9, 654\$9, 655\$9, 656\$9, 657\$9, 690\$9, 700\$9, 710\$9, 711\$9, 730\$9, 800\$9, 810\$0, 811\$9, 830\$9	
.	att 8910	Koha-Auth-Number		an
.	att 9905	llength	leader:0-5	
.	att 9902	summary		
.	att 9990	Call-Number		
.	att 9900	Author-personal-bibliography	100\$a:p, 100\$a:s	aub
.	att 9902	Author-in-order	245\$c:w, 245\$c:p, 245\$c:s	auo
.				

Note 1: LDR/06 is the source for this index. The codes you can use as search values are: 06 - Type of record
a - Language material
c - Notated music
d - Manuscript notated music
e - Cartographic material
f - Manuscript cartographic material
g - Projected medium
i - Nonmusical sound recording
j - Musical sound recording
k - Two-dimensional nonprojectable graphic
m - Computer file
o - Kit
p - Mixed materials
r - Three-dimensional artifact or naturally occurring object
t - Manuscript language material

Note 2: 008/24-27 (Book) is the source for this index. The codes you can use as search values are: 24-27 - Nature of contents (006/07-10)
- No specified nature of contents
a - Abstracts/summaries
b - Bibliographies
c - Catalogs
d - Dictionaries
e - Encyclopedias
f - Handbooks
g - Legal articles
i - Indexes
j - Patent document
k - Discographies
l - Legislation
m - Theses
n - Surveys of literature in a subject area
o - Reviews
p - Programmed texts

<p>q - Filmographies r - Directories s - Statistics t - Technical reports u - Standards/specifications v - Legal cases and case notes w - Law reports and digests z - Treaties 2 - Offprints j - No attempt to code</p>

Appendices

Manual for Koha Version 3.0 (stable)

1. Important Links

Links related to working with your Koha system.

Koha

- Report Koha Bugs - <http://bugs.koha.org/cgi-bin/bugzilla/index.cgi>
- Koha Community - <http://www.koha.org/community/>
- Koha Versioning Control - <http://git.koha.org/>
- Koha MARC Tutorials - <http://www.pakban.net/brooke/>
- Koha 3.0 embedded holdings data fields - http://wiki.koha.org/doku.php?id=en:documentation:marc21holdings_holdings_data_information_for_vendors
- Database Structure - http://git.koha.org/cgi-bin/gitweb.cgi?p=Koha;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD
- Add a new & upcoming section to your OPAC:
<http://www.mylapl.org/koha/newtitles>
- Koha as a CMS: http://wiki.koha.org/doku.php?id=koha_as_a_tiny_cms
- SIP2 Support: <http://wiki.koha.org/doku.php?id=en:development:sip2>
- Koha Tools: <http://kylehall.info/index.php/projects/koha-tools/>
 - A package that includes a bunch of handy tools including reports
- Installing Koha on Ubuntu 8.10 - <http://www.blazingmoon.org/guides/k3-on-u810-1.html>

Zebra

- Documentation for Zebra : <http://indexdata.dk/zebra/doc/>

Cataloging

- Z39.50 Server Search - <http://targettest.indexdata.com/>
- Z39.50 Server List - <http://staff.library.mun.ca/staff/toolbox/z3950hosts.htm>
- Library of Congress Authorities - <http://authorities.loc.gov/>
- MARC Country Codes - <http://www.loc.gov/marc/countries/>
- Search the MARC Code List for Organizations - <http://www.loc.gov/marc/organizations/org-search.php>

Enhanced Content

- Amazon Associates - <http://associates.amazon.com>
- Amazon Web Services - <http://aws.amazon.com>
- WorldCat Affiliate Tools - <http://www.worldcat.org/wcpa/do/AffiliateUserServices?method=initSelfRegister>
- XISBN - <http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp>

Reports

- Sample reports from NEKLS: <http://www.nexpresslibrary.org/training/reports-training/>

Biblios

- Google Gears - <http://gears.google.com>
- PazPar2 - <http://www.indexdata.dk/pazpar2/>

Misc

- Zotero - <http://zotero.org>

2. Cron Jobs

Cron jobs run on a schedule to perform specific tasks behind the scenes.

Koha requires several cron jobs to run. Please list the jobs you know about below so I can build on the manual. If you think we need more than the fields I listed, let me know - or alter the document.

