

Koha Manual

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Koha administration

1. Koha Basics

Koha is the first free and open source software library automation package (ILS). Development is sponsored by libraries of varying types and sizes, volunteers, and support companies from around the world.

2. Koha Recommendations

When working in the Koha staff client it is strongly recommended that you use the Firefox browser. Koha's staff client is not supported in Internet Explorer and has not yet been fully optimized for Google Chrome.

2. Basic Parameters

Get there: More > Administration

Important

Configure all 'parameters' in the order they appear.

2.1. Libraries & Groups

When setting up your Koha system you will want to add information for every library that will be sharing your system. This data is used in several areas of Koha.

- *Get there:* More > Administration > Basic Parameters > Libraries and Groups

When visiting this page you are presented with a list of the libraries and groups that have already been added to the system.

Home > Administration > Libraries and groups

System preferences

System preferences

+ New library + New group

Basic parameters

Libraries and groups

Item types

Authorized values

Patrons and circulation

Patron types and categories

Circulation and fines rules

Patron attribute types

Library transfer limits

Transport cost matrix

Item circulation alerts

Cities and towns

Road types

Catalog

MARC bibliographic framework

Koha to MARC mapping

Keywords to MARC mapping

Libraries

Showing 1 to 10 of 16 Show 10 entries First Previous Next Last Search:

Name	Code	Address	Properties	IP		
Aligarh muslim university library	AMU				Edit	Delete
Centerville	CPL	Jefferson Summit			Edit	Delete
DU	MPL	372 Forest Street			Edit	Delete
Fairfield	FFL	River Station			Edit	Delete
Fairview	FPL	Hickory Squire			Edit	Delete
Franklin	FRL	Smith Heights			Edit	Delete
Institut Protestant de Théologie	IPT				Edit	Delete
Jammu & kashmir	JK				Edit	Delete
KABLibrary	KAB				Edit	Delete
Liberty	LPL	East Hills			Edit	Delete

Showing 1 to 10 of 16 First Previous Next Last

Group(s): Search domain
No search domain defined. Add a new group.

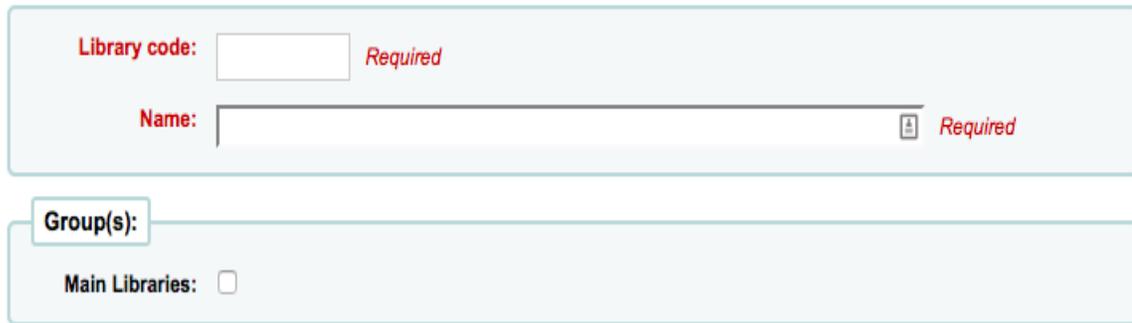
Group(s): Properties
No properties defined. Add a new group.

2.1.1. Adding a Library

To add a new library:

- Click 'New Library'
- The top of the form asks for some basics about the library

New library



Library code: Required

Name: Required

Group(s):

Main Libraries:

- The library code should not contain any spaces and be 10 or fewer characters. This code will be used as a unique identifier in the database.
- The name will be displayed on the OPAC wherever the library name displays to the public and should be a name that makes sense to your patrons.
- If you have groups set up you can choose what group this library belongs to after entering in the code and name
- Next you can enter basic contact info about the branch

Address line 1:

Address line 2:

Address line 3:

City:

State:

Zip/Postal code:

Country:

Phone:

Fax:

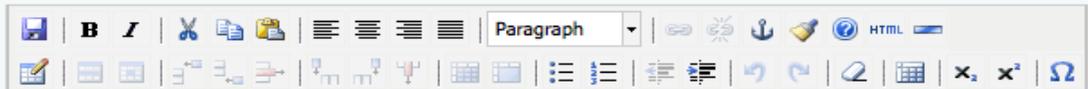
Email:

Reply-To (if different to Email):

Return-Path (if different to Email):

URL:

OPAC info:



Path: p

IP: Can be entered as a single IP, or a subnet such as 192.168.1.*

Notes:

- The address and contact fields can be used to make notices custom for each library
- The email address field is not required, but it should be filled for every library in your system
 - **Note**

Be sure to enter a library email address to make sure that notices are sent to and from the right address

- If you'd like you can enter a different 'Reply-To' email address. This is the email address that all replies will go to.

Note

If you do not fill in this value Koha will use the address in the ReplytoDefault preference

- If you'd like you can also enter a different 'Return-Path' email address. This is the email address that all bounced messages will go to.

Note

If you do not fill in this value Koha will use the address in the ReturnpathDefault preference

- If the URL field is populated then the library name will be linked in the holdings table on the OPAC

2.1.2. Editing/Deleting a Library

You will be unable to delete any library that has patrons or items attached to it.

Library cannot be deleted because there are patrons using that library

Each library will have an 'Edit' link to the right of it. Click this link to edit/alter details associated with the library in question.

Important

You will be unable to edit the 'Library code'

2.1.3. Adding a group

To add a Search Domain or Library Property Group click the 'New Group' button at the top of the screen

Add group

Category code:

Name:

Description:

Category type:

Show in search pull-down:

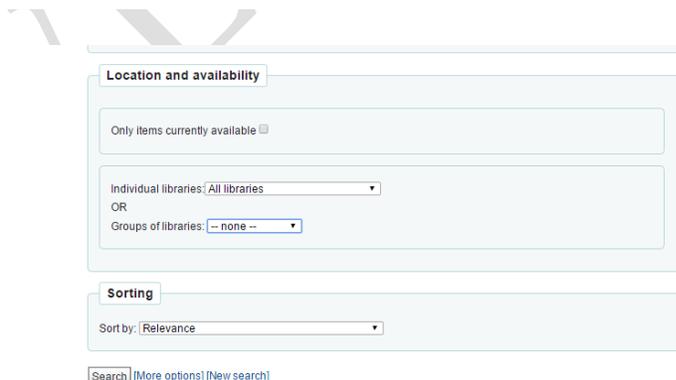
Give the group a 'Category type; of 'searchdomain' and if you would like the group to show up in the library pull down at the top of the OPAC (with OpacAddMastheadLibraryPull-down set to 'Add') and on the advanced search page you can check the 'Show in search pull-down' box.

Of the fields on the group form, 'Category code', 'Name', and 'Category type' are the only required fields

2.1.3.1. Search Domain Groups

Search Domain Groups allow you to search a group of libraries at the same time instead of searching just one library or all libraries.

To see Search Domain Groups in action visit the staff client advanced search page in your Koha system:



The screenshot shows the 'Location and availability' section of the Koha advanced search page. It includes a checkbox for 'Only items currently available', a dropdown for 'Individual libraries' set to 'All libraries', and a dropdown for 'Groups of libraries' set to '-- none --'. Below this is the 'Sorting' section with a dropdown for 'Sort by' set to 'Relevance'. At the bottom, there is a 'Search' button and links for 'More options' and 'New search'.

2.1.3.2. Library Property Groups

You can assign specific categories to your libraries by adding groups for them

Group(s): Properties

Name	Code	Description		
Academic Libraries	ACA		Edit	Delete
Public Libraries	PUB		Edit	Delete

Properties are then applied to libraries via the add or edit library form

Modify library

Library code FFL

Name

Group(s):

Main Libraries

2.2. Item Types

Koha allows you to organize your collection by item types and collection codes.

- *Get there:* More > Administration > Basic Parameters > Item Types

Item types typically refer to the material type (book, cd, dvd, etc), but can be used in any way that works for your library.

[New Item Type](#)

Item Types Administration

Image	Code	Description	Not for loan	Renewable	Charge	Actions
	BK	Books		5 times	0.00	Edit Delete

2.2.1. Adding Item Types

The Checkin message type can be a Message or an Alert. The only difference between these two is the styling. By default a Message is blue

Check In

Enter item barcode:

Options

Forgive overdue charges

Book drop mode

Checked-in items

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
08/22/2016 23:59	Art of Asia.	Rubissow, Helen.	1234	CPL	CPL		709.5	BK	Kumar, Kapil (ST)	

and an Alert is yellow.

This is a book

Check In

Enter item barcode:

Options

Forgive overdue charges

Book drop mode

Checked-in items

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
Not checked out	My sister's keeper :	Picoult, Jodi,	849837178272195	FFL	NIC		PS3566.I372 M9 2005	B	Not checked out	

- Some SIP devices need you to use a SIP-specific media type instead of Koha's item type (usually lockers and sorters need this media type), if you use a device like this you'll want to enter the SIP media type.
- When finished, click 'Save Changes'
 - **Note**

All fields, with the exception of the 'Item Type' will be editable from the Item Types list

- Your new item type will now appear on the list

	DVD	DVD				1.00			Edit Delete
---	-----	-----	--	--	--	------	--	--	----------------

2.2.2. Editing Item Types

Each item type has an Edit button beside it. To edit an item simply click the 'Edit' link.

Note

You will not be able to edit the code you assigned as the 'Item Type' but you will be able to edit the description for the item.

2.2.3. Deleting Item Types

Each item has a Delete button beside it. To delete an item, simply click the 'Delete' link.

Note

You will not be able to delete item types that are being used by items within your system.

Cannot Delete Item Type

This record is used 4 times. Deletion is not possible.

Item type	BK
Description	Books
Loan length	
Renewals	Allowed
Rental charge	0.00

2.3. Authorized Values

Home > Administration > Authorized values

System preferences

System preferences

Basic parameters

Libraries and groups

Item types

Authorized values

Patrons and circulation

Patron types and categories

Circulation and fines rules

Patron attribute types

Library transfer limits

Transport cost matrix

Item circulation alerts

Cities and towns

New authorized value for BOR_NOTES

Authorized values

NOTE: If you change an authorized value, existing records using it won't be updated.

Show category: BOR_NOTES

Values for custom patron notes

Authorized values for category BOR_NOTES:

Showing 1 to 1 of 1 | Show 20 entries | First Previous Next Last | Search:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
ADDR	Address Notes			No limitation	Edit	Delete

Showing 1 to 1 of 1 | First Previous Next Last

- Bsort1
 - Values that can be entered to fill in the patron's sort 1 field
- Bsort2
 - Values that can be entered to fill in the patron's sort 2 field
- CART
 - Is the shelving cart location, used by InProcessingToShelvingCart and ReturnToShelvingCart
- CCODE
 - Collection codes (appears when cataloging and working with items)
- DAMAGED
 - Descriptions for items marked as damaged (appears when cataloging and working with items)
- DEPARTMENT
 - Departments are required by and will be used in the Course Reserves module
- 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 adding or editing an item)
- LOST
 - Descriptions for the items marked as lost (appears when adding or editing an item)
- MANUAL_INV
 - Values for manual invoicing types

he value set as the Authorized Value for the MANUAL_INV authorized value category will appear as the Description and the Authorized Value Description will be used as the amount. Enter monetary amounts in the description without currency symbols.
- NOT_LOAN
 - Reasons why a title is not for loan

Values given to lost statuses should be numeric and not alphabetical in order for statuses to appear properly

- **Note**

Negative number values will still allow holds (use for on order statuses for example) where as positive numbers will not allow holds or checkouts

- **PROC**

- The location to be used for NewItemsDefaultLocation (change description as desired), also the location expected by InProcessingToShelvingCart.

- **REPORT_GROUP**

- A way to sort and filter your reports, the default values in this category include the Koha modules (Accounts, Acquisitions, Catalog, Circulation, Patrons)

Show category:

Authorized values for category REPORT_GROUP:

Page(s): Entries/page:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
ACC	Accounts			No limitation	Edit	Delete
ACQ	Acquisitions			No limitation	Edit	Delete
CAT	Catalog			No limitation	Edit	Delete
CIRC	Circulation			No limitation	Edit	Delete
PAT	Patrons			No limitation	Edit	Delete

- **REPORT_SUBGROUP**

- Can be used to further sort and filter your reports. This category is empty by default. Values here need to include the authorized value code from REPORT_GROUP in the Description (OPAC) field to link the subgroup to the appropriate group.

Show category:
Authorized values for category REPORT_SUBGROUP:

 Page(s): Entries/page:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
ADD	Added	CAT		No limitation	Edit	Delete
PADD	Added	PAT		No limitation	Edit	Delete
DEL	Deleted	CAT		No limitation	Edit	Delete
HOLD	Holds	CIRC		No limitation	Edit	Delete
TRANS	Transfers	CIRC		No limitation	Edit	Delete

- **RESTRICTED**
 - Restricted status of an item
- **ROADTYPE**
 - Road types to be used in patron addresses
- **SIP_MEDIA_TYPE**
 - Used when creating or editing an item type to assign a SIP specific media type for devices like lockers and sorters.
- **SUGGEST**
 - List of patron suggestion reject or accept reasons (appears when managing suggestions)
- **WITHDRAWN**
 - Description of a withdrawn item (appears when adding or editing an item)
- **YES_NO**
 - A generic authorized value field that can be used anywhere you need a simple yes/no pull down menu.

2.3.2. Add new Authorized Value Category

In addition to the existing categories that come by default with Koha, librarians can add their own authorized value categories to control data that is entered into the system. To add a new category:

- Click 'New Category'

New category

Category

Authorized value

Description

Description (OPAC)

Branches limitation:

All branches

Centerville

Fairfield

Fairview

Franklin

Goleta Public Library

Liberty

Midway

Nicole's Library

Pleasant Valley

Select All if this authorised value must to be displayed all the time. Otherwise select libraries you want to associate with this value.

Choose an icon:

None
liblime-kids
crystal-clear
sudoc
bridge
Seshat
npl
carredart
colors
vokal

No image:

- Limit your Category to 10 characters (something short to make it clear what the category is for)
 - **Note**

Category cannot have spaces or special characters other than underscores and hyphens in it.
- When adding a new category you're asked to create at least one authorized value
- Enter a code for your Authorized Value into the 'Authorized value' field
 - **Note**

Authorized value is limited to 80 characters and cannot have spaces or special characters other than underscores and hyphens in it.
- Use the Description field for the actual value that will be displayed. If you want something different to show in the OPAC, enter a 'Description (OPAC)'
- If you would like to limit this authorized value category to only specific libraries you can choose them from the 'Branches limitation' menu. To have it show for all libraries just choose 'All branches' at the top of the list.
- If you have StaffAuthorisedValueImages and/or AuthorisedValueImages set to show images for authorized values you can choose the image under 'Choose an icon'
- Click 'Save'
- Your new category and value will appear on the list of Authorized Values

Show category:

Authorized

Page(s):

Authorize value	Description (OPAC)	Icon	Branches limitations	Edit	Delete
BIB			No limitation	Edit	Delete
INX			No limitation	Edit	Delete

MARC504:

- 504MARC
- Asort1
- Asort2
- BOR_NOTES
- BRANCHRP
- Bsort1
- Bsort2
- CCODE
- DAMAGED
- HINGS_AS
- HINGS_C
- HINGS_PF
- HINGS_RD
- HINGS_UT
- LOC
- LOST
- MANUAL_INV
- MARC504**
- NOT_LOAN
- OPAC_SUG

2.3.3. Add new Authorized Value

New authorized values can be added to any existing or new category. To add a value:

- Click 'New authorized value for ...'

New authorized value

Category MARC504

Authorized value

Description

Description (OPAC)

Branches limitation:

All branches
 Centerville
 Fairfield
 Fairview
 Franklin
 Goleta Public Library
 Liberty
 Midway
 Nicole's Library
 Pleasant Valley

Select All if this authorised value must to be displayed all the time. Otherwise select librairies you want to associate with this value.

Choose an icon:

None
liblime-kids
crystal-clear
sudoc
bridge
Seshat
npl
carredart
colors
vokal

No image:

- Enter a code for your Authorized Value into the 'Authorized value' field
 - **Note**

Authorized value is limited to 80 characters and cannot have spaces or special characters other than underscores and hyphens in it.
- Use the Description field for the actual value that will be displayed. If you want something different to show in the OPAC, enter a 'Description (OPAC)'
- If you would like to limit this authorized value category to only specific libraries you can choose them from the 'Branches limitation' menu. To have it show for all libraries just choose 'All branches' at the top of the list.
- If you have StaffAuthorisedValueImages and/or AuthorisedValueImages set to show images for authorized values you can choose the image under 'Choose an icon'
- Click 'Save'
- The new value will appear in the list along with existing values

Show category:
Authorized values for category MARC504:

 Page(s): Entries/page:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
BIB	Includes bibliographic references and index.			No limitation	Edit	Delete
INX	Includes index.			No limitation	Edit	Delete

3. Patrons & Circulation

Settings for controlling circulation and patron information.

3.1. Patron Categories

Patron categories allow you to organize your patrons into different roles, age groups, and patron types.

- *Get there:* More > Administration > Patrons & Circulation > Patron Categories

Patron category administration

 Showing 1 to 15 of 15 Show entries Search:

Code	Category name	Type	Enrollment period	Age required	Upper age limit	Enrollment fee	Overdue	Lost items	Hold fee	Messaging	Branches limitations	Default privacy		
ADPT	Adult Patron	Adult	12 months	17 years	0 years	0.00	Yes	Shown	0.00	Advance notice : email Hold filled : email	No limitation	Default	Edit	Delete
B	Board	Prof.	99 months	5 years	17 years	0.00	Yes	Shown	0.00	Item checkout : email Hold filled : sms Item due : email	3 branches limitations	Default	Edit	Delete
HB	Home Bound	Adult	99 months	18 years	999 years	0.00	Yes	Shown	0.00	Advance notice : email Hold filled : email	No limitation	Default	Edit	Delete
INH	In house	Statistical	999 months	0 years	0 years	0.00	No	Shown	0.00	None	No limitation	Default	Edit	Delete

Patrons are assigned to one of six main categories:

- Adult

- Most common patron type, usually used for a general 'Patron' category.
- Child
 - Children patrons can have a guardian to be attached to them.
- Staff
 - Librarians (and library workers) should be assigned the staff category so that you can set their permissions and give them access to the staff client.
- Organizational
 - Organizational patrons are organizations. Organizations can be used as guarantors for Professional patrons.
- Professional
 - Professional patrons can be linked to Organizational patrons
- Statistical
 - This patron type is used strictly for statistical purposes, such as in house use of items.

3.1.1. Adding a patron category

To add a new patron category click 'New Category' at the top of the page

New category

Category code: *Required*

Description: *Required*

Enrollment period:

Choose one

In months: months

Until date:

Age required: years

Upperage limit: years

Enrollment fee:

Overdue notice required:

Lost items in staff client:

Hold fee:

Category type: *Required*

Branches limitation:

- All branches
- Centerville
- Fairfield
- Fairview
- Franklin
- Goleta Public Library
- Liberty
- Midway
- Nicole's Library
- Pleasant Valley

Select *All branches* if this category type must to be displayed all the time.
Otherwise select libraries you want to associate with this value.

Block expired patrons: Choose whether patrons of this category be blocked from public catalog actions such as renewing and placing holds when their cards have expired.

Default privacy: Controls how long a patrons checkout history is kept for new patrons of this category. "Never" anonymizes checkouts on return, and "Forever" keeps a patron's checkout history indefinitely. When set to "Default", the amount of history kept is controlled by the cronjob *batch_anonymise.pl* which should be set up by your system administrator.

Default messaging preferences for this patron category

	Days in advance	SMS	Email	Digests only?	Do not notify
Advance notice	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item check-in	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>

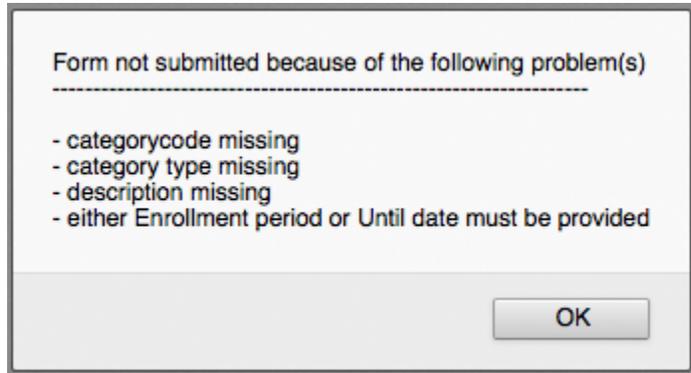
- The 'Category Code' is an identifier for your new code.

- **Note**

The category code is limited to 10 characters (numbers and letters)

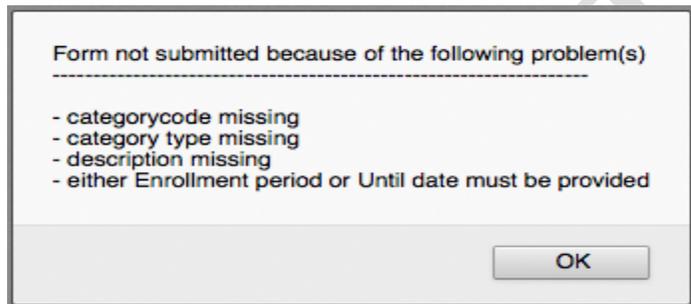
- **Note**

This field is required in order to save your patron category. If left blank you will be presented with an error.



- Enter a plain text version of the category in the 'Description' field.
 - **Note**

This field is required in order to save your patron category. If left blank you will be presented with an error.

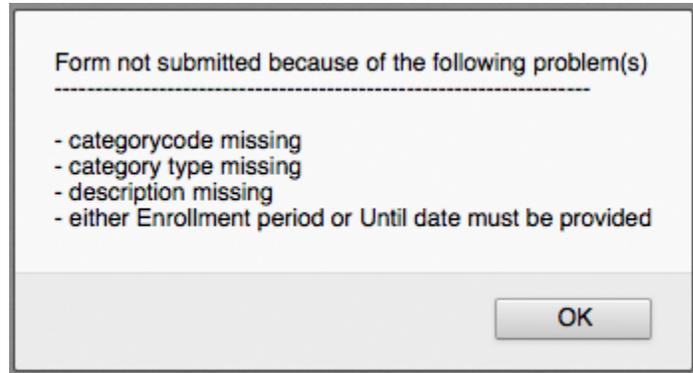


- Enrollment period (in months) should be filled in if you have a limited enrollment period for your patrons (eg. Student cards expire after 9 months or until a specific date)
 - **Note**

You cannot enter both a month limit and a date until. Choose to enter either one or the other.

- **Note**

This field is required in order to save your patron category. If left blank you will be presented with an error.



- Some patron categories can have a minimum age (in years) requirement associated with them, enter this age in the 'Age required'

- **Note**

This value will only be checked if BorrowerMandatoryField defines the dateofbirth as a required field on the patron record

- Patron categories can also have a maximum age (in years) associated with them (such as children), enter this age in the 'Upperage limit'

- **Note**

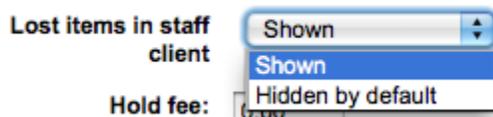
This value will only be checked if BorrowerMandatoryField defines the dateofbirth as a required field on the patron record

- If you charge a membership fee for your patrons (such as those who live in another region) you can enter that in the 'Enrollment fee' field.

- **Note**

Only enter numbers and decimals in this field

- If you want your patron to receive overdue notices, set the 'Overdue notice required' to 'Yes'
- You can decide on a patron category basis if lost items are shown in the staff client by making a choice from the 'Lost items in staff client' pull down



- **Note**

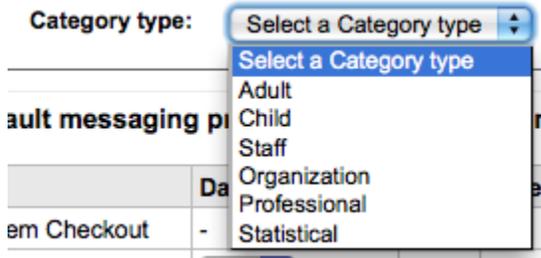
Note that this is only applicable in the staff client, so changing this value on patron categories who do not have access to the staff client won't make any difference

- If you charge patrons for placing holds on items, enter the fee amount in the 'Hold fee' field.

o **Note**

Only enter numbers and decimals in this field

- In the 'Category type' field choose one of the six main parent categories

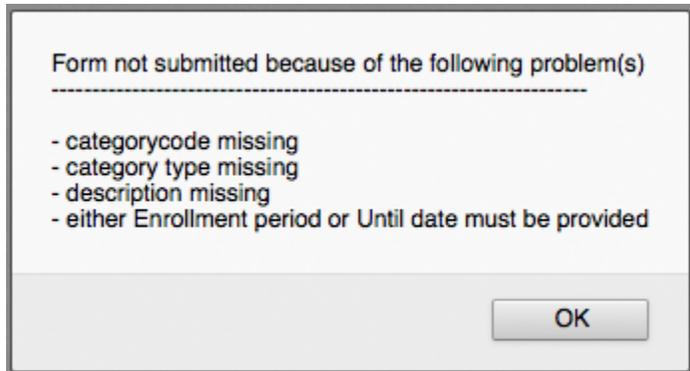


Category type: Select a Category type

Adult
Child
Staff
Organization
Professional
Statistical

o **Note**

This field is required in order to save your patron category. If left blank you will be presented with an error.



Form not submitted because of the following problem(s)

- categorycode missing
- category type missing
- description missing
- either Enrollment period or Until date must be provided

OK

- The Branch Limitations let you limit this patron category to only some branches in your library system. Select 'All branches' if you would like any library to be able to use this category.
- You can decide if this patron category is blocked from performing actions in the OPAC if their card is expired using the next option. By default it will follow the rule set in theBlockExpiredPatronOpacActions preference



Block expired patrons: Follow system preference BlockExpiredPatronOpacActions

Block
Don't block

- Next you can choose the default privacy settings for this patron category. This setting can be edited by the patron via the OPAC if you allow it with the OPACPrivacy system preference.

Default privacy: Controls how long a patrons checkout history is kept for new patrons of this category. "Never" anonymizes checkouts on return, and "Forever" keeps a patron's checkout history indefinitely. When set to "Default", the amount of history kept is controlled by the cronjob `batch_anonymise.pl` which should be set up by your system administrator.

- Finally you can assign advanced messaging preferences by default to a patron category

- **Note**

Requires that you have EnhancedMessagingPreferences enabled

- These defaults will be applied to new patrons that are added to the system. They will not edit the preferences of the existing patrons. Also, these can be changed for individual patrons, this setting is just a default to make it easier to set up messages for an entire category.

- **Note**

After setting the default for the patron category you can force those changes to all existing patrons by running the `borrowers-force-messaging-defaults` script found in `themisc/maintenance` folder. Ask your system administrator for assistance with this script.

3.2. Circulation and Fine Rules

These rules define how your items are circulated, how/when fines are calculated and how holds are handled.

- *Get there:* More > Administration > Patrons & Circulation > 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, all item type
- same library, all patron types, same item type
- same library, all patron types, all item types
- default (all libraries), same patron type, same item type
- default (all libraries), same patron type, all item types
- default (all libraries), all patron types, same item type
- default (all libraries), all patron types, all item types

The `CircControl` and `HomeOrHoldingBranch` also come in to play when figuring out which circulation rule to follow.

- If `CircControl` is set to "the library you are logged in at" circ rules will be selected based on the library you are logged in at
- If `CircControl` is set to "the library the patron is from" circ rules will be selected based on the patron's library
- If `CircControl` is set to "the library the item is from" circ rules will be selected based on the item's library where `HomeOrHoldingBranch` chooses if item's home library is used or holding library is used.

- If IndependentBranches is set to 'Prevent' then the value of HomeOrHoldingBranch is used in figuring out if the item can be checked out. If the item's home library does not match the logged in library, the item cannot be checked out unless you are a superlibrarian.

Note

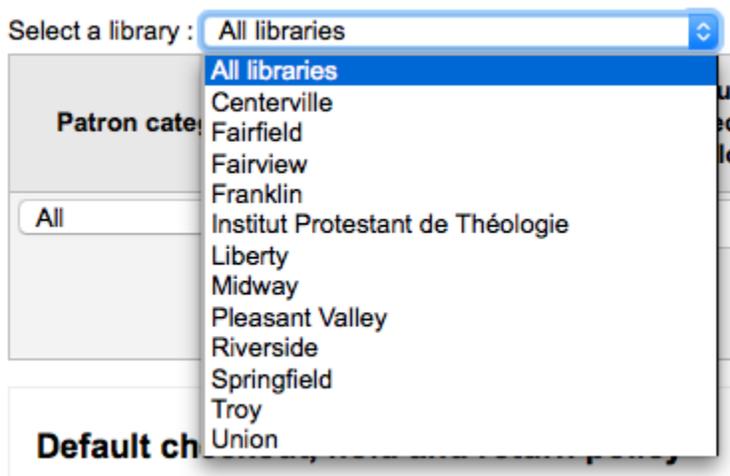
If you are a single library system choose your branch name before creating rules (sometimes having only rules for the 'all libraries' option can cause issues with holds)

Important

At the very least you will need to set a default circulation rule. This rule should be set for all item types, all libraries and all patron categories. That will catch all instances that do not match a specific rule. When checking out if you do not have a rule for all libraries, all item types and all patron types then you may see patrons getting blocked from placing holds. You will also want a rule for your specific library set for all item types and all patron types to avoid this holds issue. Koha needs to know what rule to fall back on.

3.2.1. Default Circulation Rules

Using the issuing rules matrix you can define rules that depend on patron/item type combos. To set your rules, choose a library from the pull down (or 'all libraries' if you want to apply these rules to all branches):



From the matrix you can choose any combination of patron categories and item types to apply the rules to

System preferences

- System preferences
- Basic parameters
 - Libraries and groups
 - Item types
 - Authorized values
- Patrons and circulation
 - Patron types and categories
 - Circulation and fines rules
 - Patron attribute types
 - Library transfer limits
 - Transport cost matrix
 - Item circulation alerts
 - Cities and towns
 - Road types
- Catalog
 - MARC bibliographic framework
 - Koha to MARC mapping
 - Keywords to MARC mapping
 - MARC bibliographic framework test
 - Authority types
 - Classification sources
 - Record matching rules
 - OAI sets configuration
- Acquisition parameters
 - Currencies and exchange rates

Defining circulation and fine rules for all libraries

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, all item types
- same library, all patron types, same item type
- same library, all patron types, all item types
- default (all libraries), same patron type, same item type
- default (all libraries), same patron type, all item types
- default (all libraries), all patron types, same item type
- default (all libraries), all patron types, all item types

To modify a rule, create a new one with the same patron type and item type.

Select a library: All libraries Clone these rules to: Aligarh muslim university library Clone

Patron category	Item type	Current checkouts allowed	Loan period	Unit	Hard due date	Fine amount	Fine charging interval	Fine grace period (day)	Overdue fines cap (amount)	Suspension in days (day)	Renewals allowed (count)	Renewal period	Holdings allowed (count)	Rental discount (%)	Edit	Delete
All	All	2	12	days	None defined	1.00	1	0		0	2	15	0	0.000000		
All	All			Days	Before										Save	Delete

Default checkout, hold and return policy

You can set a default maximum number of checkouts, hold policy and return policy that will be used if none is defined below for a particular item type or category.

Total current checkouts allowed	Hold policy	Return policy
Defaults (not set)	From any library	Item returns home

Default checkout limit by patron category

For this library, you can specify the maximum number of loans that a patron of a given category can make, regardless of the item type. 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.

Patron category	Total current checkouts allowed
Board	

- First choose which patron category you'd like the rule to be applied to. If you leave this to 'All' it will apply to all patron categories
- Choose the 'Item type' you would like this rule to apply to. If you leave this to 'All' it will apply to all item types
- Limit the number of items a patron can have checked out at the same time by entering a number in the 'Current checkouts allowed' field
- Define the period of time an item can be checked out to a patron by entering the number of units (days or hours) in the 'Loan period' box.
- Choose which unit of time, Days or Hours, that the loan period and fines will be calculated in in the 'Unit' column
- You can also define a hard due date for a specific patron category and item type. A hard due date ignores your usual circulation rules and makes it so that all items of the type defined are due on, before or after the date you specify.
- 'Fine amount' should have the amount you would like to charge for overdue items
 - **Important**

Enter only numbers and decimal points (no currency symbols).

- Enter the 'Fine charging interval' in the unit you set (ex. charge fines every 1 day, or every 2 hours)
- The 'Fine grace period' is the period of time an item can be overdue before you start charging fines.
 - **Important**

This can only be set for the Day unit, not in Hours

- The 'Overdue fines cap' is the maximum fine for this patron and item combination
 - **Important**

If this field is left blank then Koha will not put a limit on the fines this item will accrue. A maximum fine amount can be set using the MaxFine system preference.

- If your library 'fines' patrons by suspending their account you can enter the number of days their fine should be suspended in the 'Suspension in days' field
 - **Important**

This can only be set for the Day unit, not in Hours

- You can also define the maximum number of days a patron will be suspended in the 'Max suspension duration' setting
- Next decide if the patron can renew this item type and if so, enter how many times they can renew it in the 'Renewals allowed' box
- If you're allowing renewals you can control how long the renewal loan period will be (in the units you have chosen) in the 'Renewal period' box
- If you're allowing renewals you can control how soon before the due date patrons can renew their materials with the 'No renewals before' box.

- Items can be renewed at any time if this value is left blank. Otherwise items can only be renewed if the item is due after the number in units (days/hours) entered in this box.

- You can enable automatic renewals for certain items/patrons if you'd like. This will renew automatically following your circulation rules unless there is a hold on the item
 - **Important**

You will need to enable the automatic renewal cron job for this to work.

- **Important**

This feature needs to have the "no renewal before" column filled in or it will auto renew everyday after the due date

- If the patron can place holds on this item type, enter the total numbers of items (of this type) that can be put on hold in the 'Holds allowed' field
- Finally, if you charge a rental fee for the item type and want to give a specific patron type a discount on that fee, enter the percentage discount (without the % symbol) in the 'Rental Discount' field

When finished, click 'Add' to save your changes. To modify a rule, simply click the 'Edit' link to the right of the rule and edit the values that appear filled in at the bottom of the form.

Select a library : Clone these rules to:

Patron category	Item type	Current checkouts allowed	Loan period	Unit	Hard due date	Fine amount	Fine charging interval	Fine grace period (day)	Overdue fines cap (amount)	Suspension in days (day)	Max. suspension duration (day)	Renewals allowed (count)	Renewal period	No renewal before	Automatic renewal	Hold allowed (count)	Rental discount (%)	
All	All	12	1	hours	None defined	0.10	1	0		0		1	1		No	15	0.000000	Edit Delete
<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="12"/>	<input type="text" value="1"/>	<input type="text" value="Hours"/>	<input type="text" value="Before"/> <small>(MM/DD/YYYY)</small>	<input type="text" value="0.10"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="No"/>	<input type="text" value="15"/>	<input type="text" value="0.000"/>	<input type="button" value="Save"/> <input type="button" value="Clear"/>

If you would like to delete your rule, click the 'Delete' link to the right of the rule.

To save time you can clone rules from one library to another by choosing the clone option above the rules matrix.

Select a library : Clone these rules to:

After choosing to clone you will be presented with a confirmation message.

Cloning issuing rules to "Centerville"

The rules have been cloned.

[Return to Issuing rules](#)

3.2.2. Default Checkouts and Hold Policy

You can set a default maximum number of checkouts and hold policy that will be used if none is defined below for a particular item type or category. This is the fall back rule for defaults.

	Total current checkouts allowed	Hold policy	Return policy		
Defaults (not set)	<input type="text" value="25"/>	<input type="text" value="From any library"/>	<input type="text" value="Item returns home"/>	<input type="button" value="Save"/>	Unset

From this menu you can set a default to apply to all item types and patrons in the library if no other option is set in the forms below.

- In 'Total Current Checkouts Allowed' enter the total number of items patrons can have checked out at one time
- Control where patrons can place holds from using the 'Hold Policy' menu

- 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.
- Control where the item returns to once it is checked in
 - Item returns home
 - Item returns to issuing branch
 - Item floats
 - When an item floats it stays where it was checked in and does not ever return 'home'
- Once your policy is set, you can unset it by clicking the 'Unset' link to the right of the rule

3.2.3. Checkouts Per Patron

For this library, you can specify the maximum number of loans that a patron of a given category can make, regardless of the item type.

Patron Category	Total Current Checkouts Allowed	
Board	<input type="text"/>	Add

Note

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.

For example, if you have a rule in the matrix that says Board patrons are allowed 10 books and 5 DVDs but you want to make it so that Board patrons only have a total of 12 things checked out at once. If you enter 12 here and the patron has 10 books out already they will only be allowed 2 DVDs to equal the 12 total they're allowed.

3.2.4. Item Hold Policies

For this library, you can edit hold and return policies for a given item type, regardless of the patron's category.

Item type	Hold policy	Return policy	
Book	From any library	Item returns home	Add

The various Hold Policies have the following effects:

- 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.

Important

Note that if the system preference AllowHoldPolicyOverride set to 'allow', these policies can be overridden by your circulation staff.

Important

These policies are based on the patron's home branch, not the branch that the reserving staff member is from.

The various Return Policies have the following effects:

- Item returns home: The item will prompt the librarian to transfer the item to its home library
 - **Important**
If the AutomaticItemReturn preference is set to automatically transfer the items home, then a prompt will not appear
- Item returns to issuing branch: The item will prompt the librarian to transfer the item back to the library where it was checked out
 - **Important**
If the AutomaticItemReturn preference is set to automatically transfer the items home, then a prompt will not appear
- Item floats: The item will not be transferred from the branch it was checked in at, instead it will remain there until transferred manually or checked in at another branch

For example you might allow holds at your libraries but not what New items or DVDs to be placed on hold by other branches so you can set the 'Hold policy' to 'From home library' so that those items can only be placed on hold if the items' owning library and the patron's home library are the same. You can also block holds completely on specific item types from this form. This is also how you can set up floating item types and types that remain with their home library.

3.3. Patron Attribute Types

Patron attributes can be used to define custom fields to associate with your patron records. In order to enable the use of custom fields you need to set the ExtendedPatronAttributes system preference.

- *Get there:* More > Administration > Patrons & Circulation > Patron attribute types

A common use for this field would be for a student ID number or a Driver's license number.

New patron attribute type

Patron attribute types

Code	Description	Branches limitation	Actions
DL	Driver's License	6 branches limitations	Edit Delete
HBR	Home Branch	No limitation	Edit Delete
RES	Resident	No limitation	Edit Delete
SHOW_BCODE	Show Barcode in OPAC	No limitation	Edit Delete

3.3.1. Adding Patron Attribute

To add a new Patron Attribute Type, click the 'New Patron Attribute Type' button at the top of the page

JIVESNA

Add patron attribute type

Patron attribute type code:

Description:

Repeatable: Check to let a patron record have multiple values of this attribute. This setting cannot be changed after an attribute is defined.

Unique identifier: If checked, attribute will be a unique identifier — if a value is given to a patron record, the same value cannot be given to a different record. This setting cannot be changed after an attribute is defined.

Allow password: Check to make it possible to associate a password with this attribute.

Display in OPAC: Check to display this attribute on a patron's details page in the OPAC.

Searchable: Check to make this attribute staff_searchable in the staff patron search.

Display in check-out: Check to show this attribute in patron check-out.

Authorized value category: Authorized value category; if one is selected, the patron record input page will only allow values to be chosen from the authorized value list. However, an authorized value list is not enforced during batch patron import.

Branches limitation:

All branches
Centerville
Fairfield
Fairview
Franklin
Goleta Public Library
Liberty
Midway
Nicole's Library
Pleasant Valley

 Select All if this attribute type must to be displayed all the time. Otherwise select libraries you want to associate with this value.

Category: Choose one to limit this attribute to one patron type. Please leave blank if you want these attributes to be available for all types of patrons.

Class: Group attributes types with a block title (based on Authorised values category 'PA_CLASS')

- In the 'Patron attribute type code', enter a short code to identify this field
 - **Important**
 - **Important**

This field is limited to 10 characters (numbers and letters only)

This setting cannot be changed after an attribute is defined

- In the 'Description' field, enter a longer (plain text) explanation of what this field will contain
- Check the box next to 'Repeatable' to let a patron record have multiple values of this attribute.
 - **Important**

This setting cannot be changed after an attribute is defined

- If 'Unique identifier' is checked, the attribute will be a unique identifier which means, if a value is given to a patron record, the same value cannot be given to a different record.
 - Unique attributes can be used as match points on the patron import tool
 - **Important**

This setting cannot be changed after an attribute is defined

- Check 'Allow password' to make it possible to associate a password with this attribute.
- Check 'Display in OPAC' to display this attribute on a patron's details page in the OPAC.
- Check 'Searchable' to make this attribute searchable in the staff patron search.
- Check 'Display in check-out' to make this attribute visible in the patron's short detail display on the left of the checkout screen and other patron pages
- Authorized value category; if one is selected, the patron record input page will only allow values to be chosen from the authorized value list.
 - You will first need to add an authorized value list for it to appear in this menu
 - *Get there:* More > Administration > Basic Parameters > Authorized Values
 - **Important**

an authorized value list is not enforced during batch patron import.

- If you would like this attribute to only be used by specific branches you can choose those branches from the 'Branches limitation' list. Choose 'All branches' to show it for all libraries.
 - **Important**

Note that items with locations already set on them will not be altered. The branch limitation only limits the choosing of an authorized value based on the home branch of the current staff login. All authorized values for item records (LOC, LOST, CCODE, etc) will show in the OPAC for all patrons.

- If you'd like to only show this attribute on patrons of one type choose that patron type from the 'Category' pull down
- If you have a lot of attributes it might be handy to group them so that you can easily find them for editing. If you create an Authorized Value for PA_CLASS it will show in the 'Class' pull down and you can then change your attributes page to have sections of attributes

Patron attribute types

Code	Description	Branches limitation	Actions
DL	Driver's License	6 branches limitations	Edit Delete
HBR	Home Branch	No limitation	Edit Delete
RES	Resident	No limitation	Edit Delete
SHOW_BCODE	Show Barcode in OPAC	No limitation	Edit Delete

Students

Code	Description	Branches limitation	Actions
STUID	Student ID	No limitation	Edit Delete

- Click Save to save your new attribute

Once added your attribute will appear on the list of attributes and also on the patron record add/edit form

Additional attributes and identifiers

Type	Value	
DL (Driver's License)	<input type="text"/>	Clear
HBR (Home Branch)	<input type="text"/>	Clear
RES (Resident)	<input type="text" value="↓"/>	Clear
SHOW_BCODE (Show Barcode in OPAC)	<input type="text" value="↓"/>	Clear

If you have set up classes for organizing attributes they will appear that way on the add/edit patron form

Additional attributes and identifiers

Type	Value	
HBR (Home Branch)	<input type="text"/>	Clear
RES (Resident)	<input type="text" value="↓"/>	Clear
SHOW_BCODE (Show Barcode in OPAC)	<input type="text" value="↓"/>	Clear

Students

Type	Value	
STUID (Student ID)	<input type="text"/>	Clear

3.3.2. *Editing/Deleting Patron Attributes*

Each patron attribute has an edit and a delete link beside it on the list of attributes.

Some fields in the attribute will not be editable once created:

- Patron attribute type code
- Repeatable
- Unique identifier

You will be unable to delete an attribute if it's in use.

Could not delete patron attribute type "STUID" — it is in use by 3 patron records

3.4. **Library Transfer Limits**

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

- *Get there:* More > Administration > Patrons & Circulation > Library Transfer Limits

These rules only go into effect if the preference UseBranchTransferLimits is set to 'enforce'.

Before you begin you will want to choose which library you are setting these limits for.

Select a library :

Check the boxes for the libraries you accept to checkin items from.

Transfer limits are set based on the collections codes you have applied via the Authorized Value administration area.