TIP: Please note that the locations below assume a dev install which puts the crons in misc/, if you have a standard install you may want to look in bin/ instead.

Script path: misc/migration_tools/rebuild_zebra.pl
Does: Updates Zebra indexes with recently changed data.
Required by: Zebra

Frequency suggestion: every n minutes, depending on performance needs

Script path: misc/cronjobs/advance_notices.pl
Does: prepares "pre-due" notices and "item due" notices for patrons who request them
 prepares notices for patrons for items just due or coming due soon.
 requires EnhancedMessagingPreferences to be on
Frequency suggestion: nightly
 TIP: This script does not actually send the notices. It queues them in the message queue for later

Script path: misc/cronjobs/process_message_queue.pl
Does: processes the message_queue to send emails and SMS messages to users
 sends outgoing emails to patrons.
 these messages are the ones prepared by other scripts, like overdue_notices.pl and others.
Frequency suggestion: nightly

Script path: misc/cronjobs/build_browser_and_cloud.pl
Does:
Required by: OpacBrowser system preference
Frequency suggestion:

Script path: misc/cronjobs/fines.pl
Does:

Required by: finesMode system preference

Frequency suggestion: nightly

IMPORTANT: This script replaces the old fines2.pl, fines-ll.pl, and fines-sanop.pl scripts.

Script path:

misc/cronjobs/holds/build_holds_queue.pl

Does:

Updates holds queue

Required by: Circulation >> Holds Queue

Frequency suggestion: every 1-4 hrs

Script path: misc/cronjobs/longoverdue.pl

Does: allows one to specify on the command line system-wide delays for changing items to different lost statuses, and optionally charge for the item.

Required by:

Frequency suggestion:

nightly

Script path: misc/cronjobs/overdue_notices.pl

Does: prepares messages to alert patrons of overdue messages

Frequency suggestion: nightly

IMPORTANT: This script replaces the old overduenotices.pl, overduenotices-30.pl, overduenotices-csv.pl, and smsoverdues.pl scripts.

Script path: misc/cronjobs/services_throttle.pl

Does: Resets counters for web services. Currently only OCLC's XISBN service is affected.

Required by: XISBN feature

Frequency suggestion: nightly

Script path: misc/migration_tools/merge_authorities.pl

Does: Updates biblio data with changes to authorities records

Required by: dontmerge system preference

Frequency suggestion: nightly

Script path: misc/cronjobs/rss/rss.pl

Does: Produces an RSS XML document for any SQL query (not used for search results RSS feed) **Required by:**

Frequency suggestion:

hourly

Deprecated scripts

Should not be run without modification:

Script path: misc/cronjobs/update_items.pl

Script path:

misc/cronjobs/smsoverdues.pl

Script path: misc/cronjobs/notifyMailsOp.pl

Script path: misc/cronjobs/reservefix.pl

Script path: misc/cronjobs/zebraqueue_start.pl

Script path: misc/cronjobs/j2a.pl

3. Browser Compatibility

A list of browsers that Koha works best on.

Please note that all screenshots (with the exception of the RSS and MarcEdit documents) were taken in FireFox. This is because the staff client has not been tested in other browsers and it is recommended that you use FireFox for accessing your staff client.

Download FireFox for free at: <http://www.mozilla.com/en-US/firefox/>

Koha's OPAC, circulation, cataloging, management and self-checkout interfaces are all based on standards-compliant World Wide Web technologies: XHTML, CSS and Javascript (Javascript is only implemented for 'extra' functionality, not for core functionality). For this reason, Koha can be accessed from older clients on the network that are running old browser versions. In fact, Koha's interfaces have been successfully tested on the original browser "WorldWideWeb" released in 1990.

For use of Koha's OPAC, the following browsers are officially supported:

- MSIE >= 5.0
- Mozilla/Firefox (Since at least Mozilla 1.0)
- Netscape >= 6
- Safari >= 1.2
- Konqueror >= 3.3.2
- Opera

All features are implemented in officially supported browsers.

4. Hot Keys

A list of keyboard shortcuts that work in Koha.

Koha has some hot keys ready to use out of the box:

- On any screen that has it, you can:
 - jump to the catalog search with Alt+Q
 - jump to the checkout with Alt+U
 - TIP: this will not work for Mac user
 - jump to the checkin with Alt+R

TIP: Mac users use the OPTION button in place of ALT

5. Handling Long Overdue Items

Long overdue items can automatically be marked as lost with some system tweaking.

IMPORTANT: the NoReturnSetLost system preference been deprecated in favor of the cron script 'longoverdues.pl'.

IMPORTANT: The script has only been tested with one --lost argument. While it accepts multiple --lost arguments, the results are unspecified. In particular there is a danger in the second argument undoing all the status changes of the first.

The current functionality is as follows:

1. You may create any number of LOST authorized values.
The defaults are: 1='Lost' ; 2='Long overdue' .
A potential variation might be: 1='Lost' ; 2='Long overdue, pending lost' ; 3='Long overdue'.
2. The 'longoverdue.pl' cron script allows you to specify:
 - a. any number of status transitions, occurring at a specified overdue length (number of days overdue). In the case of the variation proposed above, you might choose to have the status transition as:
at 30 days overdue, set status to 3 (long overdue)
at 45 days overdue, set status to 2 (pending lost)
at 60 days overdue, set status to 1 (lost).
Note the parentheses here are the authorized values that you define.
 - b. specify which transition triggers the replacement value charge. This is specified as the 'Lost' authorized value. In the case above, we would specify the authorized value '1' = 'Lost' as the transition that triggers the charge. When the longoverdues script runs each night, whenever it sets the LOST value to 1, it will also charge the replacement price.
3. There are no defaults for replacement charges. If your item record does not have a value stored in the replacement charge field, the patron will not be charged (in point of fact, they will be charged a \$0 charge, which can be useful to see where this happens -- this will be visible on their account. However no charge will be assessed on their account). I expect that someone will want to sponsor an itemtype-level default replacement charge, probably with an optional surcharge sometime very soon here, but as yet, this is not in the development queue. The other option for a workaround is to update item records' replacement prices to include surcharges / defaults.
4. The item remains checked out to the patron unless you specify the replacement charge trigger (2b.). If a replacement charge trigger is specified, the item marked returned, removing it from the patron's account, and a charge is levied (even if it is \$0) in accordance with the item replacement cost.
5. There is no implicit billing notice functionality. If you need to notify the patron that the replacement charge has been assessed, you must coordinate this with the notice/status triggers functionality. Clearly, this is a limitation, as the replacement charge is assessed without regard to library or patron category, while the notices themselves are dependent on those values. This is also an area where I expect (/hope) one of our clients will step up and sponsor further development. The current notices module was developed for the specific needs of a specific French library system.

6. SIP2 Integration

Koha versions 3.0 and later include a functional implementation of the SIP2 protocol. It was designed against the 3M SIP2 specifications, document version 2.12, April 11, 2006. It supports ALL of the SIP (version 1) commands

and almost all of the SIP2 commands.

Introduction

Koha versions 3.0 and later include a functional implementation of the SIP2 protocol. It was designed against the 3M SIP2 specifications

, document version 2.12, April 11, 2006. It supports ALL of the SIP (version 1) commands and almost all of the SIP2 commands.

Compatible Devices and Software include:

- 3M Self-Check (SC) Terminals
- Envisionware
- CASSIE PC reservation system by Librarica
- Integratedtek

SIP2 messages supported by Koha

If the Koha Version column is blank, the SIP2 message is not yet supported.

#	Message Name	Koha Version	Note
23	Patron Status Request	3.0	
11	Checkout	3.0	
09	Checkin	3.0	
01	Block Patron	3.0	
99	SC Status	3.0	
97	Request ACS Resend	3.0	
93	Login	3.0	
63	Patron Information	3.0	
35	End Patron Session	3.0	
37	Fee Paid		
17	Item Information	3.0	
19	Item Status Update		
25	Patron Enable	3.0	
15	Hold	3.0	item-level holds not supported
29	Renew	3.0	title-level renew not supported, nor is "third party allowed"
65	Renew All	3.0	

Configuration

1. Create SIP user(s) in STAFF interface as normal for staff users. Set userid and password. Consider setting one of the notes fields to "SYSTEM USER -- DO NOT DELETE" to warn against deletion. Note the expiration date will affect the SIP users' connection so consider setting it far in the future.
 - TIP: Learn more in this manual on the Adding Staff Patrons page.