Show category:

Values for collection codes

Authorized values for category CCODE:

Page(s): Entries/page:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
AUD	Audio Book	Audio Book		No limitation	Edit	Delete
PROG	Computer Programming	Computer Programming		4 branches limitations	Edit	Delete
DVD	DVD	DVD		No limitation	Edit	Delete

Collection codes will appear as tabs above the checkboxes:

FIC
 REF
 NFIC
 REF-BK
 YMAR

Policy for Collection Code: FIC

Check the boxes for the libraries that you accept checkins from for the item type you have selected at the top (in the example below - FIC)



Select a library :

Check the boxes for the libraries you accept to checkin items from.

For all Collection Codes: [Check All](#) | [Uncheck All](#)

FIC REF NFIC REF-BK YMAR

Policy for Collection Code: FIC

[Check All](#) | [Uncheck All](#)

Library	Allow transfer?
CPL - Centerville	<input checked="" type="checkbox"/>
FFL - Fairfield	<input checked="" type="checkbox"/>
FPL - Fairview	<input checked="" type="checkbox"/>
FRL - Franklin	<input type="checkbox"/>
IPT - Institut Protestant de Théologie	<input checked="" type="checkbox"/>
LPL - Liberty	<input type="checkbox"/>
MMM - Main	<input checked="" type="checkbox"/>
MPL - Midway	<input checked="" type="checkbox"/>
PVL - Pleasant Valley	<input checked="" type="checkbox"/>
RPL - Riverside	<input checked="" type="checkbox"/>
SPL - Springfield	<input checked="" type="checkbox"/>
TPL - Troy	<input checked="" type="checkbox"/>
UPL - Union	<input checked="" type="checkbox"/>

[Cancel](#)

In the above example, Centerville library will allow patrons to return items from all libraries except Liberty and Franklin to their branch.

3.5. Transport cost matrix

The Transport cost matrix lets a library system define relative costs to transport books to one another. In order for the system to use this matrix you must first set the UseTransportCostMatrix preference to 'Use'.

Important

The Transport cost matrix takes precedence in controlling where holds are filled from, if the matrix is not used then Koha checks the StaticHoldsQueueWeight.

Costs are decimal values between some arbitrary maximum value (e.g. 1 or 100) and 0 which is the minimum (no) cost. For example, you could just use the distance between each library in miles as your 'cost', if that would accurately reflect the cost of transferring them. Perhaps post offices would be a better measure. Libraries sharing a post office would have a cost of 1, adjacent post offices would have a cost of 2, etc.

To enter transport costs simply click in the cell you would like to alter, uncheck the 'Disable' box and enter your 'cost'

From \ To	Centerville	Fairfield	Fairview	Franklin	Goleta Public Library	Liberty	Midway	Nicole's Library	Pleasant Valley	Riverside	Springfield	Troy	Union
Centerville													
Fairfield					5 Disable <input type="checkbox"/>								
Fairview													
Franklin			10.00										
Goleta Public Library													
Liberty													
Midway													
Nicole's Library													
Pleasant Valley													
Riverside													
Springfield	4.00		5.00										
Troy													
Union													

After entering in your cost, hit 'Enter' on your keyboard or click the 'Save' button at the bottom of the matrix to save your changes.

Note

A NULL value will make no difference where the From and To libraries are the same library. However, as a best practice, you should put a 0 in there. For all other To/From combinations, a NULL value will cause that relationship to act as if it has been disabled. So, in summary, don't leave any of the values empty. It's best to always put a number in there (even if you choose to disable that given To/From option).

3.6. Item Circulation Alerts

Libraries can decide if they want to have patrons automatically notified of circulation events (check ins and check outs).

- *Get there:* More > Administration > Patrons & Circulation > Item Circulation Alerts

These preferences are set based on patron types and item types.

Important

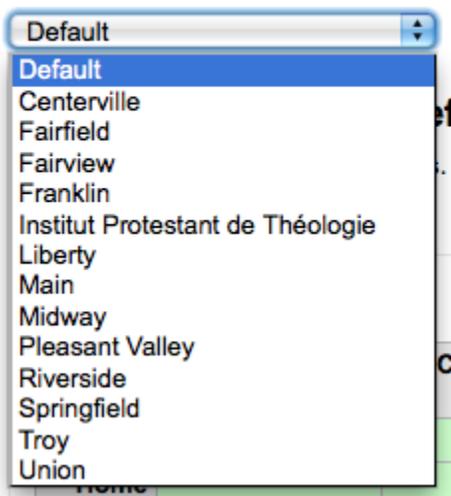
These preference can be overridden by changes in the individual patron's messaging preferences.

To set up circulation alerts:

- Choose your library from the pull down at the top of the screen

Item Circulation Alerts

Select a library:



A screenshot of a web application interface showing a dropdown menu for selecting a library. The menu is currently open, displaying a list of library names. The 'Default' option is selected and highlighted in blue. The list includes: Default, Centerville, Fairfield, Fairview, Franklin, Institut Protestant de Théologie, Liberty, Main, Midway, Pleasant Valley, Riverside, Springfield, Troy, and Union. The background of the page is partially visible, showing a header area with a navigation bar.

- To set preferences for all libraries, keep the menu set to 'Default'
- By default all item types and all patrons are notified of check ins and check outs. To change this, click on the item/patron type combo that you would like to stop notices for.

Circulation Alerts for Default

Click on the grid to toggle the settings.

Checkout

	Books	Computer Files	Continuing Resources	DVD	Maps	Mixed Materials	Music	Reference	Visual Materials	Young Adult
Board										
Home Bound										
Inter-Library Loan										
Juvenile	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all
Kid	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all
Library										
Patron										
School										
Staff										
Student										
Teacher										
Young Adult										

- In the above example, Juveniles and Kids will not receive check out notices.

3.7. Cities and Towns

To standardize patron input you can define cities or towns within your region so that when new patrons are added librarians simply have to select the town from a list instead of having to type the town and zip (or postal) code information.

- *Get there:* More > Administration > Patrons & Circulation > Cities and Towns

3.7.1. Adding a City

To add a new city, click the 'New City' button at the top of the page and enter the city name, state, zip/postal code and country.

New city

City:

State:

Zip/Postal code:

Country:

One you click Submit, your city will be saved and will be listed on the Cities and Towns page

Cities

Page(s): 1/1 Entries/page: 20

City ID	City	State	Zip/Postal code	Country		
2	Atantic City	NJ	08401		Edit	Delete
1	Philadelphia	PA	19030	USA	Edit	Delete

Cities can be edited or deleted at any time.

3.7.2. Viewing Cities on Patron Add Form

If you have defined local cities using the New city form, then when adding or editing a patron record you will see those cities in a pull down menu to make city selection easy.

Main address

Street number:

Address:

Address 2:

City: or choose

State:

Zip/Postal code:

Country:

Atantic City NJ 08401
Philadelphia PA 19030

This will allow for easy entry of local cities into the patron record without risking the potential for typos or mistaken zip/postal codes.

4. Catalog Administration

Set these controls before you start cataloging on your Koha system.

- *Get there:* More > Administration > Catalog

4.1. MARC Bibliographic Frameworks

Think of Frameworks as templates for creating new bibliographic records. Koha comes with some predefined frameworks that can be edited or deleted, and librarians can create their own frameworks for content specific to their libraries.

- *Get there:* More > Administration > Catalog > MARC Bibliographic Frameworks

New framework

MARC frameworks

Framework name, then go to MARC biblio to set MARC editor parameters

Code	Description		Edit	Delete	Export	Import
	Default framework	MARC structure			Export	Import
ACQ	Acquisitions	MARC structure	Edit	Delete	Export	Import
SR	Audio Cassettes, CDs	MARC structure	Edit	Delete	Export	Import
IR	Binders	MARC structure	Edit	Delete	Export	Import
BKS	Books, Booklets, Workbooks	MARC structure	Edit	Delete	Export	Import
CF	CD-ROMs, DVD-ROMs, General Online Resources	MARC structure	Edit	Delete	Export	Import
VR	DVDs, VHS	MARC structure	Edit	Delete	Export	Import
FA	Fast Cataloging	MARC structure	Edit	Delete	Export	Import
FA2	Fast Cataloging2	MARC structure	Edit	Delete	Export	Import
KT	Kits	MARC structure	Edit	Delete	Export	Import
AR	Models	MARC structure	Edit	Delete	Export	Import
SER	Serials	MARC structure	Edit	Delete	Export	Import
TST	test	MARC structure	Edit	Delete	Export	Import

Important

Do not delete or edit the Default Framework since this will cause problems with your cataloging records - always create a new template based on the Default Framework, or alter the other Frameworks.

After clicking the 'MARC structure' link to the right of each framework you can decide how many fields you want to see on one screen by using the pagination options at the top of the table.

page(s) :  1/16 , entries/page :

Tag		Lib
000	LEADER	
001	CONTROL NUMBER	
003	CONTROL NUMBER IDENTIFIER	
005	DATE AND TIME OF LATEST TRANSACTION	
006	FIXED-LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL CHARACTERISTICS--GENERAL INFORMATION	

4.1.1. Add New Framework

To add a new framework

- Click 'New Framework'

Add framework



Framework code

Description

Submit

- Enter a code of 4 or fewer characters
- Use the Description field to enter a more detailed definition of your framework
- Click 'Submit'
- Once your Framework is added click 'MARC structure' to the right of it on the list of Frameworks

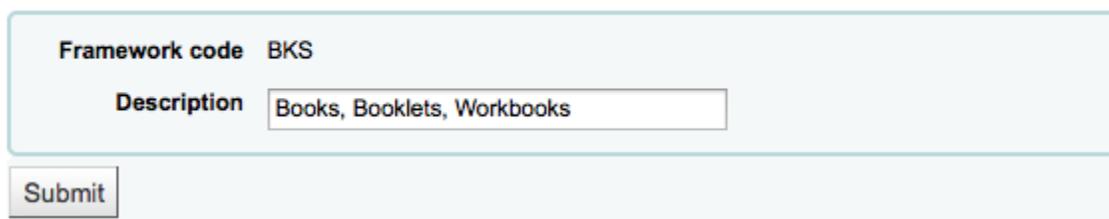
Create framework for MIN (Short Record) using OK

- You will be asked to choose a Framework to base your new Framework off of, this will make it easier than starting from scratch
- Once your Framework appears on the screen you can edit or delete each field by following the instructions for editing subfields

4.1.2. Edit Existing Frameworks

Clicking 'Edit' to the right of a Framework will only allow you to edit the Description for the Framework:

Modify framework text



Framework code BKS

Description

Submit

To make edits to the fields associated with the Framework you must first click 'MARC Structure' and then follow the instructions for editing subfields

4.1.3. Add subfields to Frameworks

To add a field to a Framework click the 'New Tag' button at the top of the Framework definition

New tag

MARC Framework for Books, Booklets, Workbooks (BKS)

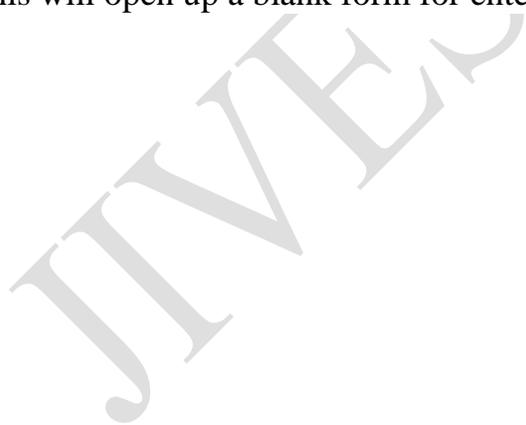
Search for tag: In framework: Books, Booklets, Workbooks Search

Display only used tags/subfields

Page(s): ⏪ ⏩ 1/16 ⏴ ⏵ Entries/page: 20

Tag	Lib	Repeatable	Mandatory	Auth value	Subfields	Edit	Delete
000	LEADER	No	Yes		Subfields	Edit	Delete
001	CONTROL NUMBER	No	No		Subfields	Edit	Delete
003	CONTROL NUMBER IDENTIFIER	No	No		Subfields	Edit	Delete
005	DATE AND TIME OF LATEST TRANSACTION	No	No		Subfields	Edit	Delete

This will open up a blank form for entering MARC field data



MARC Framework for Books, Booklets, Workbooks (BKS)

Add tag

Tag:

Label for lib:

Label for opac:

Repeatable:

Mandatory:

Authorized value: (if you select a value here, the indicators will be limited to the authorized value list)

Enter the information about your new tag:

- The 'Tag' is the MARC field number
- The 'Label for lib' is the text that will appear in the staff client when in the cataloging module
- The 'Label for OPAC' is the text that will appear in the OPAC when viewing the MARC version of the record
- If this field can be repeated, check the 'Repeatable' box
- If this field is mandatory, check the 'Mandatory' box
- If you want this field to be a pull down with limited possible answers, choose which 'Authorized value' list you want to use

When you're finished, click 'Save Changes' and you will be presented with your new field

520	SUMMARY, ETC.	Yes	No	Subfields
-----	---------------	-----	----	---------------------------

To the right of the new field is a link to 'Subfields,' you will need to add subfields before this tag will appear in your MARC editor. The process of entering the settings for the new subfield is the same as those found in the editing subfields in frameworks section of this manual.

4.1.4. Edit Framework Subfields

Frameworks are made up of MARC fields and subfields. To make edits to most Frameworks you must edit the fields and subfields. Clicking 'Edit' to the right of each subfield will allow you to make changes to the text associated with the field

MARC Framework for default MARC framework

Modify tag 022

Tag: 022

Label for lib:

Label for opac:

Repeatable:

Mandatory:

Authorized value: (if you select a value here, the indicators will be limited to the authorized value list)

- Each field has a tag (which is the MARC tag) that is uneditable
 - The 'Label for lib' is what will show in the staff client if you have advancedMARCeditor set to display labels
 - The 'Label for OPAC' is what will show on the MARC view in the OPAC
 - If you check 'Repeatable' then the field will have a plus sign next to it allowing you to add multiples of that tag
 - If you check 'Mandatory' the record will not be allowed to save unless you have a value assigned to this tag
 - 'Authorized value' is where you define an authorized value that your catalogers can choose from a pull down to fill this field in

To edit the subfields associated with the tag, click 'Subfields' to the right of the tag on the 'MARC Structure' listing

- From the list of subfields you can click 'Delete' to the right of each to delete the subfields
- To edit the subfields click 'Edit Subfields'
- For each subfield you can set the following Basic constraint values

Tag 952 Subfield constraints

0	1	2	3	4	5	6	7	8	9	a	b	c	d	e	f	g	h
j	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z	New	

▼ **Basic constraints**

Subfield code:

Text for librarian:

Text for OPAC:

Repeatable:

Mandatory:

Managed in tab: (ignore means that the subfield does not display in the record editor)

▶ **Advanced constraints**

▶ **Other options (choose one)**

- Text for librarian
 - what appears before the subfield in the librarian interface
- Text for OPAC
 - what appears before the field in the OPAC.
 - If left empty, the text for librarian is used instead
- Repeatable
 - the field will have a plus sign next to it allowing you to add multiples of that tag
- Mandatory
 - the record will not be allowed to save unless you have a value assigned to this tag
- Managed in tab
 - defines the tab where the subfield is shown. All subfields of a given field must be in the same tab or ignored. Ignore means that the subfield is not managed.

- For each subfield you can set the following Advanced constraint values

Tag 952 Subfield constraints

0	1	2	3	4	5	6	7	8	9	a	b	c	d	e	f	g	h
j	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z	New	

▸ **Basic constraints**

▾ **Advanced constraints**

Default value:

Max length: (see online help)

Visibility: OPAC Intranet Editor Collapsed Flagged

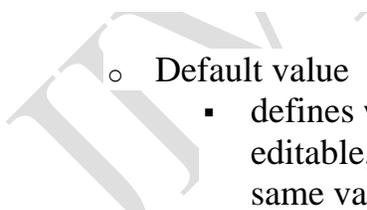
Is a URL: (if checked, it means that the subfield is a URL and can be clicked)

Link: (e.g., Title or Local-Number) *NOTE: If you change this value you must ask your administrator to run misc/batchRebuildBiblioTables.pl.*

Koha link:

▸ **Other options (choose one)**

Save changes Cancel



- Default value
 - defines what you want to appear in the field by default, this will be editable, but it saves time if you use the same note over and over or the same value in a field often.
- Visibility
 - allows you to select from where this subfield is visible/hidden, simply check the boxes where you would like the field to show and uncheck the boxes where you would like it hidden.

Visibility: OPAC Intranet Editor Collapsed Flagged

- Is a URL
 - if checked, it means that the subfield is a URL and can be clicked
- Link
 - If you enter a field/subfield here (200b), a link appears after the subfield in the MARC Detail view. This view is present only in the staff client, not the OPAC. If the librarian clicks on the link, a search is done on the database for the field/subfield with the same value. This can be used for 2 main topics :
 - on a field like author (200f in UNIMARC), put 200f here, you will be able to see all bib records with the same author.
 - on a field that is a link (4xx) to reach another bib record. For example, put 011a in 464\$x, will find the serials that are with this ISSN.
 - **Warning**

This value should not change after data has been added to your catalog. If you need to change this value you must ask your system administrator to run misc/batchRebuildBiblioTables.pl.
- Koha link
 - Koha is multi-MARC compliant. So, it does not know what the 245\$a means, neither what 200\$f (those 2 fields being both the title in MARC21 and UNIMARC). So, in this list you can "map" a MARC subfield to its meaning. Koha constantly maintains consistency between a subfield and its 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).
- For each subfield you can set the following Other option values

Tag 952 Subfield constraints

0	1	2	3	4	5	6	7	8	9	a	b	c	d	e	f	
j	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z	N

▶ **Basic constraints**

▶ **Advanced constraints**

▼ **Other options (choose one)**

Authorized value:

Thesaurus:

Plugin:

Save changes Cancel

- Authorized value
 - means the value cannot be typed by the librarian, but must be chosen from a pull down generated by the authorized value list
 - In the example above, the 504a field will show the MARC504 Authorized Values when cataloging

504 ? - BIBLIOGRAPHY, ETC. NOTE  

▲ a Bibliography, etc

505 ? - FORMATTED CONTENTS NOTE  

▲ a Formatted contents note

Includes bibliographic references and index.
Includes index.

- Thesaurus

- means that the value is not free text, but must be searched in the 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)
- To save your changes simply click the 'Save Changes' button at the top of the screen

4.1.5. Import/Export Frameworks

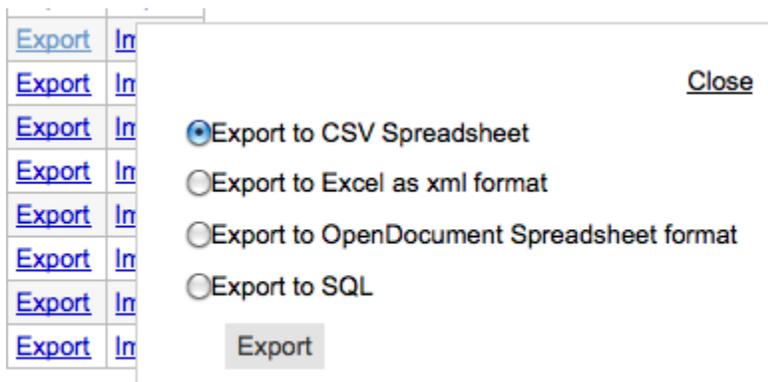
Next to each framework is a link to either import or export the framework.

4.1.5.1. Export Framework

To export a framework simply click the 'Export' link to the right of framework title.

BKS	Books, Booklets, Workbooks	MARC structure	Edit	Delete	Export	Import
-----	----------------------------	--------------------------------	----------------------	------------------------	------------------------	------------------------

When you click 'Export' you will be prompted to choose what format to export the file in.



A framework exported this way can be imported into any other Koha installation using the import framework option.

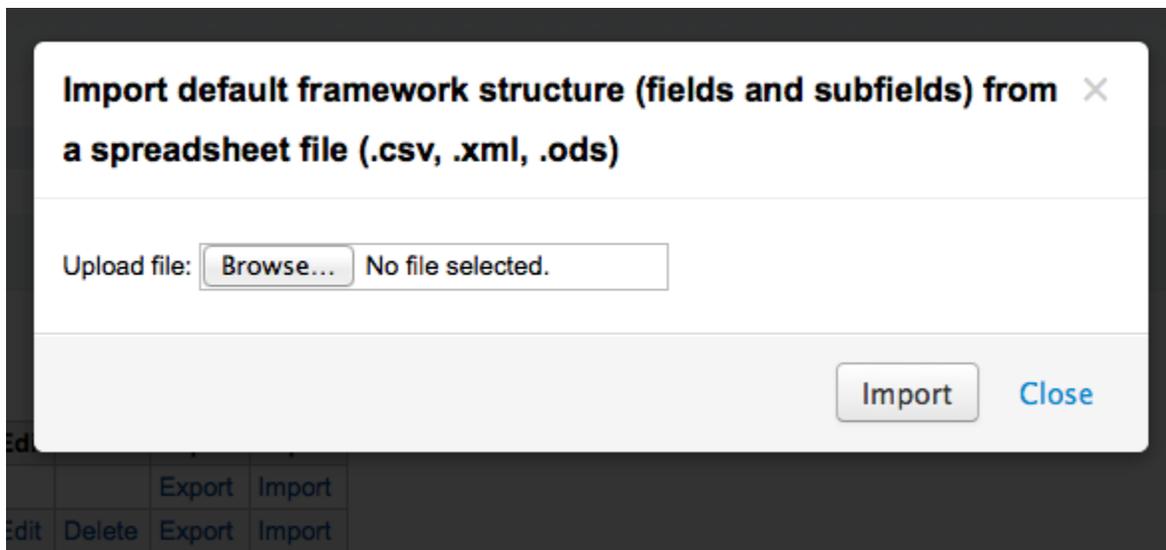
4.1.5.2. Import Framework

An easy way to create a new framework is to import one created for your or another Koha installation. This framework would need to be exported from the other system using the instructions above to be available for import here.

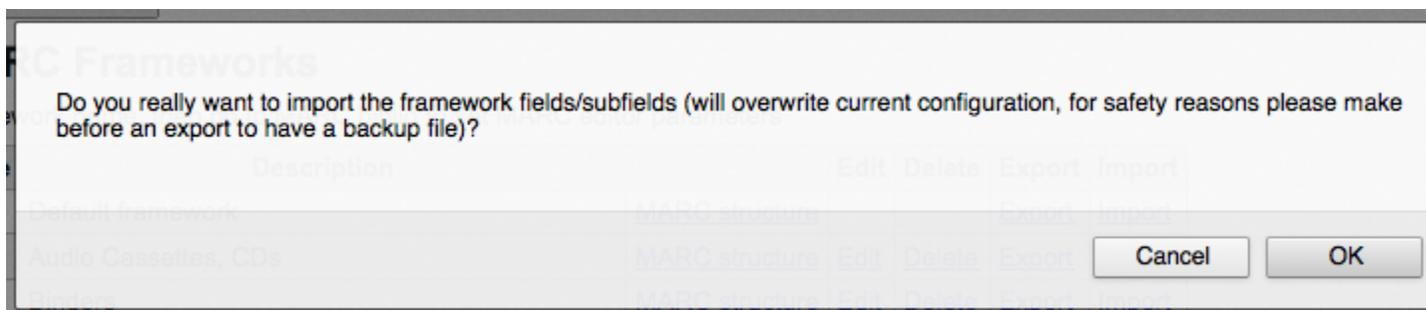
To import a framework you first need to create a new framework. Once you have that framework, click 'Import' to the right of the new framework.

BKS	Books, Booklets, Workbooks	MARC structure	Edit	Delete	Export	Import
-----	----------------------------	--------------------------------	----------------------	------------------------	------------------------	------------------------

You will be prompted to find a file on your computer to import into the framework.



You will be asked to confirm your actions before the file is imported.



As your file is uploaded you will see an image that will confirm that the system is working.

Import



Importing TST from *export_BKS.csv*

Once your import is complete you will be brought to the framework edit tool where you can make any changes you need to the framework you imported.

4.2. Koha to MARC Mapping

While Koha stores the entire MARC record, it also stores common fields for easy access in various tables in the database. Koha to MARC Mapping is used to tell Koha where to find these values in the MARC record. In many cases you will not have to change the default values set by in this tool on installation, but it is important to know that the tool is here and can be used at any time.

- *Get there:* More > Administration > Catalog > Koha to MARC Mapping

The Koha to MARC Mapping page offers you the option of choosing from one of three tables in the database to assign values to.

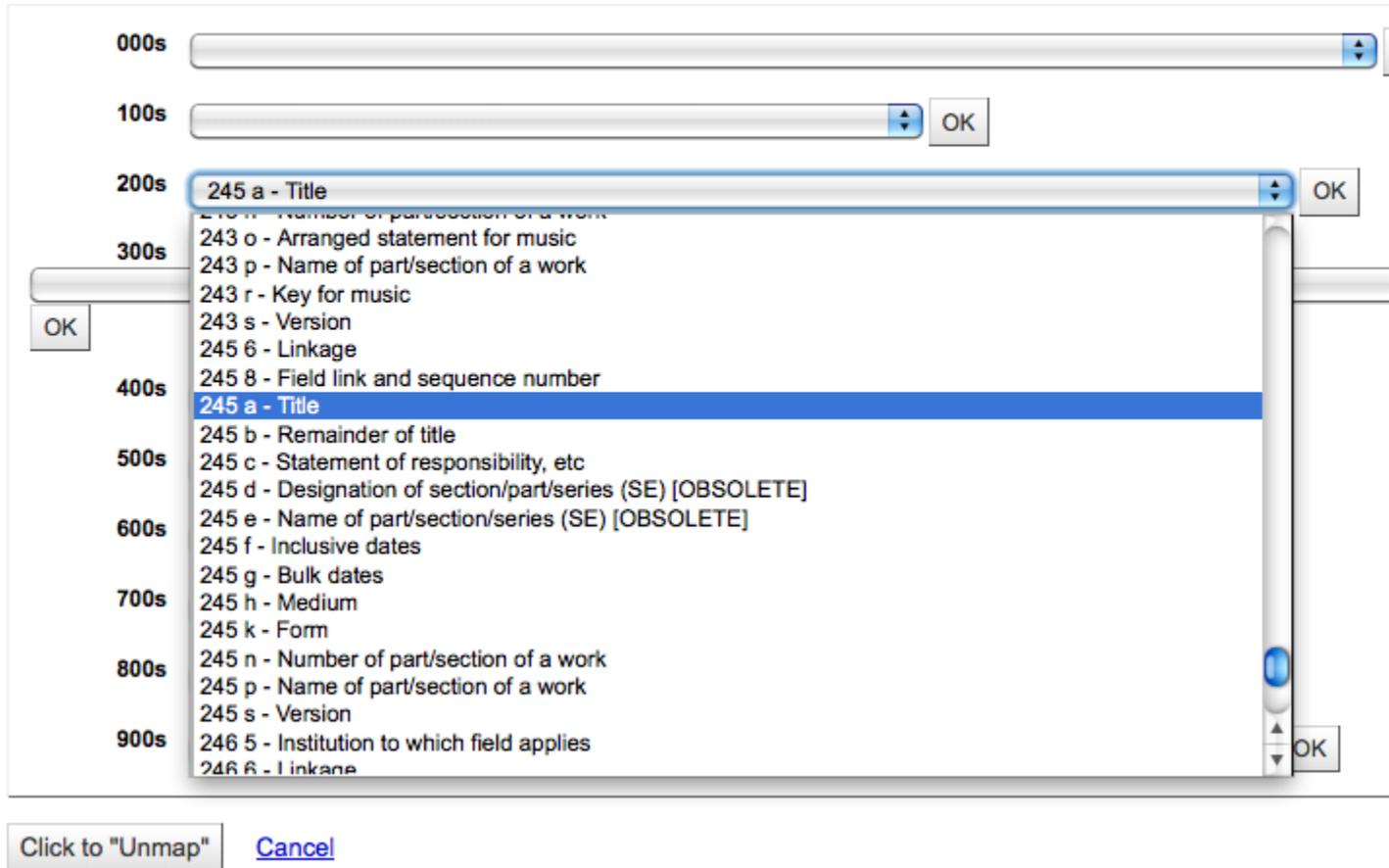
Koha to MARC Mapping

Table	Tag	Subfield	Lib	
biblio				OK
biblio				
biblioitems	999	c	Koha biblionumber	Edit
items				
frameworkcode				Edit
author	100	a	Personal name	Edit
title	245	a	Title	Edit
unititle	240	a	Uniform title	Edit
notes	500	a	General note	Edit
serial	942	s	Serial record flag	Edit
seriestitle	440	a	Title	Edit
copyrightdate	260	c	Date of copyright, publication, distribution, release, etc	Edit
timestamp				Edit
datecreated				Edit
abstract	520	a	Summary, etc	Edit

After choosing the table you would like to view, click 'OK.' To edit any mapping click on the 'Koha Filed' or the 'Edit' link.

Connect biblio.title to a MARC subfield

Choose and validate 1 MARC subfield for **biblio.title**. That will modify **all frameworks** which is usually what you need, but you have been warned.



000s

100s

200s **245 a - Title**

300s

400s

500s

600s

700s

800s

900s

245 a - Title

245 b - Remainder of title

245 c - Statement of responsibility, etc

245 d - Designation of section/part/series (SE) [OBSOLETE]

245 e - Name of part/section/series (SE) [OBSOLETE]

245 f - Inclusive dates

245 g - Bulk dates

245 h - Medium

245 k - Form

245 n - Number of part/section of a work

245 p - Name of part/section of a work

245 s - Version

246 5 - Institution to which field applies

246 6 - Linkage

Click to "Unmap" [Cancel](#)

Choose which MARC field you would like to map to this Koha Field and click the 'OK' button. If you would like to clear all mappings, click the 'Click to "Unmap"' button.

Important

At this time you can map only 1 MARC field to 1 Koha field. This means that you won't be able to map both the 100a and the 700a to the author field, you need to choose one or the other.

4.3. Keywords to MARC Mapping

This tool will allow you to map MARC fields to a set of predefined keywords.

- *Get there:* More > Administration > Catalog > Keywords to MARC Mapping

Important

This tool only effects sites that are not using the XSLT Stylesheets.

At this time the only keyword in use is 'subtitle.'

Using this tool you can define what MARC field prints to the detail screen of the bibliographic record using keywords. The following example will use the subtitle field.

Using the Framework pull down menu, choose the Framework you would like to apply this rule to. For example, the subtitle for books can be found in the 245\$b field.

Framework:

Add a mapping

Field name:

MARC field:

MARC subfield:

However the subtitle for DVDs appears in 245\$p

Framework:

Add a mapping

Field name:

MARC field:

MARC subfield:

Using this tool you can tell Koha to print the right field as the subtitle when viewing the bibliographic record in the OPAC.

No cover
image
available

Library mashups :, exploring new ways to deliver library data /

Normal View

MARC View

ISBD View

Authors: [Engard, Nicole C.,--1979-](#)

Published by : [Information Today, Inc.,](#) (Medford, N.J. :)

Physical details: 334 p. cm.

ISBN: 9781573873727

This tool can be used to chain together pieces of the record as well. If you want the series number to show in the title on your search results you simply have to map 490 \$v to 'subtitle' along with the 245 \$b.

Note

Chain together the fields you want to show after the item title in the order in which you want them to appear.

Future developments will include additional keyword assigned fields.

4.4. MARC Bibliographic Framework Test

Checks the MARC structure.

- *Get there:* More > Administration > Catalog > MARC Bibliographic Framework Test

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

MARC Bibliographic Framework Test

Test	Result
OK	itemnum : the field itemnumber is mapped to a field in tab -1
OK	All item fields are in the same tag and in item tab
OK	Only 1 MARC tag mapped to items
OK	biblioitems.itemtype defined
OK	homebranch defined
OK	holdingbranch defined
OK	at least 1 item type defined
OK	at least 1 branch defined
OK	biblionumber and biblioitemnumber mapped correctly
OK	no NULL value in frameworkcode
OK	all subfields for each tag are in the same tab (or ignored)
OK	all authority types used in the frameworks are defined

Configuration OK, you don't have errors in your MARC parameters table

4.5. Authority Types

Authority Types are basically MARC Frameworks for Authority records and because of that they follow the same editing rules found in the MARC Bibliographic Frameworks section of this manual. Koha comes with many of the necessary Authority frameworks already installed. To learn how to add and edit Authority Types, simply review the MARC Bibliographic Frameworks section of this manual.

- *Get there:* More > Administration > Catalog > Authority Types

4.6. Classification Sources

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Fixed typos, changed content where necessary and added new screenshots.

2010

Source of classification or shelving scheme is an Authorized Values category that is mapped to field 952\$2 and 942\$2 in Koha's MARC Bibliographic frameworks and stored in the items.cn_source field in the database.

- *Get there:* More > Administration > Catalog > Classification sources

New Classification Source
New Filing Rules

Classification Sources

Code	Description	In Use	Filing Rule	Actions
anscr	ANSCR (Sound Recordings)	No	generic	Edit Delete
ddc	Dewey Decimal Classification	Yes	dewey	Edit Delete
lcc	Library of Congress Classification	Yes	lcc	Edit Delete
sudocs	SuDoc Classification (U.S. GPO)	No	generic	Edit Delete
udc	Universal Decimal Classification	No	generic	Edit Delete
z	Other/Generic Classification Scheme	No	generic	Edit Delete

Classification Filing Rules

Code	Description	Sorting Routine	Actions
dewey	Default filing rules for DDC	Dewey	Edit Delete
generic	Generic call number filing rules	Generic	Edit Delete
lcc	Default filing rules for LCC	LCC	Edit Delete

Commonly used values of this field are:

- ddc - Dewey Decimal Classification
- lcc - Library of Congress Classification

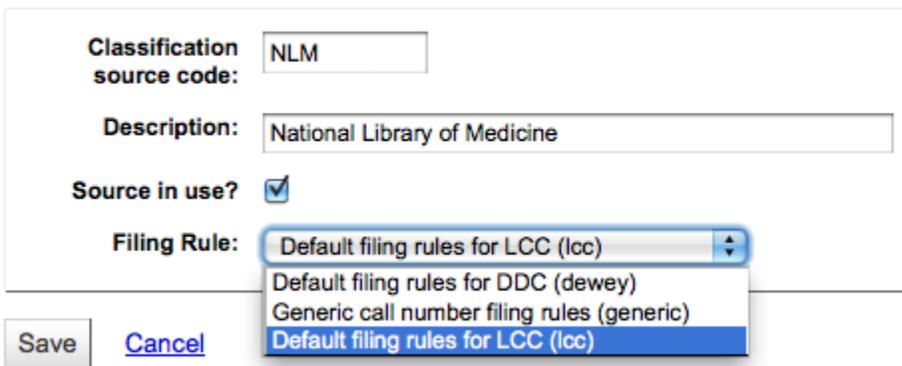
If you chose to install classification sources during Koha's installation, you would see other values too:

- ANSCR (sound recordings)
- SuDOC classification
- Universal Decimal Classification
- Other/Generic Classification

4.6.1. Adding/Editing Classification Sources

You can add your own source of classification by using the New Classification Source button. To edit use the Edit link.

Add classification source



Classification source code: NLM

Description: National Library of Medicine

Source in use?

Filing Rule: Default filing rules for LCC (lcc)

Save Cancel

When creating or editing:

- You will need to enter a code and a description.
- Check the 'Source in use?' checkbox if you want the value to appear in the drop down list for this category.
- Select the appropriate filing rule from the drop down list.

4.6.2. Classification Filing Rules

Filing rules determine the order in which items are placed on shelves.

Values that are pre-configured in Koha are:

- Dewey
- LCC
- Generic

Filing rules are mapped to Classification sources. You can setup new filing rules by using the New Filing Rule button. To edit use the Edit link.

When creating or editing:

- Enter a code and a description
- Choose an appropriate filing routine - dewey, generic or lcc

4.7. Record Matching Rules

Changed/edited content where necessary.

2013

Record matching rules are used when importing MARC records into Koha.

- *Get there:* More > Administration > Catalog > Record Matching Rules

The rules that you set up here will be referenced with you Stage MARC Records for Import.

It is important to understand the difference between Match Points and Match Checks before adding new matching rules to Koha.

Match Points are the criteria that you enter that must be met in order for an incoming record to match an existing MARC record in your catalog. You can have multiple match points on an import rule each with its own score. An incoming record will be compared against your existing records ('one record at a time') and given a score for each match point. When the total score of the matchpoints matches or exceeds the threshold given for the matching rule, Koha assumes a good match and imports/overlays according your specifications in the import process. An area to watch out for here is the sum of the match points. Doublecheck that the matches you want will add up to a successful match.

Example:

Threshold of 1000

Match Point on 020\$a 1000

Match Point on 022\$a 1000

Match Point on 245\$a 500

Match Point on 100\$a 100

In the example above, a match on either the 020\$a or the 022\$a will result in a successful match. A match on 245\$a title and 100\$a author (and not on 020\$a or 022\$a) will only add up to 600 and not be a match. And a match on 020\$a and 245\$a will result in 1500 and while this is a successful match, the extra 500 point for the 245\$a title match are superfluous. The

incoming record successfully matched on the 020\$a without the need for the 245\$a match. However, if you assigned a score of 500 to the 100\$a Match Point, a match on 245\$a title and 100\$a author will be considered a successful match (total of 1000) even if the 020\$a is not a match.

Match Checks are not commonly used in import rules. However, they can serve a couple of purposes in matching records. First, match checks can be used as the matching criteria instead of the match points if your indexes are stale and out of date. The match checks go right for the data instead of relying on the data in the indexes. (If you fear your indexes are out of date, a rebuild of your indexes would be a great idea and solve that situation!) The other use for a Match Check is as a “double check” or “veto” of your matching rule. For example, if you have a matching rule as below:

Threshold of 1000

Match Point on 020\$a 1000

Match Check on 245\$a

Koha will first look at the 020\$a tag/subfield to see if the incoming record matches an existing record. If it does, it will then move on to the Match Check and look directly at the 245\$a value in the incoming data and compare it to the 245\$a in the existing ‘matched’ record in your catalog. If the 245\$a matches, Koha continues on as if a match was successful. If the 245\$a does not match, then Koha concludes that the two records are not a match after all. The Match Checks can be a really useful tool in confirming true matches.

When looking to create matching rules for your authority records the following indexes will be of use:

4.7.1. Adding Matching Rules

To create a new matching rule :

- Click 'New Record Matching Rule'

Add record matching rule

Matching rule code: Required

Description: Required

Match threshold: Required

Record type: Required

Match points

Match point 1 | [Add match point](#) | [Remove this match point](#)

Search index:

Score:

Matchpoint components

Tag:

Subfields:

Offset:

Length:

Normalization rule:

Required match checks

Match check 1 | [Add match check](#) | [Remove this match check](#)

Source (incoming) record check field

Tag:

Subfields:

Offset:

Length:

Normalization rule:

- Choose a unique name and enter it in the 'Matching rule code' field
- 'Description' can be anything you want to make it clear to you what rule you're picking
- 'Match threshold' is the total number of 'points' a biblio must earn to be considered a 'match'
- 'Record type' is the type of import this rule will be used for - either authority or bibliographic
- Match points are set up to determine what fields to match on
- 'Search index' can be found by looking at the ccl.properties file on your system which tells the zebra indexing what data to search for in the MARC data".
- 'Score' - The number of 'points' a match on this field is worth. If the sum of each score is greater than the match threshold, the incoming record is a match to the existing record
- Enter the MARC tag you want to match on in the 'Tag' field
- Enter the MARC tag subfield you want to match on in the 'Subfields' field
- 'Offset' - For use with control fields, 001-009
- 'Length' - For use with control fields, 001-009
- Koha only has one 'Normalization rule' that removes extra characters such as commas and semicolons. The value you enter in this field is irrelevant to the normalization process.
- 'Required match checks' - ??

JIVESNA

4.7.2. Sample Bibliographic Record Matching Rule: Control Number

Add record matching rule

Matching rule code:	<input type="text" value="LOC"/>	Required
Description:	<input type="text" value="Library of Congress ID Number"/>	Required
Match threshold:	<input type="text" value="100"/>	Required
Record type:	<input type="text" value="Bibliographic record"/>	Required

Match points

Match point 1 | [Add match point](#) | [Remove this match point](#)

Search index:	<input type="text" value="Control-number"/>
Score:	<input type="text" value="101"/>

Matchpoint components

Tag:	<input type="text" value="001"/>
Subfields:	<input type="text" value="a"/>
Offset:	<input type="text" value="0"/>
Length:	<input type="text" value="0"/>
Normalization rule:	<input type="text" value="Control-number"/>

Required match checks

[Add match check](#)

- Match threshold: 100
- Record type: Bibliographic
 - Note

If you'd like a rule to match on the 001 in authority records you will need the repeat all of these values and change just the record type to 'Authority record'

- Matchpoints (just the one):
- Search index: Control-number
- Score: 101
- Tag: 001
 - **Note**

this field is for the control number assigned by the organization creating, using, or distributing the record

- Subfields: a
- Offset: 0
- Length: 0
- Normalization rule: Control-number
- Required Match checks: none (remove the blank one)

JIVESNA TECH

Required match checks
Add match check

Match check 1 | Remove this match check

Source (incoming) record check field

Tag:

Subfields:

Offset:

Length:

Normalization rule:

Target (database) record check field

Tag:

Subfields:

Offset:

Length:

Normalization rule:

Save Cancel

4.8. OAI Sets Configuration

On this page you can create, modify and delete OAI-PMH sets

4.8.1. Create a set

To create a set:

- Click on the link 'Add a new set'
- Fill the mandatory fields 'setSpec' and 'setName'
- Then you can add descriptions for this set. To do this click on 'Add description' and fill the newly created text box. You can add as many descriptions as you want.

- Click on 'Save' button'

4.8.2. *Modify/Delete a set*

To modify a set, just click on the link 'Modify' on the same line of the set you want to modify. A form similar to set creation form will appear and allow you to modify the setSpec, setName and descriptions.

To delete a set, just click on the link 'Delete' on the same line of the set you want to delete.

4.8.3. *Define mappings*

Here you can define how a set will be build (what records will belong to this set) by defining mappings. Mappings are a list of conditions on record content. A record only need to match one condition to belong to the set.

- Fill the fields 'Field', 'Subfield' and 'Value'. For example if you want to include in this set all records that have a 999\$9 equal to 'XXX'. Fill 'Field' with 999, 'Subfield' with 9 and 'Value' with XXX.
- If you want to add another condition, click on 'OR' button and repeat step 1.
- Click on 'Save'

To delete a condition, just leave at least one of 'Field', 'Subfield' or 'Value' empty and click on 'Save'.

Note

Actually, a condition is true if value in the corresponding subfield is strictly equal to what is defined if 'Value'. A record having 999\$9 = 'XXX YYY' will not belong to a set where condition is 999\$9 = 'XXX'.

And it is case sensitive : a record having 999\$9 = 'xxx' will not belong to a set where condition is 999\$9 = 'XXX'.

4.8.4. *Build sets*

Once you have configured all your sets, you have to build the sets. This is done by calling the script misc/migration_tools/build_oai_sets.pl.

4.9. *Item search fields*

From here you can add custom search fields to the item search option in the staff client.

Items search fields

Name	Label	MARC field	MARC subfield	Authorised values category	Operations
Subject	Subject	650	a		Edit Delete

Add a new field

Name

Label

MARC field

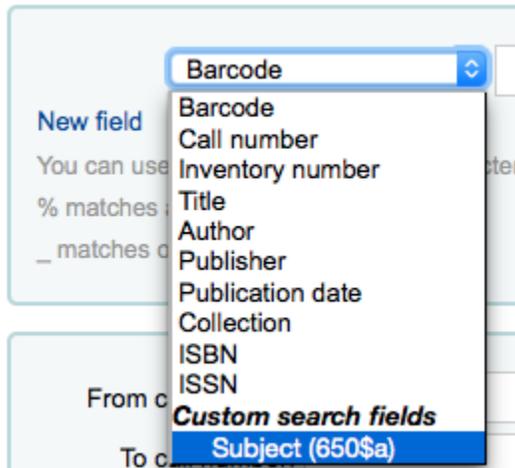
MARC subfield

Authorised values category

To add a new search term simply fill in the 'Add a new field' area:

- Name is a field for you to identify the search term
- Label is what will appear on the item search page
- MARC field allows you to pick which field you'd like to search in
- MARC subfield is the subfield you'd like to search in
- Authorised values category can be used to turn this search field in to a pull down instead of a free text field

Once your new field is added it will be visible at the top of this page and on the item search page



5. Acquisitions

The Koha Acquisitions module provides a way for the library to record orders placed with vendors and manage purchase budgets.