2. Set Permissions > grant "Circulate" permissions.
 - TIP: Learn more in this manual on the Patron Permissions page.
3. Koha uses syslogd facility "local6" to catch log messages. Edit your /etc/syslog.conf file to handle them. For example, adding a line like the following to write all levels of messages to /var/log/sipserver.log:


```
sudo echo "local6.* /var/log/sipserver.log" >> /etc/syslog.conf
```
4. Restart syslogd.
5. On command line, export KOHA_CONF and PERL5LIB as normal. Then copy the example SIPconfig.xml file and edit the copy, like:

```
cd $PERL5LIB/C4/SIP
cp ./SIPconfig.xml ./SIPServer.xml
vi ./SIPServer.xml # or use whatever text editor you like
```

1. Edit the <accounts> section to contain a <login> element for each of your SIP user accounts, including correct userid, password and institution (library). These are the values you set in the STAFF interface in Configuration Step #1.
2. Edit the <institutions> section to contain an <institution> element for each of your SIP users' libraries. Note: it is not necessary to include all institutions here, only those to which SIP users belong.
3. Note the port number for TCP connections is controlled in this file also.

Exampmle SIPServer.xml file with important points highlighted:

```
<acsconfig xmlns="http://openncip.org/acs-config/1.0/">
  <error-detect enabled="true" />

  <listeners>
    <service
      port="8023/tcp"
      transport="telnet"
      protocol="SIP/2.00"
      timeout="60" />

    <service
      port="127.0.0.1:6001/tcp"
      transport="RAW"
      protocol="SIP/2.00"
      timeout="60" />
    </listeners>

    <accounts>
      <login id="sipterm1" password="term1" delimiter="|" error-detect="enabled"
institution="MAIN" />
      <login id="envision" password="koha" delimiter="|" error-detect="enabled"
institution="CPL" />
    </accounts>

    <institutions>
      <institution id="MAIN" implementation="ILS" parms="">
        <policy checkin="true" checkout="true" renewal="true"
          status_update="false" offline="false"
          timeout="100"
          retries="5" />
      </institution>
      <institution id="CPL" implementation="ILS" parms="">
        <policy checkin="true" checkout="true" renewal="true"
          status_update="false" offline="false"
          timeout="25"
          retries="5" />
      </institution>
    </institutions>
  </acsconfig>
```

```
</institutions>
</acsconfig>
```

Run command

From the SIP directory, start the SIP2 server as a background process like:

```
perl -I./ ./SIPServer.pm ./SIPServer.xml >~/sip_log.out 2>~/sip_log.err &
```

Note the same KOHA_CONF and PERL5LIB variables must be exported as always.
Note the redirected STDOUT and STDERR (logs) can be to arbitrary locations.

Stopping

Find the head SIP process ID that is running with "ps". Example:

```
$ ps -ef | grep SIP
atz4sip 5869 1 0 Oct28 ? 00:00:05 perl -
I./ /home/atz4sip/koha/C4/SIP/SIPServer.pm ./SIPconfig.xml
atz4sip 5870 5869 0 Oct28 ? 00:00:01 perl -
I./ /home/atz4sip/koha/C4/SIP/SIPServer.pm ./SIPconfig.xml
atz4sip 5872 5869 0 Oct28 ? 00:00:00 perl -
I./ /home/atz4sip/koha/C4/SIP/SIPServer.pm ./SIPconfig.xml
atz4sip 5873 5869 0 Oct28 ? 00:00:00 perl -
I./ /home/atz4sip/koha/C4/SIP/SIPServer.pm ./SIPconfig.xml
atz4sip 6382 5869 0 Oct28 ? 00:00:00 perl -
I./ /home/atz4sip/koha/C4/SIP/SIPServer.pm ./SIPconfig.xml
atz4sip 10045 5869 0 Nov11 ? 00:00:01 perl -
I./ /home/atz4sip/koha/C4/SIP/SIPServer.pm ./SIPconfig.xml
atz4sip 28105 32533 0 15:20 pts/23 00:00:00 grep SIP
```

In this case, the head process is 5869, serving as the parent process for all the other "worker" processes. To stop SIP server, kill the head process:

```
kill 5869
```

You can verify that it succeeded by repeating the "ps" command above. Take care not to target another user's SIP processes by mistake if you share the same system.