Before using the Acquisitions Module, you will want to make sure that you have completed all of the set up.

- *Get there:* More > Administration > Acquisitions

5.1. Currencies and Exchange Rates

If you place orders from more than one country you will want to input currency exchange rates so that your acquisitions module will properly calculate totals.

- *Get there:* More > Administration > Acquisitions > Currencies and Exchange Rates

Currencies and exchange rates

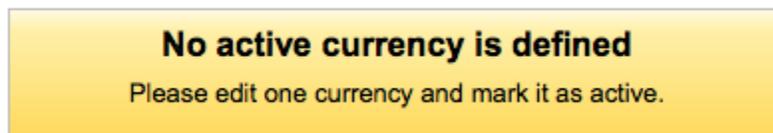
Currency	Rate	Symbol	Last updated	Active	Actions
CAD	1.02207	\$	06/07/2015		Edit Delete
EUR	0.87400	€	06/07/2015		Edit Delete
GBP	1.00000	£	06/07/2015	✓	Edit Delete
USD	1.00000	\$	06/07/2015		Edit Delete

Note

This data is not automatically updated, so be sure to keep it up to date so that your accounting is kept correct.

The ISO code you enter will be used when importing MARC files via the staging tools, the tool will attempt to find and use the price of the currently active currency.

The active currency is the main currency you use in your library. Your active currency will have a check mark in the 'Active' column. If you don't have an active currency you will see an error message telling you to choose an active currency.



5.2. Budgets

Budgets are used for tracking accounting values related to acquisitions. For example you could create a Budget for the current year (ex. 2015) and then break that into Funds for different areas of the library (ex. Books, Audio, etc).

- *Get there:* More > Administration > Acquisitions > Budgets

When visiting the main budget administration you will see two tabs, one for active and one for inactive budgets.

+ New budget

Budgets administration
Currency = GBP

Active budgets

Inactive budgets

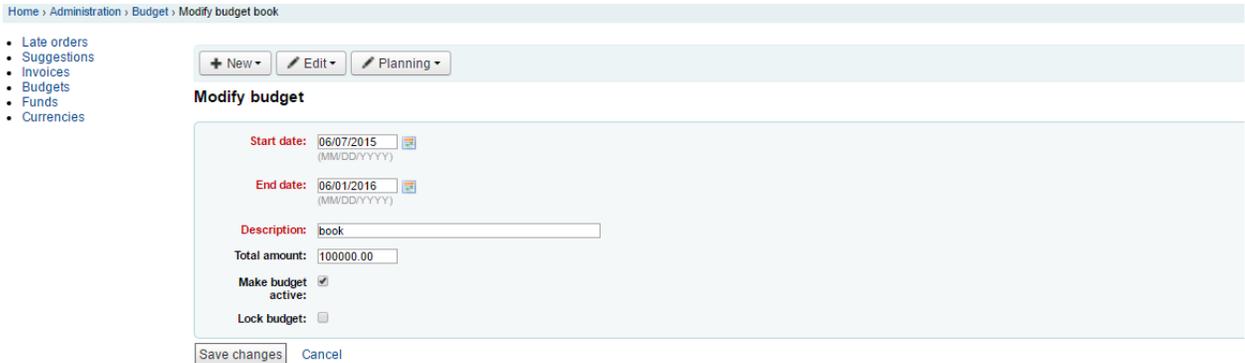
Budget name	Start date	End date	Locked	Total	Actions
book	06/07/2015	06/01/2016		100,000.00	Edit Delete Add fund

5.2.1. Adding budgets

Budgets can either be created from scratch, by duplicating the previous year's budget or by closing a previous year's budget.

5.2.1.1. Add a new budget

If you haven't used Koha before for acquisitions then you'll need to start fresh with a new budget. To add a new budget click the 'New Budget' button.



Home > Administration > Budget > Modify budget book

• Late orders
• Suggestions
• Invoices
• Budgets
• Funds
• Currencies

+ New - Edit - Planning -

Modify budget

Start date: 06/07/2015 (MM/DD/YYYY)

End date: 06/01/2016 (MM/DD/YYYY)

Description: book

Total amount: 100000.00

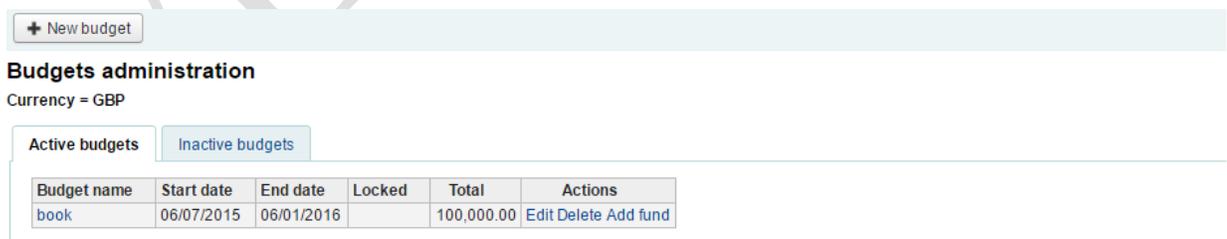
Make budget active:

Lock budget:

Save changes Cancel

- Choose the time period this budget is for, whether it's an academic year, a fiscal year, a quarter, etc.
- The Description should be something that will help you identify the budget when ordering
- In the amount box do not use any symbols, simply enter the amount of the budget with numbers and decimals.
- Marking a budget active makes it usable when placing orders in the acquisitions module, even if the order is placed after the budget end date. This will allow you to record orders that were places in a previous budget period.
- Locking a budget means that Funds will not be able to be modified by librarians

Once you have made your edits, click the 'Save Changes' button. You will be brought to a list of your existing budgets.



+ New budget

Budgets administration

Currency = GBP

Active budgets Inactive budgets

Budget name	Start date	End date	Locked	Total	Actions
book	06/07/2015	06/01/2016		100,000.00	Edit Delete Add fund

5.3. Funds

- *Get there:* More > Administration > Acquisitions > Funds

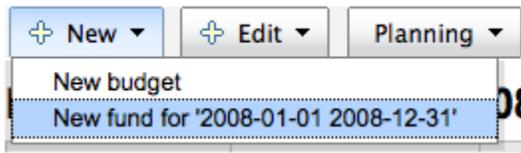
5.3.1. Add a Fund

A fund is added to a budget.

Important

A budget must be defined before a fund can be created.

To add a new fund click the New button and then choose which Budget you would like to add the fund to.



In the form that appears you want to enter the basics about your fund.

JIVESNA

+ New ▾
✎ Edit ▾
✎ Planning ▾

Add Fund for Budget '2013 Budget'

Fund code:

Fund name:

Amount:

Warning at (%): 0 to disable

Warning at (amount): 0 to disable

Owner: Edit owner Remove owner

Users: Add users

Library:

Restrict access to:

Notes:

Statistic 1 done on:

Statistic 2 done on:

Submit
Cancel

The three first fields are required, the rest are optional

- Fund Code is a unique identifier for your fund
- The Fund Name should be something that librarians will understand
- Amount should be entered with only numbers and decimals, no other characters
- Warning at (%) or Warning at (amount) can be filled in to make Koha warn you before you spend a certain percentage or amount of your budget. This will prevent you from overspending.
- You can choose to assign this fund to a librarian. Doing so will make it so that only that librarian can make changes to the Fund

- Choose which library will be using this fund
- You can restrict who can order from this fund by choosing either the 'owner', 'owner and users' or 'owner, users and library' from the 'Restrict access to' menu

Restrict access to:

Notes:

- None
- Owner
- Owner and users
- Owner, users and library

○ **Important**

Without an owner, the access restriction will be ignored, be sure to enter an owner as well as choose a restriction

- Notes are simply for any descriptive notes you might want to add so that librarians know when to use this fund
- Planning categories are used for statistical purposes. To learn more about planning categories, check out the Planning Category FAQ.

When complete, click 'Submit' and you will be brought to a list of all of the funds for the budget.

+ New ▾ Edit ▾ Planning ▾

Funds for '2015'
Currency = USD

Showing 1 to 2 of 2 Search:

Fund code	Fund name	Base-level allocated	Base-level ordered	Total ordered	Base-level spent	Total spent	Base-level available	Total available	Actions
Budget 2015 [id=2]									
BK	Books	100,000.00	23.00	23.00	0.00	0.00	99,977.00	99,977.00	Actions ▲
AV	Audio/Visual	8,000.00	0.00	0.00	0.00	0.00	8,000.00	8,000.00	Actions ▲
Period allocated 1,000,000.00		108,000.00		23.00		0.00			107,977.00

Showing 1 to 2 of 2

The monetary columns in the fund table break down as follows:

1. Base-level allocated is the "Amount" value you defined when creating the fund
2. Base-level ordered is the ordered amount for this fund (without child funds)
3. Total ordered is the base-level ordered for this fund and all its child funds
4. Base-level spent is the spent amount for this fund (without child funds)
5. Total spent is the base-level spent for this fund and all its child funds
6. Base-level available is 1 - 2

7. Total available is 1 - 3

To the right of each fund you will find the 'Actions' button under which you will find the 'Edit,' 'Delete,' and 'Add Child Fund' options.

Total available	Actions
	<ul style="list-style-type: none"> Edit Delete Add child fund
5,000.00	Actions ▲
100.00	Actions ▲
107,977.00	

A child fund simply a sub-fund of the fund listed. An example would be to have a fund for 'Fiction' and under that have a fund for 'New Releases' and a fund for 'Science Fiction.' It is an optional way to further organize your finances.

Funds with children will show with a small arrow to the left. Clicking that will show you the children funds.

Funds for '2015'

Currency = USD

Showing 1 to 5 of 5

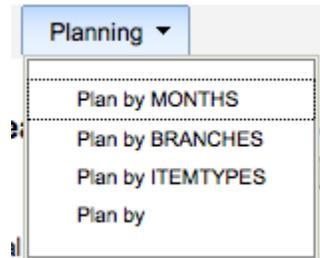
Search:

Fund code	Fund name	Base-level allocated	Base-level ordered	Total ordered	Base-level spent
Budget 2015 [id=2]					
▼ BK	Books	100,000.00	23.00	23.00	0.00
FIC	Fiction	3,000.00	0.00	0.00	0.00
▼ AV	Audio/Visual	8,000.00	0.00	0.00	0.00
▼ MOV	Movies	5,000.00	0.00	0.00	0.00
DVD	DVD	100.00	0.00	0.00	0.00
Period allocated 1,000,000.00		108,000.00		23.00	

Showing 1 to 5 of 5

5.3.2. Budget Planning

When viewing the list of funds click the 'Planning' button and choose how you would like to plan to spend your budget.



If you choose 'Plan by MONTHS' you will see the budgeted amount broken down by months:

Planning for 2012 by MONTHS

Currency = USD. Cells contain estimated values only.

Fund name	Fund total	2012-01	2012-02	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09	2012-10
		[hide]									
Fiction	5,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Non Fiction	2,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Staff Collection	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Test	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Books	1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hardback	400.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Save

To hide some of the columns you can click the 'hide' link to the right (or below as in the screenshot above) the dates. To add more columns you can click the 'Show a column' link found below the 'Fund Remaining' heading.

Fund remaining	2012-01
[show a column]	2012-02
	2012-03
5000.00	2012-04
	2012-05
2500.00	2012-06
	2012-07
500.00	2012-08
	2012-09
500.00	2012-10
	2012-11
1000.00	2012-12
400.00	

From here you can plan your budget spending by manually entering values or by clicking the 'Auto-fill row' button. If you choose to auto-fill the form the system will try to divide the amount accordingly, you may have to make some edits to split things more accurately.

Non Fiction	2'000'00	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	508'3'	0'00	Auto-fill row
Fiction	2'000'00	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	418'8'	0'00	Auto-fill row
		[hide]	Auto-fill column												
Fund name	Total Fund	5015-01	5015-02	5015-03	5015-04	5015-05	5015-06	5015-07	5015-08	5015-09	5015-10	5015-11	5015-12	5015-13	Auto-fill row

Currency = USD. Cells contain estimated values only.

Once your changes are made, click the 'Save' button. If you would like to export your data as a CSV file you can do so by entering a file name in the 'Output to a file named' field and clicking the 'Output' button.

Output to a file named: Into an application:

6. Additional Parameters

- *Get there:* More > Administration > Additional Parameters

6.1. Z39.50/SRU servers

Z39.50 is a client-server protocol for searching and retrieving information from remote computer databases, in short it's a tool used for copy cataloging.

SRU- Search/Retrieve via URL - is a standard XML-based protocol for search queries, utilizing CQL - Contextual Query Language - a standard syntax for representing queries.

Using Koha you can connect to any Z39.50 or SRU target that is publicly available or that you have the log in information to and copy both bibliographic and/or authority records from that source.

- *Get there:* More > Administration > Additional Parameters > Z39.50/SRU Servers

Koha comes with a default list of Z39.50/SRU targets set up that you can add to, edit or delete

Z39.50/SRU servers administration

Showing 1 to 6 of 6 Show 20 entries First Previous Next Last Search:

Target ^	Hostname/Port ↕	Database	Userid	Password	Preselected ↕	Rank ↕	Syntax	Encoding	Timeout	Record type	Options
COLUMBIA UNIVERSITY	clio-db.cc.columbia.edu:7090	voyager			No	0	USMARC	MARC-8	0	Bibliographic	Edit Copy Delete
LIBRARY OF CONGRESS	lx2.loc.gov:210	LCDB			Yes	1	USMARC	utf8	0	Bibliographic	Edit Copy Delete
LIBRARY OF CONGRESS NAMES	lx2.loc.gov:210	NAF			Yes	1	USMARC	utf8	0	Authority	Edit Copy Delete
LIBRARY OF CONGRESS SRU	lx2.loc.gov:210	LCDB			No		USMARC	utf8	0	Bibliographic	Edit Copy Delete
LIBRARY OF CONGRESS SUBJECTS	lx2.loc.gov:210	SAF			Yes	2	USMARC	utf8	0	Authority	Edit Copy Delete
SMITHSONIAN INSTITUTION LIBRARIES	siris-libraries.si.edu:210	Default			No	0	USMARC	MARC-8	0	Bibliographic	Edit Copy Delete

Showing 1 to 6 of 6 First Previous Next Last

To find additional Z39.50 targets you use IndexData's IRSpy: <http://irspy.indexdata.com> or the Library of Congress's List of Targets <http://www.loc.gov/z3950/>

6.1.1. Add a Z39.50 Target

- From the main Z39.50 page, click 'New Z39.50 Server'

New Z39.50 server

Server name:

Hostname: *Required*

Port: *Required*

Database: *Required*

Userid:

Password:

Preselected (searched by default):

Rank (display order):

Syntax (z3950 can send records in various format. Choose one):

Encoding (z3950 can send records in various encodings. Choose one):

Timeout (0 its like not set): seconds

Record type:

XSLT File(s) for transforming results:
Separate multiple filenames by commas.

- 'Z39.50 server' should be populated with a name that will help you identify the source (such as the library name).
- 'Hostname' will be the address to the Z39.50 target.
- 'Port' tells Koha what port to listen on to get results from this target.
- 'Userid' and 'Password' are only required for servers that are password protected.
- Check the 'Preselected' box if you want this target to always be selected by default.
- 'Rank' lets you enter where in the list you'd like this target to appear.
 - If this is left blank the targets will be in alphabetical order.
- 'Syntax' is the MARC flavor you use.
- 'Encoding' tells the system how to read special characters.
- 'Timeout' is helpful for targets that take a long while. You can set the timeout so that it doesn't keep trying the target if results aren't found in a reasonable amount of time.

- 'Record type' lets you define if this is a bibliographic or an authority target.
- 'XSLT file(s)' lets enter one or more (comma-separated) XSLT file names that you want to apply on the search results.
 - When retrieving records from external targets you may wish to automate some changes to those records. XSLT's allow you to do this. Koha ships with some sample XSLT files in the /koha-tmpl/intranet-tmpl/prog/en/xslt/ directory ready for use:
 - Del952.xsl: Remove items (MARC21/NORMARC)
 - Del995.xsl: Remove items (UNIMARC)
 - Del9LinksExcept952.xsl: Remove \$9 links. Skip item fields (MARC21/NORMARC)
 - Del9LinksExcept995.xsl: Remove \$9 links. Skip item fields (UNIMARC)

6.1.2. *Suggested Bibliographic Z39.50 Targets*

Koha libraries with open Z39.50 targets can share and find connection information on the Koha wiki: http://wiki.koha-community.org/wiki/Koha_Open_Z39.50_Sources. You can also find open Z39.50 targets by visiting IRSpy: <http://irspy.indexdata.com>.

The following targets have been used successfully by other Koha libraries (in the Americas):

- ACCESS PENNSYLVANIA 205.247.101.11:210 INNOPAC
- CUYAHOGA COUNTY PUBLIC webcat.cuyahoga.lib.oh.us:210 INNOPAC
- GREATER SUDBURY PUBLIC 216.223.90.51:210 INNOPAC
- HALIFAX PUBLIC catalogue.halifaxpubliclibraries.ca:210 horizon
- HALTON HILLS PUBLIC cat.hhpl.on.ca:210 halton_hills
- LIBRARY OF CONGRESS lx2.loc.gov: 210 LCDB
- LONDON PUBLIC LIBRARY catalogue.londonpubliclibrary.ca:210 INNOPAC
- MANITOBA PUBLIC library.gov.mb.ca:210 horizon
- MILTON PL cat.mpl.on.ca:210 horizon
- NATIONAL LIBRARY OF WALES cat.llgc.org.uk:210 default
- NHUPAC 199.192.6.130:211 nh_nhupac
- OCEAN STATE LIBRARIES (RI) catalog.oslri.net:210 INNOPAC
- OHIOLINK olc1.ohiolink.edu:210 INNOPAC
- PUBCAT prod890.dol.state.vt.us:2300 unicorn
- SAN JOAQUIN VALLEY PUBLIC LIBRARY SYSTEM (CA) hip1.sjvls.org:210 ZSERVER
- SEATTLE PUBLIC LIBRARY ZSERVER.SPL.ORG:210 HORIZON
- TORONTO PUBLIC symphony.torontopubliclibrary.ca:2200 unicorn
- TRI-UNI 129.97.129.194:7090 voyager
- VANCOUVER PUBLIC LIBRARY z3950.vpl.ca:210 Horizon

6.1.3. Suggested Authority Z39.50 Targets

The following targets have been used successfully by other Koha libraries (in the Americas):

- LIBRARIESAUSTRALIA AUTHORITIES z3950-
test.librariesaustralia.nla.gov.au:210 AuthTraining Userid: ANLEZ / Password:
z39.50
- LIBRARY OF CONGRESS NAME AUTHORITIES lx2.loc.gov:210 NAF
- LIBRARY OF CONGRESS SUBJECT AUTHORITIES lx2.loc.gov:210 SAF

6.1.4. Add a SRU Target

- From the main Z39.50/SRU page, click 'New SRU Server'

New SRU server

Server name:

Hostname: *Required*
Includes the domain part, but the path part of the URL should go into Database.

Port: *Required*

Database: *Required*

Userid:

Password:

Preselected (searched by default):

Rank (display order):

Syntax (z3950 can send records in various format. Choose one):

Encoding (z3950 can send records in various encodings. Choose one):

Timeout (0 its like not set): seconds

Record type:

Additional SRU options:
Separate options by commas. Example: sru=get,sru_version=1.1. See also <http://www.indexdata.com/yaz/doc/zoom.html>.

SRU Search fields mapping:

XSLT File(s) for transforming results:
Separate multiple filenames by commas.

- 'Server name' should be populated with a name that will help you identify the source (such as the library name).
- 'Hostname' will be the address to the Z39.50 target.
- 'Port' tells Koha what port to listen on to get results from this target.

- 'Userid' and 'Password' are only required for servers that are password protected.
- Check the 'Preselected' box if you want this target to always be selected by default.
- 'Rank' lets you enter where in the list you'd like this target to appear.
 - If this is left blank the targets will be in alphabetical order.
- 'Syntax' is the MARC flavor you use.
- 'Encoding' tells the system how to read special characters.
- 'Timeout' is helpful for targets that take a long while. You can set the timeout so that it doesn't keep trying the target if results aren't found in a reasonable amount of time.
- 'Additional SRU options' is where you can enter additional options of the external server here, like `sru_version=1.1` or `schema=marc21`, etc. Note that these options are server dependent.
- 'SRU Search field mapping' lets you add or update the mapping from the available fields on the Koha search form to the specific server dependent index names.
 - To further refine your searches, you could add the following index names to the SRU search field mappings. To do this, edit the server and click the Modify button next to this field.

Table 2.2. SRU Mapping

Title	dc.title
ISBN	bath.isbn
Any	cql.anywhere
Author	dc.author
ISSN	bath.issn
Subject	dc.subject
Standard ID	bath.standardIdentifier

- 'XSLT file(s)' lets enter one or more (comma-separated) XSLT file names that you want to apply on the search results.

- When retrieving records from external targets you may wish to automate some changes to those records. XSLT's allow you to do this. Koha ships with some sample XSLT files in the /koha-tmpl/intranet-tmpl/prog/en/xslt/ directory ready for use:
 - Del952.xsl: Remove items (MARC21/NORMARC)
 - Del995.xsl: Remove items (UNIMARC)
 - Del9LinksExcept952.xsl: Remove \$9 links. Skip item fields (MARC21/NORMARC)
 - Del9LinksExcept995.xsl: Remove \$9 links. Skip item fields (UNIMARC)

6.2. Did you mean?

Get there: More > Administration > Additional Parameters > Did you mean?

Koha can offer 'Did you mean?' options on searches based on values in your authorities.

Important

Did you mean? only works in the OPAC at this time. The Intranet options are here for future development.

Using this page you can control which options Koha gives patrons on their search results.

Did you mean?

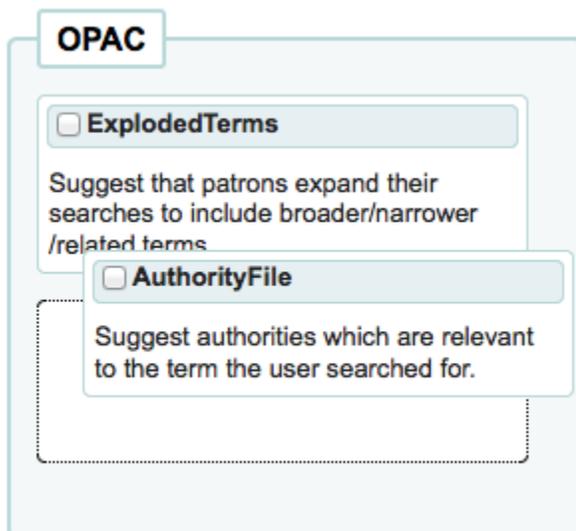
Please put the *Did you mean?* plugins in order by significance, from most significant to least significant, and check the box to enable those plugins that you want to use. (NOTE: *Did you mean?* functionality is not yet enabled on the staff client)

OPAC	Intranet
<input type="checkbox"/> ExplodedTerms Suggest that patrons expand their searches to include broader/narrower /related terms.	<input type="checkbox"/> ExplodedTerms Suggest that patrons expand their searches to include broader/narrower /related terms.
<input type="checkbox"/> AuthorityFile Suggest authorities which are relevant to the term the user searched for.	<input type="checkbox"/> AuthorityFile Suggest authorities which are relevant to the term the user searched for.

To turn on the 'Did you mean?' bar on your search results you need to check the box next to each plugin you would like to use. The two plugins you have to choose from are:

- The ExplodedTerms plugin suggests that the user try searching for broader/narrower/related terms for a given search (e.g. a user searching for "New York (State)" would click the link for narrower terms if they're also interested in "New York (City)"). This is only relevant for libraries with highly hierarchical authority data.
- The AuthorityFile plugin searches the authority file and suggests the user might be interested in bibs linked to the top 5 authorities

If you want one plugin to take priority over another you simply drag it above the other.



If you choose both plugins you will see several options at the top of your search results

If you choose just the AuthorityFile you'll see just authorities.

6.3. Column settings

This administration area will help you hide or display columns on fixed tables throughout the staff client. Right now there is only one table, the currencies table, you can control with this, but more will come.

- *Get there:* Administration > Additional Parameters > Column settings

Columns settings

▶ Acquisition
▶ Administration
▶ Authorities
▶ Catalog
▶ Cataloging
▶ Circulation

Clicking on the module you'd like to edit tables for will show you the options available to you. Right now only 'Administration' has any options.

This area lets you control the columns that show in the Currency admin area. If nothing is hidden you will see no check marks.

Columns settings

▸ Acquisition

▼ Administration

Administration tables

currency

Currency (id=currencies-table)

Column name	Is hidden by default	Cannot be toggled
currency	<input type="checkbox"/>	<input checked="" type="checkbox"/>
rate	<input type="checkbox"/>	<input checked="" type="checkbox"/>
symbol	<input type="checkbox"/>	<input type="checkbox"/>
iso_code	<input type="checkbox"/>	<input type="checkbox"/>
last_updated	<input type="checkbox"/>	<input type="checkbox"/>
active	<input type="checkbox"/>	<input type="checkbox"/>
actions	<input type="checkbox"/>	<input type="checkbox"/>

Save

▸ Authorities

▸ Catalog

▸ Cataloging

▸ Circulation

And will see all of the columns when viewing the table.

Currency ⇅	Rate ⇅	Symbol ⇅	ISO code ⇅	Last updated ⇅	Active ⇅	Actions
CAD	1.02207	\$		01/14/2015		Edit Delete
EUR	0.87400	€		01/14/2015		Edit Delete
GBP	1.99290	£		01/14/2015		Edit Delete
USD	1.00000	\$		01/14/2015	✓	Edit Delete

If columns are hidden they will be checked off

Columns settings

▸ Acquisition

▾ Administration

Administration tables

currency

Currency (id=currencies-table)

Column name	Is hidden by default	Cannot be toggled
currency	<input type="checkbox"/>	<input checked="" type="checkbox"/>
rate	<input type="checkbox"/>	<input checked="" type="checkbox"/>
symbol	<input checked="" type="checkbox"/>	<input type="checkbox"/>
iso_code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
last_updated	<input type="checkbox"/>	<input type="checkbox"/>
active	<input type="checkbox"/>	<input type="checkbox"/>
actions	<input type="checkbox"/>	<input type="checkbox"/>

Save

▸ Authorities

▸ Catalog

▸ Cataloging

▸ Circulation

And hidden when you view the table.

Currency	Rate	Last updated	Active	Actions
CAD	1.02207	01/14/2015		Edit Delete
EUR	0.87400	01/14/2015		Edit Delete
GBP	1.99290	01/14/2015		Edit Delete
USD	1.00000	01/14/2015	✓	Edit Delete

You can also toggle columns using the 'Show/Hide Columns' button in the top right of the page

Currencies and exchange rates

Currency	Rate	Symbol	ISO code	Last updated	Active	Actions
CAD	1.02207	\$		01/14/2015		Edit Delete
EUR	0.87400	€		01/14/2015		Edit Delete
GBP	1.99290	£		01/14/2015		Edit Delete
USD	1.00000	\$		01/14/2015	✓	Edit Delete

Show / hide columns

- Symbol
- ISO code
- Last updated
- Active
- Actions

3. Patrons & Circulation

Settings for controlling circulation and patron information.

3.1. Patron Categories

Patron categories allow you to organize your patrons into different roles, age groups, and patron types.

- *Get there:* More > Administration > Patrons & Circulation > Patron Categories

+ New category

Patron category administration

Showing 1 to 15 of 15 | Show 20 entries | « First « Previous Next » Last » | Search:

Code	Category name	Type	Enrollment period	Age required	Upper age limit	Enrollment fee	Overdue	Lost items	Hold fee	Messaging	Branches limitations	Default privacy		
ADPT	Adult Patron	Adult	12 months	17 years	0 years	0.00	Yes	Shown	0.00	Advance notice : email Hold filled : email	No limitation	Default	Edit	Delete
B	Board	Prof.	99 months	5 years	17 years	0.00	Yes	Shown	0.00	Item checkout : email Hold filled : sms Item due : email	3 branches limitations	Default	Edit	Delete
HB	Home Bound	Adult	99 months	18 years	999 years	0.00	Yes	Shown	0.00	Advance notice : email Hold filled : email	No limitation	Default	Edit	Delete
INH	In house	Statistical	999 months	0 years	0 years	0.00	No	Shown	0.00	None	No limitation	Default	Edit	Delete

Patrons are assigned to one of six main categories:

- Adult
 - Most common patron type, usually used for a general 'Patron' category.

- Child
 - Children patrons can have a guardian to be attached to them.
- Staff
 - Librarians (and library workers) should be assigned the staff category so that you can set their permissions and give them access to the staff client.
- Organizational
 - Organizational patrons are organizations. Organizations can be used as guarantors for Professional patrons.
- Professional
 - Professional patrons can be linked to Organizational patrons
- Statistical
 - This patron type is used strictly for statistical purposes, such as in house use of items.

3.1.1. Adding a patron category

To add a new patron category click 'New Category' at the top of the page

Cataloging

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 - 4.3. Handling On Order Items and Holds**

Before you start cataloging in Koha you're going to want to do some basic setup. Refer to the Implementation Checklist for a full list of these things. Most importantly you're going to want to make sure that your Frameworks are all defined the way you want. Once in the cataloging module you will not be able to add or remove fields and subfields so your frameworks must be ready before you start cataloging.

1. Bibliographic Records

1.1. Adding Records

Records can be added to Koha via original or copy cataloging. If you would like to catalog a record using a blank template

- Click 'New Record'

Default Framework

Models

Acquisitions Framework

Books, Booklets, Workbooks

Binders

Fast Add Framework

CD-ROMs, DVD-ROMs, General Online Resources

Short Record

Audio Cassettes, CDs

Serials

Kits

DVDs, VHS

- Choose the framework you would like to base your record off of

If you want to catalog a record based on an existing record at another library

- Click 'z39.50 Search'

Z39.50 Search Points

Title:
ISBN/ISSN:
LC Call Number:
Control No.:
Raw (any):

Author:
Subject Heading:
Dewey:
Standard ID:

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 [siris-libraries.si.edu]
- LIBRARY OF CONGRESS [z3950.loc.gov]

[Cancel](#)

- Search for the item you would like to catalog

If no results are found, try searching for fewer fields, not all Z39.50 targets can search all of the fields above.

- Search targets can be altered by using the Z39.50 Admin area.
- From the results you can view the MARC or Card view for the records or choose to Import them into Koha

Results

Server	Title	Author	Date	Edition	ISBN	LCCN	MARC	Card	Import
LIBRARY OF CONGRESS	[Movement of human appendages and pulley systems compared using principles of mechanics and statics]		1680			92517507	MARC	Card	Import
LIBRARY OF CONGRESS	A brief introduction to fluid mechanics /		2011	5th ed.	9780470596791 (pbk) 0470596791 (pbk)	2010038482	MARC	Card	Import
LIBRARY OF CONGRESS	Advanced structures, material and fabrication technique for aerospace vehicles.		1966			68004202	MARC	Card	Import
LIBRARY OF CONGRESS	Boards of directors in India :		1983			85902848	MARC	Card	Import
LIBRARY OF CONGRESS	Bulletin on rural health statistics in India.					2015307611	MARC	Card	Import
LIBRARY OF CONGRESS	Business networks reloaded /			1. ed.	9783848720385 (HB:Nomos) 9781472470928 (HB:Ashgate)	2015014732	MARC	Card	Import

- In addition to the Import link to the right of each title, you can click on the title you're interested in and a menu will pop up with links to preview the record and import it

Results

Server	Title	Author	Date	Edition	ISBN	LCCN	MARC	Card	Import
LIBRARY OF CONGRESS	[Movement of human appendages and pulley systems compared using principles of mechanics and statics]		1680			92517507	MARC	Card	Import
LIBRARY OF CONGRESS	A brief introduction to fluid mechanics /		2011	5th ed.	9780470596791 (pbk) 0470596791 (pbk)	2010038482	MARC	Card	Import
LIBRARY OF CONGRESS	Advanced structures, material and fabrication technique for aerospace vehicles.		1966			68004202	MARC	Card	Import
LIBRARY OF CONGRESS	Boards of directors in India :		1983			85902848	MARC	Card	Import
LIBRARY OF CONGRESS	Bulletin on rural health statistics in India.					2015307611	MARC	Card	Import
LIBRARY OF CONGRESS	Business networks reloaded /			1. ed.	9783848720385 (HB:Nomos) 9781472470928 (HB:Ashgate)	2015014732	MARC	Card	Import

- Once you've opened a blank framework or imported a record via Z39.50 you will be presented with the form to continue cataloging

Add MARC Record

Change framework:

000 ? - LEADER

nam a22 7a 4500 ...

005 ? - DATE AND TIME OF LATEST TRANSACTION

20101120033217.0 ...

006 ? - FIXED-LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL CHARACTERISTICS--GENERAL INFORMATION + -

007 ? - PHYSICAL DESCRIPTION FIXED FIELD--GENERAL INFORMATION + -

008 ? - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION

101120t xxu||||| |||| 00| 0 eng d ...

020 ? - ISBN + -

a International Standard Book Number

024 ? - OTHER STANDARD IDENTIFIER + -

037 ? - PUBLICATION, DISTRIBUTION DETAILS--SOURCE OF ACQUISITION + -

040 ? - CATALOGING SOURCE

041 ? - LANGUAGE CODE + -

050 ? - LIBRARY OF CONGRESS CALL NUMBER + -

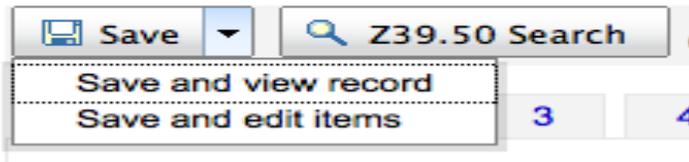
- To expand a collapsed tag click on the tag number
- To get help from the Library of Congress on a Marc tag click the question mark to the right of each field number
- Sometimes fields may not be editable due to the value in your BiblioAddsAuthorities system preference. If you have this preference set to not allow catalogers to type in fields controlled by authorities you may see a lock symbol to the left of the field.

100 ? - Author - Personal Name -

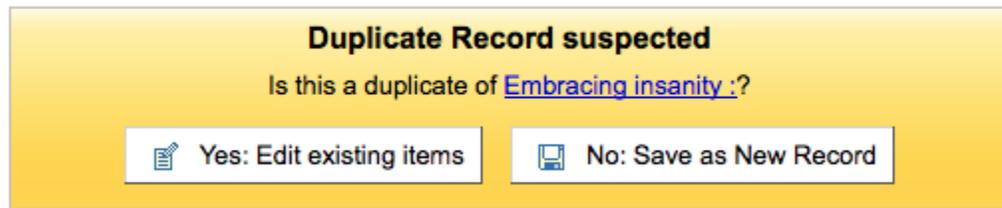
g 9 (RLIN)

a Personal name

Add MARC Record



- If you are about to add a duplicate record to the system you will be warned before saving



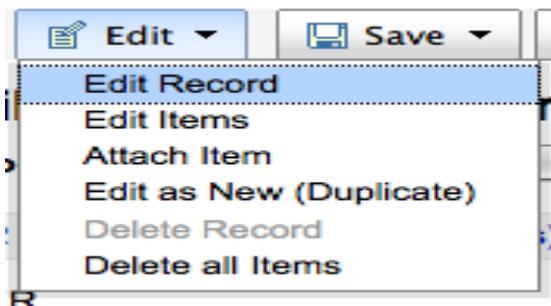
1.2. Editing Records

To edit a record you can click 'Edit Biblio' from the search results on the cataloging page

+ New record ▾		Q New from Z39.50 ▾	
1 result(s) found in catalog, 0 result(s) found in reservoir			
Title	Location	Preview	
A foundation course in statics and dynamics / Plum, David. - 0582210607 - Longman, - 1997 ; Harlow, Essex, England ; [New York] : - xi, 179 p. : ; 25 cm.	1 Centerville 531	MARC Card	Edit biblio Add/Edit items

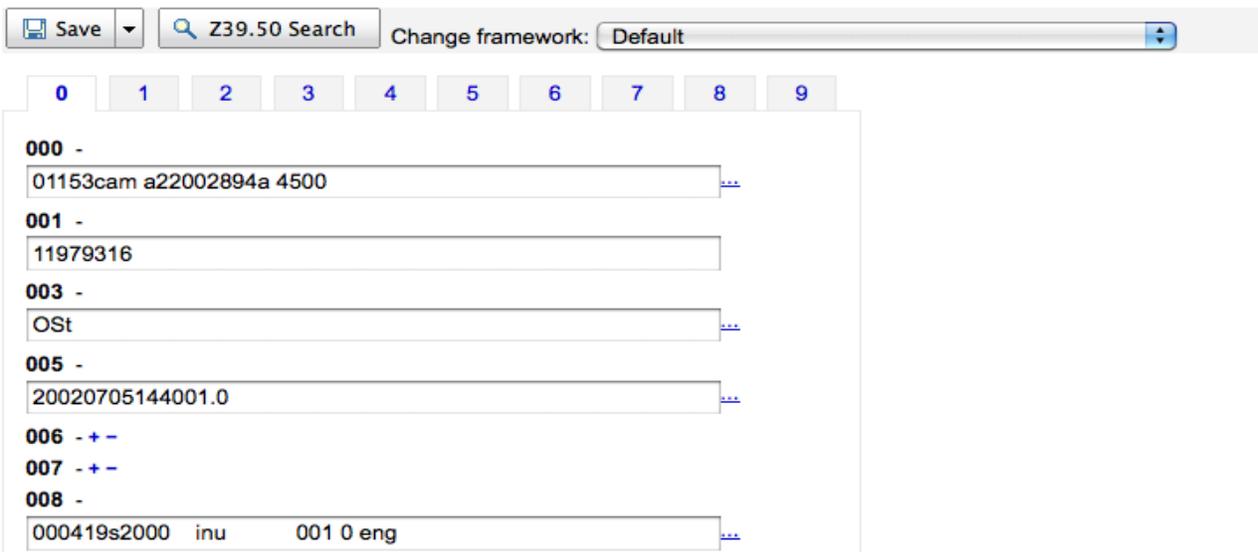
Biblios in reservoir

or by clicking the Edit button on the Bibliographic Record



The record will open in the MARC editor....

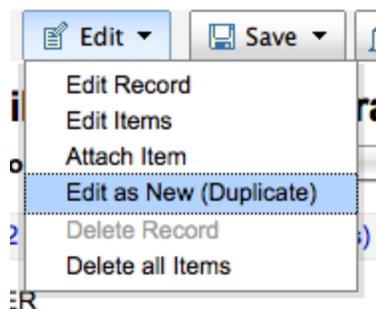
Editing *Embracing insanity : open source software development / Russell C. Pavlicek. (Record Number 1270)*



Once you have made your edits you can click 'Save' at the top of the editor.

1.3. Duplicating Records

Sometimes a copy of the record you need to catalog can't be found via Z39.50. In these cases you can create a duplicate of similar record and edit the necessary pieces to create a new record. To duplicate an existing record click 'Edit as New (Duplicate)' from the Edit menu on the Bibliographic Record



This will open a new MARC record with the fields filled in with the values from the original Bibliographic Record.

Add MARC Record

Change framework:

210 -+-
 222 -+-
 240 -
 243 -
 245 -

▲ a
 ▲ b
 ▲ c
 ▲ h

2. Item Records

2.1. Adding Items

After saving a new bibliographic record, you will be redirected to a blank item record so that you can attach an item to the bibliographic record. You can also click 'Add Holdings' from the cataloging search results

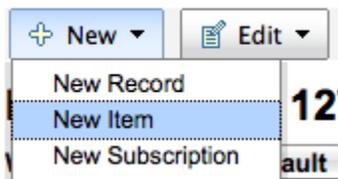
A **Course in statics and dynamics /**
 A
 A **ie, Martin.**
 T

Publisher: Harlow, Essex, England ; [New York] : Longman, c1997
 Description: xi, 179 p. : ill. ; 25 cm.
 ISBN: 0582210607.
 Subject(s): Mechanics, Analytic
 OPAC view: [Open in new window.](#)
 MARC Preview: [Show](#)

Activate filters

Item type	Current location	Home library	Call number	Status	Last seen	Barcode
Books	Aligarh muslim university library	Aligarh muslim university library	531	Available	08/12/2016	jivesna1001
Books	Centerville	Centerville	531	Available	08/12/2016	jivesna100

or you can add new item at any time by clicking 'New' on the bibliographic record and choosing 'New Item'



The item edit form will appear:

Items for Embracing insanity : by Pavlicek, Russell C. (Record #1357)

Add Item

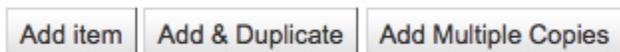
0 - Withdrawn status	<input type="text"/>
1 - Lost status	<input type="text"/>
2 - Source of classification or shelving scheme	Dewey Decimal Classification
3 - Materials specified (bound volume or other part)	<input type="text"/>
4 - Damaged status	<input type="text"/>
5 - Use restrictions	<input type="text"/>
7 - Not for loan	<input type="text"/>
8 - Collection code	<input type="text"/>
a - Permanent location	Centerville
b - Current location	Centerville
c - Shelving location	<input type="text"/>
d - Date acquired	<input type="text"/>
e - Source of acquisition	<input type="text"/>
f - Coded location qualifier	<input type="text"/>
g - Cost, normal purchase price	<input type="text"/>
h - Serial Enumeration / chronology	<input type="text"/>

At the very least, the following fields should be entered for new items:

- 8 - Collection code
- a - Permanent location
- b - Shelving location
- o - Full call number
- p - Barcode
- v - Cost, replacement price

- This value will be charged to patrons when you mark an item they have checked out as 'Lost'
- y - Koha item type

Below the add form there are 3 buttons for adding the item



- Add Item will add just the one item
- Add & Duplicate will add the item and fill in a new form with the same values for you to alter
- Add Multiple Copies will ask how many copies and will then add that number of copies adding +1 to the barcode so each barcode is unique

Your added items will appear above the add form once submitted

Items for A foundation course in statics and dynamics / by Plum, David. (Record #38569)

	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Full call number	Barcode	Date last seen	Price effective from	Koha item type
Edit Delete			ddc			Aligarh muslim university library	Aligarh muslim university library	2016-08-12	531	jivesna1001	2016-08-12	2016-08-12	Books
Edit Delete			ddc			Centerville	Centerville	2016-08-12	531	jivesna100	2016-08-12	2016-08-12	Books

[Add item](#)

Your items will also appear below the bibliographic details on the bib record display.

Items for A foundation course in statics and dynamics / by Plum, David. (Record #38569)

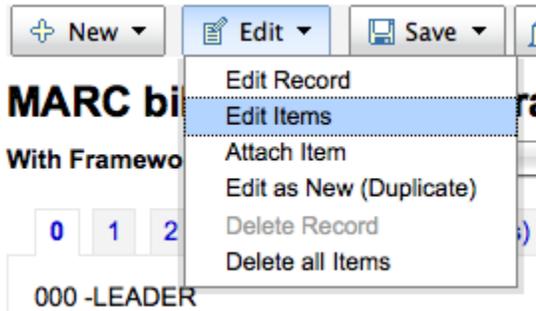
	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Full call number	Barcode	Date last seen	Price effective from	Koha item type
Edit Delete			ddc			Aligarh muslim university library	Aligarh muslim university library	2016-08-12	531	jivesna1001	2016-08-12	2016-08-12	Books
Edit Delete			ddc			Centerville	Centerville	2016-08-12	531	jivesna100	2016-08-12	2016-08-12	Books

[Add item](#)

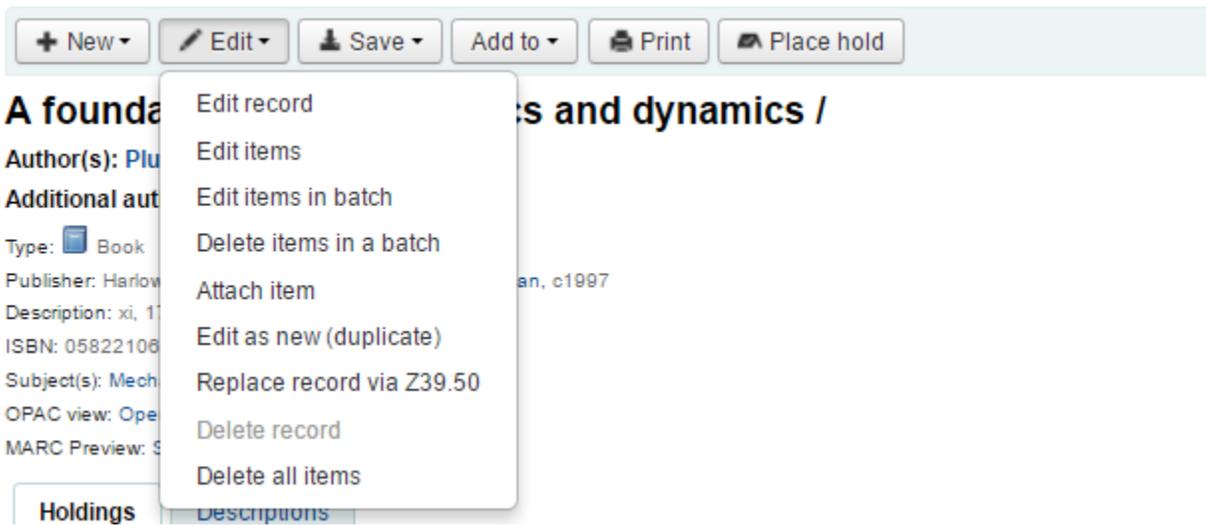
2.2. Editing Items

Items can be edited in several ways.

- Clicking 'Edit' and 'Edit Items' from the bibliographic record



- Clicking 'Edit Items' beside the item on the 'Items' tab

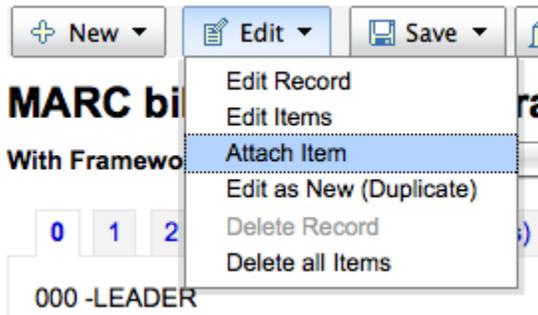


The edit menu is also where items can be deleted from:

		Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code
Edit	Delete			ddc			Non Fiction
Edit	Delete			ddc			

2.3. Moving Items

Items can be moved from one bibliographic record to another using the Attach Item option



Visit the bibliographic record you want to attach the item to and choose 'Attach Item' from the 'Edit' menu.

Attach an item to *Marc Brown Arthur's adventures library*

Enter the barcode of the item to attach:

The item you select will be moved to the target record.

Simply enter the barcode for the item you want to move and click 'Select'

If you want to move all items to a new record creating only one bibliographic record you can use the Merge Records tool instead.

2.4. Item Specific Circulation History

Each bibliographic record keeps a circulation history (with or without the patron information depending on your settings), but each item also has its own circulation history page. To see this, click on the 'Items' tab to the left of the record you are viewing.

- Normal
- MARC
- ISBD
- Items**
- Holds
- Checkout history
- Modification log

A foundation course in statics and dynamics /

by Plum, David.

Biblionumber:	38569
Rental charge:	0.00
ISBN:	0582210607
Publisher:	Hartow, Essex, England ; [New York] : Longman,
Physical details:	xi, 179 p. : ill. ; 25 cm.
No. of items:	2

Barcode jivesna1001

Item information [\[Edit Item\]](#)

Home library:	Aligarh muslim university library
Item type:	Books
Item callnumber:	531
Replacement price:	0.00

Statuses

Current location:	Aligarh muslim university library
Checkout status:	
Current renewals:	
Lost status:	Choose <input type="button" value="Set Status"/>
Damaged status:	Choose <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

History

Accession date:	08/12/2016
Total checkouts:	0 (View item's checkout history)
Last seen:	08/12/2016
Last borrowed:	
Public note:	<input type="text"/> <input type="button" value="Update"/>

JIVESNA

Patrons

Table of Contents

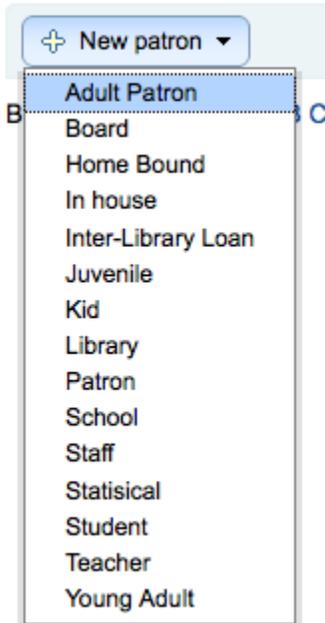
- 1. Add a new patron**
- 2. Add a Staff Patron**
- 3. Add a Statistical Patron**
- 4. Duplicate a Patron**
- 5. Editing Patrons**
- 6. Patron Permissions**
 - 6.1. Setting Patron Permissions**
 - 6.2. Patron Permissions Defined**
- 7. Patron Information**
 - 7.1. Check Out**
 - 7.2. Details**
 - 7.3. Fines**
 - 7.4. Circulation History**
 - 7.5. Modification Log**
 - 7.6. Notices**

JIVESNA

1. Add a new patron

Patrons are added by going to the 'Patrons' module.

- Click 'New'



- The fields that appear on the patron add form can be controlled by editing the BorrowerUnwantedField system preference.
- First enter the identifying information regarding your patron

Add Patron patron

Patron identity

Salutation:

Surname: *Required*

First name: *Required*

Date of birth: 
(MM/DD/YYYY)

Initials:

Other name:

Female Male N/A

- Required fields are defined in the BorrowerMandatoryField system preference
- Salutation is populated by the BorrowersTitles system preference
- Next enter the contact information

Main address

Address:

Address 2:

City: or choose

State:

Zip/Postal code:

Contact

Primary phone:
Shows on transit slips

Secondary phone:

Other phone:

Primary email:
Shows on transit slips

Secondary email:

Fax:

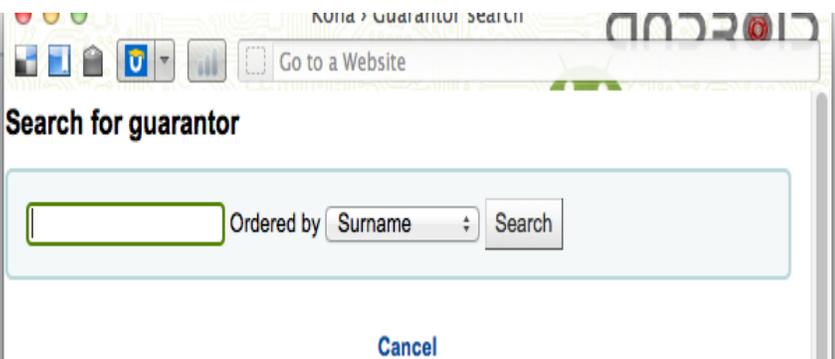
- For contact information, note that the primary phone and email addresses are the ones that appear on notices and slips printed during circulation (receipts, transfer slips and hold slips). The primary email is also the one that overdue notices and other messages go to.
- If this patron is a child, you will be asked to attach the child patron to an adult patron

Guarantor information

Surname:

First name:

Relationship:



- Click 'Set to Patron' to search your system for an existing patron

- If the Guarantor is not in the system, you can enter the first and last name in the fields available
- The relationships are set using the borrower Relationship system preference
- If this patron is a professional, you will be asked to attach the patron to an organizational patron

Guarantor information

Organization name:

- Click 'Set to Patron to search your system for an existing patron
- Each patron can have an alternate contact

Alternate address

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

Email:

Contact note:

Alternate contact

Surname:

First name:

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

- An alternate contact could be a parent or guardian. It can also be used in academic settings to store the patron's home address.
- The library management section includes values that are used within the library

Library management
Card number: *Required*
Library: 
Category: 
Sort 1:
Sort 2:

- The card number field is automatically calculated if you have the autoMemberNum system preference set that way
- **Note**

For a newly installed system this preference will start at 1 and increment by 1 each time after. To have it start with the starting number of your barcodes, enter the first barcode by hand in the patron record and save the patron. After that the field will increment that number by 1.

- If you accidentally chose the wrong patron category at the beginning you can fix that here
 - Sort 1 and 2 are used for statistical purposes within your library
- Next, the Library Setup section includes additional library settings

Library set-up

Registration date: (MM/DD/YYYY)

Expiry date (leave blank for auto calc): (MM/DD/YYYY)

OPAC note:
This message appears on this patron's user page in the OPAC

Circulation note:
This message displays when checking out to this patron

OPAC/Staff login

Username:

Password: Minimum password length: 4

Confirm password:

- The registration date will automatically be filled in with today's date
- If your patron cards expire (based on your patron category settings) the Expiry date will automatically be calculated
- The OPAC Note is a note for the patron - it will appear in the OPAC on the patron's record
- The Circulation Note is meant solely for your library staff and will appear when the circulation staff goes to check an item out to the patron

Home > Circulation > Checkouts > Kapil Kumar (jivesna0001)

Kapil Kumar (jivesna0001)



No address stored.
No city stored.
No phone stored.
No email stored.
Category: Student (ST)
Home library: Centerville

Edit + Add child Change password Duplicate Print Search to hold More

Checking out to Kapil Kumar (jivesna0001)

Enter item barcode: Check Out

Specify due date (MM/DD/YYYY): Remember for session: Clear

0 Checkouts **1 Hold(s)**

Patron has nothing checked out.

Attention:

Messages:

[Add a new message](#)

- The Staff/OPAC asks for the username and password to be used by the patron (and/or staff member) to log into their account in the OPAC and for staff to log in to the staff client.
 - Staff will only be able to use this log in info to log in to the staff client if they have the **necessary permissions**.
- If you have set additional patron attributes up, these will appear next

Additional attributes and identifiers

Type	Value	
DL (Drivers License)	<input type="text"/>	Clear
FAVCOLOR (Favourite Colour)	<input type="text"/>	Clear New
PREVID (Previous system ID)	<input type="text"/>	Clear New

- Finally, if you have Enhanced Messaging Preferences set to 'allow,' you can choose the messaging preferences for this patron.

Patron messaging preferences

	Days in advance	Email	Digests only?	Do not notify
Advance notice	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>

Save Cancel

- o **Note**

These preferences will override any you set via the patron categories

- o **Note**

These preference can be altered by the patron via the OPAC

- Once finished, click 'Save'

If the system suspects this patron is a duplicate of another it will warn you.

Duplicate suspected

[Detail](#) Duplicate ? [Yes](#) No, it is not

If you have set a minimum or upper age limit on the patron category and are requiring that the birth date be filled in, Koha will warn you if the patron you're adding is too old or young for the patron category you have selected:

The following fields are wrong. Please fix them.

- Patron's age is incorrect for their category. Ages allowed are 5-17.

2. Add a Staff Patron

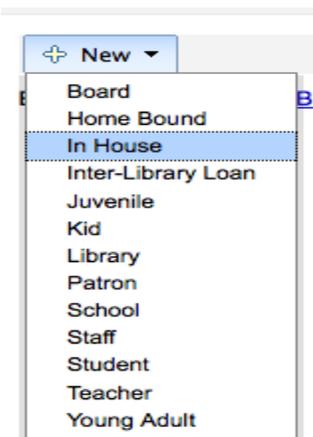
All staff members must be entered into Koha as patrons of the 'Staff' type. Follow the steps in Add a Patron to add a staff member. To give the staff member permissions to access the staff client, follow the steps in Patron Permissions

3. Add a Statistical Patron

One way to track use of in house items is to "check out" the materials to a statistical patron. The "check out" process doesn't check the book out, but instead tracks an in house use of the item. To use this method for tracking in house use you first will need a patron category set up for your Statistical patron.

INHS	In House	Statistical	999 months	0 years	0 years	0.00	No	0.00	none	Edit	Delete
------	--------------------------	-------------	------------	---------	---------	------	----	------	------	----------------------	------------------------

Next, you will need to create a new patron of the statistical type



Next, follow the steps put forth in the 'Add a new Patron' section of this manual. Since this patron is not a real person, simply fill in the required fields, the correct library and nothing else.

To learn about other methods of tracking in house use visit the Tracking inhouse use section of this manual.

Duplicate a Patron

Sometimes when you're adding a new family to your system you don't want to type the contact information over and over. Koha allows for you to duplicate a patron and change only the parts you want to (or need to) change.

- Open the patron you want to use as your base (the patron you want to duplicate information from)
- Click the 'Duplicate' button at the top of their record



Checking out to kapil kumar (23529001223650)

Attention:

All of the fields with the exception of first name, card number, username and password have been duplicated. Fill in the missing pieces and click 'Save'

Duplicate Adult patron kapil kumar

Patron identity

Salutation:

Surname: *Required*

First name:

Date of birth: 
(MM/DD/YYYY)

Initials:

Other name:

Female Male N/A

5. Editing Patrons

Patrons in Koha can be edited using one of many edit buttons.

- To edit the entire patron record simply click the 'Edit' button at the top of the patron record.

Edit + Add child Change password Duplicate Print Search to hold More

Checking out to **kapil kumar (23529001223650)** **Attention:**

Patron passwords are not recoverable. The stars show on the patron detail next to the Password label are always there even if a password isn't set. If a patron forgets their password the only option is to reset their password. To change the patron's password, click the 'Change Password' button

Edit + Add child Change password Duplicate Print Search to hold More

Change username and/or password for Kapil Kumar

New username:

New password:
Koha cannot display existing passwords. Leave the field blank to leave password unchanged.
[Click to fill with a randomly generated suggestion. Passwords will be displayed as text.](#)
 Minimum password length: 3

Confirm new password:

Save Cancel

- - Koha cannot display existing passwords. Leave the field blank to leave password unchanged.
 - This form can automatically generate a random password if you click the link labeled "Click to fill with a randomly generated suggestion. Passwords will be displayed as text."
- To edit a specific section of the patron record (for example the Library Use section) click the 'Edit' link below the section

Library use

Card number:	jivesna0001
Borrowernumber:	75
Category:	Student (ST)
Registration date:	08/08/2016
Expiration date:	08/08/2017
Library:	Centerville
Username:	kapil
Password:	*****

[Edit](#)

- A patron image can be added by browsing for the image on your machine from the 'Manage Patron Image' section

Upload Patron Image

Ronnie Ballard does not currently have an image available. To import an image for Ballard, enter the name of an image file to upload. Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:

- This form will not appear if you have the [patronimages](#) system preference to not allow patron images
 - To add patron images in bulk, use the [Upload Patron Images Tool](#)
- Patrons can also be blocked from checking items out by setting Patron Flags

Patron account flags

Gone no address: Yes No

Lost card: Yes No

Restricted: Yes No Until: (optional)

Comment:

Additional attributes and identifiers

Type	
HBR (Home Branch)	<input type="checkbox"/>
RES (Resident)	<input type="checkbox"/>
SHOW_BCODE (Show Barcode in OPAC)	<input type="checkbox"/>

Jun 2012

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Today Done

- If you would like your circulation staff to confirm a patron's address before checking items out to the patron, you can see the 'Gone no Address' flag

Cannot Check Out!

> **Address:** Patron's address in doubt

- If you would like to bar a patron from the library you can set the 'Restricted' flag
 - This flag can automatically be set with the [Overdue/Notice Status Triggers](#)

Cannot Check Out!

> **Restricted:** Patron's account is restricted [Lift restriction](#)

- If you enter in a date and/or note related to the restriction you will see that in the restricted message as well

Cannot check out!

> **Restricted:** Patron's account is restricted until 02/29/2012 with the comment "blocked due to trouble in th

- If the patron reports that they have lost their card you can set the 'Lost Card' flag to prevent someone else from using that card to check items out

Cannot Check Out!

> **Lost:** Patron's card is lost

- Children patrons do not become adults automatically in Koha. To upgrade a child patron to an adult patron category click on the 'More' menu and choose 'Update Child to Adult Patron'



- You will then be presented with a pop up window asking which one of your adult patron categories this Child should be updated to

Choose Adult category

	Code ↕	Description ▼
<input type="radio"/>	ADPT	Adult Patron
<input type="radio"/>	HB	Home Bound
<input type="radio"/>	PT	Patron
<input type="radio"/>	ST	Student

Submit Cancel

Patron Permissions

Patron Permissions are used to allow staff members access to the staff client.

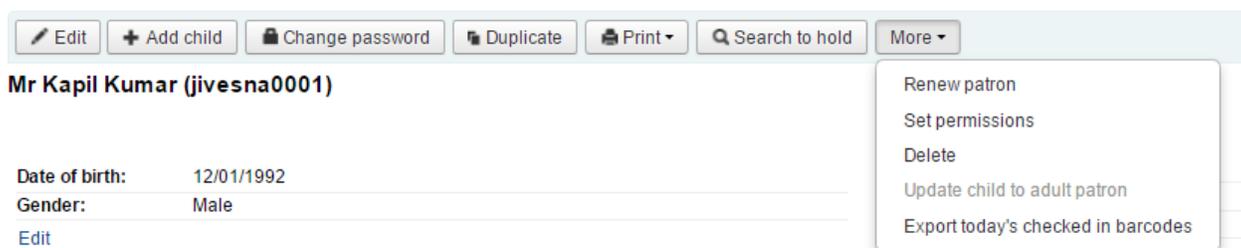
Note

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.

6.1. Setting Patron Permissions

To set patron permissions, you must first have a patron of the 'Staff' type open

- On the patron record click More and choose Set Permissions to alter patron permissions



- You will be presented with a list of preferences, some of which can be expanded by clicking the plus sign to the left of the section title.

Set Privileges for Engard, Nicole

- (*superlibrarian*) Access to all librarian functions
- (+) (*circulate*) Circulate books
 - (*catalogue*) View Catalog (Librarian Interface)
 - (*parameters*) Set Koha system parameters
 - (*borrowers*) Add or modify borrowers
 - (*permissions*) Set user permissions
- (+) (*reserveforothers*) Place and modify holds for patrons
 - (*borrow*) Borrow books
- (+) (*editcatalogue*) Edit Catalog (Modify bibliographic/holdings data)
 - (*edit_catalogue*) Edit catalog (Modify bibliographic/holdings data)
 - (*edit_items*) Edit Items
 - (*fast_cataloging*) Fast cataloging
- (*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](#)

6.2. Patron Permissions Defined

- superlibrarian
 - Access to all functions within the staff client
 - **note**

With this selected there is no need to choose any other permissions

- circulate
 - Ability to check (issue) books out and in and access the 'Circulation' page in the staff client
 - This section can be expanded (Learn more)
- catalogue
 - Allows staff members to search the catalog via the staff client
 - Must be given to all staff members to allow them to login to the staff client
- parameters
 - Provides access to all areas of the Administration menu
- borrowers
 - Allows staff members to add or modify patrons (with the exception of setting permissions)
- permissions
 - Ability to set patron permissions
- reserveforothers
 - Ability to place holds on books for patrons via the staff interface
 - This section can be expanded (Learn more)
- borrow
 - Grants staff members the rights to borrow books from the library
- editcatalogue
 - Ability to catalog items (add and edit bibliographic and holdings data)
 - This section can be expanded (Learn more)
- updatecharges
 - Manage patron accounts (including paying fines, adding credits, and creating invoices)
- acquisition
 - Provides access to the acquisitions and patron purchase suggestion modules
 - This section can be expanded (Learn more)
- management
 - No longer in use
- tools
 - Access to all items in the Tools section of the staff client
 - This section can be expanded (Learn more)
- editauthorities

- Provides access to edit the authority record
- serials
 - Allows access to the serials module
 - This section can be expanded (Learn more)
- reports
 - Allow access to the Reports module (ability to create, edit and run all reports)
 - Reports found on the Circulation page are not controlled by this permission
 - This section can be expanded (Learn more)
- staffaccess
 - Provides the ability to modify login / permissions for staff users Requires the borrowers permission above

6.2.1. Granular Circulate Permissions

If the staff member has 'circulate' permissions they have the ability to perform all of these actions. If you would like to control circulation permissions on a more granular level choose from these options:

- circulate_remaining_permissions
 - All circulation rights except the ability to override renewals
- override_renewals
 - Override blocked renewals
 - Requires that the staff member also has circulate_remaining_permissions

6.2.2. Granular Holds Permissions

If the staff member has 'reserveforothers' permissions they have the ability to perform all of these actions. If you would like to control holds permissions on a more granular level choose from these options:

- modify_holds_priority
 - Allow staff members to alter the holds priority (moving patrons up and down the queue)
- place_holds
 - Allows staff members to place holds for patrons via the staff interface

6.2.3. Granular Cataloging Permissions

If the staff member has 'editcatalogue' permissions they have the ability to perform all of these actions. If you would like to control cataloging permissions on a more granular level choose from these options:

- edit_catalogue
 - Ability to access all cataloging functions via the Cataloging page
- edit_items
 - Ability to make edits to item records, but not bib records
- fast_cataloging
 - The ability to catalog using only the Fast Add Framework found on the Circulation page

6.2.4. Granular Acquisitions Permissions

If the staff member has 'acquisition' permissions they have the ability to perform all of these actions. If you would like to control acquisitions permissions on a more granular level choose from these options:

- budget_add_del
 - Ability to add and delete budgets (not modify)
- budget_manage
 - Manage budgets
- budget_modify
 - Ability to edit existing budgets (not to add or delete)
- contracts_manage
 - Manage contracts
- group_manage
 - Manage orders and basket groups
- order_manage
 - Manage orders and baskets
- order_receive
 - Manage orders and baskets
- period_manage
 - Manage periods
- planning_manage
 - Manage budget planning
- vendors_manage
 - Manage vendors

6.2.5. Granular Serials Permissions

If the staff member has 'serials' permissions they have the ability to perform all of these actions. If you would like to control serials permissions on a more granular level choose from these options:

- check_expiration

- Check the expiration of a serial
- claim_serials
 - Claim missing serials
- create_subscription
 - Create a new subscription
- delete_subscription
 - Delete an existing subscription
- edit_subscription
 - Edit (but not delete or create) an existing subscription
- receive_serials
 - Receive serials on existing subscriptions
- renew_subscription
 - Renew an existing subscription
- routing
 - Manage routing lists

6.2.6. Granular Tools Permissions

If the staff member has 'tools' permissions they have the ability to access and use all items under the Tools menu. If you would like to control which tools staff members have access to on a more granular level choose from these options:

- batch_upload_patron_images
 - Upload patron images in batch or one at a time (Access to the Image Upload Tool)
- delete_anonymize_patrons
 - Delete old borrowers and anonymize circulation/reading history (Access to the Anonymize Patron Tool)
- edit_calendar
 - Define days when the library is closed (Access to the Calendar/Holidays Tool)
- edit_news
 - Write news for the OPAC and staff interfaces (Access to the News Tool)
- edit_notice_status_triggers
 - Set notice/status triggers for overdue items (Access to the Overdue Notice Status/Triggers Tool)
- edit_notices
 - Define notices (Access to the Notices Tool)
- export_catalog
 - Export bibliographic and holdings data (Access to the Export Bibliographic & Holdings Data Tool)
- import_patrons
 - Import patron data (Access to the Import Patrons Tool)

- inventory
 - Perform inventory (stocktaking) of your catalog (Access to the Inventory Tool)
- items_batchdel
 - Perform batch deletion of items (Access to the Delete a queryset of items Tool)
- items_batchmod
 - Perform batch modification of items (Access to the Modify a queryset of items Tool)
- label_creator
 - Create printable labels and barcodes from catalog and patron data (Access to the Label Creator and Quick Label Creator Tools)
- manage_csv_profiles
 - Create and edit CSV profiles (Access to the CSV Profiles Tool)
- manage_staged_marc
 - Managed staged MARC records, including completing and reversing imports (Access to the Manage Staged MARC Records Tool)
- moderate_comments
 - Moderate patron comments (Access to the Comments and Tags Tools)
- schedule_tasks
 - Schedule tasks to run (Access to the Task Scheduler Tool)
- stage_marc_import
 - Stage MARC records into the reservoir (Access to the Stage MARC Records Tool)
- upload_local_cover_images
 - Upload local cover images (Access to the Upload Local Cover Image Tool)
- view_system_logs
 - Browse the system logs (Access to the Log Viewer Tool)

6.2.7. Granular Reports Permissions

If the staff member has 'reports' permissions they have the ability to perform all of these actions. If you would like to control reports permissions on a more granular level choose from these options:

- create_reports
 - The ability to create and edit but not run SQL reports
- execute_reports
 - The ability to run but not create or edit SQL reports (this includes Circulation reports such as Overdues)

Patron Information

When viewing a patron record you have the option to view information from one of many tabs found on the left hand side of the record.

7.1. Check Out

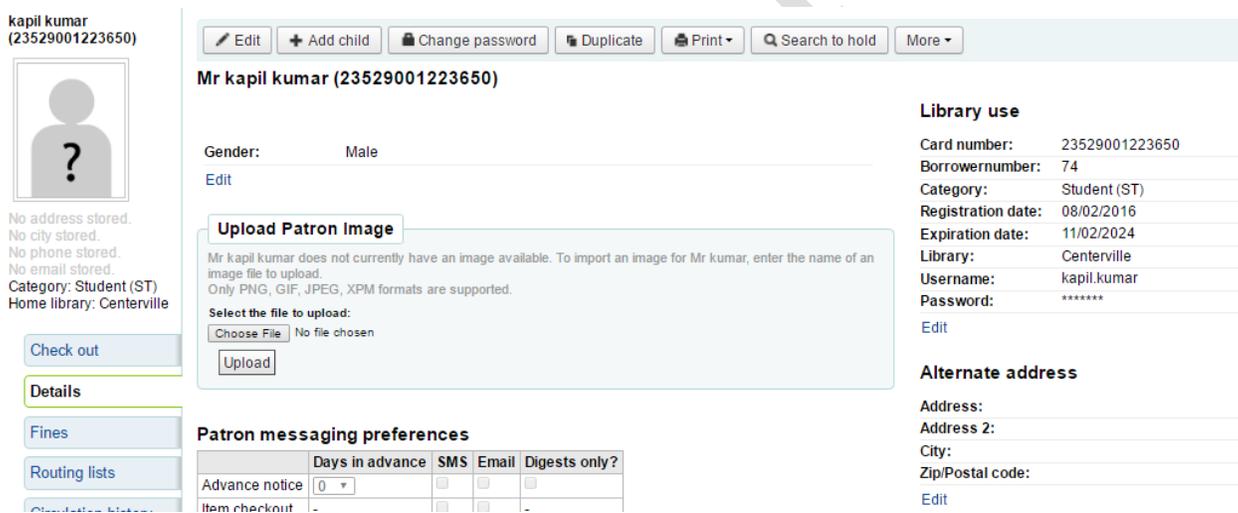
For instruction on checking items out, view the Checking Out section of this manual.

7.2. Details

All patron information will appear on the Details tab. This includes all the contact information, notes, custom patron attributes, messaging preferences, etc entered when adding the patron.

In the case of patrons who are marked as 'Child' or 'Professional' and their Guarantors additional information will appear on their record.

- A child patron will list their Guarantor



Mr kapil kumar (23529001223650)

Gender: Male

Upload Patron Image

Mr kapil kumar does not currently have an image available. To import an image for Mr kumar, enter the name of an image file to upload. Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:

Choose File No file chosen

Upload

Patron messaging preferences

	Days in advance	SMS	Email	Digests only?
Advance notice	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Library use

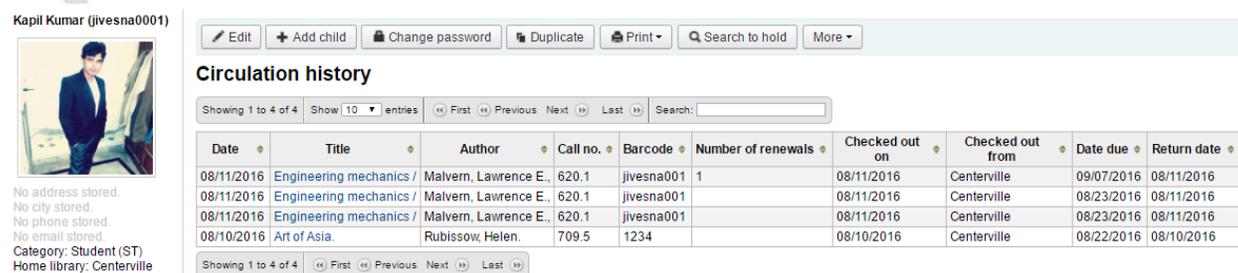
Card number: 23529001223650
 Borrowernumber: 74
 Category: Student (ST)
 Registration date: 08/02/2016
 Expiration date: 11/02/2024
 Library: Centerville
 Username: kapil.kumar
 Password: *****

Alternate address

Address:
 Address 2:
 City:
 Zip/Postal code:

7.2.1. Circulation Summary

Below the patron's information on the details screen is a tabbed display of the items they have checked out, overdue, and on hold.



Kapil Kumar (jivesna0001)

Circulation history

Showing 1 to 4 of 4 Show 10 entries First Previous Next Last Search:

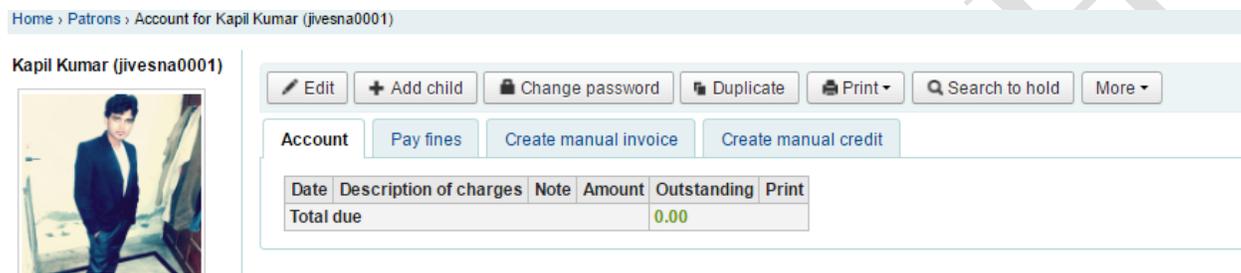
Date	Title	Author	Call no.	Barcode	Number of renewals	Checked out on	Checked out from	Date due	Return date
08/11/2016	Engineering mechanics /	Malvern, Lawrence E.,	620.1	jivesna001	1	08/11/2016	Centerville	09/07/2016	08/11/2016
08/11/2016	Engineering mechanics /	Malvern, Lawrence E.,	620.1	jivesna001		08/11/2016	Centerville	08/23/2016	08/11/2016
08/11/2016	Engineering mechanics /	Malvern, Lawrence E.,	620.1	jivesna001		08/11/2016	Centerville	08/23/2016	08/11/2016
08/10/2016	Art of Asia.	Rubissov, Helen.	709.5	1234		08/10/2016	Centerville	08/22/2016	08/10/2016

Showing 1 to 4 of 4 First Previous Next Last

If they have family at the library staff can see what the other family members have checked out.

7.3. Fines

The patron's complete accounting history will appear on the Fines tab. Contrary to its name, the Fines tab does not just show fine data, it also shows membership fees, rental fees, reserve fees and any other charge you may have for patrons.



Date	Description of charges	Note	Amount	Outstanding	Print
	Total due			0.00	

The table will show you the following columns:

- Date: the date the charge/payment was posted
 - In the case of fines this will be the last day that the fine was accrued
- Description: a description of the charges including the due date for overdue items and a link to the item record where one is available
- Note: any notes about this charge/payment
- Amount: the total amount of the payment or charge
- Outstanding: the amount still due on charge

7.3.1. Charging Fines/Fees

Most fees and fines will be charged automatically if the fines cron job is running:

- Fines will be charged based on your Circulation & Fines Rules
- Hold fees will be charged based on the rules you set in the Patron Types & Categories administration area
- Rental fees will be charged based on the settings in your Item Types administration area
- Marking an item 'Lost' via the cataloging module will automatically charge the patron the replacement cost for that item

7.3.2. Pay/Reverse Fines

Each line item can be paid in full (or written off) using the 'Pay Fines' tab.

Home > Patrons > Pay fines for Kapil Kumar

Kapil Kumar (jivesna0001)



No address stored.
No city stored.

Kapil Kumar has no outstanding fines.

Each line item can be paid in full (or written off) using the 'Pay Fines' tab.

Fines & Charges	Sel	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input checked="" type="checkbox"/>	Non resident Account Management fee	A	1	0	120.00	120.00
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input checked="" type="checkbox"/>	Fine	F	1	0	1.15	1.15
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input checked="" type="checkbox"/>	Fine 9	F	1	0	2.35	2.35
Sub Total:							123.50
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input checked="" type="checkbox"/>	Copier Fees	Copie	0	0	0.25	0.25
Sub Total:							0.25
Total Due:							123.75

- Each line item can be paid in full, partially paid, or written off.
- Pay a fine in full
 - Click "Pay" next to the fine you want to pay in full
 - The full amount of the fine will be populated for you in the "Collect From Patron" box

Account **Pay fines** Create manual invoice Create manual credit

Pay an individual fine

Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Non resident Account Management fee	A	1	0	120.00	120.00
Total amount payable:					120.00

Collect from patron:

[Cancel](#)

- Click "Confirm"
- The fine will be removed from outstanding fines, and displayed as fully paid.
- Pay a partial fine
 - Click "Pay" next to the fine you want to partially pay
 - Enter the amount you are collecting from the patron in the "Collect From Patron" box

Account **Pay fines** Create manual invoice Create manual credit

Pay an individual fine

Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Fine 9	F	1	0	2.35	2.35
Total amount payable:					2.35

Collect from patron:

[Cancel](#)

- Click "Confirm"
- The fine will be updated to show the original Amount, and the current Amount Outstanding
- Pay an amount towards all fines
 - Click the "Pay Amount" button

- Enter the amount you are collecting from the patron in "Collect from Patron." The sum of all fines is shown in "Total Amount Outstanding"

Account **Pay fines** Create manual invoice Create manual credit

Pay an amount toward all fines

Total amount outstanding: **2.75**

Collect from patron:

Confirm [Cancel](#)

- Click "Confirm"
- The fine totals will be updated with the payment applied to oldest fines first.
- Pay Selected fines
 - Check the selection boxes next to the fines you wish to pay, click "Pay Selected"

Account **Pay fines** Create manual invoice Create manual credit

Fines & Charges	Sel	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input checked="" type="checkbox"/>	Fine	F	1	0	1.15	1.15
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input type="checkbox"/>	Fine 9	F	1	0	2.35	1.35
						Sub Total:	2.50
<input type="button" value="Pay"/> <input type="button" value="Write off"/>	<input checked="" type="checkbox"/>	Copier Fees	Copie	0	0	0.25	0.25
						Sub Total:	0.25
						Total Due:	2.75

[Cancel](#)

- Enter an amount to pay towards the fines.

Account **Pay fines** Create manual invoice Create manual credit

Pay an amount toward selected fines

Total amount outstanding: **1.40**

Collect from patron:

[Cancel](#)

- Click "Confirm"
- The fine totals will be updated with the payment applied to the oldest selected fines first.
- Writeoff a single fine
 - Click "Writeoff" next to the fine you wish to writeoff.
 - The fine will be removed from outstanding fines, and displayed as written off.
- Writeoff All fines
 - Click the "Writeoff All" button
 - All fines will be removed from outstanding fines, and displayed as written off.
- If you accidentally mark and item as paid, you can reverse that line item by clicking 'Reverse' to the right of the line

02/26/2012	Payment, thanks - View item Change of heart :	1.00	0.00	Reverse	Print
------------	---	------	------	-------------------------	-----------------------

- Once clicked a new line item will be added to the account, showing the payment as reversed

02/26/2012	Payment, thanks - Reversed - View item Change of heart :	1.00	-1.00	Re
------------	--	------	-------	--------------------

7.3.3. Creating Manual Invoices

For fees that are not automatically charged, librarians can create a manual invoice

Account Pay fines **Create Manual Invoice** Create Manual Credit

Manual Invoice

Type:

- Lost Item
- Fine
- Account Management Fee
- New Card
- Sundry

Barcode:

Description:

Amount: Example: 5.00

[Cancel](#)

- First choose the type of invoice you would like to create
 - To add additional values to the manual invoice type pull down menu, add them to the MANUAL_INV Authorized Value
 - **Important**

The value set as the Authorized Value for the MANUAL_INV authorized value category will appear as the Description and the Authorized Value Description will be used as the amount.
- If the fee is associated with an item you can enter its barcode so that the line item shows a link to that item
- The description field is where you will enter the description of the charge
- In the amount field, do not enter currency symbols, only numbers and decimals

7.3.4. Creating Manual Credits

Manual credits can be used to pay off parts of fines, or to forgive a fine amount.

Account Pay fines Create Manual Invoice **Create Manual Credit**

Manual Credit

Credit Type:

Barcode:

Description:

Amount: Example: 5.00

[Cancel](#)

- First choose the type of credit you'd like to apply
- If this credit is associated with an item you can enter that item's barcode so that the line item links to the right item
- The description field is where you will enter the description of the credit
- In the amount field, do not enter currency symbols, only numbers and decimals

7.3.5. *Printing Invoices*

To the right of each account line there is a print link. Clicking that link will print an invoice for the line item that includes the date and description of the line item along with the total outstanding on the account.

Circulation

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Circulation functions can be accessed in several different ways. On the main page of the staff client there are some quick links in the center of the page to check items out, in or transfer them. For a complete listing of Circulation functions you can visit the Circulation page which is linked from the top left of every page or from the center of the main page.

Before circulating your collection you will want to set your Global System Preferences, Basic Parameters and Patrons & Circulation Rules.

While in Circulation you can jump between the tabs on the quick search box at the top of the screen by using the following hot keys:

- jump to the catalog search with Alt+Q
- jump to the checkout with Alt+U
 - 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

1. Check Out (Issuing)

To begin the checkout process you must enter the patron barcode or part of their name. The checkout option appears in three main places:

- Check out option on main staff client
- Check out option on the quick search bar

Enter patron card number or partial name:

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

koha Enter patron card number or partial name:

[Check out](#) [Check in](#) [Search the catalog](#)

Home > Circulation > Checkouts > Kapil Kumar (jivesna0001)

Kapil Kumar (jivesna0001)



No address stored.
No city stored.
No phone stored.
No email stored.
Category: Student (ST)
Home library: Centerville

[Check out](#)

Edit + Add child Change password Duplicate Print Search to hold More

Checking out to Kapil Kumar (jivesna0001)

Enter item barcode:

Specify due date (MM/DD/YYYY):

0 Checkouts **0 Holds**

Patron has nothing checked out.

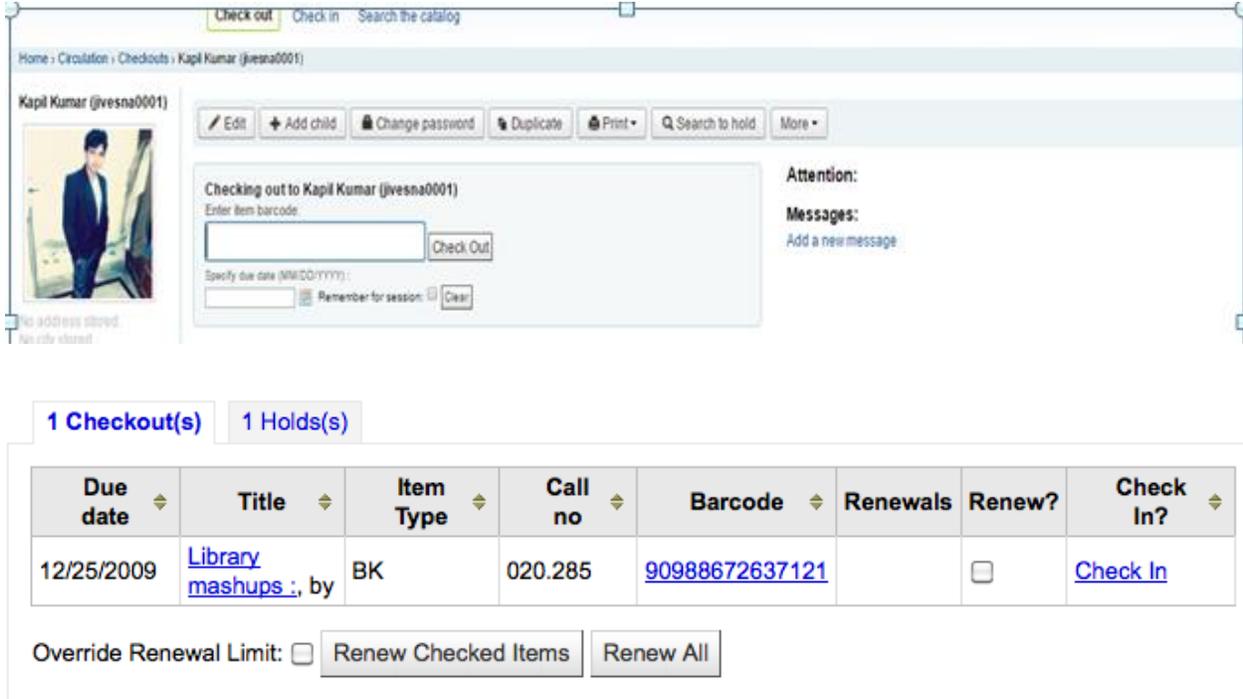
Attention:

Messages:

[Add a new message](#)

1.1. Checking Items Out

To check an item out to a patron, first search for that patron using one of the many options listed above.



The screenshot shows the 'Check Out' page for a patron named Kapil Kumar (jivesna0001). The page includes a navigation bar with 'Check out', 'Check in', and 'Search the catalog'. Below the navigation bar, there is a breadcrumb trail: 'Home > Circulation > Checkouts > Kapil Kumar (jivesna0001)'. A profile picture of Kapil Kumar is shown on the left. The main content area has a title 'Checking out to Kapil Kumar (jivesna0001)' and a form with the following fields:

- 'Enter item barcode:' with a text input field and a 'Check Out' button.
- 'Specify due date (MM/DD/YYYY):' with a text input field, a 'Remember for session:' checkbox, and a 'Clear' button.

On the right side, there are sections for 'Attention:' and 'Messages: Add a new message'. Below the form, there are two tabs: '1 Checkout(s)' and '1 Holds(s)'. The '1 Checkout(s)' tab is active, showing a table with the following data:

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
12/25/2009	Library mashups : , by	BK	020.285	90988672637121		<input type="checkbox"/>	Check In

At the bottom of the table, there are three buttons: 'Override Renewal Limit: ', 'Renew Checked Items', and 'Renew All'.

At the top of the Check Out screen is a box for you to type or scan the item's barcode into.

- **Important**

Many modern barcode scanners will send a 'return' to the browser, making it so that the 'Check Out' button is automatically clicked

Below the box for the barcode there may be options for you to override the default due date for the item.

- This option will only appear if you have set the SpecifyDueDate system preference to allow staff to override the due date

At the bottom of the page there is a summary of the patron's current checked out items along with the due date, items checked out today will appear at the top.

Art of Asia.

by [Rubissow, Helen.](#)

Type:  Book

Publisher: New York, [Philosophical Library](#) [1954]

Description: xiii, 237 p. illus., maps. 24 cm.