Testing

Manual testing

Telnet to the TCP port and login as a SIP user. Example session:

```
$ telnet localhost 8023
Trying 127.0.0.1...
Connected to localhost.
Escape character is '^]'.
login: sipterm1
password: term1
Login OK. Initiating SIP
9300CNSipterm1|COTerm1|CPMAIN
941
2300120080623 172148AOMAIN|AA23820002060444|ACsipterm1|ADbadpassword
24 00120081216 111849AEWava, W.
Jamal|AA23820002060444|BLY|CQN|AFGreetings from Koha. |AOMAIN|
^]
telnet> quit
```

Here we check the info for a patron with barcode 23820002060444 and a

"badpassword". The response declares him a valid patron (BLY) with an invalid password (CQN).

So OK, it's up, but what if you don't speak SIP... how do you test the beast then?

Automated testing

Automated testing of the SIP interface can be tedious because it is necessary to map out all the data to be used by the tests. However, the structure allows C4/SIP/t/SIPtest.pm to consolidate the data used by all the various tests. Edit the section at the top labeled "#Configuration parameters to run the test suite" to match data in your database and your other SIP configuration info. Then run "make test" from the SIP directory.

Advanced Variations

- Export environmental variable KOHA_SIP_LOG_IDENT before starting SIP server to change the name sent to syslogd (default is "acs-server"). This is useful if running multiple SIPs or multiple Koha's on the same interface. Note that the port numbers would have to be different or the 2nd and subsequent SIPs will fail to run.
- Like zebra and mysql and the apache instances, SIP2 can be run on a totally different server than your other Koha interfaces, for security or load balancing. It still needs a fully functioning Koha with DB access, of course.
- Consider using iptables or network level security to prevent unsolicited connections to your SIP2 server. In general you should know the IPs of the systems connecting your SIP2 server.

7. Backing Up Koha

Instructions for backing up the data in your Koha system.

For the purpose of this guide, data is defined as follows:

- Everything stored in the MySQL database is considered data.

Data is the most volatile and is exclusively internal to the application. Everybody should backup their data and mysqldump is the plainest way to do it.

To run a mysqldump, you just need to have the following command run on a regular schedule:

- `mysqldump --add-drop-table -u<dbusername> -p<dbpassword> koha > koha.sql`

You should then use a cron to run the above, create a compressed file and the copy it to a remote location that also gets backed up every day.

Another option is to use AutoMySQLBackup (<http://sourceforge.net/projects/automysqlbackup>) which is very easy to use.

Other backups

Other system backups should be handled by a system admin.

8. Implementation Checklist

A quick guide to getting started with your Koha system.

Data Migration

- Location/Branch codes created and defined
- Patron category type codes created and defined
- Alternate patron attribute fields created and defined
- Item type codes created and defined
- Additional item authorized values (collection codes, shelving locations, etc.) created and defined
- Review data migration and sign off on data mapping

Circulation Configuration

- Set-up circ/fines matrix
- Define whether circ rules are based on item's location, patron's location or transaction location (sys pref = CircControl)
- Set-up calendar for closed days / holidays
- Set whether due dates can fall on closed days (sys pref = useDaysMode)
- Set whether fines are charged for closed days (sys pref = finesCalendar)
- Set sys pref 'finesMode' to "production" just prior to go-live
- Enable "Specify Due Date" form in circulation (sys pref = SpecifyDueDate)
- Enable printing of circulation receipts (sys pref = printcirculationslip)
- Specify if items should be sent back to their owning location at checkin (sys pref = AutomaticItemReturn)
- Specify how current checkouts sort on the circulation page (sys pref = todaysIssuesDefaultSortOrder)
- Specify how previous checkouts sort on the circulation page (sys pref = previousIssuesDefaultSortOrder)
- Define max amount owing to block checkouts (sys pref = noissuecharge)
- Specify whether checkout is prevented if patron expires before due date (sys pref = ReturnBeforeExpiry)
- Specify whether requests can be placed on items that are not on loan (sys pref = AllowOnShelfLoans)
- Specify whether requests can be placed on items with a damaged status (sys pref = AllowHoldsOnDamagedItems)
- Define max amount of holds a patron can place (sys pref = maxreserves)
- Define max amount owing to block ability to place requests (sys pref = maxoutstanding)
- Define number of days on hold shelf before request expires (sys pref = ReservesMaxPickupDelay)
- Set-up and define notice templates
- Set-up and define notice triggers
- Set-up and define staff patron records and set permissions
- Enable web-based self checkout if applicable (sys pref = WebBasedSelfCheck)

Patron Configuration

- Specify the max amount accrued for a single late return (sys pref = MaxFine)
- Specify the number of days overdue before an item is marked lost and patron is charged (cron job = longoverdues.pl)
- Specify the number of days before a patron expires to alert staff at checkout (sys

- pref = NotifyBorrowerDeparture)
- Set whether circulation history will be displayed in the staff client if maintained (sys pref = intranetreadinghistory)
- Define mandatory fields in patron record (sys pref = BorrowerMandatoryField)
- Specify the default email address where notices are sent (sys pref = AutoEmailPrimaryAddress)
- Enable ability for patrons to sign up for additional messages about items due or nearly due (sys pref = EnhancedMessagingPreferences)

OPAC Configuration

- Enable 'Book Cart' in OPAC (sys pref = opacbookbag)
- Enable patrons to place holds in OPAC (sys pref = RequestOnOpac)
- Enable item level holds in OPAC (sys pref = OPACItemHolds)
- Enable or disable display of user login features (sys pref = opacuserlogin)
- Enable patrons to change their password via OPAC (sys pref = OpacPasswordChange)
- Enable patrons to renew items from OPAC (sys pref = OpacRenewalAllowed)
- Enable display of patron's circ history (sys pref = opacreadinghistory)
- Enable patrons to submit reviews (sys pref = reviewson)
- Enable patrons to submit reviews anonymously (sys pref = AnonSuggestions)
- Enable patron created 'Lists' in OPAC (sys pref = virtualshelves)
- Enable patrons to submit purchase requests (sys pref = suggestion)
- Enable public display of user's purchase requests (sys pref = OPACViewOthersSuggestions)
- Disable user logins (sys pref = noOPACUserLogin)
 - **IMPORTANT: disables all functionality requiring user authentication**
- Enable display of 'Change Languages' feature in OPAC (sys pref = opaclanguagesdisplay)
- Create / implement library branded custom stylesheet for the OPAC
- Customize and enable XSLT stylesheet changes to reflect changes to the display content of bibliographic information for either the results list or bibliographic detail pages of the OPAC (sys prefs = XSLTResultsDisplay & XSLTDetailsDisplay)
- Making customizations to the vanilla OPAC:
 - Define the library name shown on main OPAC page (sys pref = LibraryName)
 - Enter url to library logo to replace default Koha logo (sys pref = opacsmallimage)
 - Define html credits at bottom of the OPAC page (sys pref = opaccredits)
 - Define text to display in the main content area of the OPAC main page (sys pref = OpacMainUserBlock)
 - Define library specific url links to display in the left hand navigational bar of the OPAC main page (sys pref = OpacNav)
 - Define html to include a custom header in the OPAC (sys pref = opacheader)
 - Add CSS to be included in the OPAC (sys pref = OPACUserCSS)
- If library has technical expertise on staff they may also choose to:
 - Create custom stylesheet and enter url to library created custom stylesheet (sys pref = opacstylesheet)
 - **IMPORTANT: Do not remove the default values colors.css or opac.css from the sys prefs opaccolorstylesheet and opacstylesheet as these are the defaults required to fall back on in case of problems with user created stylesheets**
 - Define custom javascript for inclusion in OPAC (sys pref = opacuserjs)
- Enable highlighting of search terms in the results list (sys pref = OpacHighlightedWords)
- Disable display of 'lost' items in the OPAC (sys pref = hidelostitems)
- Define default tab to display on bibliographic detail page (sys pref = BiblioDefaultView)