Subject(s): [Art -- Asia](#)

Tags from this library:

No tags from this library for this title.

 Add

 average rating: 0.0 (0 votes)

Item type	Location	Call number	Status	Date due	Barcode
 Books	Centerville	709.5 (Browse shelf)	Available		
 Books	Centerville	709.5 (Browse shelf)	Available		
 Books	Centerville	709.5 (Browse shelf)	Available		
 Books	Centerville	709.5 (Browse shelf)	Available		1234

- This screen will show whether an item is renewable and if not, why not.
- To override the renewal limits you can set the [AllowRenewalLimitOverride](#) system preference to allow overrides and a checkbox will appear below the list of checkouts that reads 'Override Renewal Limit'

Override Renewal Limit:

- Checking that box will add checkboxes in the renew column above where before the item was not renewable.

Also at the bottom of the page is the list of items the patron has on hold

3 Checkout(s)
0 Holds

Due date	Title	Item Type	Checked out on	Call no	Charge	Price	Renew select all none	Check in select all none
05/26/2010	Finding statistics online ; by Berinstein, Paula. 10044445	Books	04/07/2010	HA33.5 .B47 1998	1.00		1 <input checked="" type="checkbox"/>	<input type="checkbox"/>
Previous checkouts								
05/26/2010	Adam Smith's library ; by Mizuta, Hiroshi, FPL10022221	Books	05/01/2010	Z988 .S62	1.00	30.00	0 On Hold	<input type="checkbox"/>
07/14/2010	The skeptical business searcher ; by Berkman, Robert I. 88377264409310	Books	03/28/2010	025.06/338	1.00		3 Not Renewable	<input type="checkbox"/>

- This screen will show whether an item is renewable and if not, why not.
- To override the renewal limits you can set the [AllowRenewalLimitOverride](#) system preference to allow overrides and a checkbox will appear below the list of checkouts that reads 'Override Renewal Limit'

Override Renewal Limit: [Renew or Return checked items](#) [Renew all](#)

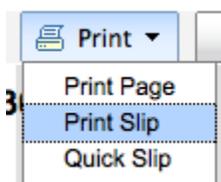
- Checking that box will add checkboxes in the renew column above where before the item was not renewable.

Also at the bottom of the page is the list of items the patron has on hold

1 Checkout(s) 1 Holds(s)

Hold date ▼	Title ◆	Item Type ◆	Call Number ◆	Barcode ◆	Priority ◆
08/23/2009	The skeptical business searcher ; by Berkman, Robert I.	Books	025.06/338	Item 88377264409311	Hold priority 1

Once you have checked out all of the items for the patron you can print them a receipt by clicking the Print button at the top of the screen and choosing 'Print Slip' or 'Quick Slip'.



If you choose 'Print Slip' it will print all of the items the patron has checked out, including those they checked out at an earlier date. Choosing 'Quick Slip' will print only the items that were checked out today.

If there are notes on the patron record these will appear to the right of the checkout box

Kapil Kumar (jivesna0001)



No address stored.
No city stored.

Edit Add child Change password

Checking out to Kapil Kumar (jivesna0001)
Enter item barcode:
 Check Out

Specify due date (MM/DD/YYYY) :
 Remember for session: Clear

Attention:

- > **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- > **Fines:** Patron has [Outstanding fines of 1.00](#). Make [Payment](#)

If the patron has a hold waiting at the library that too will appear to the right of the check out box making it easy for the circulation librarian to see that there is another item to give the patron

Home > Circulation > Checkouts > Kapil Kumar (jivesna0001)

Kapil Kumar (jivesna0001)



No address stored.
No city stored.
No phone stored.
No email stored.
Category: Student (ST)
Home library: Centerville

Edit Add child Change password

Checking out to Kapil Kumar (jivesna0001)
Enter item barcode:
Specify due date (MM/DD/YYYY) :

Attention:

Holds waiting:

- > [The skeptical business searcher](#) : (Books), by Berkman, Robert I. Hold placed on 08/23/200!
Waiting at Fairview

1.2. Check Out Messages

There are times when Koha will prevent the librarian from being able to check out items to a patron. When this happens a warning will appear notifying the librarian of why the patron cannot check items out.

- Patron owes too much in fines

Checking out to Kapil Kumar (jivesna0001)

Cannot check out!

- > **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- > **Fines:** Patron has [Outstanding fines of 22.50](#). Checkouts are **BLOCKED** because fine balance is **OVER THE LIMIT**.
[Make Payment](#)

Messages:

[Add a new message](#)

1 Checkout(s) 1 Hold(s)

Due date	Title	Item Type	Checked out on	Call no	Charge	Price	Renew select all none	Check in select all none
Previous checkouts								
01/01/2011	Blue book, dolls & values. , by - in repair 10101000000409	Continuing Resources	12/18/2010	688.722B	0.00	25.00	0 Hold On	<input type="checkbox"/>

You can set the amount at which patron checkouts are blocked with the noissuescharge system preference

- Patron has been barred from the library

Checking out to Kapil Kumar (jivesna0001)

Cannot Check Out!

> **Restricted:** Patron's account is restricted [Lift restriction](#)

- - This can be set by the librarian editing a patron record and adding a [flag](#) or by the [Overdue/Notice Status Triggers](#)
- Patron needs to confirm their address

Checking out to Kapil Kumar (jivesna0001)

Cannot Check Out!

> **Address:** Patron's address in doubt

- - This can be set by the librarian editing a patron record and adding a [flag](#)
- Patrons has lost their library card

Checking out to Kapil Kumar (jivesna0001)

Cannot Check Out!

> **Address:** Patron's address in lost

- - This can be set by the librarian editing a patron record and adding a flag

1.3. Check Out Warnings

Sometimes checkouts will trigger warning messages that will appear in a yellow box above the check out field. These warnings need to be acknowledged before you will be able to continue checking items out.

- Patron has outstanding fines

Please Confirm Checkout

- The patron has a debt of 1.00

Yes, Check Out (Y)

No, Don't Check Out (N)

- Item on hold for someone else

Please Confirm Checkout

- Item *Young people* (34000000039637) has been on hold for [Chloe Leonard](#) (100545) at Athens since 05/12/2010

Cancel hold

Yes, Check Out (Y)

No, Don't Check Out (N)

- Item should be on the hold shelf waiting for someone else

Please Confirm Checkout

- Item *Anne of Green Gables* (32000000004725) has been waiting for [Owen Leonard](#) (0006067) at Athens since 07/07/2010

Cancel hold

Yes, Check Out (Y)

No, Don't Check Out (N)

- Item already checked out to this patron

Please Confirm Checkout

- Item *Vantage point* (31000000012713) is currently checked out to this patron. Renew?

Yes, Check Out (Y)

No, Don't Check Out (N)

- Item checked out to another patron

Please Confirm Checkout

- Item *Empress* / (31000000013217) is checked out to [Owen Leonard](#) (0006067). Check in and check out?

Yes, Check Out (Y) No, Don't Check Out (N)

- Item not for loan

Please Confirm Checkout

- Item is normally not for loan. Check out anyway?

Yes, Check Out (Y) No, Don't Check Out (N)

- Patron has too many things checked out

Please Confirm Checkout

- Too many checked out. 5 checked out, only 5 are allowed.

Yes, Check Out (Y) No, Don't Check Out (N)

- Item cannot be renewed

• No more renewals possible

- This can be overridden with the AllowRenewalLimitOverride system preference

- Barcode not found

• The barcode was not found

2. Check In (Returning)

Checking in items can be performed from various different locations

- The check in link on main staff client

Circulation

- Check out to:
- [Check in](#)
- [Transfers](#)

- The check in option on the quick search bar on the Circulation page

Scan a barcode to check in:

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

- The check in link on the patron's checkout summary (and on the checkout summary page)

1 Checkout(s)
1 Hold(s)

Due date	Title	Item type	Checked out on	Checked out from	Call no	Charge	Price	Renew select all none	Check in select all none
08/23/2016 23:59	Engineering mechanics /, by Malvern, Lawrence E., jivesna001	Books	08/11/2016	Centerville	620.1	0.00		0 <input type="checkbox"/>	<input type="checkbox"/>
Totals:							0.00	0.00	
								Renewal due date: <input style="width: 50px;" type="text"/>	<input type="button" value=""/>
								Forgive fines on return: <input type="checkbox"/>	

2.1. Checking Items In

To check an item in scan the barcode for the item into the box provided. A summary of all items checked in will appear below the checkin box

Check In

Enter item barcode:

Options

Forgive overdue charges

Book drop mode

Checked-in items

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
08/23/2016 23:59	Engineering mechanics /	Malvern, Lawrence E.,	jivesna001	CPL	CPL		620.1	BK	Kumar, Kapil (ST)	

If you are checking items in that were put in the dropbox while the library was closed you can check the 'Dropbox mode' box before scanning items. This will effectively roll back the returned date to the last date the library was open.

- This requires that you have your closings added to the Holidays & Calendar Tool

You can also choose to forgive all overdue charges for items you are checking in by checking the 'Forgive overdue charges' box before scanning items.

2.2. Check In Messages

There are several messages that can appear when checking items in:

- If you are checking an item in at a library other than the home branch, a message will appear asking you to transfer the book to the home library

Check In	Options
Enter item barcode: <input type="text"/> <input type="submit" value="Submit"/>	<input type="checkbox"/> Forgive overdue charges <input type="checkbox"/> Book drop mode

Checked-in items

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
08/23/2016 23:59	Engineering mechanics /	Malvern, Lawrence E.,	jivesna001	CPL	CPL		620.1	BK	Kumar, Kapil (ST)	

3. Circulation Messages

Circulation messages are short messages that librarians can leave for their patrons or their colleagues that will appear at the time of circulation.

3.1. Setting up Messages

Circulation messages are set up as Authorized Values. To add or edit Circulation Messages you want to work with the BOR_NOTES value.

Authorized values

This table is used in MARC definition. You can define as many categories as you want, and as many authorized values as you want in each category.

When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user ask for adding of modifying a biblio, the subfield is not entered through a free field, but through a list of authorized values

Show Category: 

Authorised values for category BOR_NOTES :

Authorized value	Description	Description (OPAC)	Icon	Edit	Delete
UMBOPAC	Your umbrella was found in the library. Please pick it up next time you visit.			Edit	Delete
UMBR	Patron left umbrella in library last time			Edit	Delete
VERID	Patron needs to bring in driver's license to verify ID			Edit	Delete

3.2. Adding a Message

When on the patron's check out tab you will see a link to 'Add a new message' to the right of the check out box.

Attention:

> **Fines:** Patron has [Outstanding fines of 2.00](#). Make [Payment](#)

Messages:

> 09/22/2009 FPL "Patron left umbrella in library last time" [\[Delete\]](#)
[Add a new message](#)

When you click 'Add a new message' you will be asked to choose if the message is for the librarians or the patron and the message you would like to leave.

Leave a message

Add a message for:
Edna

Predefined notes:
UMBOPAC

Your umbrella was found in the library. Please pick it up next time you visit.

Save [Cancel](#)

3.3. Viewing Messages

Circulation messages meant for the staff will appear on the patron's checkout screen.

Attention:

> **Fines:** Patron has [Outstanding fines of 2.00](#). Make [Payment](#)

Messages:

> 09/22/2009 FPL "Patron left umbrella in library last time" [\[Delete\]](#)
[Add a new message](#)

Circulation messages meant for the patron will appear when they log into the OPAC.

Messages For You

- **Your umbrella was found in the library. Please pick it up next time you visit.**
Written on 12/07/2009 by Fairview

Hello, Edna Acosta ([Click here](#) if you're not Edna Acosta)

4. Holds

4.1. Placing Holds in Staff Client

There are several ways to place holds from the staff client. The most obvious is using the 'Place Hold' button at the top of any bibliographic record.

Library mashups :

- **Additional Authors:**
 - [Engard, Nicole C.,--1979-](#)

- **ISBN:** 9781573873727
- **Subjects:**
 - [Mashups \(World Wide Web\)](#) -- [Library applications.](#)

You can also click the smaller 'Place Hold' link found at the top of your catalog search results, or the 'Holds' link found below each result.

[Select All](#) | [Clear All](#) | [Unhighlight](#) | [Place Hold](#) Add to: Save z39.50 Search

Results	
<input type="checkbox"/>	<p>1. Library mashups :</p> <p>Information Today, Inc., Description: ; Medford, N.J. : , 2009 : p. cm. ISBN: 9781573873727 Books</p> <p style="text-align: right;">Holds</p>

You will be asked to search for a patron by barcode or any part of their name to start the hold process.

Place a hold on [Library mashups :](#)

Patron:
 Enter patron card number or partial name:

Depending on how many items you choose to place a hold on at once you will be see a different place hold form. If you are placing a hold on one bibliographic record you will see a list of all of the items you can place a hold on.

Place a hold on Library mashups :

- Pickup library is different than [Olga Rivera's](#) home library (Pleasant Valley / PVL)

Hold details

Patron: [Olga Rivera \(23529000358268\)](#)

Priority: 5

Notes:

Pickup at:

Hold starts on date:

Hold expires on date:

[Clear Date](#)

Place a hold on the next available copy

Place Hold

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Last Location	Call no.	Copy no.	Information
<input type="radio"/>	Books	887369820192012	Midway	Centerville	020.285/4678		In transit from Midway, to Centerville, since 12/07/2009 Can't be cancelled when item is in transit
<input type="radio"/>	Books	90988672637121	Fairview	Centerville	020.285		In transit from Fairview, to Centerville, since 02/05/2010 Not on hold
<input type="radio"/>	Books	23535466545423123	Fairview		020.285/4678		On hold for Edna Acosta expected at Centerville since 02/17/2010. Cancel hold
<input checked="" type="radio"/>	Books	2354676754325	Fairfield				Not on hold
<input checked="" type="radio"/>	Books	898739894	Centerville		020.285/4678		Not on hold

- Enter any notes that might apply to this hold
- Choose the library where the patron will pick up the item
- If the patron wants the hold to start on a date other than today, enter that in the 'Hold starts on date' field
 - This option will only appear if the AllowHoldDateInFuture system preference is set to 'Allow'
- If the patron has specified that they don't want the item after a certain date, or if you have limits on hold lengths, you can enter an expiration date for the hold in the 'Hold expires on date'

- To have expired holds canceled automatically you will need to have the Expired Holds cron job set to run on a regular basis.
- Next choose if you want to place a hold on the next available item or a specific item by clicking the radio button next to an individual item.

If you're placing a hold on multiple items you will be presented with the next available option for all titles. If no items are available for hold it will say so on the confirmation screen.

● Pickup library is different than [Gloria Odom's](#) home library (Springfield / SPL)

Hold details

Patron: [Gloria Odom \(23529000054503\)](#)

Notes:

Pickup at:

Hold starts on date: 

Hold expires on date:  [Clear Date](#)

Title	Priority	Information
Library mashups :	1	No copies are available to be placed on hold
Adam Smith's library:	1	

4.2. Managing Holds

Holds can be altered and canceled from the Holds tab found on the left of the bibliographic record.

[Home](#) > [Catalog](#) > [Library mashups](#) :

- Normal
- MARC
- ISBD
- Items
- Holds**
- Checkout history
- Modification log

From the list of holds you can change the order of the holds, the pickup location and/or cancel the hold.

Existing holds

Priority		Patron	Notes	Date	Expiration	Pick up Library	Details		
1	↑ ↓	23529001000463		02/17/2010		Centerville	Only item 2353546545423123	↓	×
2	↑ ↓	23529000033739		02/17/2010		Fairview	Next available	↓	×
3	↑ ↓	23529000662701		02/17/2010		Midway	Next available	↓	×
4	↑ ↓	23529000429697		02/17/2010		Riverside	Only item 887369820192012	↓	×

Note

Depending on how you have your HidePatronName system preference set the list may show patron names instead of card numbers in the Patron column like in the image above.

To rearrange or delete holds, simply make a selection from the 'Priority' pull down or click the arrows to the right of the priority pull down.

Existing holds

Priority		Patron
1	↑ ↑ ↓ ↓	23529001000463
2	↑ ↑ ↓ ↓	23529000033739
3	↑ ↑ ↓ ↓	23529000429697
4	↑ ↑ ↓ ↓	23529000662701

To delete or cancel a hold, choose 'del' from the menu or click the red 'X' to the right of the hold line.

Clicking the down arrow to the right of the hold will stick the hold at the bottom of the list even if more requests are made.

For example, your library has home-bound patrons that are allowed to keep books out for months at a time. It would not be fair to other patrons if a home-bound patron were able to check out a brand new book and keep it for months. For this reason, the home-bound patron's hold request would stay at the bottom of the queue until everyone else who wanted to read that book has already done so.

Details	↓	
Only item 2353546545423123	↓	×
Next available	↓	×
Only item 887369820192012	↓	×
Next available	↓	×

Once you have made your changes, click the 'Update hold(s)' button and your changes will be saved.

4.3. Receiving Holds

When items that are on hold are checked in or out the system will remind the circulation librarian that the item is on hold and offer them options for managing the hold.

When you check in an item that has a hold on it the system will ask you to either confirm and transfer the item

Hold Found: The Baltimore book:

Hold for:

- [Acosta, Edna](#) (23529001000463)
- 7896 Library Rd.
Portland, OR 44240
- (212) 555-1212

Transfer to: Fairview

Confirm hold and Transfer

Print slip, Transfer, and Confirm Ignore

or just confirm the hold

Hold Found: Library mashups :

Hold for:

- [Acosta, Edna](#) (23529001000463)
- 7896 Library Rd.
Portland, OR 44240
- (212) 555-1212

Hold at Centerville

Confirm hold Print Slip and Confirm Ignore

Clicking the Confirm button will mark the item as on hold for the patron. If the item needs to be transferred the item will also be marked as in transit to the proper branch. Clicking 'Ignore' will retain the hold, but allow you to check the item out to another patron. Choosing to confirm and print will present you with a printable page that you can slip inside the book with the necessary hold and/or transfer information.

Once confirmed the hold will show on the patron record and on the checkout screen under the 'Hold' tab.

1 Checkout(s) 1 Hold(s)

Hold date ▾	Title ⇅	Call Number ⇅	Barcode ⇅	Priority ⇅	Delete? ⇅
12/28/2009	Library mashups :	020.285/4678	Item 898739894 waiting at Centerville		No ▾

The item record will also show that the item is on hold.

Item type	Location	Collection	Call Number	Status	La
Books	Centerville General Stacks	Non Fiction	020.285/4678	Waiting for 23529001000463 at Centerville since 12/28/2009	12

In some cases a patron may come in to pick up a hold for their partner (or someone else in their household). In this case you want to make sure that the hold is cancelled when you check the item out to someone else. When trying to check out an item that is already waiting for someone else you will be presented with a warning message.

Please Confirm Checkout

- Item is consigned for Edna ACOSTA (23529001000463, Centerville)

Cancel Reserve

Yes, Check Out (Y)
 No, Don't Check Out (N)

From here you can check the item out to the patron at the desk and cancel the hold for the partner.

5. Transfers

If you work in a multi-branch system you can transfer items from one library to another by using the Transfer tool. To transfer an item

- Click 'Transfer' on the Circulation page

Transfer

Destination library:

Enter barcode:

- Enter the library you would like to transfer the item to
 - Scan or type the barcode on the item you would like to transfer
- Click 'Submit'

Transfer

Destination library:

Enter barcode:

Transferred Items

Bar Code	Title	To
887369820192012	Library mashups : ()	Centerville

- The item will now say that it is in transit

	Centerville	020.285/4678	In transit from Midway, to Centerville, since 12/07/2009	12/07/2009	887369820192012
---	-------------	--------------	--	------------	---------------------------------

- When the item arrives at the other branch the librarian must check the item in to acknowledge that it is no longer in transit
- The item will not be permanently moved to the new library

Barcode 887369820192012

Item Information [\[Edit Items\]](#)

Home Library:	Midway
Item type:	Books
Item Callnumber:	020.285/4678
Replacement Price:	0.00

Statuses

Current Location:	Centerville
Checkout Status:	Not Checked out
Lost Status:	<input type="text"/> <input type="button" value="Set Status"/>
Damaged Status:	<input type="text"/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

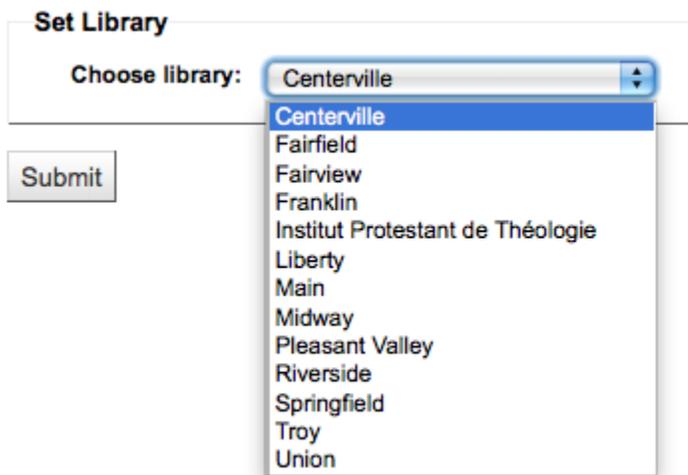
- The item shows the same 'Home Library' but has updated the 'Current Location' to note where it resides at this time

6. Set Library

By default you will enter the staff client as if you are at your home library. This library will appear in the top right of the Staff Client.

Fairview ([Set](#)) | nce ([Log Out](#)) | [[?](#)]

This is the library that all circulation transactions will take place at. If you are at another library (or on a bookmobile) you will want to set your library before you start circulating items. To do this you can click 'Set' at the top right or on the Circulation page.



Set Library

Choose library:

- Centerville
- Fairfield
- Fairview
- Franklin
- Institut Protestant de Théologie
- Liberty
- Main
- Midway
- Pleasant Valley
- Riverside
- Springfield
- Troy
- Union

Once you have saved your changes your new library will appear in the top right.

7. Fast Add Cataloging

Sometimes circulation librarians need to quickly add a record to the system for an item they are about to check out. This is called 'Fast Add.' To allow circulation librarians access to the Fast Add Cataloging tool, simply make sure they have the fast_cataloging permissions. To add a title with the fast add framework, click the Fast Cataloging option on the Circulation page

Circulation

- [Check Out](#)
- [Check In](#)
- [Transfer](#)
- [Set library](#)
- [Fast cataloging](#)

Offline Circulation

- [Offline Circulation File \(.koc\) Uploader](#)

The cataloging interface will open up with the short cataloging record:

Add MARC Record

 Save

 z39.50 Search

Change framework: Fast Add Framework

0

000	-				
008	-				
010		<input type="text"/>	<input type="text"/>	-	-
020		<input type="text"/>	<input type="text"/>	-	+ -
050		<input type="text"/>	<input type="text"/>	-	+ -
082		<input type="text"/>	<input type="text"/>	-	-
100		<input type="text"/>	<input type="text"/>	-	-
245		<input type="text"/>	<input type="text"/>	-	
250		<input type="text"/>	<input type="text"/>	-	-
260		<input type="text"/>	<input type="text"/>	-	+ -
500		<input type="text"/>	<input type="text"/>	-	+ -

After adding your cataloging data you will be asked to enter item data. Enter the items barcode, collection code, etc and save the item before checking it out.

8. Circulation Reports

8.1. Holds Queue

This report will show you all of the holds at your library. To generate this report, you must have the Build Holds Queue cron job running.

Holds Queue

23 items found for SFL

Title	Collection	Call Number	Barcode	Patron	Send To	Date
Sepulchre Mosse, Kate , Penguin Audio, , 2008 : 16 sound discs (20 hr., 30 min.) : 4 3/4 in. ISBN: 9780143143178 0143143174 :		AUDIOBOOK COM FIC MOSSE	<i>Any available copy</i>	Sutton, Robin (22373000072368) 802-253-5104	SFL	09/24/2009
Uncrowned king : Weintraub, Stanley , Free Press, , 1997 : xvii, 478 p. : 24 cm. ISBN: 0684834863		BIO B ALBERT	<i>Any available copy</i>	Testfamily, Kid (2345)	SFL	10/19/2009
The lost : Mendelsohn, Daniel Adam , HarperCollins Publishers, , 2006 : 512 p. : 24 cm. ISBN: 0060542977 :		BIO B MENDELSONH	<i>Any available copy</i>	Matalon, Ilse (22373000012042) (802)253-4801	SFL	09/22/2009
Red and me : Russell, Bill , Harper, , 2009 : xvi, 187 p., [8] p. of plates : 22 cm. ISBN: 9780061766145		BIO B RUSSELL	<i>Any available copy</i>	FIX, CATALOG (22373000130018)	SFL	09/24/2009

8.2. Holds to pull

This report will show you all of the items that have holds on them that are available at the library for pulling.

JIVESNA

Pending holds placed between 12/01/2008 and 12/16/2009

Reported on 12/16/2009

The following holds have not been filled. Please retrieve them and check them in.

Pull This Many Items	Items Available	Patrons with Holds	Title	Libraries	Available Call Numbers	Available Itypes	Available Locations	Earliest Hold Date
2	2	2	The Hunger Games /	SFL	TEE COL	BOOK	TEEN	09/22/2009 in SFL
1	1	2	Eclipse /	SFL	TEE MEY	BOOK	TEEN	09/22/2009 in SFL
1	1	1	Mad men, Season 1, disc 3.	SFL	DVD MAD	FILM	DVD	09/24/2009 in SFL
1	1	1	Monarch of the glen, season 5, disc 1.	SFL	DVD MONARCH	FILM	DVD	09/28/2009 in SFL
1	1	1	Monarch of the glen, season 5, disc 2.	SFL	DVD MONARCH	FILM	DVD	09/28/2009 in SFL
1	1	1	Monarch of the glen, season 5, disc 3.	SFL	DVD MONARCH	FILM	DVD	09/28/2009 in SFL

This report will be generated based on a few system preferences:

- **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.

You can limit the results you see by using the Refine box on the left side of the page:

Refine Results

Start date:
 

End date:
 

(Inclusive, default is two days ago to today, set other date ranges as needed.)

8.3. Holds awaiting pickup

This report will show all of the holds that are waiting for patrons to pick them up.

Holds awaiting pickup for your library on: 12/16/2009

Available since	Title	Patron	Location	Action
09/29/2009 Hold Over	Strength in what remains / (Book) Barcode: 32373007779054	Detora, Regina	SFL B KIDDER	Cancel h
09/28/2009 Hold Over	South of Broad / (Book) Barcode: 32373007778437	Beckerhoff, Helen	SFL FIC CONROY	Cancel h
09/22/2009 Hold Over	A reliable wife : (Book) Barcode: 32373007774600	Leclair, Joann	SFL FIC GOOLRICK	Cancel h
09/28/2009 Hold Over	The girl who played with fire / (Book) Barcode: 32373007778049	Hodari, Leah	SFL FIC LARSSON	Cancel h
09/27/2009 Hold Over	Labor Day / (Book) Barcode: 32373007778734	Hanson, Pamela	SFL FIC MAYNARD	Cancel h
09/28/2009 Hold Over	The price of malice : (Book) Barcode: 32373007779948	Grimes, Christopher	SFL FIC MAYOR MYS	Cancel h
09/28/2009 Hold Over	The price of malice : (Book) Barcode: 32373007779930	Greer, Molly	SFL FIC MAYOR MYS	Cancel h
09/29/2009 Hold Over	The time traveler's wife : (Book) Barcode: 32373007127007	Hulme, Terry	SFL FIC NIFFENEGGER	Cancel h

8.4. Hold ratios

Hold ratios help with collection development. Using this report you will be able to see how many of your patrons have holds on items and whether you should buy more. 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.

Hold Ratios to Calculate Items Needed

Calculated on 12/16/2009. From 12/16/2008 to 12/16/2009

These items have a hold ratio ≥ 3 .

Reserves ▾	Items ⇅	Hold Ratio ⇅	Title ⇅	Holding Libraries ⇅	Location ⇅	Itype ⇅	Call Number
3	1	3.00	A gate at the stairs :	SFL	FIC	BOOK	FIC MOORE
4	1	4.00	Alex Cross's trial /	SFL	FIC	BOOK	FIC PATTERSON
4	1	4.00	The defector /	SFL	FIC	BOOK	FIC SILVA
5	1	5.00	The elegance of the hedgehog / "French Voices"--P. 4 of cover.	SFL	FIC	BOOK	FIC BARBER
6	2	3.00	Catching fire /	SFL	TEEN	BOOK	TEE COL
6	1	6.00	True compass :	SFL		BOOK	B KENNEDY KENNEDY

8.5. Transfers to receive

This report will list all of the items that Koha thinks are in transit to your library.

Transfers made to your library on : 12/15/2009

Your library is the destination for the following transfer(s)

Coming from Centerville

Date of transfer	Title	Reserved by	Location
12/15/2009	Library mashups : (Books) Barcode: 898739895	None	CPL 020.285/4678

If your transfers are late in arriving at your library you will see a message stating how late your items are.

Transfers made to your library as of 02/01/2010

Your library is the destination for the following transfer(s)

Transfers are **considered late** after 3 days.

Coming from Centerville

Date of transfer	Title	Reserved by	Location
12/19/2009 Transfer is 41 days late	The world rubber economy : (Books) Barcode: 33203000400797	None	MMM HD9161.A2 G7

Important

An item is considered late based on the number of days you have entered in the TransfersMaxDaysWarning system preference.

8.6. Overdues

Important

For libraries with a large patron base, this report may take a significant amount of time to run.

Tip

Large libraries can choose to filter the report before it runs by setting the FilterBeforeOverdueReport system preference to 'Require'.

This report will list all items that are overdue at your library.

1799 Items Overdue as of 12/16/2009

[Download file of all overdue](#)

Filter On:

Name or cardnumber:

Patron category:

Patron flags:

Item type:

Library of the patron:

Sort By:

Show any items currently issued:

Due Date	Patron	Library	Title
11/14/2000	Dionne Georges ()	SFL	Death du jour / , by Reichs, Kathy.
11/14/2000	Dionne Georges ()	SFL	The voyage of the Narwhal : , by Barrett, An
08/27/2007	Nolan Cherie ()	SFL	Babel
08/27/2007	Nolan Cherie ()	SFL	Mrs. Henderson presents
09/03/2007	Nolan Cherie ()	SFL	The verbally abusive man - can he change? by Evans, Patricia.
09/03/2007	Nolan Cherie ()	SFL	Scientists confront intelligent design and creationism /
10/11/2007	Safford Grace ()	SFL	
02/08/2008	Gerencser Jessica ()	SFL	Into the wild / , by Krakauer, Jon.
03/13/2008	Walker Haley ()	SFL	Give a boy a gun / , by Strasser, Todd.
06/04/2008	Marcia's Desk ()	SFL	Disturbing the dead / , by Parshall, Sandra.
06/23/2008	Wright Sam ()	SFL	Asterix and Cleopatra / , by Goscinny, Rene,
09/08/2008	McMonagle Ryan ()	SFL	Oz Clarke's new wine atlas : , by Clarke, Oz.
11/26/2008	Bailin Allison ()	SFL	365 ways to save the earth / , by Bourseiller, Philippe.

The report can be filtered using the menu options found on the left of the report.

9. Tracking Inhouse Use

Many libraries track the use of items within the library. This is possible within Koha with the use of one or more Statistical Patrons. When collecting items that have been used within the library, you will want to check them out to your statistical patron:

Checking out to In House Statisical (23529001223640)

Enter item barcode:

Specify Due Date:

Instead of marking the item as 'checked out' the system will record that the item was used in house:

• Local Use Recorded

Repeat these steps for all items that have been used within the library to keep accurate statistics for item use.

10. In Processing / Book Cart Locations

Koha allows for handling temporary locations like the processing center and/or book carts throughout the library. For this feature to work you must first make sure you have authorized values set in the LOCcategory for PROC (Processing Center) and CART (Book Cart).

Show Category:

Authorised values for category LOC :

Authorized value	Description	Description (OPAC)	Icon	Edit	Delete
AV	Audio Visual			Edit	Delete
CART	Circ Cart			Edit	Delete
CHILD	Children's Area			Edit	Delete
DISPLAY	On Display			Edit	Delete
FIC	Fiction			Edit	Delete
GEN	General Stacks			Edit	Delete
NEW	New Materials Shelf			Edit	Delete
PROC	Processing Dept			Edit	Delete
REF	Reference			Edit	Delete
STAFF	Staff Office			Edit	Delete

Next you need to set the NewItemsDefaultLocation system preference to PROC. This will set the new items to the Processing Center as their default location.

Create items with their desired final shelving location.

- These newly cataloged items will be temporarily set to the PROC location and will display with whatever description PROC has. The original location code entered at item creation is stored in the new items column 'permanent_location', for future use. Items will stay in the PROC location until they are checked in. To have those items then move to the shelving cart:
 1. Turn on the InProcessingToShelvingCart system preference
 2. Check in those newly-created items and they will be moved to the location code of CART and display with whatever description CART has.

3. A cron job runs at specified intervals to age items from CART to the permanent shelving location. (For example, an hourly cron entry of `cart_to_shelf.pl --hours 3` where `--hours` is the amount of time an item should spend on the cart before aging to its permanent location.)

- **Tip**

If the `ReturnToShelvingCart` system preference is turned on, any newly-checked-in item is also automatically put into the shelving cart, to be covered by the same script run.

- **Important**

Checkins with confirmed holds will not go into the shelving cart. If items on the shelving cart are checked out, the cart location will be cleared.

11. Self Checkout

Koha comes with a very basic self checkout module. To enable this module you need to set the `WebBasedSelfCheck` preference to 'Enable.' To use this module you have to log in as a staff member with circulation permissions.

Tip

Create a staff patron specifically for this action so that you don't leave a real staff client logged into a computer all day

There is no link to the Self Checkout module, but a simple addition to the `intranetuserjs` system preference can add one.

```
$(document).ready(function(){ $("#login
  #submit").parent().after("<p><a
  href=\"http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl\"
  target=\"_blank\">Self-Checkout</a></p>"); });
```

The link will then appear at the bottom of the log in page:

Username:

Password:

Library:

Login »

[Self-Checkout](#)

You can also access this module by going to : http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl

When on the self checkout page you will be asked to enter your patron card number:

Nicole's Library Self Checkout System

Self Checkout

Please enter your card number:

Submit

© Nicole C. Engard

[Home](#) | [Contact](#) | [Privacy](#)

Once your card number is entered you will be asked to scan the items you are checking out

Nicole's Library Self Checkout System

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

You currently have nothing checked out.

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[Home](#) | [Contact](#) | [Privacy](#)

As you scan items they will appear below the barcode box

Issues for Nicole Engard (1 total)

Title	Call No.	Due	Renew
Blue book, dolls & values. (10101000000409)	688.722B	01/01/2010	<input type="button" value="Return Item"/>

When you are finished scanning items it is important to click the 'Click here if done' button to log the patron out and prepare for the next patron.

When attempting to check items out there are some instances where error messages will appear and the patron will be directed to the librarian. This will happen even if you are allowing overrides on circulation functions. Only a librarian can override a circulation block and so patrons must go to the librarian for help in these situations.

Item cannot be checked out.

Sorry, This item cannot be checked out at this station.

MESSAGE 6: You owe the library and cannot borrow. Please see a member of the library staff.

12. Offline Circulation Utility

12.1. Firefox Plugin

There is a plugin for Firefox that can be used for Offline Circulation: <https://addons.mozilla.org/en-US/firefox/addon/14399>

Once installed there will be an icon for the Offline Circulation Tool in the status bar at the bottom of you Firefox Window.



Additional instructions for using this Plugin can be found on the Koha Wiki: http://wiki.koha-community.org/wiki/Offline_circulation_firefox_plugin

12.2. Offline Circ Tool for Windows

The Offline Circulation Utility can be downloaded at: <http://millruntech.com/koha/koha-tools/koha-offline-circulation>

12.3. Upload Offline Circ File

The offline circulation tool for Windows will generate a KOC file that you can upload into Koha once your system comes back up.

On the Circulation menu click 'Offline Circulation File (.koc) Uploader'

Circulation

- [Check Out](#)
- [Check In](#)
- [Transfer](#)
- [Set library](#)
- [Fast cataloging](#)
- **Offline Circulation**
 - [Offline Circulation File \(.koc\) Uploader](#)

Browse your computer for the *.koc file

Upload Offline Circulation Data

Choose .koc File:

Once the file is uploaded, click the process the file

Upload progress:


100%

When this is complete you'll see the summary of actions from when you were offline (including any errors).

Koha Offline Circulation

Your data was processed. Here are the results:

Checked out [I did it for myself](#) (100113350) to ():

Checked out [The Web library](#) (100104291) to ():

Warning: Unable to determine patron from item barcode (100104291). Cannot check in.



Acquisitions

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1. Setup

Before using the Acquisitions Module you will want to make sure that you have completed all of the set up.

First, set your Acquisitions System Preferences and Acquisitions Administration to match your library's workflow.

2. Vendors

Before any orders can be places you must first enter at least one vendor.

2.1. Add a Vendor

To add a vendor click the 'New Vendor' button on the Acquisitions page



The screenshot shows a web interface for the Acquisitions module. At the top, there is a button labeled 'New Vendor'. Below it, the heading 'Acquisitions' is displayed. Underneath, there is a section titled 'Manage orders'. In this section, there is a label 'Vendor:' followed by a text input field and a 'Search' button.

The vendor add form is broken into three pieces

- The first section is for basic information about the Vendor

Add vendor

Company details

Name *

Postal address

Physical address

Phone

Fax

Website

- Of these fields, only the Vendor name is required, the rest of the information should be added to help with generating claim letters and invoices
- The second section is for information regarding your contact at the Vendor's office

Contact details

Contact Name

Position

Phone

Alternative phone

Fax

Email

Notes

- None of these fields are required, they should only be entered if you want to keep track of your contact's information within Koha
- The final section is for billing information

Ordering information

Vendor is: Active Inactive

List Prices are

Invoice Prices are

Discount %

GST rate %

Notes

[Cancel](#)

- To be able to order from a vendor you must make them 'Active'
- For List Prices and Invoice Prices choose the currency
 - Currencies are assigned in the Currencies & Exchange Rates admin area
- If the vendor offers a consistent blank discount, enter that in the 'Discount' field
 - You can enter item specific discounts when placing an order
- GST rate is for any tax the vendor may charge

- Notes are for internal use

2.2. View/Edit a Vendor

To view a vendor's information page you must search for the vendor from the Acquisitions home page. Your search can be for any part of the Vendor's name:

+ New ▾
✎ Edit vendor
📦 Receive shipments

[Show all baskets](#)

ambika batra New basket Receive shipment

No. ↕	Name ↕	Item count ↕	Biblio count ↕	Items expected ↕	Created by ↕	Date ↕	
4	ORDER 1	2	1	2	mkdfmv test1	05/14/2016	View
5	ORDER 1	1	1	1	mkdfmv test1	05/14/2016	View

From the results, click on the name of the vendor you want to view or edit

Home > Acquisitions > ambika batra

+ New ▾
✎ Edit vendor
📦 Receive shipments

- Baskets
- Basket groups
- Contracts
- Invoices
- Uncertain prices

ambika batra

Vendor details

Company name: ambika batra
Postal address: 6587268
Physical address:
Phone: 658006543
Fax: 7890-
Website: www.koha.com
Account number: 088553479

Ordering information

Vendor is: Active
List prices are: GBP
Invoice prices are: GBP
Discount: 0.0 %
Tax rate: 0.0 %
Delivery time: 0 days

Contact details

Contact name: kamlesh batra
Position: principal
Phone: 39983-0-0
Alternative phone: 908089
Fax: 839-90
Email: kamleshbatra.62@gmail.com
Notes: 'oouugg'

2.3. Vendor Contracts

You can define contracts (with a start and end date) and attach it to a vendor. This is used so that at the end of the year you can see how much you spent on a specific contract with a vendor. In some places, contracts are set up with a minimum and maximum yearly amount.

2.3.1. Add a Contract

At the top of a vendor search results page with only result or at the top of a vendor information page you will see a 'New ' for contract , vender, basket button.

The contract form will ask for some very basic information about the contract

New contract for ambika batra

Name: *

Description:

Start date: * 
(MM/DD/YYYY)

End date: * 
(MM/DD/YYYY)

Note:

You will not be able to enter a contract retrospectively; the end date must not be before today's date.

Once the contract is saved it will appear below the vendor information.

Note:

You will not be able to enter a contract retrospectively; the end date must not be before today's date.

Once the contract is saved it will appear below the vendor information.

ambika batra

Supplier details

Company Name: **ambika batra**

Postal Address: PO Box 1234 Bridgewater, NJ 08807-2944

Physical Address: 1120 U.S. 22 Bridgewater, NJ 08807-2944

Phone: 555.555.1234

Fax:

Web site: <http://www.btol.com/>

Contact details

Contact name: Jane Doe

Position: Sales Manager

Phone: 555.555.1233

Alternative phone:

Fax:

Email: jane@btol.com

Notes: On Friday's contact John instead: 555.555.1222

Ordering information

Vendor is: Active

List Prices are: USD

Invoice Prices are: USD

Discount: 0.0000 %

Contract(s)

Name	Description	Start date	End date		
Fiction for 2016		01/01/ 2016	2/31/ 2016	Edit	Delete

It will also be an option when creating a basket

Add a basket to ambika batra

Basket name	<input type="text" value="2/26/ 16"/>
Internal note	<input type="text"/>
Vendor note	<input type="text"/>
Contract	<input type="text" value="Fiction for 2016"/>

16 2016

3. Managing Suggestions

Depending on your settings in the suggestion system preference, patrons may be able to make purchase suggestions via the OPAC. When a suggestion is waiting for library review, it will appear on the Acquisitions home page in the list of links on the left of the page.



[Home](#) > [Acquisitions](#) >

- [Late orders](#)
- [3 suggestions waiting](#)
- [Manage suggestions](#)
- [Budgets](#)
- [Funds](#)
- [Currencies](#)

Clicking 'Manage suggestions' will take you to the suggestion management tool. If there are no pending suggestions you can access the suggestion management tool by clicking the 'Manage suggestions' link on the menu on the left of the Acquisitions page.

[+ New purchase suggestion](#)

Suggestions management

Accepted (1)

[Check all](#) | [Uncheck all](#)

Showing 1 to 1 of 1 | Show entries | [First](#) [Previous](#) [Next](#) [Last](#) | Search:

<input type="checkbox"/>	Suggestion	Suggested by - on	Managed by - on	Library	Fund	Status
<input type="checkbox"/>	koha [edit] ; BK	test1, mkdfmv - 06/07/2015	test1, mkdfmv - 06/07/2015	CPL		Accepted

Showing 1 to 1 of 1 | [First](#) [Previous](#) [Next](#) [Last](#)

Mark selected as: with this reason: OR: Delete selected

Your suggestions will be sorted into three categories: Accepted, Pending, and Rejected. Each accepted or rejected suggestion will show the name of the librarian who managed the suggestion and the reason they gave for accepting or rejecting it (found under 'Status').

For libraries with lots of suggestions, there are filters on the left hand side of the Manage Suggestions page to assist in limiting the number of titles displayed on the screen.

Organize by:

Filter by: [\[clear\]](#)

[Bibliographic information](#)

[Suggestion information](#)

[Acquisition information](#)

Clicking on the blue headings will expand the filtering options and clicking '[clear]' will clear all filters and show all suggestions.

When reviewing 'Pending' suggestions you can choose to check the box next to the item(s) you want to approve/reject and then choose the status and reason for your selection. You can also choose to completely delete the suggestion by checking the 'Delete selected' box.

[+ New purchase suggestion](#)

Suggestions management

Accepted (1)

Check all | Uncheck all

Showing 1 to 1 of 1 | Show 20 entries | First Previous Next Last | Search:

Suggestion	Suggested by - on	Managed by - on	Library	Fund	Status
<input type="checkbox"/> koha [edit] ; BK	test1, mkdfmv - 06/07/2015	test1, mkdfmv - 06/07/2015	CPL		Accepted

Showing 1 to 1 of 1 | First Previous Next Last

Mark selected as: with this reason: OR: Delete selected

Reasons for accepting and rejecting suggestions are defined by the SUGGEST authorized value.

with this reason:

- Choose a reason --
- Available via ILL
- Bestseller
- Library Copy Lost
- Shelf Copy Damaged
- Others...