- Enable Shelf Browser on item details page (sys pref = OPACShelfBrowser)
- Set whether urls in the OPAC open in a new window or not (sys pref = OPACURLOpenInNewWindow)
- Limit results to items owned at user's library by default (sys pref = SearchMyLibraryFirst)
 - **IMPORTANT: Only applicable for multi-branch or multi-library dbs**
- If using serials in Koha:
 - Specify how to display serial issue information in the OPAC (sys pref = OPACSubscriptionDisplay)
 - Specify whether to display extended serial issue information in the OPAC (sys pref = OPACDisplayExtendedSubInfo)
 - Define display preference for serial issue history (sys pref = SubscriptionHistory)
- If you have loaded / migrated full MARC authorities:
 - Enable authority searching and OPAC Dictionary (sys pref = Disable_Dictionary)
 - Enable the search authorities link in OPAC (sys pref = OPACAuthorities)
 - Enable subject authorities browser in OPAC (sys pref = OPACBrowser) + ensure build_browser.pl is running on the server

Searching Configuration

- Enter stopwords to be used in searching in the Stop Word page under Administration
- Remove defined stopwords from queries (sys pref = QueryRemoveStopwords)
- Enable fuzzy queries (sys pref = QueryFuzzy)
- Enable field weighting (sys pref = QueryWeightFields)
- Enable query stemming (sys pref = QueryStemming)
- Enable query truncation (sys pref = QueryAutoTruncate)
- Specify which field will comprise the Type limit in advanced search (sys pref = AdvancedSearchTypes)
- Specify the maximum number of hits to display on results list in staff client (sys pref = numSearchResults)
- Specify the maximum number of hits to display on results list in OPAC (sys pref = OPACnumSearchResults)
- Specify the maximum number of items to display on results list in OPAC (sys pref = maxItemsInSearchResults)
- Specify the default field used to sort in staff client (sys pref = defaultSortField)
- Specify the default field used to sort in OPAC (sys pref = OPACdefaultSortField)
- Specify the default sort order in staff client (sys pref = defaultSortOrder)
- Specify the default sort order in OPAC (sys pref = OPACdefaultSortOrder)
- Define whether full item information or item status only should appear on the results list (sys pref = OPACItemsResultsDisplay)
- Specify whether advanced search options should be auto-expanded in the staff client (sys pref = expandedSearchOption)

Enhanced Content Configuration

- Decide whether to enable social tagging feature in OPAC and enable if desired (sys pref = TagsEnabled)
- Enable input of tags from the results list in OPAC (sys pref = TagsInputOnList)
- Enable input of tags from the bibliographic detail page in OPAC (sys pref = TagsInputOnDetail)
- Define number of tags to display on results list in OPAC (sys pref = TagsShowOnList)
- Define number of tags to display on the bibliographic detail page in OPAC (sys pref = TagsShowOnDetail)
- Enable tag moderation (sys pref = TagsModeration)
- Specify or have LibLime specify the path on server to the local ispell executable (sys pref = TagsExternalDictionary)
- Decide whether to display Amazon based enhanced content (book jacket covers, etc.)

- Apply for Amazon access key at <http://aws.amazon.com>
- Enable Amazon content in Koha (sys pref = AmazonContent)
- Enter AmazonAccessKeyID and AmazonAssocTag (sysprefs = AWSAccessKeyID and AmazonAssocTag)
- Enable Google Book Jackets (sys pref = GoogleJackets)
- Decide whether to enable FRBRize editions functionality.
 - Enable ability to FRBRize editions (sys pref = FRBRizeEditions)
 - Enable various isbn services:
 - OCLCAffiliateID
 - PINESISBN
 - ThingISBN
 - XISBN
 - **IMPORTANT: the XISBN service is free for non commercial use when usage does not exceed 500 requests per day ... the sys pref XISBNDailyLimit is set to 499 upon install**
- For customers with contracts with Baker&Taylor for Content Café:
 - Enable Baker & Taylor enhanced content features (sys pref = BakerTaylorEnabled)
 - Enter user name to access Content Café content (sys pref = BakerTaylorUserName)
 - Enter password to access Content Café content (sys pref = BakerTaylorPassword)
 - Enter url for Baker & Taylor Bookstore if applicable (sys pref = BakerTaylorBookstoreURL)