If you choose 'Others...' as your reason you will be prompted to enter your reason in a text box. Clicking 'Cancel' to the right of the box will bring back the pull down menu with authorized reasons.

with this reason: [Cancel](#)

4. Placing Orders

To place an order you must first search for the vendor or bookseller you want to send the order to.

4.1. Create a basket

To create a basket you have several options from the vendor search results page:



From here you can choose to create a new basket by clicking 'New basket' under 'Manage orders' or by clicking 'Add basket'

Add a basket to ambika batra

Basket name	<input type="text" value="December 20 16"/>
Internal note	<input type="text" value="12th monthly order"/>
Vendor note	<input type="text"/>

When adding a basket you want to give it a name that will help you identify it later. The notes fields are optional and can contain any type of information.

If you have added contracts to the vendor you're ordering from, you will also have an option to choose which contract you're ordering these items under.

When finished, click 'Save'

Basket December 2009 (5) for **ambika batra**

Basket details

Internal note: 12th Monthly Order

Managed by: Nicole Engard

Open on: 12/14/

Order Details

Add To Order

- From an existing record:
- [From a Suggestion](#)
- [From a new \(empty\) record](#)
- [From an external source](#)
- [From a staged file](#)

Once your basket is created you are presented with several options for adding items to the order.

- If you are ordering another copy of an existing item, you can simply search for the record in your system

Search Existing Records

Summary	Publisher	Copyright		
Library mashups : 9781573873727 - p. cm.	Information Today, Inc., ; Medford, N.J. :	2009	View MARC	Order
Library mashups : 9781573873727 - p. cm.	Information Today, Inc., ; Medford, N.J. :	2009	View MARC	Order

Add To Order

- From an existing record:
- [From a Suggestion](#)
- [From a new \(empty\) record](#)

- From the results, simply click 'Order' to be brought to the order form

Basket ORDER 1 (4) for ambika batra

Internal note: ORDER 1 FOR AMBIKA
 Vendor note: ambika
 Delivery place: DU
 Billing place: DU
 Managed by: mkdfmv test1
 Opened on: 05/14/2016

Orders

Show all details

Showing 1 to 1 of 1 | Show 10 entries | First Previous Next Last | Search:

Order	RRP tax exc.	ecost tax exc.	Qty.	Total tax exc. (GBP)	GST %	GST	Fund	Modify	Delete
Title 1 / 2 by ambika Batra - yuteiure69809 , ambu , dehekj [Add note]	5.00	4.37	2	8.74	0.00	0.00	bok	Modify	Delete order Delete order and catalog record
Total (GST 0.00)			2	8.74		0			
Total (GBP)			2	8.74		0.00			

Showing 1 to 1 of 1 | First Previous Next Last

- All of the details associated with the item will already be listed under 'Catalog details'
- If you allow patrons to make purchase suggestions (learn more in the Managing Suggestions section of this manual) then you can place orders from those suggestions

Suggestions

Showing 1 to 1 of 1 | Show 10 entries | First Previous Next Last | Search:

Suggestion	Suggested by	Accepted by	
koha -	test1, mkdfmv	test1, mkdfmv	Order

Showing 1 to 1 of 1 | First Previous Next Last

- From the results, click 'Order' next to the item you want to order and you will be presented with the order form

New order

Basket details

Internal note: ORDER 1 FOR AMBIKA
Vendor note: ambika
Managed by: mkdfmv test1
Open on: 05/14/2016

Catalog details

Title:
Author:
Publisher:
Edition:
Publication year:
ISBN:
Series:

Suggestion

Suggested by: test1, mkdfmv (suggestion #1)

Item

No ACO framework, using default. You should create a framework with code

0 - Withdrawn status
2 - Source of classification or shelving scheme
4 - Damaged status

- From this form you can make changes to the Catalog Details if necessary
- To order from a record that can't be found anywhere else, choose the 'From a new (empty) record'

JIVESNA

New order

Basket details

Internal note: ORDER 1 FOR AMBIKA
Vendor note: ambika
Managed by: mkdfmv test1
Open on: 05/14/2016

Catalog details

Title:
Author:
Publisher:
Edition:
Publication year:
ISBN:
Series:

Suggestion

Suggested by: test1, mkdfmv (suggestion #1)

Item

No ACQ framework, using default. You should create a framework with code

0 - Withdrawn status
2 - Source of classification or shelving scheme
4 - Damaged status

- You will be presented with an empty form to fill in all of the necessary details about the item you are ordering
- If you want to search other libraries for an item to purchase you can use the 'From an external source' option which will allow you to order from a MARC record found via a Z39.50 search

JIVESNA

Z39.50 Search Points

Title:

ISBN/ISSN:

LC Call Number:

Author:

Subject Heading:

Dewey:

Select used MARC framework:

Default

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 [siris-libraries.si.edu]
- LIBRARY OF CONGRESS [z3950.loc.gov]

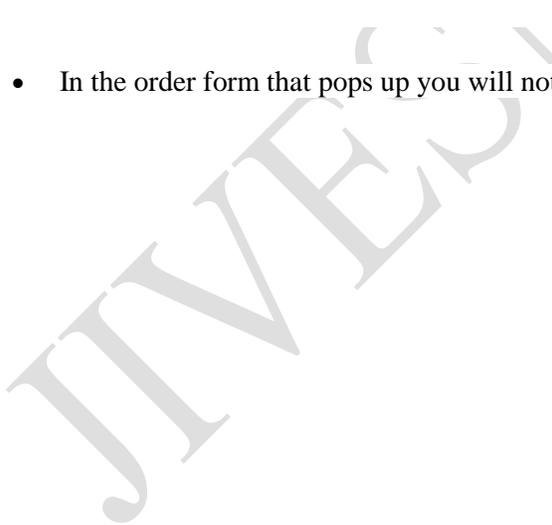
[Cancel](#)

- From the results click the Order link next to the item you want to purchase

Results

Server	Title ▾	Author ◆	ISBN ◆	LCCN ◆	Preview
LIBRARY OF CONGRESS	Change of heart :	Picoult, Jodi,	9780743496742 0743496744	2007035721	MARC Card Order

- In the order form that pops up you will not be able to edit the catalog details



New order

Basket details

Internal note: ORDER 1 FOR AMBIKA
 Vendor note: ambika
 Managed by: mkdfmv test1
 Open on: 05/14/2016

Catalog details

Title:
 Author:
 Publisher:
 Edition:
 Publication year:
 ISBN:
 Series:

Suggestion

Suggested by: test1, mkdfmv (suggestion #1)

Item

No ACQ framework, using default. You should create a framework with code

0 - Withdrawn status

2 - Source of classification or shelving scheme

4 - Damaged status

- The final option for ordering is to order from a staged record (learn more about staging records)

Choose the file to add to the basket

Showing 1 to 3 of 3 Show entries

File name	Comments	Status	Staged	# Bibs	
procall.mrc		staged	10/25/2015 00:39		Add orders
icarcall.mrc		staged	06/30/2015 15:47		Add orders
cart.iso2709		staged	06/09/2015 17:03		Add orders

Showing 1 to 3 of 3

- From the list of files you are presented with, choose the 'Add orders' link

New order

Basket details

Internal note: ORDER 1 FOR AMBIKA
Vendor note: ambika
Managed by: mkdfmv test1
Open on: 05/14/2016

Catalog details

Title:
Author:
Publisher:
Edition:
Publication year:
ISBN:
Series:

Suggestion

Suggested by: test1, mkdfmv (suggestion #1)

Item

No ACQ framework, using default. You should create a framework with code

0 - Withdrawn status

2 - Source of classification or shelving scheme

4 - Damaged status

JIVESNA

New order

Basket details	
Internal note:	ORDER 1 FOR AMBIKA
Vendor note:	ambika
Managed by:	mkdfmv test1
Open on:	05/14/2016

Catalog details	
Title:	<input type="text" value="koha"/>
Author:	<input type="text"/>
Publisher:	<input type="text"/>
Edition:	<input type="text"/>
Publication year:	<input type="text" value="0"/>
ISBN:	<input type="text"/>
Series:	<input type="text"/>

Suggestion	
Suggested by:	test1, mkdfmv (suggestion #1)

Item	
No ACQ framework, using default. You should create a framework with code	
0 - Withdrawn status	<input type="text"/>
2 - Source of classification or shelving scheme	<input type="text" value="Dewey Decimal Classification"/>
4 - Damaged status	<input type="text"/>

- From the order form you will not be able to edit the catalog details.

Once you have entered the info about the item you need to enter the Accounting information.

Accounting Details

Quantity:

Budget:

Vendor price:

 (entered as USD)

Uncertain price:

Replacement cost: (adjusted for)

Budgeted cost: (adjusted for 0.00% discount)

Total: (budgeted cost * quantity)

Actual cost:

Notes:

The 2 following fields are available for your own usage. They can be useful for statistical purposes

Planning value1:

Planning value2:

[Cancel](#)

- Quantity is populated by the number of items you've added to the order above
- The list of budgets is populated by the budgets you have assigned in the Acquisitions Administration area.
- The vendor price will be used to calculate the rest of the amount fields below
- If the price is uncertain, check the uncertain price box.
 - A basket with at least one uncertain price can't be closed
- If you added Planning Values when creating the Fund those values will appear in the two planning value fields

Once an item is added to the basket you will be presented with a basket summary

[+ Add to basket](#)
[Edit basket](#)
[Delete this basket](#)
[Close this basket](#)
[Export this basket as CSV](#)

Basket ORDER 1 (4) for ambika batra

Internal note: ORDER 1 FOR AMBIKA
Vendor note: ambika
Delivery place: DU
Billing place: DU
Managed by: mkdfmv test1
Opened on: 05/14/2016

Orders

Show all details

Showing 1 to 1 of 1 | Show 10 entries | [First](#) [Previous](#) [Next](#) [Last](#) | Search:

Order	RRP tax exc.	ecost tax exc.	Qty.	Total tax exc. (GBP)	GST %	GST	Fund	Modify	Delete
Title 1 / 2 by ambika Batra - yuteiure69809 , ambu , dehekj [Add note]	5.00	4.37	2	8.74	0.00	0.00	bok	Modify	Delete order Delete order and catalog record
Total (GST 0.00)			2	8.74		0			
Total (GBP)			2	8.74		0.00			

Showing 1 to 1 of 1 | [First](#) [Previous](#) [Next](#) [Last](#)

Activate W

From here you can edit or remove the items you have added.

Basket ORDER 1 (4) for ambika batra

Internal note: ORDER 1 FOR AMBIKA
Vendor note: ambika
Delivery place: DU
Billing place: DU
Managed by: mkdfmv test1
Opened on: 05/14/2016

Also on the summary page you have the option to edit the information you entered about the basket by clicking the 'Edit basket header information' button, deleting the basket altogether by clicking the 'Delete this basket' button, or exporting your basket as a CSV file by clicking the 'Export this basket as CSV' button.

Once you're sure your basket is complete you can click 'Close this basket' button to indicate that this basket is complete and has been sent to the vendor.

4.2. Create a basket group

A basket group is simply a group of baskets. In some libraries, you have several staff members that create baskets, and, at the end of a period of time, someone then groups them together to send to the vendor in bulk. That said, it is possible to have one basket in a basket group if that's the workflow used in your library.

4.3. Printing baskets

When you are finished adding items to your basket you want to click 'Close this Basket'

Basket Fiction Order (17) for [Borders](#)

Basket details

Managed by: ambika batra

Opened on: 05/01/2016

Order Details

Order	RRP	Est.	Qty.	Total	Fund
Practical Open Source Software for Libraries by ambika batra	10.00	10.00	1	10.00	Fiction
Total Tax Exc.	10.00		1	10.00	

You will be asked if you want to create a purchase order at this time.

Are you sure you want to close basket Fiction Order?

create a purchase order now?

Your completed order will be listed on the Basket Grouping page for the printing or further modification.

Basket Grouping for [Borders](#)

another

Basket Group n°4

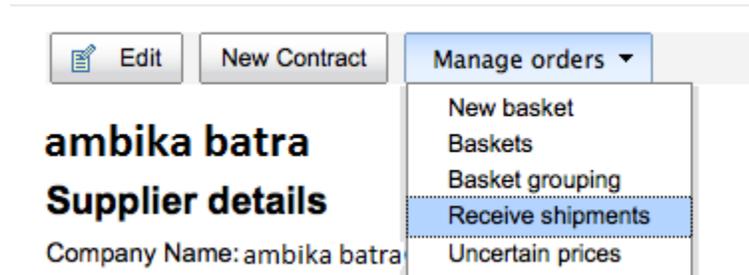
Fiction Order

Clicking 'Print' below your order will generate a PDF for printing. The PDF will have all of your library information followed by the items in your order.

Basket (N ^o)	Document	Qty	RRT GST Inc.	Discount	Discount price GST Exc.	GST	Total GST Inc.
17	Practical Open Source Software for Libraries / ambika batra	1	10.00	0.00%	9.99	0.12%	10.00

5. Receiving Orders

Orders can be received from the vendor information page



ambika batra
Supplier details
 Company Name: ambika batra

- Manage orders ▾
 - New basket
 - Baskets
 - Basket grouping
 - Receive shipments**
 - Uncertain prices

or the vendor search results page

After clicking 'Receive shipment' you will be asked to enter a vendor invoice number and a shipment received date.

JIVESNA

Receive shipment from vendor ambika batra

1 shipments

Showing 1 to 1 of 1 Show 10 entries First Previous Next Last Search:

Line	Date received	Invoice number	Item count	Biblio count	Items expected
1	08/13/2016	sdW	0	0	0

Showing 1 to 1 of 1 First Previous Next Last

Receive a new shipment

Vendor invoice:

Shipment date: (MM/DD/YYYY)

Shipping cost:

Fund: Show all:

[Next](#) [Cancel](#)

The receive page will list all items still on order with the vendor regardless of the basket the item is from.

Receipt summary for ambika batra [sdW] on 08/13/2016

Invoice number: sdW Received by: admin On: 08/13/2016

Pending orders

Showing 1 to 2 of 2 Show 10 entries First Previous Next Last Search:

Basket	Order line	Summary	View record	Quantity	Unit cost	Order cost	Fund		
4	1	Title 1 by ambika Batra – yuteiure69809 [Add note]	MARC Card	2	4.37	8.74	bok	Receive	Delete order Delete order and catalog record
5	2	Information source and services by greg bognar – 6899654333 [Add note]	MARC Card	1	4.37	4.37	bok	Receive	Delete order Delete order and catalog record

Showing 1 to 2 of 2 First Previous Next Last

Already received

There are no received orders.

[Finish receiving](#)

To receive a specific item, click the 'Receive' link to the right of the item.

Receive items from : ambika batra [sdW] (order #1)

Catalog details										
Title: Tile 1										
Author: ambika Batra										
Copyright: 2016										
ISBN: yuteiure69809										
Series: 2										
Items										
Receive?	Barcode	Home branch	Holding branch	Not for loan	Restricted	Location	Call number	Copy number	Si	nu
<input type="checkbox"/>	Edit	Centerville	Centerville	Ordered	Restricted Access	Audio Visual				
<input type="checkbox"/>	Edit	Centerville	Centerville	Not For Loan	Restricted Access	Audio Visual				

Accounting details	
Date received:	08/13/2016
Budget:	bok
Created by:	mkdfmv test1
Quantity to receive:	<input type="text" value="2"/>
Quantity received:	<input type="text" value="0"/>
Replacement cost:	<input type="text" value="4.37"/>
Budgeted cost:	<input type="text" value="4.37"/>
Actual cost:	<input type="text" value="4.37"/>
Notes:	<div style="border: 1px solid gray; height: 40px;"></div>

- From this form you can alter the cost information. You can also choose to only receive 1 of multiple items if only 1 arrived. Once you have made any changes necessary, click 'Save' to mark the item as received.

Receipt summary for ambika batra [sdW] on 08/13/2016

Invoice number: sdW Received by: admin On: 08/13/2016

Pending orders

Showing 1 to 2 of 2 Show 10 entries First Previous Next Last Search:

Basket	Order line	Summary	View record	Quantity	Unit cost	Order cost	Fund	Receive	
4	1	Tile 1 by ambika Batra – yuteiure69809 [Add note]	MARC Card	1	4.37	4.37	bok	Receive	Delete order Can't delete order and catalog record 1 item(s) left 1 order(s) left
5	2	information source and services by greg bognar – 6899654333 [Add note]	MARC Card	1	4.37	4.37	bok	Receive	Delete order Delete order and catalog record

Showing 1 to 2 of 2 First Previous Next Last Search:

Already received

Showing 1 to 1 of 1 Show 10 entries First Previous Next Last Search:

Basket	Order line	Summary	View record	Quantity	Est cost	Actual cost	TOTAL	
4	5	Tile 1 / ambika Batra MARC Card	MARC Card	1	4.37	4.37	4.37	Cancel receipt
Total tax exc.							4.37	
Total (GST 0.0%)							0	
Total tax inc.							4.37	

Showing 1 to 1 of 1 First Previous Next Last Search:

 Activate Windows
Go to PC settings to activate Windows

You will also see that the item is received if you view the basket

Basket ORDER 1 (4) for ambika batra

Internal note: ORDER 1 FOR AMBIKA
 Vendor note: ambika
 Delivery place: DU
 Billing place: DU
 Managed by: mkdfrm test1
 Opened on: 05/14/2016

Orders

Show all details

Showing 1 to 2 of 2 Show 10 entries First Previous Next Last Search:

Order	RRP tax exc.	ecost tax exc.	RRP tax inc.	ecost tax inc.	Qty.	Total tax exc. (GBP)	Total tax inc. (GBP)	GST %	GST	Fund	Modify	Delete
Tile 1 / 2 by ambika Batra - yuteiure69809 , ambu , dehek [Add note]	5.00	4.37	5.00	4.37	1	4.37	4.37	0.00	0.00	bok	Modify	Delete order Can't delete order and catalog record 1 item(s) left 1 order(s) left
(rcvd) Tile 1 / 2 by ambika Batra - yuteiure69809 , ambu , dehek [Add note]	5.00	4.37	5.00	4.37	1	4.37	4.37	0.00	0.00	bok	Modify	Delete order Can't delete order and catalog record 1 item(s) left 1 order(s) left
Total (GST 0.00)					2	8.74	8.74		0			
Total (GBP)					2	8.74	8.74		0.00			

Showing 1 to 2 of 2 First Previous Next Last

6. Claims & Late Orders

If you have entered in an email address for the vendors in your system you can send them claim emails when an order is late. Before you can send claims you will need to set up an acquisitions claim notice.

Upon clicking on the link to 'Late Orders' from the Acquisitions page you will be presented with a series of filter options on the left hand side.

Filter Results:

Order date:
 days ago

Vendor:

Once you filter your orders to show you the things you consider to be late you will be presented with a list of these items.

Late orders

Claim using notice: Acquisition Claim

Order Date	Vendor	Information	Total cost	Basket	
10/05/2010 (104 days)	ABE Books	<i>Published by:</i> Information Today, Inc.,	39.00x1 = 39.00 Fiction	31 FPL	<input type="checkbox"/>
10/05/2010 (104 days)	ABE Books	<i>Author:</i> Chris Brogan	11.00x1 = 11.00 Reference	31 FPL	<input type="checkbox"/>
08/05/2010 (165 days)	ABE Books	<i>Author:</i> Raymond	22.00x1 = 22.00 Fiction	30 FPL	<input type="checkbox"/>
07/07/2010 (194 days)	Borders	<i>Author:</i> Gordon, Rachel Singer. <i>Published by:</i> Information Today, Inc.,	50.00x1 = 50.00 Fiction	27 FPL	<input type="checkbox"/>
02/25/2010 (326 days)	Baker & Taylor		29.99x1 = 29.99	13 FPL	<input type="checkbox"/>
Total			151.99		<input type="button" value="Claim Order"/>

To the right of each late title you will be see a checkbox. Check off the ones you want a claim letter sent to and click 'Claim Order.' This will automatically send an email to the vendor at the email address you have on file.

If you would rather use a different acquisition claim letter (other than the default) you can create that in the notices module and choose it from the menu above the list of late items.

Claim using notice: Acquisition Claim

Acquisition Claim

Order Date Vendor

7. Acquisition Searches

At the top of the various Acquisition pages there is a quick search box where you can perform either a Vendor Search or an Order Search.

Search vendors:

[Vendor Search](#) [Orders Search](#)

In the Vendor Search you can enter any part of the vendor name to get results.

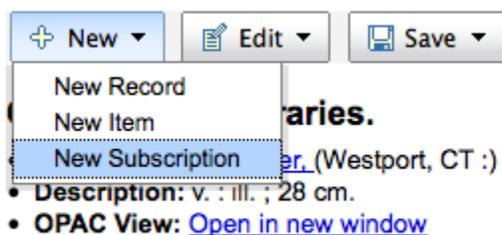
Serials

Table of Contents

1. Add a subscription
- 1.1 Recive Serial
2. Receive Issues
3. Create a Routing List
4. Subscriptions in Staff Client
5. Subscriptions in OPAC

1. Add a subscription

Subscriptions can be added by clicking the 'New' button on any bibliographic record



Or by visiting the Serials module and clicking 'New Subscription'



If you are entering a new subscription from the Serials module you will be presented with a blank form (if creating new from a bibliographic record the form will include the bib info).

Add a new subscription

Subscription details

Vendor: (ambika batra) [Search for a vendor](#)

Biblio: (Art of Asia) *Required*
[Search for Biblio](#) | [Create Biblio](#)

create an item record when receiving this serial
 do not create an item record when receiving this serial

Library: (select a library)

Location:

Call number:

Grace period: day(s)

OPAC note:

Nonpublic note:

Patron notification:
Select a notice and subscribers will be notified when new issues are received.

Number of issues to display to staff:

Number of issues to display in OPAC:

Serials planning

First issue publication date: *Required*

Frequency: *Required*

Manual history:

Numbering pattern:

	Volume	Number
Starting with:	<input type="text" value="1"/>	<input type="text" value="1"/>
Rollover at:	<input type="text" value="12"/>	

Subscription start date: *Required*

Subscription length: (enter amount in numerals) *Required*

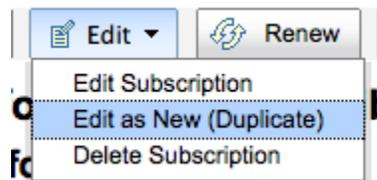
Subscription end date:

Numbering formula:

Activate Windows
Go to PC settings to activate Windows.

- 'Librarian' field will show the logged in librarian's username
- 'Vendor' can be found by either searching vendors entered via the [Acquisitions module](#) or entering the vendor ID number
 - Vendor information is not required
 - In order to claim missing and late issues you need to enter vendor information

- 'Biblio' is the MARC record you'd like to link this subscription to
- This can be done by searching for an existing record by clicking on the 'Search for Biblio' link below the boxes or by entering the bib number for a record in the first box. Only if you search with the field between the parenthesis.
- Next you can choose whether a new item is created when receiving an issue
- 'Location' is for the shelving location
- 'Call Number' is for your item's call number prefix
- 'Library' is the branch that owns this subscription.
- If more than one library subscribes to this serial you will need to create a subscription for each library
- This can be done easily by using the 'Edit as New (Duplicate)' option found on the subscription information page and changing only the 'Library' field



- The 'Grace Period' is the number of days before an issue is automatically moved from 'expected' status to 'waiting' and how many days before an issue is automatically moved from 'waiting' status to 'late'
- Use the 'Public Note' for any notes you would like to appear in the OPAC for the patrons
- 'Nonpublic Note' should be used for notes that are only visible to the librarians via the staff client
- To set up a routing list for serials, choose 'Routing List' from the 'Patron notification' field.
 - For this option to appear you need to make sure that you have a Routing List notice set up in the [Notices Tool](#)
 - Learn more about [Routing Lists](#) later in this manual
- The Staff and OPAC Display options allow you to control how many issues appear by default on bibliographic records in the Staff Client and the OPAC
 - If no values are entered in these fields, they will use the [OPACSerialIssueDisplayCount](#) and [StaffSerialIssueDisplayCount](#) system preference values
- In 'First issue publication date' you want to enter the date of the issue you have in your hand, the date from which the prediction pattern will start
- There are several pre-defined options for the 'Frequency' of publication
 - Without periodicity: some very specific (usually high level science journals) 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 related to 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
 - Start with the numbering on the issue you have in hand, the numbering that matches the date you entered in the 'First issue publication' field
 - If you have chosen any 'Numbering Format' other than 'Number' in the 'Rollover at' field, enter the last issue number before the volume number changes
 - If you chose the 'Number' Numbering Format you will see 'issues expected' in which you will enter the total number of issues you expect to receive.

Frequency: Required

Manual history:

Numbering pattern:

	Number
Starting with:	<input type="text" value="1"/>
issues expected	<input type="text" value="0"/>

- You can choose to create your own numbering pattern by choosing 'None of the above' and clicking the 'Show/Hide Advanced Pattern' button at the bottom of the form
- 'Subscription start date' is the date at which the subscription begins. This is used for setting up renewal alerts
- 'Subscription length' is the number of issues or months in the subscription. This is also used for setting up renewal alerts
- 'Subscription end date' should only be entered for subscriptions that have ended (if you're entering in a backlog of serials)
- The 'Numbering formula' is editable to match the way you'd like your numbering to print on the item record and subscription information pages

Click 'Save Subscription' to save the information you have entered. [Find sample serial examples in the appendix.](#)

Recive Serial:

Just click on receive option at the right side of the above screen. It will display the window as given below

Search subscriptions:
 ISSN: Title: [Advanced search](#)
[Search subscriptions](#) [Check out](#) [Search the catalog](#)

[+ New subscription](#)

Serials subscriptions (1 found)

Open (1) Closed (0)

Showing 1 to 1 of 1 Show 10 entries Search:

ISSN	Title	Notes	Library	Call number	Expiration date	Routing list		
	Art of Asia.		Aligarh muslim university library		08/01/2017	New	Issue history	Serial receive
<input type="text" value="Search ISSN"/>	<input type="text" value="Search title"/>	<input type="text" value="Search notes"/>	<input type="text" value="Search library"/>	<input type="text" value="Search callnumber"/>	<input type="text" value="Search expiration date"/>			

Showing 1 to 1 of 1

Just click on receive option at the right side of the above screen. It will display the window as given below.

 Search subscriptions:
 ISSN: Title: [Advanced search](#)
[Search subscriptions](#) [Check out](#) [Search the catalog](#)

[Home](#) > [Serials](#) > Serial edition *Art of Asia*.

- Claims
- Check expiration
- Serial collection #1
- Subscription #1
- Show biblio

Serial edition *Art of Asia*. (Staff Office)

Numbered	Published on	Expected on	Status	Notes
Issue <input type="text" value="Vol 1, No 1"/>	<input type="text" value="08/01/2016"/>	<input type="text" value="08/01/2016"/>	<input type="text" value="Expected"/> ▼	<input type="text"/>
Supplemental issue <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="----"/> ▼	<input type="text"/>

Receive the serial accordingly. In this way, serial can be retrieved.

For ex:

You have received 2 (two) serials issue and no. 3 does not come to library but you have received the no. 4 issue. So, you have to send the claim for the no.3 issue.

Let us see, how it can be done?.

Select the particular issue and set the status as Late and receive the next issue as per your schedule

Circulation Patrons Search Cart More admin | Centerville

koha Search subscriptions: ISSN: Title: [Advanced search](#)

[Search subscriptions](#) [Check out](#) [Search the catalog](#)

Home > Serials > Serial edition *Art of Asia*.

- Claims
- Check expiration
- Serial collection #1
- Subscription #1
- Show biblio

Serial edition *Art of Asia*. (Staff Office)

Numbered	Published on	Expected on	Status	Notes
Issue <input type="text" value="Vol 1, No 3"/>	08/01/2016	08/01/2016	Late	
Supplemental issue <input type="text"/>			----	

At the left side, you will observe an option 'Claims', just click on Claims. It will open another window where you can send the claim to vendor.

After sending notification to the Vendor, a screen will appear as it is given below

Home > Serials > Claims

- Claims
- Check expiration

Claims

No claims notice defined. Please define one.

Vendor:

Missing issues

Filters :

Status :

Title :

Library:

From: To: (MM/DD/YYYY)

Vendor	Library	Title	Issue number	Status	Since	Claim date	Begin claim
ambika batra	AMU	Art of Asia	Vol 1, No 3	Late	08/01/2016		Export item data

[Export selected items data](#)

2. Receive Issues

Issues can be marked as received from several locations. To find a subscription, use the search box at the top of the Serials page to search for the serial you'd like to receive issues for:

Search Subscriptions:

Standard Number: String:

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

[+ New Subscription](#)

Serials subscriptions

Search for Serial Routing List

ISSN	Title	Notes	Library (Callnumber)	Routing list	
1041-7915	Computers in libraries.	Combined issues in November & July.	FPL (MAG)	Edit	Issue History Serial receive

From the search results you can click the 'Serial Receive' link or you can click on the subscription title and then click the 'Receive' button.

[+ New Subscription](#) [Edit](#) [Renew](#) [Receive](#)

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 1
- Librarian identity: nce
- Vendor: _
- Biblio: (1368) [Computers in libraries.](#)
- Library: FPL
- Serial receipt creates an item record.
- Grace period: 15
- Call Number: MAG
- Notes: Combined issues in November & July.

The final way to receive serials is from the 'Serial Collection' page. To the left of the Subscription summary page there is a menu with a link to 'Serial Collection'

[Home](#) > [Serials](#) > Details for Subscription #1

- [Serial Collection](#)
- [Create Routing List](#)
- [Claims](#)
- [Check Expiration](#)

Subscription for Computers in libraries.

Subscription information

- Subscription ID: 1
- Librarian identity: nce
- Vendor: _
- Biblio: (1368) [Computers in libraries.](#)

From the page that opens up you can click 'Edit Serial' with the issue you want to receive checked.

2009 2008

Date published	Date received	Number	Status	Notes	branch	Edit
01/15/2009	01/15/2009	Vol 29, No 1	Expected		FPL	<input checked="" type="checkbox"/>

All three of these options will open up the issue receive form:

Serial Edition *Computers in libraries.* (MAG)

Numbered	Published on	Expected on	Status	Notes
Issue <input type="text" value="Vol 28, No 5"/>	<input type="text" value="05/15/2008"/>	<input type="text" value="05/15/2008"/>	Expected	
Click to add item				
Supplemental Issue <input type="text"/>	<input type="text"/>	<input type="text"/>		
Click to add item				

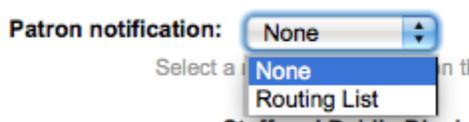
Expected
Arrived
 Late
 Missing
 Claimed
 Not Available
 Delete

- Choose 'Arrived' from the status pull down to mark a serial as received.
- If you have decided to have an item record created for each issue an item add form will appear

- If your issue has a supplemental issue with it, fill in the Supplemental Issue information.
- If you have decided to have an item record created for each issue an item add form will appear for your supplement and for the issue itself
- Once you have entered your info you can click 'Save'

3. Create a Routing List

A routing list is a list of people who receive the serial before it goes to the shelf. When setting up your serial subscription you want to be sure to pick 'Routing List' from the 'Patron Notification' pull down.



When on the subscription page you will see a link to the left that reads 'Create Routing List.'

- [Serial Collection](#)
- [Create Routing List](#)
- [Claims](#)
- [Check Expiration](#)



Subscription for Computers in libraries.

Subscription information

- Subscription ID: 5
- Librarian identity: nce
- Vendor: [Baker & Taylor](#)
- Biblio: (1383) [Computers in libraries.](#)
- Library: FPL
- Serial receipt creates an item record.
- Grace period: 0
- Call Number: MAG
- Number of issues to display to staff: 10
- Number of issues to display to the public: 3
- Patron alert with: RLIST
- Routing: yes

Clicking that link will bring you to the menu to add a new routing list.

Edit routing list for *Art of Asia*.

Issue:

Recipients:

Name	Rank	Delete
Kapil Kumar	1	Delete

[Add recipients](#) [Delete all](#)

Notes:

From here you want to click 'Add recipients' in order to add people to the routing list. In the menu that appears you can filter patrons by part of their name, their library and/or patron category.

Filter :

Name:

Library:

Category:

Results 1 to 2 of 2 found for 'kapil'

Card	Name	Library	Add
23529001223650	kumar, kapil	CPL	Add
jivesna0001	Kumar, Kapil	CPL	Add

[Close](#)

Clicking 'Add' to the right of each name will add them to the routing list. When you have chosen all of the people for the list, click the 'Close' link to be redirected to the routing list.

Edit routing list for *Art of Asia*.

Issue:

Recipients:

Name	Rank	Delete
Kapil Kumar	1 <input type="text"/>	Delete

[Add recipients](#) [Delete all](#)

Notes:

If the list looks the way you expect it to, then click 'Save'. Next you will be brought to a preview of the routing list. To print the list click 'Save and preview routing slip.' This will open a printable version of the list.

Preview routing list for *Art of Asia*.

Issue:

List member:

Name
Kumar, Kapil

Notes:

If RoutingListAddReserves is set to on then patrons listed in the routing list will automatically be added to the holds list for the issue.

4. Subscriptions in Staff Client

Subscription information will appear on bibliographic records under the 'Subscriptions' tab

[+ New](#)
[Edit](#)
[Save](#)
[Add to List](#)
[Print](#)
[Place Hold](#)
[z39.50 Search](#)

Computers in libraries.

- **Published by:** [Meckler](#), (Westport, CT :)
- **Description:** v. : ill. ; 28 cm.
- **OPAC View:** [Open in new window](#)

- **ISSN:**1041-7915
- **Subjects:**
 - [Libraries -- Automation -- Periodicals.](#)
 - [Library science -- Computer programs -- Periodicals.](#)
 - [Minicomputers -- Periodicals.](#)
 - [Information technology -- Periodicals.](#)
 - [Information Systems -- Periodicals.](#)
 - [Libraries -- Periodicals.](#)
 - [Computers.](#)
 - [Bibliotheken.](#)
 - [Micro-ordinateurs -- Périodiques.](#)
 - [Bibliothèques -- Automatisation -- Périodiques.](#)
 - [COMPUTER APPLICATIONS.](#)
 - [LIBRARY AUTOMATION.](#)
 - [LIBRARIES.](#)
 - [MICROCOMPUTERS.](#)
 - [Automatisation](#)
 - [Bibliothèque](#)
 - [Micro-ordinateur](#)
- **Copyright:** 1988

[Holdings](#)
[Descriptions](#)
[Subscriptions](#)

This is a serial subscription

(There are 1 subscriptions associated with this title).

At library: Fairview

Combined issues in November & July.

The 3 latest issues related to this subscription:

Issue #	Date	Status	Note
Vol 28, No 7	07/15/2008	Arrived	
Vol 28, No 6	06/15/2008	Arrived	
Vol 28, No 5	05/15/2008	Arrived	

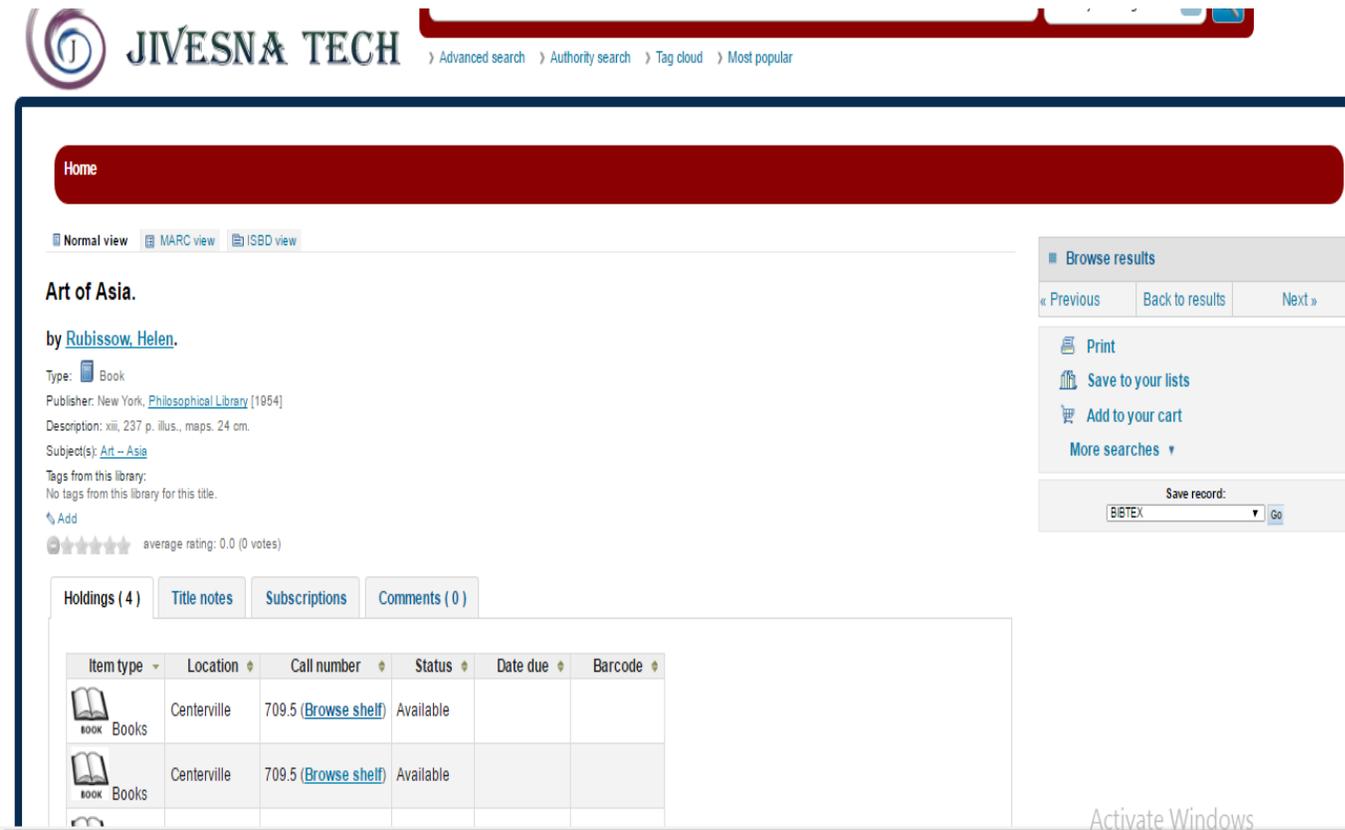
[Subscription Details](#)

Clicking the 'Subscription Details' link will take you to the Subscription summary page in the staff client.

5. Subscriptions in OPAC

When viewing the subscription in the OPAC there will be several options.

Like in the staff client, there will be a Subscriptions tab on the bibliographic record.



Home

Normal view | MARC view | ISBD view

Art of Asia.

by [Rubissow, Helen.](#)

Type: Book
 Publisher: New York: [Philosophical Library](#) (1954)
 Description: xiii, 237 p. illus., maps. 24 cm.
 Subject(s): [Art -- Asia](#)
 Tags from this library:
 No tags from this library for this title.
 Add
 average rating: 0.0 (0 votes)

Holdings (4) | Title notes | **Subscriptions** | Comments (0)

Item type	Location	Call number	Status	Date due	Barcode
Books	Centerville	709.5 (Browse shelf)	Available		
Books	Centerville	709.5 (Browse shelf)	Available		

Activate Windows

Browse results
 « Previous | Back to results | Next »

Print
 Save to your lists
 Add to your cart
 More searches ▾

Save record:
 BIBTEX Go

Under this tab will appear the number of issues you chose when setting up the subscription or in your OPACSerialIssueDisplayCount system preference. Clicking the 'More details' link will provide you with additional information about the serial history. You can set the default view of a serial in the OPAC with the SubscriptionHistory system preference.

There are two views, compact and full. The compact serial subscription will show basic information regarding the subscription

Issues for a subscription

[Normal View](#) [Full History](#)

Subscription information for Computers in libraries.

The current subscription began on 01/15/2009 and is issued every month for 10 issues

The first subscription was started on

The subscription expired on 01/15/2010

Fairview Combined issues in November & July.

Available Issues

Vol 28, No 5; Vol 28, No 6; Vol 28, No 7

Whereas the full view shows extensive details, broken out by year, regarding the subscription

Subscription information for Computers in libraries.

[Back to biblio](#)

[2008 Compact view](#)

Filters :

Library : Subscription :

Date	Library	Notes	Date received	Number	Status	Subscription
09/15/2008	FPL			Vol 28, No 8	Waiting	1
07/15/2008	FPL		07/15/2008	Vol 28, No 7	Arrived	1
06/15/2008	FPL		06/15/2008	Vol 28, No 6	Arrived	1
05/15/2008	FPL		05/15/2008	Vol 28, No 5	Arrived	1

Tools

Tools in Koha all perform some sort of action. Often many of the items listed under Tools in Koha are referred to as 'Reports' in other library management systems.

- *Get there:* More > Tools

1. Patrons and Circulation

1.1. Patron lists

- *Get there:* More > Tools > Patrons and Circulation > Patron lists

Patron lists are a way to store a group of patrons for easy modification via the batch patron modification tool or reporting.

Your patron lists

+ New patron list

Showing 1 to 1 of 1 Show 10 entries ◀ Previous Next ▶ Search:

Name ▲	Patrons in list ◆	◆	◆	◆
My Patrons	0	+ Add patrons 	✎ Edit	🗑 Delete

Showing 1 to 1 of 1 ◀ Previous Next ▶

To create a new list of patrons click the 'New patron list' button

o create a new list of patrons click the 'New patron list' button

New patron list

Create a new patron list

Name:

Owner: nce

Enter a list name and save the list.

My Patrons

Add patrons

Patron search:

No entries to show Show entries Search:

	Card	Firstname	Surname	Address	Category	Library	Expires on	Circ notes
No data available in table								

No entries to show

To add patrons to the list click the 'Add patrons' button to the right of the list name.



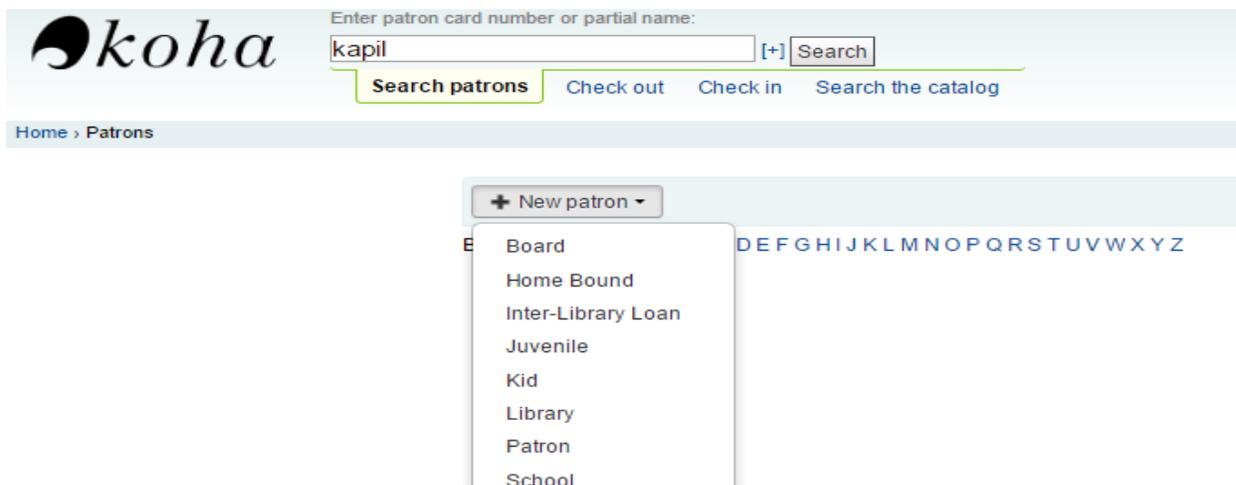
Enter patron card number or partial name:

[Search patrons](#) [Check out](#) [Check in](#) [Search the catalog](#)

[Home](#) > [Patrons](#)

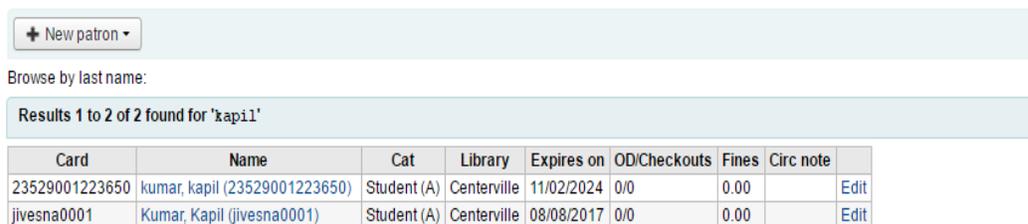
Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Enter the patron's name or cardnumber in the search box and click on the right result to add the patron.