Cataloging Configuration

- Codes / descriptions for any custom authorized values entered
- z39.50 client targets defined for copy cataloging
- MARC Bibliographic frameworks defined for different templates
- Run MARC Bibliographic framework test to ensure any changes to frameworks are error free
- Classification sources used in cataloging defined in database
- Record matching rules for import/overlay defined
- MARC Organization Code entered for 003 tag (sys pref = MARCOrgCode)
- Verify MARC support is enabled (sys pref = marc)
- Verify MARC Flavor is set to MARC21 (sys pref = marcflavour)
- If using frameworks, set type of label display (sys pref = LabelMARCView)
- If using frameworks, enable Advanced MARC editor (editor does not display tag / subfield labels) (sys pref = advancedMARCeditor)
- Specify default classification scheme (sys pref = DefaultClassificationSource)
- Specify default view for bibliographic detail page in staff client (sys pref = IntranetBiblioDefaultView)
- Modify default tags / subfields displayed in ISBD view if necessary (sys pref = ISBD)
- Define tag / subfield from MARC bibliographic record to derive item call number from (sys pref = itemcallnumber)
- Enable auto item barcode generation if desired (sys pref = autoBarcode)
- If using serials and serials routing:
 - Enable serials routing (sys pref = RoutingSerials)
- The following cataloging system preferences should already be set and should not be modified.
 - item-level_itypes = ON
 - NoZebra = OFF
 - NoZebraIndexes = 0

Authorities Configuration

The following system preferences only need be checked if your library has migrated / loaded full MARC authorities and / or plans to implement authority control in Koha:

- Enable creation of brief minimal MARC authorities when adding bibliographic records whose authority controlled tags do NOT match an existing authority in the database (sys pref = BiblioAddsAuthorities)
- Specify whether an update to an authority record auto updates the associated bibs (sys pref = dontmerge)
- Define the character used to display between subfields of an authority (sys pref = authoritysep)

Log Configuration

- Enable which transaction data the system should keep a log of:
- Patron creation / modification (sys pref = BorrowersLog)
- Bibliographic record creation / modification (sys pref = CataloguingLog)
- Fines assessment / payment (sys pref = FinesLog)
- Checkouts (sys pref = IssueLog) *
- Checkins (sys pref = ReturnLog) *
- Notices (sys pref = LetterLog) *
- Serial checkin (sys pref = SubscriptionLog)

TIP: If you have high circulation volume, you do not activate the logging for checkouts, checkins and notices as they can slow down the system.

Localization Configuration

Ensure the following preferences are set correctly (the following at US specific):

- dateformat = us
- language = en
- opaclanguages = en

Admin Configuration

Most admin system preferences are part of the vanilla system and need not be touched. There are only a handful of administrative system preferences you may wish to set / check before go-live:

- Enable IP authentication to block access to staff client from unauthorized IP addresses (sys pref = AutoLocation)
- Specify the default separator character for separating values for exported reports (sys pref = delimiter)
- Specify the default application for exporting report data (sys pref = MIME)
- Specify a master address to use for printing on receipt, overdues if different from the physical address in the branch record (sys pref = libraryAddress)
- Specify email address to which OPAC self initiated patron record modification requests are sent (sys pref = KohaAdminEmailAddress)
- Specify inactivity timeout period for OPAC (sys pref = timeout)
- Enable single branch mode (sys pref = singleBranchMode)
 - **IMPORTANT: This is only applicable for single location sites and enabling it eliminates the branch selection limits / facets in the OPAC**

Acquisitions Configuration

- Specify type of acquisitions to enable in Koha (sys pref = acquisitions)
- Create vendor records & fund accounts

- Specify if OPAC purchase suggestions are emailed rather than handled via acquisitions (sys pref = emailPurchaseSuggestions)
- Specify whether a purchase suggestion is created when a serial renews (sys pref = RenewSerialAddsSuggestion)

Planning for go-live

- Work with your service provider (if you have one) to determine a go-live date
- Schedule training dates / times with your service provider
- Schedule training dates / times with your staff if you are going to do a additional in-house training to your staff
- If migrating from another system, determine with help of implementation team the timeline for extracting, loading and indexing data for go-live
- Schedule any extractions jobs which must be run by your current vendor to supply your data to LibLime in time for the final migration
- Determine whether the library will run two systems in parallel during go-live, close during the final migration of data (in future we will have an offline circ module to assist in this time period)
- Determine your production db's staff client and OPAC urls and communicate this information with staff
- Ensure server is ordered in time to be configured and set-up for the final load. Ensure that you have a back-up power system in case of power failure

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