The screenshot shows the Koha search interface. At the top left is the Koha logo. To its right is a search box with the text "Enter patron card number or partial name:" and the search term "kapil". Below the search box are buttons for "Search patrons", "Check out", "Check in", and "Search the catalog". Below this is a breadcrumb "Home > Patrons". A dropdown menu titled "+ New patron" is open, showing options: Board, Home Bound, Inter-Library Loan, Juvenile, Kid, Library, Patron, and School. To the right of the dropdown is a navigation bar with letters "E DEFGHIJKLMNOPQRSTUVWXYZ".

Once you have all of the patrons you would like to add you can click the 'Update' button to save them to the list.



The screenshot shows the search results for "kapil". It includes a "+ New patron" button, a "Browse by last name:" section, and a table of results. The table has columns for Card, Name, Cat, Library, Expires on, ODI/Checkouts, Fines, Circ note, and an Edit button.

Card	Name	Cat	Library	Expires on	ODI/Checkouts	Fines	Circ note	
23529001223650	kumar, kapil (23529001223650)	Student (A)	Centerville	11/02/2024	0/0	0.00		Edit
jivesna0001	Kumar, Kapil (jivesna0001)	Student (A)	Centerville	08/08/2017	0/0	0.00		Edit

1.2. Comments

- *Get there:* More > Tools > Patrons and Circulation > Comments

All comments added by patrons via the OPAC to bibliographic records require moderation by the librarians. If there are comments awaiting moderation they will be listed on the main page of the staff client below the module list:

-  **Circulation**
-  **Patrons**
-  **Advanced search**
-  **Lists**
-  **Course reserves**
-  **Cataloging**
-  **Authorities**

Comments pending approval: 1

and next to the Comments tool on the Tools Module

Patrons and circulation

Patron lists

Manage lists of patrons.

Comments 1

Moderate patron comments.

To moderate comments click on the notification on the main dashboard or go directly to the Comments Tool and click 'Approve' or 'Delete' to the right of the comments awaiting moderation.

Comments

Approved comments

Comments awaiting moderation

Committer	On title	Comment	
ambika batra	Lasher :	So much better than the newer vampire series.	Approve Delete

If there are no comments to moderate you will see a message saying just that

Comments

Approved comments

Comments awaiting moderation

No comments to moderate.

You can also review and unapprove comments you have approved in the past by choosing the 'Approved comments' tab

[+ New patron](#)

Browse by last name:

Results 1 to 2 of 2 found for 'kapil'

Card	Name	Cat	Library	Expires on	OD/Checkouts	Fines	Circ note	
23529001223650	kumar, kapil (23529001223650)	Student (A)	Centerville	11/02/2024	0/0	0.00		Edit
jivesna0001	Kumar, Kapil (jivesna0001)	Student (A)	Centerville	08/08/2017	0/0	0.00		Edit

1.3. Patron Import

- *Get there:* More > Tools > Patrons and Circulation > Import Patrons

The patron import tool can be used at any time to add patrons in bulk. It is commonly used in universities and schools when a new batch of students registers.

Home > Tools > Import patrons

> Tools home

Patrons and circulation

- > Comments
- > **Import patrons**
- > Notices & slips
- > Overdue notice/status triggers
- > Patron card creator
- > Batch patron deletion/anonymization
- > Batch patron modification
- > Tag moderation
- > Upload patron images

Catalog

- > Batch item deletion
- > Batch item modification
- > Export data
- > Inventory/stocktaking
- > Label creator

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: No file chosen

Field to use for record matching

Default values

cardnumber:

surname:

firstname:

title:

othernames:

1.3.1. Creating Patron File

Your Koha installation comes with a blank CSV file that you can use as a template for your patron records. If you would like to create the file yourself, make sure that your file has the following fields in this order as the header row:

cardnumber, surname, firstname, title, othernames, initials, streetnumber, streettype, address, address2, city, state, zipcode, country, email, phone, mobile, fax, emailpro, phonepro, B_streetnumber, B_streettype, B_address, B_address2, B_city, B_state, B_zipcode, B_country, B_email, B_phone, dateofbirth, branchcode, categorycode, dateenrolled, dateexpiry, gonenoaddress, lost, debarred, debarredcomment, contactname, contactfirstname, contacttitle, guarantorid, borrowernotes, relationship, ethnicity, ethnotes, sex, password, flags, userid, opacnote, contactnote, sort1, sort2, altcontactfirstname, altcontactsurname, altcontactaddress1, altcontactaddress2, altcontactaddress3, altcontactstate, altcontactzipcode, altcontactcountry, altcontactphone, smsalertnumber, privacy, patron_attributes

Important

The 'password' should be stored in plaintext, and will be converted to a Bcrypt hash.

If your passwords are already encrypted, talk to your systems administrator about options

Important

Date formats should match your system preference, and must be zero-padded, e.g. '01/02/2008'.

Important

The fields 'branchcode', 'categorycode' and all fields you have defined in the BorrowerMandatoryField preference are required and must match valid entries in your database.

Note

If loading patron attributes, the 'patron_attributes' field should contain a comma-separated list of attribute types and values.

- The attribute type code and a colon should precede each value.
 - For example: "INSTID:12345,BASEBALL:Cubs"
 - This field must be wrapped in quotes if multiple values are defined.
 - Since values can contain spaces, additional doubled-quotes may be required:
 - "INSTID:12345,BASEBALL:Cubs,""BASEBALL:White Sox""
 - When replacing a patron record, any attributes specified in the input file replace all of the attribute values of any type that were previously assigned to the patron record.

1.3.2. Importing Patrons

Once you have created your file, you can use the Patron Import Tool to bring the data into Koha.

- Choose your CSV file

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: No file selected.

- Choose to match on 'Cardnumber' or 'Username' to prevent adding of duplicate card numbers to the system

Field to use for record matching

Cardnumber
 Cardnumber
 Username

Default values

- Next you can choose default values to apply to all patrons you are importing
 - ex. If you're importing patrons specific to one branch you can use the field on the Import form to apply the branch code to all those you are importing.
- Finally you need to decide on what data you want to replace if there are duplicates.

If matching record is already in the borrowers table:

Ignore this one, keep the existing one

Overwrite the existing one with this

- A matching record is found using the field you chose for matching criteria to prevent duplication
- If you included patron attributes in your file you can decide whether to add your values to existing values or erase existing values and enter only your new values.

1.4. Notices & Slips

- *Get there:* More > Tools > Patrons and Circulation > Notices & Slips

All notices and circulation receipts (or slips) generated by Koha can be customized using the Notices & Slips Tool. The system comes with several predefined templates that will appear when you first visit this tool.

Notices and Slips

Select a library :

[+ New notice](#)

Library ▲	Module ◆	Code ◆	Name ◆	Copy notice		
(All libraries)	circulation	CHECKIN	Item Check-in (Digest)	<input type="text" value="Copy to Centerville"/> Copy Edit		
(All libraries)	circulation	CHECKOUT	Item Check-out (Digest)	<input type="text" value="Copy to Centerville"/> Copy Edit		
(All libraries)	circulation	DUE	Item Due Reminder	<input type="text" value="Copy to Centerville"/> Copy Edit		
(All libraries)	circulation	DUEDGST	Item Due Reminder (Digest)	<input type="text" value="Copy to Centerville"/> Copy Edit		
(All libraries)	circulation	ISSUEQSLIP	Issue Quick Slip	<input type="text" value="Copy to Centerville"/> Copy Edit Delete		
(All libraries)	circulation	ISSUESLIP	Issue Slip	<input type="text" value="Copy to Centerville"/> Copy Edit Delete		
(All libraries)	circulation	ODUE	Overdue Notice	<input type="text" value="Copy to Centerville"/> Copy Edit Delete		
(All libraries)	circulation	PREDUE	Advance Notice of Item Due	<input type="text" value="Copy to Centerville"/> Copy Edit		
(All libraries)	circulation	PREDUEDGST	Advance Notice of Item Due (Digest)	<input type="text" value="Copy to Centerville"/> Copy Edit		
(All libraries)	circulation	RENEWAL	Item Renewals	<input type="text" value="Copy to Centerville"/> Copy Edit Delete		
(All libraries)	circulation	RESERVESLIP	Reserve Slip	<input type="text" value="Copy to Centerville"/> Copy Edit Delete		

Each notice can be edited, but only a few can be deleted, this is to prevent system errors should a message try to send without a template. Each notice and slip can be edited on a per library basis, by default you will see the notices for all libraries.

If you have a style you'd like applied to all slips you can point the SlipCSS preference to a stylesheet. The same is true for notices, using the NoticeCSS preference to define a stylesheet.

You will also want to review the Notices & Slips Field Guide for more information on formatting these notices.

1.4.1. Adding Notices & Slips

To add a new notice or slip

- Click 'New Notice'

Add notice

Library:

Koha module:

Code: *Required*

Name: *Required*

▶ Email

▶ Phone

▶ Print

▶ SMS

- Choose which library this notice or slip is for
- Choose the module this notice is related to
- The Code is limited to 20 characters
 - **Note**

When working with the overdue notices you want each notice at each branch to have a unique code. Think about using the branch code in front of the notice code for each branch.
- Use the name field to expand on your Code
 - **Note**

With overdue notices, be sure to put your branch name in the description as well so that it will be visible when setting up your triggers.
- Next you can customize the notice for every possible delivery method
 - Every notice should have an Email template set for it

Add notice

Library: All libraries

Koha module: Catalog

Code: *Required*

Name: *Required*

▶ **Email**

▼ **Phone**

You should enable the TalkingTechtivaPhoneNotification preference to use the phone templates.

HTML message:

Message subject:

Message body:

<pre>---BRANCHES--- branches.branchcode branches.branchname branches.branchaddress1 branches.branchaddress2 branches.branchaddress3 branches.branchzip branches.branchcity branches.branchstate</pre>	<input type="text"/>
---	----------------------

- If you plan on printing this notice you can set the Print template next

JIVESNA

Add notice

Library: All libraries
Koha module: Catalog
Code: *Required*
Name: *Required*

Email
 Phone
 Print

HTML message:
Message subject:
Message body:

```

---BRANCHES---
branches.branchcode
branches.branchname
branches.branchaddress1
branches.branchaddress2
branches.branchaddress3
branches.branchzip
branches.branchcity
branches.branchstate

```

- If you have enabled SMS notices with the SMSSendDriver preference you can set the text for your SMS notices next

Add notice

Library: All libraries
Koha module: Catalog
Code: *Required*
Name: *Required*

Email
 Phone
 Print
 SMS

You should enable the SMSSendDriver preference to use the SMS templates.

HTML message:
Message subject:
Message body: 0/160 characters

```

---BRANCHES---
branches.branchcode
branches.branchname
branches.branchaddress1
branches.branchaddress2
branches.branchaddress3
branches.branchzip
branches.branchcity
branches.branchstate

```

- Each notice offers you the same options
 - If you plan on writing the notice or slip in HTML check the 'HTML Message' box, otherwise the content will be generated as plain text

- Message Subject is what will appear in the subject line of the email
- In the message body feel free to type whatever message you feel is best, use the fields on the left hand side to enter individualized data from the from database.

1.4.1.1. Overdue Notice Markup

When creating your overdue notices there are two tags in addition to the various database fields that you can use in your notices.

Note

These new tags only work on the overdue notices, not other circulation related notices at this time.

These tags are `<item>` and `</item>` which should enclose all fields from the biblio, biblioitems, and items tables.

An example of using these tags in a notice template might be like:

The following item(s) is/are currently overdue:

```
<item>"<<biblio.title>>" by <<biblio.author>>, <<items.itemcallnumber>>,
Barcode: <<items.barcode>> Fine: <<items.fine>></item>
```

1.4.2. Existing Notices & Slips

Among the default notices are notices for several common actions within Koha. All of these notices can be customized by altering their text via the Notices & Slips tool and their style using the NoticeCSS preference to define a stylesheet. You will also want to review the Notices & Slips Field Guide for information on formatting item information in these notices. Here are some of what those notices do:

- ACCTDETAILS
 - Sent to patrons when their account is set up if the AutoEmailOPACUser preference is set to 'Send'
- ACQCLAIM (Acquisition Claim)
 - Used in the claim acquisition module
 - *Get there:* More > Acquisitions > Late issues
- CHECKIN
 - This notice is sent as the 'Check in' notice for all items that are checked in
 - This notice is used if two criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The patron has requested to receive this notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
- CHECKOUT
 - This notice is sent as the 'Check out' notice for all items that are checked out
 - This notice is used if two criteria are met:

1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The patron has requested to receive this notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
- **DUE**
 - This notice is sent as the 'Item due' for an item is due
 - This notice is used if two criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The patron has requested to receive this notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
 - **DUEDGST**
 - This notice is sent as the 'Item due' for all items that are due
 - This notice is used if two criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The patron has requested to receive this notice as a digest
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
 - **HOLD (Hold Available for Pickup)**
 - This notice is used if two criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The patron has requested to receive this notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
 - When this notice references the branches table it is referring to the pickup branch information.
 - **HOLDPLACED (a notice to the library staff that a hold has been placed)**
 - This notice requires the emailLibrarianWhenHoldIsPlaced system preference to be set to 'Enable'
 - When this notice references the branches table it is referring to the pickup branch information.
 - **ODUE (Overdue Notice)**
 - This notice is used to send Overdue Notices to Patrons
 - See a Sample Overdue Notice
 - Requires that you set Overdue Notice/Status Triggers
 - **PREDUE**
 - This notice is sent as the 'Advanced notice' for an item is due
 - This notice is used if two criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The patron has requested to receive this notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
 - **PREDUEDGST**
 - This notice is sent as the 'Advanced notice' for all items that are due
 - This notice is used if two criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'

2. The patron has requested to receive this notice as a digest
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
- **RENEWAL**
 - This notice is sent as the 'Check out' notice for all items that are renewed
 - This notice is used if three criteria are met:
 1. The EnhancedMessagingPreferences is set to 'Allow'
 2. The RenewalSendNotice preference is set to 'Send'
 3. The patron has requested to receive the checkout notice
 - *Get there:* OPAC > Login > my messaging
 - *Get there:* Staff Client > Patron Record > Notices
 - **RLIST (Routing List)**
 - Used in the serials module to notify patrons/staff of new issues of a serial
 - *Get there:* More > Serials > New Subscription
 - You have the option to select the 'Routing List' notice when creating a new subscription (Choose from the 'Patron notification' drop down).
 - **Note**

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
 - **SHARE_ACCEPT**
 - Used to notify a patron when another patron has accepted their shared list.
 - Requires that you set OpacAllowSharingPrivateLists to 'Allow'
 - **SHARE_INVITE**
 - Used to notify a patron that another patron would like to share a list with them.
 - Requires that you set OpacAllowSharingPrivateLists to 'Allow'

There are also a set of predefined slips (or receipts) listed on this page. All of these slips can be customized by altering their text via the Notices & Slips tool and their style using the SlipCSS preference to define a stylesheet. Here is what those slips are used for:

- **ISSUEQSLIP**
 - Used to print the quick slip in circulation
 - The quick slip only includes items that were checked out today
- **ISSUESLIP**
 - Used to print a full slip in circulation
 - The slip or receipt will show items checked out today as well as items that are still checked out
- **RESERVESLIP**
 - Used to print a holds slip
 - The holds slip is generated when a hold is confirmed
- **TRANSFERSLIP**
 - Used to print a transfer slip
 - The transfer slip is printed when you confirm a transfer from one branch to another in your system

1.5. Overdue Notice/Status Triggers

- *Get there:* More > Tools > Patrons and Circulation > Overdue Notice/Status Triggers

In order to send the overdue notices that you defined using the Notices tool, you need to first set the triggers to have these messages.

Note

In order to have overdue notices sent to your patrons, you need to set that patron category to require overdue notices.

Note

Depending on the value of your OverdueNoticeCalendar preference the delay may or may not include days the library is closed based on the holiday calendar.

The Overdue Notice/Status Triggers tool gives the librarian the power to send up to three notices to each patron type notifying them of overdue items

Select a library:

Rules for overdue actions: default library

First

Second

Third

	Delay	Letter	Restrict	Email	Feed	Phone	Print	SMS
Adult Patron	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Board	<input type="text"/>	Overdue Notices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Bound	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inter-Library Loan	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Juvenile	1	Overdue Notices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kid	1	Overdue Notices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Library	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patron	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Young Adult	<input type="text"/>	No notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Delay is the number of days after an issue is due before an action is triggered.

Note

If you want Koha to trigger an action (send a letter or restrict member), a delay value is required.

- To send additional notices, click on the tabs for 'Second' and 'Third' notice

- If you would like to prevent a patron from checking items out because of their overdue items, check the 'Restrict' box, this will put a notice on the patron's record at checkout informing the librarian that the patron cannot check out due to overdue items.
 - If you choose to restrict a patron in this way you can also have Koha automatically remove that restriction with the `AutoRemoveOverduesRestrictions` preference.
- Next you can choose the delivery method for the overdue notice. You can choose from Email, Phone (if you are using the iTiva Talking Tech service), Print and SMS (if you have set your `SMSSendDriver`).
 - **Note**

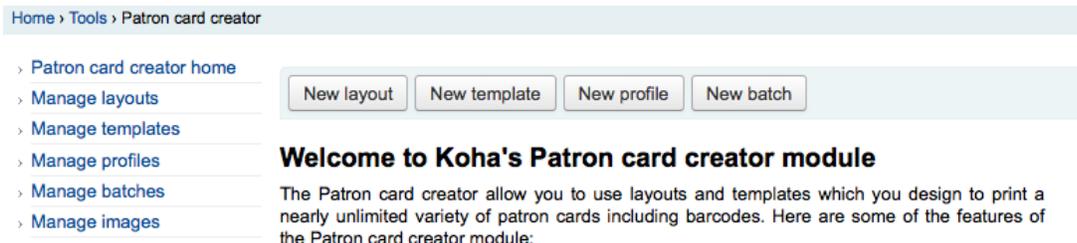
The Feed option is not yet a feature in Koha, it is there for future development.

1.6. Patron Card Creator

- *Get there:* More > Tools > Patron Card Creator

The Patron Card Creator allow you to use layouts and templates which you design to print your custom patron cards on your printer. Here are some of the features of the Patron Card Creator module:

- Customize patron card layouts with text retrieved from the Koha patron data
- Design custom card templates for printed patron cards (to match the label sheets)
- Build and manage batches of patron cards to print
- Export (as PDF) single or multiple batches to print
- Export (as PDF) single or multiple patron cards from within a batch



At the top of each screen within the Patron Card Creator, you will see a toolbar allowing quick access to relevant functions. The menu to the left of each screen also allows easy access to the different sections of the Patron Card Creator. The bread crumb trail at the top left of each screen will give specific indication as to where you are within the Patron Card Creator module and allow quick navigation to previously traversed sections. Finally, you can find more detailed information on each section of the Patron Card Creator by clicking the 'Help' link at the upper right-hand corner of every page.

1.6.1. Layouts

- *Get there:* More > Tools > Patron Card Creator > Manage layouts

A layout defines the text and images that will be printed on to the card and where it will appear.

Note

Up to three lines of text, the patron's number in barcode representation and up to two images can be printed on to the card.

1.6.1.1. Add a Layout

If you have no layouts defined, you will add a new layout by clicking the 'New layout' button at the top of your screen.



Welcome to Koha's Patron card creator module

You may also choose to press 'Manage layout' on the left side. Here you are offered a list of available layouts you can select for editing. But at the top of the page there is still the 'New layout' button.

Edit Patron card text layout

General settings

Layout name

Units:

Page side: Front Back

Guide box: On Off

Text fields

Field 1

Text

<firstname> <surname>

Font

Font size pt

Text alignment

Lower left X coordinate pt

Lower left Y coordinate pt

Field 2

Field 3

Edit Patron card graphic layout

Barcode

Print card number as barcode

Lower left X coordinate

Lower left Y coordinate

Barcode type

Print card number as text under barcode

Images

Image 1

Image source

Display height pt

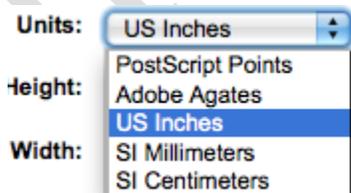
Lower left X coordinate pt

Lower left Y coordinate pt

Image 2

Image source

- The name you assign to the layout is for your benefit, name it something that will be easy to identify at a later date
- The Units pull down is used to define what measurement scale you're going to be using for your layout.



- Note

A Postscript Point is 1/72" an Adobe Agate is 1/64", an Inch is 25.4 SI Millimeters

- Next note if this layout is for the front or the back of the patron card

- **Note**

You will need a layout for both the front and back of your card if you have 2-sided library cards, this option doesn't allow you to print two sided cards, just lets you track which side of the card you're designing.

- You have the option of adding up to 3 lines of text to your card. Your text can be static text of your choosing and/or fields from the patron record. If you want to print fields from the patron record you want to put the field names in brackets like so - <firstname>

- **Note**

A full list of field names can be found in the database schema at <http://schema.koha-community.org>

- For each line of text, you can choose your font, font size and the location of the text on the card using the lower X and Y coordinates
- In order to show the barcode and the patron card number you will need to check the 'Print Card Number as Barcode' option. This will turn the patron card number into a barcode. If you want the number to print in human readable format you will need to check the 'Print Card Number as Text Under Barcode' option.
- Finally you can choose up to two images to print on the card.
 - One can be the patron image which you can resize to meet your needs.
 - The other image can be something like a library logo or symbol that you uploaded using the 'Manage Images' module of the Patron Card Creator Tool.

Important

It is the designers responsibility to define textlines, barcode and images such that overlap is avoided.

After saving, your layouts will appear on the 'Manage layouts' page.

Current Branch: Fairview

Currently Available Layouts

Layout ID	Layout	Select
20	Student Cards	<input type="checkbox"/>

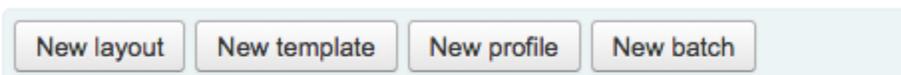
1.6.2. Templates

- *Get there:* More > Tools > Patron Card Creator > Manage templates

A template describes the arrangement of labels on the label sheet/card stock you are using. This might be Avery 5160 for address labels, Gaylord 47-284 for spine labels or Avery 28371 for your patron cards, just to give a couple of examples. All of the information you will need for setting up a template may be on the packaging, and if not it can usually be found on the vendor's website or can be measured from a sample sheet.

1.6.2.1. Add a Template

To add a new template click on the 'New template' button at the top of your page which brings you to the Edit template form immediately. You may also choose to press 'Manage templates' on the left side. Here you are offered a list of available templates you can select for editing. But in the top of the page there is still the 'New template' button.



Welcome to Koha's Patron card creator module

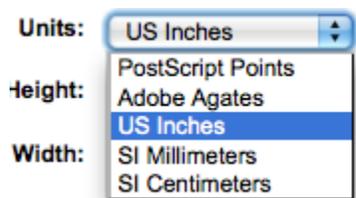
Using the form that appears after pressing either 'Edit' or 'New template' you can define the template for your sheet of labels or cards.

Edit patron card template

Template ID: 23 Template code: <input type="text" value="HB-PC0001"/> Template description: <input type="text" value="A template for home brewed patron card forms"/> Units: <input type="text" value="US Inches"/> <input type="button" value="v"/> Page height: <input type="text" value="11"/> in Page width: <input type="text" value="8.5"/> in Card width: <input type="text" value="3.1875"/> in Card height: <input type="text" value="1.9375"/> in	Top page margin: <input type="text" value="0.6875"/> in Left page margin: <input type="text" value="0.875"/> in Number of columns: <input type="text" value="2"/> Number of rows: <input type="text" value="4"/> Gap between columns: <input type="text" value="0.4375"/> in Gap between rows: <input type="text" value="0.1875"/> in Profile: <input type="text" value="Test Printer 01/Test Bin"/> <input type="button" value="v"/>
--	--

- Template ID is simply a system generated unique id
- Template Code should be the name of this template to identify it on a list of templates

- You can use the Template Description to add additional information about the template
- The Units pull down is used to define what measurement scale you're going to be using for the template.



- **Note**

A Postscript Point is 1/72" an Adobe Agate is 1/64", an Inch is 25.4 SI Millimeters

- The measurements (page height, page width, card width, card height) may be on the packaging, and if not it can usually be found on the vendor's website or can be measured from a sample sheet.
- A profile is a set of "adjustments" applied to a given template just prior to printing which compensates for anomalies unique and peculiar to a given printer (to which the profile is assigned).
 - Before defining a profile try printing some sample cards so that you can take measurements to define a profile to perform the right adjustments for your printer/template combination.
 - After finding and documenting any anomalies in the printed document, then you can create a profile and assign it to the template.

- **Note**

Do not specify a profile unless needed, i.e. do not click to define a printer profile. It is not possible to remove a profile from a template but you can switch to another profile.

- **Note**

If you are using different printers you may be required to define several templates that are identical only different profiles are specified.

After saving, your templates will appear on the 'Manage templates' page.

Current Branch: Fairview

Currently Available Templates

Template ID	Template Name	Description	Select
23	HB-PC0001	A template for home brewed patron card forms	<input type="checkbox"/>

1.6.3. Profiles

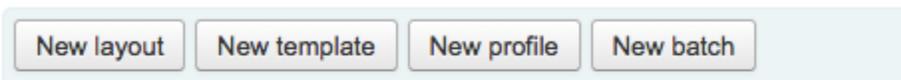
- *Get there:* More > Tools > Patron Card Creator > Manage profiles

A profile is a set of "adjustments" applied to a given template just prior to printing which compensates for anomalies unique and peculiar to a given printer. This means if you set a template up and then print a sample set of data and find that the items are not all aligned the same on each card, you need to set up a profile for each printer (or even different tray selections on the same printer) to make up for the differences in printing styles, such as the shifting of text to the left, right, top or bottom.

If your cards are printing just the way you want, you will not need a profile.

1.6.3.1. Add a Profile

To add a new profile, you want to click on the 'Profiles' button at the top of your page and choose 'New Profile'



Welcome to Koha's Patron card creator module

To add a new profile, you want to click on the 'New profile' button at the top of your page. Using the form that appears you can define the values to correct the card misalignments on your label sheet. You may also choose 'Manage profiles' on the left side and select one of the currently available profiles for editing.

Edit printer profile

Profile settings

Printer name:

Paper bin:

Template name: Profile unassigned

Units:

Offset:

Horizontal: pt

Vertical: pt

Creep:

Horizontal: pt

Vertical: pt

- The Printer Name and Paper Bin do not have to match your printer exactly, they are for your reference so you can remember what printer you have set the profile for.

- Note**

For example: if you want to use the Printer model number in printer name you can, or you can call it 'the printer on my desk'

- Template will be filled in once you have chosen which template to apply the profile to on the template edit form
- The Units pull down is used to define what measurement scale you're going to be using for your profile.

Units:

Height:

Width:

- Note**

A Postscript Point is 1/72" an Adobe Agate is 1/64", an Inch is 25.4 SI Millimeters

- Offset should be used when the entire image is off center either vertically or horizontally. Creep describes a condition where the distance between the labels changes across the page or up and down the page
 - For offset and creep values, negative numbers move the printed information up and to the left on the printed sheet and positive numbers move down and to the right
 - Example: the text is printed 0 .25" from the left edge of the first label, 0 .28" from the left edge of the second label and 0 .31" from the left edge of the third label. This means the horizontal creep should be set to (minus) -0.03 " to make up for this difference.

After saving, your profiles will appear on the 'Manage Profiles' page.

Current Branch: Fairview

Currently Available Profiles

Profile ID	Printer Name	Paper Bin	Template Name	Select
16	Test Printer 01	Test Bin	HB-PC0001	<input type="checkbox"/>

 Edit  Delete

Once you have saved your new profile, you can return to the list of templates and choose to edit the template that this profile is for.

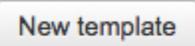
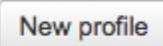
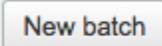
1.6.4. Batches

- *Get there:* More > Tools > Patron Card Creator > Manage batches

A batch is a collection of patrons for whom you want to generate cards.

1.6.4.1. Add a Batch

To add a new batch, you want to click on the 'New batches' button at the top of your page. Choosing the menu item 'Manage batches' on the left a list of already defined batches is displayed. In this display you can either select a batch for editing or add a new batch.

Welcome to Koha's Patron card creator module

For a new batch a message pops up and directs you to select patrons to be processed in this batch.

Current library: Nicole's Library

There are no items in batch 1 yet
Use the toolbar above to add items.

After choosing the 'Add item(s)' button the Patron Search window pops up.

Search for patron

Search:

Category:

Library:

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](#)

[Close](#)

From here you can search for patrons to add to your batch by any part of their name, their category and/or library. Entering * in the search box will display all the patrons.

Patron Search

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](#)

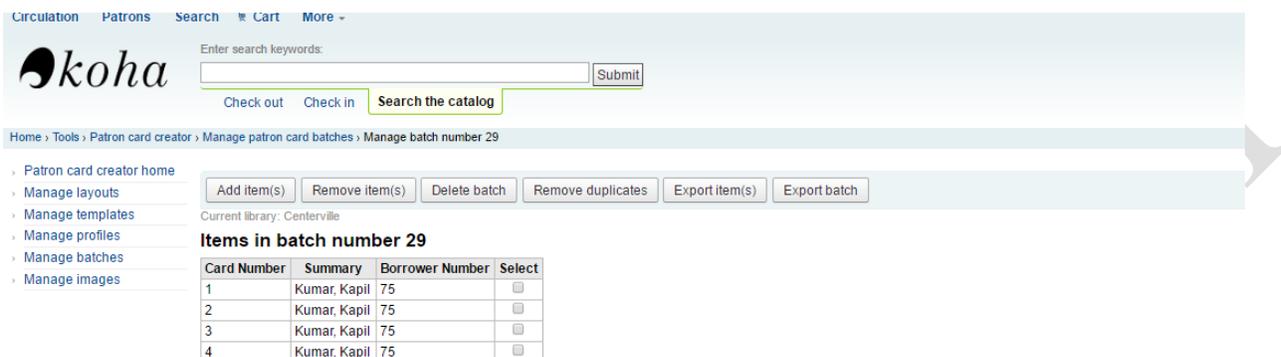
Name: Category code:

Results 1 to 2 of 2 found for name: 'kapil'

Select All

Select	Card	Name	Category	Library	Expires on	Notes
<input type="checkbox"/>	23529001223650	kumar, kapil	Student (ST)	CPL	11/02/2024	Add
<input type="checkbox"/>	jivesna0001	Kumar, Kapil	Student (ST)	CPL	08/08/2017	Add

From the results you can add patrons to the batch by clicking the 'Add' button. After adding patrons from the results you can start over and perform another search or click 'Close' at the bottom of the screen to indicate that you are done. You will then be presented with your batch.



The screenshot shows the Koha interface with the following elements:

- Navigation menu: Circulation, Patrons, Search, Cart, More -
- Koha logo and search bar: Enter search keywords: [input] Submit
- Buttons: Check out, Check in, Search the catalog
- Breadcrumb: Home > Tools > Patron card creator > Manage patron card batches > Manage batch number 29
- Batch management buttons: Add item(s), Remove item(s), Delete batch, Remove duplicates, Export item(s), Export batch
- Current library: Centerville
- Section: **Items in batch number 29**
- Table:

Card Number	Summary	Borrower Number	Select
1	Kumar, Kapil	75	<input type="checkbox"/>
2	Kumar, Kapil	75	<input type="checkbox"/>
3	Kumar, Kapil	75	<input type="checkbox"/>
4	Kumar, Kapil	75	<input type="checkbox"/>

If you are satisfied with your batch you can proceed to export. If you want to correct or even delete that batch the buttons to do so can be found at the top of your screen. You can always come back here through the 'Manage batches' menu item.

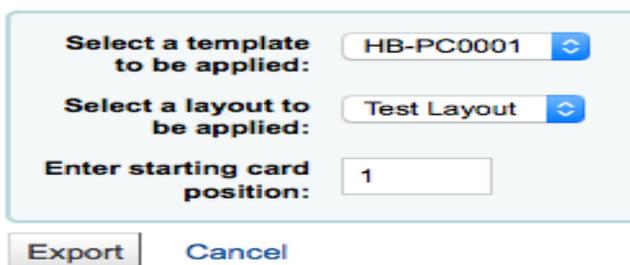
If you would like to export all patron cards you can click 'Export batch' otherwise you can choose specific patrons to print cards for by checking the box to the right of their names and then choose 'Export item(s)' at the top.

The export menu will ask you to choose a template, a layout and starting position (where on the sheet should printing begin).

Note

For the starting position if the first 6 labels have already been used on your sheet you can start printing on label in position 7 on the sheet. The labels are numbered left to right from top to bottom.

1 batch to export



The dialog box contains the following fields and buttons:

- Select a template to be applied: HB-PC0001
- Select a layout to be applied: Test Layout
- Enter starting card position: 1
- Buttons: Export, Cancel

Once you click 'Export' you will be presented with a PDF of your labels for printing



Kapil Kumar

Branch: Centerville

Expires: August 31, 2010

The above image shows a layout that is made up of two textlines. The first one is just plain text, the second one is composed of the <firstname> <surname> fields. A patron image is printed (if available) and the barcode of patrons number is displayed in code 39. All this is printed on a template with three columns and 8 rows using position 1-3 here. When printing this PDF please take care that your printer doesn't rescale the PDF (e.g do not fit to paper size) otherwise the printer will not be able to print to the right place per your templates.

1.6.5. *Manage Images*

- *Get there:* More > Tools > Patron Card Creator > Manage Images

Images uploaded using this tool will appear on the menu when creating patron card layouts. You are limited in how many images you can upload (not counting patron images) by the ImageLimit system preference.

Important

Images must be under 500k in size.

Note

Pictures uploaded with this tool should be at least 300dpi which is the minimum quality for a printable image.

In the center of the screen is a simple upload form, simply browse for the file on your computer and give it a name you'll recognize later.

Upload Images

NOTE: Only PNG, GIF, JPEG, XPM formats are supported. Images must be less than 500KB.

Select the file to upload:

Image name:

This will be the name by which you will refer to this image in the patron card layout editor.

Delete Images

No images are currently available.

Once the file is uploaded you will be presented with a confirmation message.



And the image will be listed with all of your others on the right hand side of the page.

Delete Images

Select one or more images to delete.

ID	Name	Select
3	Koha Logo	<input type="checkbox"/>
1	nicole	<input type="checkbox"/>

To delete one or multiple of these images, click the checkbox to the right of each image you want to delete and click the 'Delete' button.

1.7. Patrons (anonymize, bulk-delete)

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

This tool allows you to bulk anonymize circulation histories (this means that you keep records of how many times items were checked out - but not the patrons who checked the items out) or bulk delete patrons (remove them from the system completely).

Important

Patrons with outstanding fines or items checked out are not saved. They are not completely removed from the system (they are only moved to the delete_borrowers table), but this tool does not provide as many checks as one may desire.

Important

Before using this tool it is recommended that you backup your database. Changes made here are permanent.

Important

The anonymization will fail quietly if AnonymousPatron preference does not contain a valid value.

Batch patron deletion/anonymization

This tool allows you to delete patrons and anonymize checkout history. For deleting patrons, any combination of limits can be used.

Delete patrons

Verify you want to delete patrons

Delete patrons who meet the following criteria:

- who have not borrowed since: (MM/DD/YYYY)
- whose expiration date is before: (MM/DD/YYYY)
- whose patron category is:

Anonymize checkout history

Verify you want to anonymize patron checkout history

- Permanently delete checkout history older than (MM/DD/YYYY)

To either delete or anonymize patrons

- Check the 'Verify' box on the task you would like to complete (Delete or Anonymize)
 - Enter a date before which you want to alter the data
 - If deleting patrons you can also choose to find patrons with a specific expiration date or category
 - Click 'Next'
 - A confirmation will appear asking if you're sure this is what you want to happen
-
- Clicking 'Finish' will delete or anonymize your data

No patron records have been removed

All patrons with checkouts older than 2012-01-01 have been anonymized

1.8. Batch patron modification

- *Get there:* More > Tools > Patrons and Circulation > Batch patron modification

With this tool you can make edits to a batch of patron records. Simply load in a file of cardnumbers (one per line), choose from a list of patrons or scan patron card numbers in to the box provided.

Batch patron modification

Use a file

File: No file selected.

Or use a patron list

Patron list:

Or list cardnumbers one by one

Card number list
(one cardnumber
per line):

9876543456
9876543457

Once you have the file loaded or the barcodes scanned click 'Continue.' You will be presented with a list of the patrons and the changes you can make.

Batch patrons modification

Select all | Clear all

Card number	Surname	First name	Library	Category	City	State	Zip/Postal code	Country	Registration date	Expiry date
<input checked="" type="checkbox"/> 23529001223637	Engard	Nicole	Centerville	S					01/14/2015	04/14/2023

Edit patrons

Checking the box right next to the label will disable the entry and delete the values of that field on all selected patrons

Surname: Required fields cannot be cleared
 First name:
 Library:
 Category:
 City:
 State:
 Zip/Postal code:
 Country:
 Sort 1:
 Sort 2:
 Registration date:
 Expiry date:
 Circulation note:
 Attribute:

To the left of each text box there is a checkbox. Clicking that checkbox will clear our the field values.

Note

If the field is mandatory you will not be able to clear the value in it.

If you have multiple patron attributes you can change them all by using the plus (+) sign to the right of the text box. This will allow you to add another attribute value.

Attribute +
 Attribute + [X]

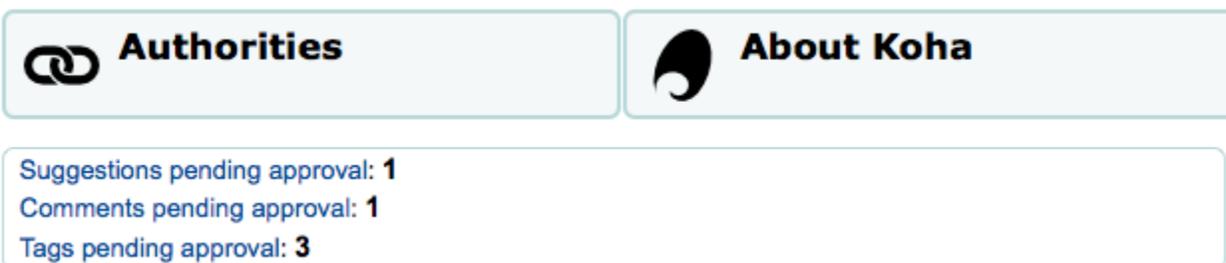
- Student ID
- Driver's License**
- Show Barcode in OPAC
- Resident
- Home Branch

Once you have made the changes you want, you can click 'Save' and Koha will present you with the changed patron records.

1.9. Tag Moderation

- *Get there:* More > Tools > Patrons and Circulation > Tags

Depending on your tagging system preferences, librarians may need to approve tags before they are published on the OPAC. This is done via the Tag Moderation Tool. If there are tags awaiting moderation they will be listed on the main staff dashboard under the module labels:



The screenshot shows two module labels: 'Authorities' with a link icon and 'About Koha' with a Koha logo icon. Below them is a summary box containing the following information:

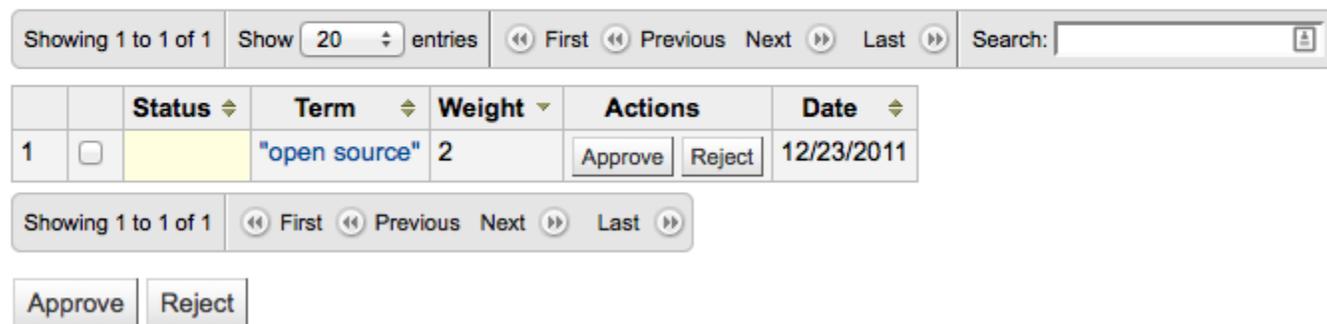
- Suggestions pending approval: 1
- Comments pending approval: 1
- Tags pending approval: 3

To moderate the tags visit the Tags tool. When first visiting the tool, you will be presented with a list of tags that are pending approval or rejection by a librarian

Tags

Displaying Pending Terms

Select: [All](#) [Pending](#) [None](#)



The screenshot shows the Tag Moderation tool interface. At the top, it displays 'Showing 1 to 1 of 1' and a 'Show 20 entries' dropdown. Navigation buttons include 'First', 'Previous', 'Next', and 'Last'. A search box is also present. Below this is a table with the following data:

	Status	Term	Weight	Actions	Date
1	<input type="checkbox"/>	"open source"	2	<input type="button" value="Approve"/> <input type="button" value="Reject"/>	12/23/2011

Below the table, there are additional navigation buttons ('First', 'Previous', 'Next', 'Last') and two large buttons: 'Approve' and 'Reject'.

- To see all of the titles this tag was added to simply click on the term

- [Approved tags](#)
- [Rejected tags](#)
- [Pending tags](#)
- [All tags](#)

Titles tagged with the term *wizards*

Showing 1 to 11 of 11		Show <input type="text" value="20"/> entries	« First « Previous Next » Last »
Search: <input type="text"/>			
Title	Location		
Harry Potter and the Chamber of Secrets / Rowling, J. K. - Arthur A. Levine Books, New York : - viii, 341 p. : 24 cm. "Year 2"--Spine. Sequel to: Harry Potter and the sorcerer's stone. Sequel: Harry Potter and the prisoner of Azkaban. Tagged with: wizards (11)	<ul style="list-style-type: none"> Nicole's Library (PZ7.R79835 Haj 1999) 	Remove tag	
Harry Potter and the deathly hallows / Rowling, J. K. - Arthur A. Levine Books, New York, NY : - 759 p. : 24 cm. Sequel to: Harry Potter and the Half-Blood Prince. Tagged with: magic (10), wizards (11)	<ul style="list-style-type: none"> Nicole's Library (PZ7.R79835 Hak 2007) Nicole's Library (PZ7.R79835 Hak 2007) 	Remove tag	

- From this list of titles you can remove a tag without outright rejecting it from being used in the future by clicking the 'Remove tag' button to the right of the title.
- To approve a tag, you can either click the 'Approve' button in line with the term, or check all terms you want to approve and click 'Approve' below the table.
- To reject a tag, you can either click the 'Reject' button in line with the term, or check all terms you want to approve and click 'Reject' below the table.

Once a tag has been approved or rejected it will be moved to the appropriate list of tags. A summary of all tags will appear on the right of the screen.

Terms summary

Approved: 26
 Rejected: 1
 Pending: 1
 Total: 28

Even though a tag is approved or rejected, it can still be moved to another list. When viewing approved tags each tag has the option to reject:

Tags

Displaying Approved Terms

Select: [All](#) [Pending](#) [None](#)

Showing 1 to 20 of 26		Show <input type="text" value="20"/> entries	« First	« Previous	Next »	Last »	Search: <input type="text"/>
		Status	Term	Weight	Actions	Reviewer	Date
1	<input type="checkbox"/>	✓	wizards	11	Approved Reject	ambika batra	2/11/2016
2	<input type="checkbox"/>	✓	magic	10	Approved Reject	ambika batra	2/11/2016
3	<input type="checkbox"/>	✓	open	7	Approved Reject	ambika batra	2/11/2016
4	<input type="checkbox"/>	✓	web development	7	Approved Reject	ambika batra	2/11/2016
5	<input type="checkbox"/>	✓	wizard	6	Approved Reject	ambika batra	2/11/2016
6	<input type="checkbox"/>	✓	dictionary	5	Approved Reject	ambika batra	2/11/2016

To check terms against the approved and rejected lists (and possibly against the dictionary you have assigned for tag moderation) simply enter the term into the search box on the bottom right of the screen to see the status of the term

Check lists

Enter a word or phrase to check against approved/rejected lists:

crap is neither permitted nor prohibited!

Finally you can find tags by using the filters on the left.

Filters
Term

Status

Reviewer

Date: from

(MM/DD/YYYY)
...to

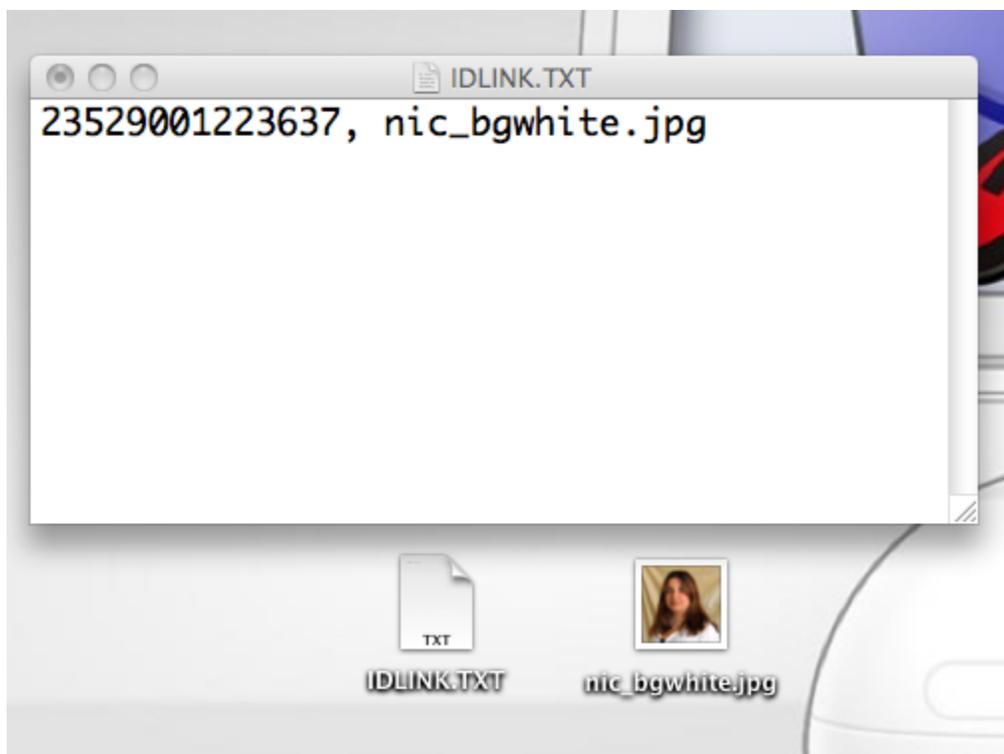
(MM/DD/YYYY)

1.10. Upload Patron Images

- *Get there:* More > Tools > Patrons and Circulation > Upload Patron Images

Patron images can be uploaded in bulk if you are allowing patron images to be attached to patron records. These images can also be used when creating patron cards.

- Create a txt file and title it "DATALINK.TXT" or "IDLINK.TXT"
- On each line in the text file enter the patron's card number followed by comma (or tab) and then the image file name



- Make sure that your TXT file is a plain text document, not RTF.
- Zip up the text file and the image files
- Go to the Upload Patron Images Tool

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](#)

- For a single image, simply point to the image file and enter the patron card number
- For multiple images, choose to upload a zip file
- After uploading you will be presented with a confirmation

Patron Image(s) Successfully Uploaded

- Unpacking completed
- 1 directorie(s) scanned.
- 1 directorie(s) processed.
- 1 image(s) moved into the database:
- nic_bgwhite.jpg - Cardnumber: 23529001223637 imported successfully.

- *Get there:* More > Tools > Catalog > Rotating Collections

Rotating Collections is a tool for managing collections of materials that frequently get shifted from library to library. It adds the ability to store not only an item's home library and current location but also information about where it is supposed to be transferred to next to ensure that all items in the collection are sent to the correct library. When an item in a rotating collection is checked in, library staff is notified that the item is part of a rotating collection and which branch it should be sent to if it is not at the correct one.

Note

The AutomaticItemReturn system preference must be set to "Don't automatically transfer items to their home library when they are returned" for Rotating Collections to function properly.

- To create a new rotating collection, click the "New Collection" button, fill in the Title and Description, and click Submit. Once submitted you'll see "Collection Name added successfully"; click "Return to rotating collections home" to return to the main Rotating Collections management page (or click Rotating Collections in the sidebar).
- To add items to a collection, click "Add or remove items" next to the collection's name in the list of collections. Under "Add or remove items" scan or type in the barcode of the item you wish to add to the collection, and hit Enter or click Submit if necessary.
- To remove an item from a collection, either click Remove next to the item's barcode in the list of items within the collection or check the "Remove item from collection" box next to the Barcode text box under "Add or remove items, and scan or type in the barcode, clicking Submit or hitting Enter if necessary. Note: The "Remove item from collection" checkbox will remain checked as long as you are on the "Add or remove items" page, unless you uncheck it, to facilitate quickly removing a number of items at a time by scanning their barcodes.

1.11.1. Transfer a Rotating Collection

Transferring a collection will:

- Change the current location of the items in that collection to the library it is to be transferred to
- Initiate a transfer from its original current location/holding library to the current location/holding library it is to be rotated to. When a library receives a collection they will need to check in the items to complete the transfer.

You can transfer a collection in one of two ways:

- From the main Rotating Collections page, click on Transfer next to the title of the collection you wish to transfer; choose the library you wish to transfer the collection to and click "Transfer collection".
- Or, from the "add or remove items" page for a collection, you can click the Transfer button, choose the library you wish to transfer the collection to and click "Transfer Collection".

Note

In order to complete the transfer process, the library receiving the rotating collection should check in all items from the collection as they receive them. This will clear the transfer so that the items are no longer shown as being "in transit".

If an item in a rotating collection is checked in at a library other than the one it is supposed to be transferred to, a notification will appear notifying library staff that the item is part of a rotating collection, also letting them know where the item needs to be sent.

This item is part of a rotating collection and needs to be transferred to
Fairfield

Please return Some book 8 to Fairfield
[Print slip or Cancel transfer](#)

Check in message
 Not checked out.

Check in

Enter item barcode:

Options

Forgive overdue charges

Book drop mode

Checked-in items

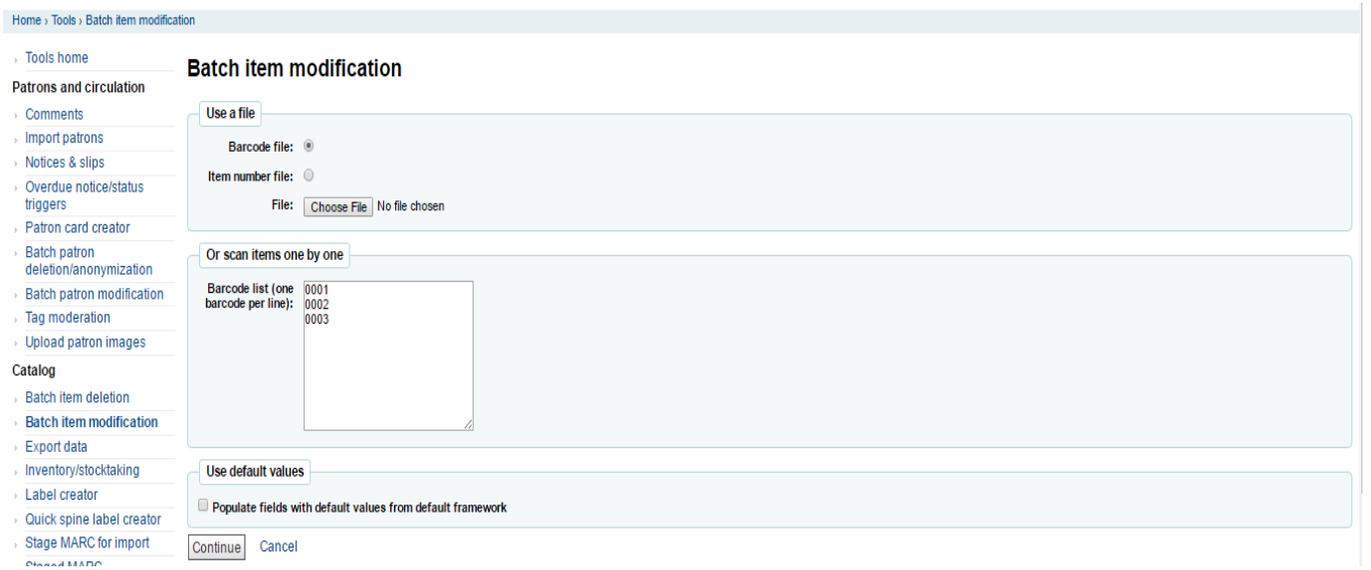
Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
Not checked out	Some book 8	Some Guy	test8888	MPL	CPL			BK	Not checked out	

Catalog

2.1. Batch item modification

- *Get there:* More > Tools > Catalog > Batch item modification

This tool will allow you to modify a batch of item records in Koha.



Home > Tools > Batch item modification

Batch item modification

Tools home

Patrons and circulation

- Comments
- Import patrons
- Notices & slips
- Overdue notice/status triggers
- Patron card creator
- Batch patron deletion/anonymization
- Batch patron modification
- Tag moderation
- Upload patron images

Catalog

- Batch item deletion
- Batch item modification**
- Export data
- Inventory/stocktaking
- Label creator
- Quick spine label creator
- Stage MARC for import
- Stage MARC

Use a file

Barcode file:

Item number file:

File: No file chosen

Or scan items one by one

Barcode list (one barcode per line):

```
0001
0002
0003
```

Use default values

Populate fields with default values from default framework

From the tool you can choose to upload a file of barcodes or item ids, or you can scan items one by one into the box below the upload tool. You can also decide the items edited should be populated with the default values you have defined in your default framework.

Once you have your file uploaded or the barcodes listed you can click 'Continue.'


 Enter search keywords:
 Check out Check in

Home > Tools > Batch item modification

Batch item modification

Select All | Clear All

 Show/hide columns: Show all columns Hide all columns Withdrawn status Lost status Source of classification or shelving scheme Damaged status Not for loan Permanent location Current location Date acquired Barcode Date last seen Price effective from Koha item type

	Title	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Barcode	Date last seen	Price effective from	Koha item type
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0001	2016-08-10	2016-08-10	Books
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0002	2016-08-10	2016-08-10	Books
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0003	2016-08-10	2016-08-10	Books

Edit Items

Checking the box right next to the subfield label will disable the entry and delete the subfield on all selected items. Leave fields blank to make no change.

You will be presented with a summary of the items you want to modify. From here you can uncheck the items you don't want to modify before making changes in the form below. You can also hide columns you don't need to see to prevent having to scroll from left to right to see the entire item form.

Note

To uncheck all items that are currently checked out you can click the 'Clear on loan' link at the top of the form.

Using the edit form you can choose which fields to make edits to. By checking the checkbox to the right of each field you can clear the values in that field for the records you are modifying.



Edit Items

Checking the box right next the subfield label will disable the entry and delete the subfield on all selected items. Leave fields blank to change.

0 - Withdrawn status	<input type="text"/>	<input type="checkbox"/>
2 - Source of classification or shelving scheme	<input type="text"/>	<input type="checkbox"/>
3 - Materials specified (bound volume or other part)	<input type="text"/>	<input type="checkbox"/>
4 - Damaged status	<input type="text"/>	<input type="checkbox"/>
5 - Use restrictions	<input type="text"/>	<input type="checkbox"/>
7 - Not for loan	<input type="text"/>	<input type="checkbox"/>
8 - Collection code	<input type="text"/>	<input type="checkbox"/>
a - Permanent location	<input type="text"/>	<input type="checkbox"/>
b - Current location	<input type="text"/>	<input type="checkbox"/>
c - Shelving location	<input type="text"/>	<input type="checkbox"/>
d - Date acquired	<input type="text"/>	<input type="checkbox"/> ...
e - Source of acquisition	<input type="text"/>	<input type="checkbox"/>
f - Coded location qualifier	<input type="text"/>	<input type="checkbox"/>
g - Cost, normal purchase price	<input type="text"/>	<input type="checkbox"/>
h - Serial Enumeration / chronology	<input type="text"/>	<input type="checkbox"/>
j - Shelving control number	<input type="text"/>	<input type="checkbox"/>
o - Full call number	<input type="text"/>	<input type="checkbox"/>
t - Copy number	<input type="text"/>	<input type="checkbox"/>
u - Uniform Resource Identifier	<input type="text"/>	<input type="checkbox"/>
v - Cost, replacement price	<input type="text"/>	<input type="checkbox"/>
w - Price effective from	<input type="text"/>	<input type="checkbox"/>
x - Non-public note	<input type="text"/>	<input type="checkbox"/>
y - Koha item type	<input type="text"/>	<input type="checkbox"/> <i>Required</i>
z - Public note	<input type="text"/>	<input type="checkbox"/>

Once you have made you changes you will be presented with the resulting items.

Batch item modification

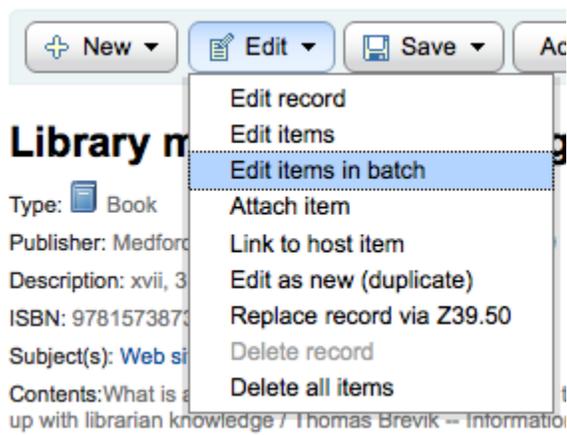
Select All | Clear All

Showhide columns: Show all columns Hide all columns Withdrawn status Lost status Source of classification or shelving scheme Damaged status Not for loan Permanent location Current location Date acquired Barcode Date last seen Price effective from Koha item type

	Title	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Barcode	Date last seen	Price effective from	Koha item type
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0001	2016-08-10	2016-08-10	Books
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0002	2016-08-10	2016-08-10	Books
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0003	2016-08-10	2016-08-10	Books

Note

You can also edit items on one bib record in a batch by going to the bib record and clicking Edit > Edit items in batch



2.2. Batch item deletion

- *Get there:* More > Tools > Catalog > Batch item deletion

This tool will allow you to delete a batch of item records from Koha.

From the tool you can choose to upload a file of barcodes or item ids, or you can scan items one by one into the box below the upload tool.

Home > Tools > Batch item modification

Batch item modification

Tools home

Patrons and circulation

- Comments
- Import patrons
- Notices & slips
- Overdue notice/status triggers
- Patron card creator
- Batch patron deletion/anonymization
- Batch patron modification
- Tag moderation
- Upload patron images

Catalog

- Batch item deletion
- Batch item modification**
- Export data
- Inventory/stocktaking
- Label creator
- Quick spine label creator
- Stage MARC for import
- Send MARC

Use a file

Barcode file:

Item number file:

File: No file chosen

Or scan items one by one

Barcode list (one barcode per line):

```
0001
0002
0003
```

Use default values

Populate fields with default values from default framework

Once you have your file uploaded or the barcodes scanned you can click 'Continue.'

You will be presented with a confirmation screen. From here you can uncheck the items you don't want to delete and decide if Koha should delete the bib record if the last item is being deleted before clicking 'Delete selected items.' If you'd like you can delete the bibliographic record if you're deleting the last item by clicking the checkbox next to 'Delete records if no items remain'.

Home > Tools > Batch item deletion

Batch item deletion

Select All | Clear All

Show/hide columns: Show all columns Hide all columns Withdrawn status Lost status Source of classification or shelving scheme Damaged status Not for loan Permanent location Current location Date acquired Barcode Date last seen Price effective from

Koha item type

	Title	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Barcode	Date last seen	Price effective from	Koha item type
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0001	2016-08-10	2016-08-10	Books
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0002	2016-08-10	2016-08-10	Books
<input checked="" type="checkbox"/>	Hindi:swarup aur vistar			ddc			Centerville	Centerville	2016-08-10	0003	2016-08-10	2016-08-10	Books

This will delete the selected items.

Delete records if no items remain.

If your file (or list of scanned barcodes) has more than 1000 barcodes, Koha will be unable to present you with a list of the items. You will still be able to delete them, but not able to choose which items specifically to delete or delete the biblio records.

the items can be deleted they will be and you will be presented with a confirmation of your deletion.

Batch item deletion results

2 item(s) deleted.

[Return to batch item deletion](#)

2.3. Batch record deletion

This tool will take a batch of record numbers for either bibliographic records or authority records and allow you to delete all those records and any items attached to them in a batch.

Batch record deletion

Record type

Bibliographic:

Authorities:

Use a file

File: No file selected.

Or enter a list of record numbers

Record number list (one per line):

When you visit the tool it will ask you:

- Choose whether you're editing bibliographic or authority records
- Enter the biblionumbers or authids

- You can upload a file of these numbers or
- Enter the numbers (one per line) in the box provided
- Finally choose the MARC Modification Template you'd like to use to edit these records.

Once you've entered your criteria click 'Continue'

Batch record modification

Modify record using the following template:

Select all | Clear all

	Biblionumber ↕	Title ↕	Preview
<input checked="" type="checkbox"/>	1	Wuthering heights /	Preview MARC
<input checked="" type="checkbox"/>	2	Moll flanders /	Preview MARC
<input checked="" type="checkbox"/>	3	Shirley /	Preview MARC
<input checked="" type="checkbox"/>	4	Night navigation /	Preview MARC
<input checked="" type="checkbox"/>	5	Book lust to go :	Preview MARC
<input checked="" type="checkbox"/>	6	Light on snow :	Preview MARC
<input checked="" type="checkbox"/>	7	The diary /	Preview MARC

! Reminder: this action will modify all selected biblios!

You will be presented with a list of records that will be edited. Next to each one is a checkbox so you can uncheck any items you would rather not edit at this time.

Clicking Preview MARC will allow you to see what edits will be made when you finalize the edit.



Check out Check in Search the catalog

Batch record modification

Modify record using the following template:

Select all | Clear all

Biblionumber	Title	Preview
<input checked="" type="checkbox"/> 1	Wuthering heights /	Preview MARC
<input checked="" type="checkbox"/> 2	Moll flanders /	Preview MARC
<input checked="" type="checkbox"/> 3	Shirley /	Preview MARC
<input checked="" type="checkbox"/> 4	Night navigation /	Preview MARC
<input checked="" type="checkbox"/> 5	Book lust to go :	Preview MARC
<input checked="" type="checkbox"/> 6	Light on snow :	Preview MARC
<input checked="" type="checkbox"/> 7	The diary /	Preview MARC

Reminder: this action will modify all selected biblios!

Modify selected records Cancel

Preview MARC Close

```
LDR 01290nam a2200253 a 4500
001 _ASIN0140620125
003 _NCE
005 20150319083709.0
008 140509s1994 xxu eng d
020 _a0140620125 (paperback)
_c$4.50
020 _a9780140620122 (paperback)
040 _cNIC
050 00 _aPZ3.B7902
_bW36
100 1 _aBrontë, Emily,
_d1818-1848.
245 10 _aWuthering heights /
_cEmily Bronte.
260 _aLondon :
_bPenguin Books,
_c1994.
300 _a279 p. ;
_c18 cm.
490 1 _aPenguin popular classics.
500 _aTest
520 _aIn a house haunted by memories, the past is everywhere
830 0 _aPenguin popular classics.
856 40 _3Amazon.com
_uhttp://www.amazon.com/exec/obidos/ASIN/0140620125/chop
942 _cEBK
_lcc
_sl
999 _cl
_di
```

Once you're sure everything is the way you want you can click the 'Modify selected records' button and your records will be modified.

2.5. Export Data (MARC & Authorities)

- *Get there:* More > Tools > Catalog > Export Data

Koha comes with a tool that will allow you to export your bibliographic, holdings and/or authority data in bulk. This can be used to send your records to fellow libraries, organizations or services; or simply for backup purposes.

2.5.1. Export Bibliographic Records

At the top of the screen you need to pick what data you're exporting. If you're exporting bibliographic records with or without the holdings information you want to click the 'Export bibliographic records' tab.

- Fill in the form in order to limit your export to a specific range (all fields are optional)

Export bibliographic records
Export authority records

Note : The items are exported by this tool unless specified.

Select records to export

From biblio number:

To biblio number:

Item type:

Library:

<input type="checkbox"/> Centerville	<input type="checkbox"/> Fairfield
<input type="checkbox"/> Fairview	<input type="checkbox"/> Franklin
<input type="checkbox"/> Institut Protestant de Théologie	<input type="checkbox"/> Liberty
<input type="checkbox"/> Nicole's Library	<input type="checkbox"/> Midway
<input type="checkbox"/> Pleasant Valley	<input type="checkbox"/> Riverside
<input type="checkbox"/> Springfield	<input type="checkbox"/> Troy
<input type="checkbox"/> Union	

From item call number:

To item call number:

Accession date (inclusive):

Start date: 

End date: 

- Choose to limit your export by any one or more of the following options
 - Limit to a bib number range
 - Limit to a specific item type

This limit will use the type you have defined in the item-level_itypes preference. If you have the item-level_itypes preference set to 'specific item' and you have no items attached to a bib record it will not be exported. To get all bib records of a specific type you will need your item-level_itypes preference set to 'biblio record'.

- Limit to a specific library or group of libraries
- Limit to a call number range
- Limit to an acquisition date range
- If you'd like you can load a file of biblionumbers for the records you would like to export

Use a file

File containing a list of biblio numbers with one biblio number per line. This list works as a filter: it is compatible with other parameters.

File : No file selected.

- Next choose what to skip when exporting

Options

Don't export items

Remove non-local items

Don't export fields separate by a blank. (e.g., 100a 200 606)

- By default items will be exported, if you would like to only export bibliographic data, check the 'Don't export items' box
 - To limit your export only to items from the library you're logged in as (if you leave the 'Library' field set to 'All') or to the library you selected above check the 'Remove non-local items' box
 - You can also choose what fields you don't want to export. This can be handy if you're sharing your data, you can remove all local fields before sending your data to another library
- Finally choose the file type and file name

Output format

File format:

File name:

- Choose to export your data in marc or marcxml format
 - Choose the name you want your file to save as
- Click 'Export bibliographic records'

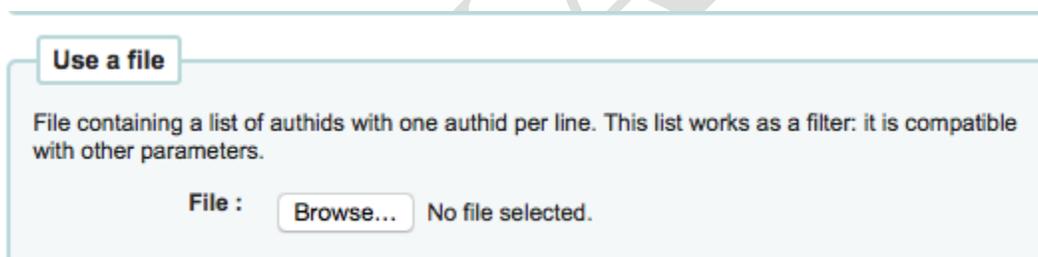
2.5.2. Export Authority Records

At the top of the screen you need to pick what data you're exporting. If you're exporting authority records you want to click the 'Export authority records' tab.

- Fill in the form in order to limit your export to a specific range or type of authority record (all fields are optional)



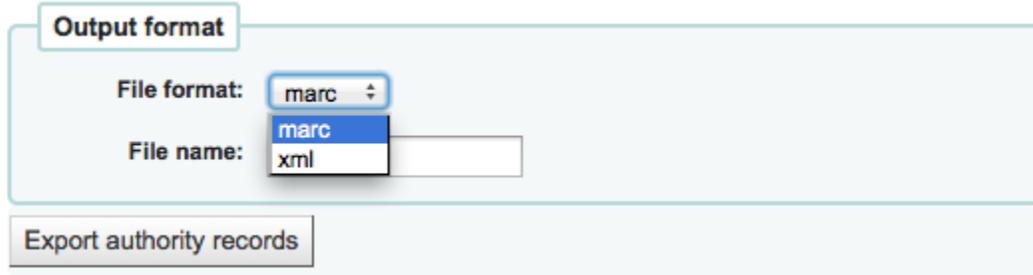
- Or you can choose a file of authids to export



- Next choose fields that you would like to exclude from the export separated by a space (no commas)



- If you'd like to exclude all subfields of the 200 for example just enter 200
 - If you'd like to exclude a specific subfield enter it beside the field value 100a will exclude just the subfield 'a' of the 100
- Finally choose the file type and file name



Output format

File format:

File name:

- Choose to export your data in marc or marcxml format
- Choose the name you want your file to save as
- Click 'Export authority records'

2.7. Label Creator

- *Get there:* More > Tools > Catalog > Label Creator

The Label Creator allow you to use layouts and templates which you design to print a nearly unlimited variety of labels including barcodes. Here are some of the features of the Label Creator module:

- Customize label layouts
- Design custom label templates for printed labels
- Build and manage batches of labels
- Export single or multiple batches
- Export single or multiple labels from within a batch
- Export label data in one of three formats:
 - PDF - Readable by any standard PDF reader, making labels printable directly on a printer
 - CSV - Export label data after your chosen layout is applied allowing labels to be imported in to a variety of applications
 - XML - Included as an alternate export format

At the top of each screen within the Label Creator, you will see a toolbar allowing quick access to relevant functions. The menu to the left of each screen also allows easy access to the different sections of the Label Creator. The bread crumb trail near the top of each screen will give specific indication as to where you are within the Label Creator module and allow quick navigation to previously traversed sections. And finally, you can find more detailed information on each section of the Label Creator by clicking the online help link at the upper left-hand corner of every page.

2.7.1.1. Add a Template

To add a new template, you want to click on the 'New template' button at the top of the Label Creator.

- > [Labels home](#)
- > [Manage layouts](#)
- > [Manage templates](#)
- > [Manage profiles](#)
- > [Manage batches](#)

New layout
New template

Welcome to Koha's lab

The Label Creator allow you to us nearly unlimited variety of labels ir the Label Creator module:

Using the form that appears you can define the template for your sheet of labels or cards.

Edit label template

Template ID: 7

Template code:

Template description:

Units:

Page height: in

Page width: in

Label width: in

Label height: in

Top page margin: in

Left page margin: in

Top text margin: in

Left text margin: in

Number of columns:

Number of rows:

Gap between columns: in

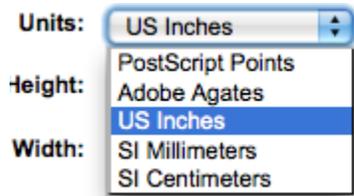
Gap between rows: in

Profile:

Save
Cancel

- Template ID will be automatically generated after saving your template, this is simply a system generated unique id
- Template Code should be something you can use to identify your template on a list of templates
- You can use the Template Description to add additional information about the template

- The Units pull down is used to define what measurement scale you're going to be using for the template. This should probably match the unit of measurement used on the template description provided by the product vendor.



- The measurements, number of columns and number of rows can be found on the vendor product packaging or website.
 - **Important**
If you do not supply a left text margin in the template, a 3/16" (13.5 point) left text margin will apply by default.
- A profile is a set of "adjustments" applied to a given template just prior to printing which compensates for anomalies unique and peculiar to a given printer (to which the profile is assigned).
 - Before picking a profile try printing some sample labels so that you can easily define a profile that is right for your printer/template combination.
 - After finding any anomalies in the printed document, create a profile and assign it to the template.

After saving, your templates will appear on the 'Manage Templates' page.

Currently Available Templates

Template ID	Template Name	Description	Select
1	Avery 5160 1 x 2-5/8	3 columns, 10 rows of labels	<input type="checkbox"/>
7	Demco WS14942260	1" X 1.5" Spine Label Setup for up to four lines of text	<input type="checkbox"/>
12	Demco WS14942260	1" X 1.5" Spine Label Setup for five lines of text	<input type="checkbox"/>
22	DEFAULT TEMPLATE 01	Default description	<input type="checkbox"/>

2.7.2. Profiles

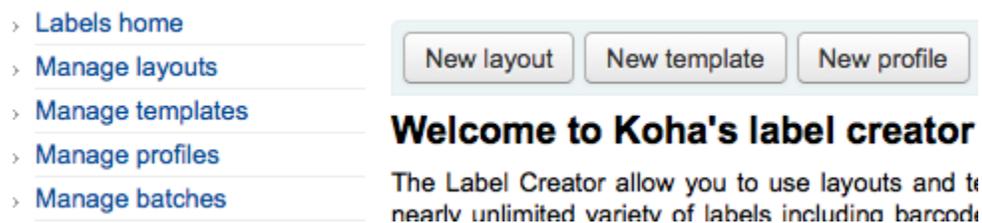
- *Get there:* More > Tools > Label Creator > Profiles

A profile is a set of "adjustments" applied to a given template just prior to printing which compensates for anomalies unique and peculiar to a given printer (to which the profile is assigned). This means if you set a template up and then print a sample set of data and find that the items are not all aligned the same on each label, you need to set up a profile for each printer to make up for the differences in printing styles, such as the shifting of text to the left, right, top or bottom.

If your labels are printing just the way you want, you will not need a profile.

2.7.2.1. Add a Profile

To add a new profile, you want to click on the 'New profile' button at the top of the Label Creator tool.



Using the form that appears you can create a profile to fix any problems with your template.

Edit printer profile

Profile settings

Printer name:

Paper bin:

Template name: Profile unassigned

Units:

Offset:

Horizontal: pt

Vertical: pt

Creep:

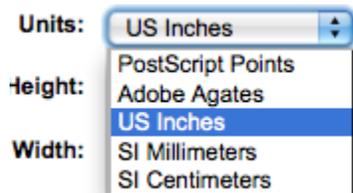
Horizontal: pt

Vertical: pt

- The Printer Name and Paper Bin do not have to match your printer exactly, they are for your reference so you can remember what printer you have set the profile for. So if

you want to use the Printer model number in printer name or you can call it 'the printer on my desk'

- Template will be filled in once you have chosen which template to apply the profile to on the template edit form
- The Units pull down is used to define what measurement scale you're going to be using for your profile.



- Offset describes what happens when the entire image is off center either vertically or horizontally and creep describes a condition where the distance between the labels changes across the page or up and down the page
 - For these values, negative numbers move the error up and to the left and positive numbers move the error down and to the right
 - Example: the text is .25" from the left edge of the first label, .28" from the left edge of the second label and .31" from the left edge of the third label. This means the horizontal creep should be set to .03" to make up for this difference.

After saving, your profiles will appear on the 'Manage Profiles' page.

Currently Available Profiles

Profile ID	Printer Name	Paper Bin	Template Name	Select
1	Library Laser	Bypass	Avery 5160 1 x 2-5/8	<input type="checkbox"/>
11	Library Laser	Tray 1	Avery 5160 1 x 2-5/8	<input type="checkbox"/>
17	HP 450	1		<input type="checkbox"/>

Once you have saved your new profile, you can return to the list of templates and choose to edit the template that this profile is for.

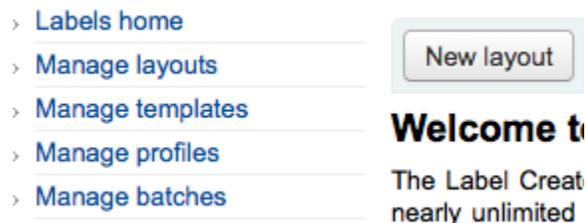
2.7.3. Layouts

- *Get there:* More > Tools > Label Creator > Layouts

A layout is used to define the fields you want to appear on your labels.

2.7.3.1. Add a Layout

To add a new layout, you want to click on the 'New layout' button at the top of the Label Creator tool.



Using the form that appears you can create a profile to fix any problems with your template.

Create Label layout

Layout name

Choose barcode type (encoding)

Choose layout type

Bibliographic data to print

Choose order of text fields to print

title author isbn issn itemtype
 barcode

List Fields

Draw guide boxes

Split call numbers

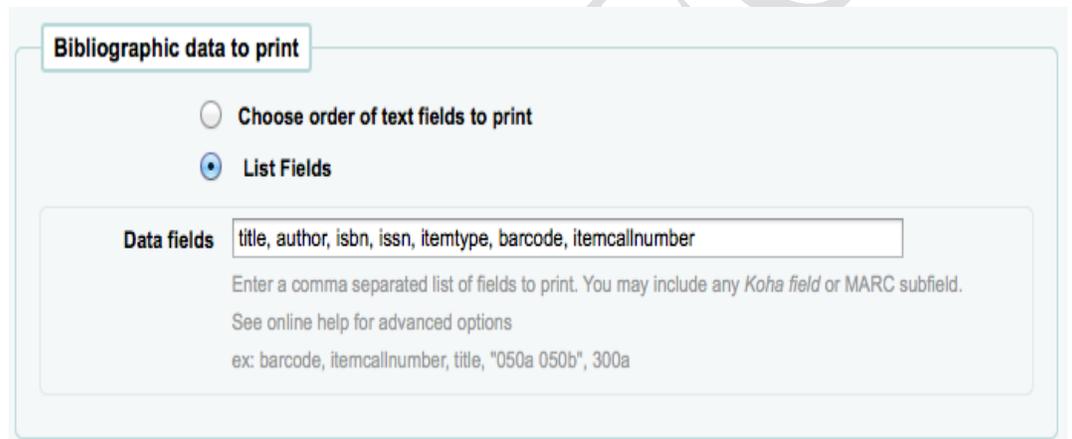
Text justification

Font

Font size

- The name of your layout can be anything you'd like to help you identify it later.
- If this is a barcode label you'll want to choose the encoding (Code 39 is the most common)
- The layout type can be any combination of bibliographic information and/or barcode. For example a spine label would just be Biblio whereas a label for your circulation staff to use to checkout the book would probably be Biblio/Barcode.

- The Bibliographic Data to Print includes any of the data fields that may be mapped to your MARC frameworks. You can choose from the preset list of fields or you can click on 'List Fields' and enter your own data. In 'List Fields', you can specify MARC subfields as a 4-character tag-subfield string: (ie. 254a for the title field), You can also enclose a whitespace-separated list of fields to concatenate on one line in double quotes. (ie. "099a 099b" or "itemcallnumber barcode"). The fields available are from the database tables list below. Finally you could add in static text strings in single-quote (ie. 'Some static text here.')
- You can use the schema viewer (<http://schema.koha-community.org>) with the following tables to find field names to use:
 - Currently all fields in the following tables are used: items, biblioitems, biblio, branches



- Choose if the label maker should print out the guidelines around each label
- Choose if you'd like Koha to try to split your call numbers (usually used on Spine Labels)
- Finally choose your text settings such as alignment, font type and size.

After saving, your layouts will appear on the 'Manage Layouts' page.

2.7.4. Batches

- *Get there:* More > Tools > Label Creator > Batches

Batches are made up of the barcodes you would like to print. Once in this tool you can search for the item records you would like to print out labels for.

2.7.4.1. Add a Batch

Batches can be created in one of two ways. The first is to click the 'Create Label Batch' link on the 'Staged MARC Management' page:

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
16	bib-1181.utf8		staged	2010-02-24 07:33:34	1	1 (Create Label Batch)	Clean
15	bib-1181.utf8		imported	2010-02-24 06:39:05	1	0	Clean
14	bib-16001.utf8		imported	2010-02-11 23:26:51	1	1 (Create Label Batch)	Clean
13	koha.mrc		cleaned	2010-02-05 03:55:12	198	394 (Create Label Batch)	
12	bib-1.mrc		imported	2009-12-15 14:30:53	1	8 (Create Label Batch)	Clean
11	bib-1.mrc		imported	2009-12-15 01:11:20	1	8 (Create Label Batch)	Clean

The other is to choose to create a new batch from the label creator tool

> [Labels home](#)

> [Manage layouts](#)

> [Manage templates](#)

> [Manage profiles](#)

> [Manage batches](#)



Welcome to Koha's label creator module

The Label Creator allow you to use layouts and templates which nearly unlimited variety of labels including barcodes. Here are so the Label Creator module:

You will be brought to an empty batch with an 'Add item(s)' button at the top of the page and a box to scan barcodes in to.



Current library: Nicole's Library

Add by barcode(s):
One barcode per line.
Leave empty to add
via item search.

**There are no items in
Batch 11 yet**

Add items by barcode using the
text area above or leave empty to
add via item search.

You can either scan barcodes in to the box provided and click the 'Add item(s)' button or you can click the 'Add item(s)' button with the barcodes box empty. Clicking 'Add item(s)' with nothing in the barcodes box will open a search window for you to find the items you want to add to the batch.

Search for items to add to Batch 11

Added on or after date 
(MM/DD/YYYY)

Added on or before date 
(MM/DD/YYYY)

From the search results, click the check box next to the items you want to add to the batch and click the 'Add checked' button. You can also add items one by one by clicking the 'Add' link to the left of each item.

Search results

Results through of 16

[Select All](#) [Clear All](#) |

The ancient library of Qumr^an and modern Biblical studies /

by Cross, Frank Moore. [], G. Duckworth, London : 1958, 196 p. :

Add Item	Call Number	Accession Date	Barcode	Select
Add	BM175.Q6 C7 1958	2010-02-12	CPL10022223	<input type="checkbox"/>

The slow learner.

by Abraham, Willard. [], Center for Applied Research in Education, New York : 1964, x, 113 p.

The Grolier library of women's biographies.

[], Grolier Educational, Danbury, Conn. : 1998, 10 v. :, ISBN: 0717291243, Includes index.

Add Item	Call Number	Accession Date	Barcode	Select
Add	NA	2009-12-27	2566543245678	<input type="checkbox"/>
Add	NA	2009-12-27	2566543245679	<input type="checkbox"/>
Add	NA	2009-12-27	2566543245680	<input type="checkbox"/>

Once you have added all of the items click the 'Done' button. The resulting page will list the items you have selected.

Current Branch: Fairview

Items in batch number 2

Label Number	Summary	Item Type	Barcode	Select
1	Cotton Mather Wendell, Barrett			<input type="checkbox"/>
2	The years Woolf, Virginia			<input type="checkbox"/>
3	The years Woolf, Virginia		33203000669201	<input type="checkbox"/>
4	The Grolier library of women's biographies N/A		2566543245678	<input type="checkbox"/>
5	The Grolier library of women's biographies N/A		2566543245679	<input type="checkbox"/>

To print your labels, click the 'Export Batch' button. To print only some of the labels, click the 'Export Item(s)' button. Either way you will be presented with a confirmation screen where you can choose your template and layout.

1 batch(es) to export.

Select a template to be applied:

Select a layout to be applied:

Enter starting label number:

You will then be presented with three download options: PDF, Excel, and CSV.



After saving your file, simply print to the blank labels you have in your library.

2.8. Quick Spine Label Creator

- *Get there:* More > Tools > Catalog > Quick Spine Label Creator

Note

This tool does not use the label layouts or templates, it simply prints a spine label in the first spot on the label sheet.

- Define the fields you want to print on the spine label in the SpineLabelFormat system preference
- Format your label printing by editing `spinelabel.css` found in `koha-tmpl/intranet-tmpl/prog/en/css/`

To use this tool you simply need the barcode for the book you'd like to print the spine label for.

Quick spine label creator

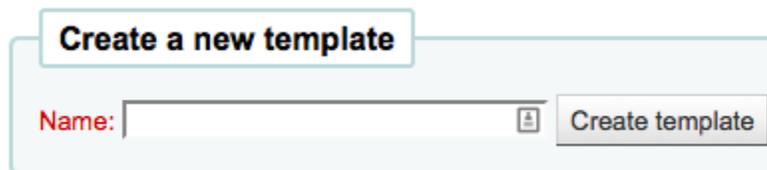
Barcode:

2.9. MARC modification templates

The MARC Modification Templates system gives Koha users the power to make alterations to MARC records automatically while staging MARC records for import.

This tool is useful for altering MARC records from various vendors/sources work with your MARC framework. The system essentially allows one to create a basic script using actions to Copy, Move, Add, Update and Delete fields.

Start by adding a new template (a template can be made up of one or more actions) by entering a name and clicking 'Create template'.

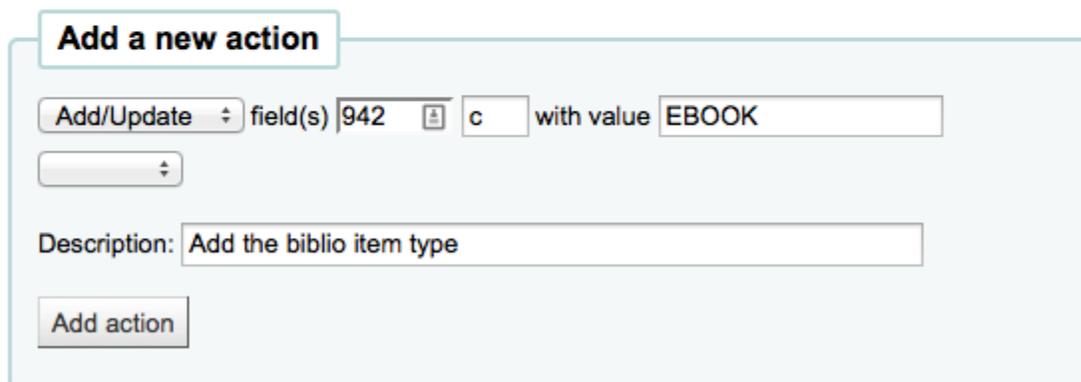


Next you can add actions to the template by filling in the Action box. For example if you're loading in a batch of files from your EBook vendor you might want to add the biblio item type of EBOOK to the 942\$c.

MARC modification templates

Template:

There are no defined actions for this template.



- Choose 'Add/Update'
- Enter the field 942 and subfield c

- Enter the value of 'EBOOK' (or whatever your ebook item type code is)
- Provide a description so you can identify this action later
- Click 'Add action'

Each action can also have an optional condition to check the value or existence of another field. For example you might want to add the call number to the item record if it's not already there.

Add a new action

Copy ▾ 1st ▾ field(s) 090 ⓘ a to field 952 o RegEx

if ▾ field 952 o doesn't exist ▾

Description: Move call number to item record if there isn't one there already

Add action

- Choose 'Copy'
- Decide if you want to copy the first occurrence or all occurrences of the field
- Enter the field 090 (or other biblio call number field) and subfield a to copy
- Enter the 952 field and o subfield to copy to
- Choose 'if'
- Enter the 952 field and o subfield
- Choose "doesn't exist"
- Provide a description so you can identify this action later
- Click 'Add action'

The Copy & Move actions also support Regular Expressions, which can be used to automatically modify field values during the copy/move. An example would be to strip out the '\$' character in field 020\$c.

Add a new action

Copy
All
field(s)
020
c
to field
020
c
RegEx

s/\\$/
/regex replacement
/ig

if
field
020
c
matches
m/\\$/
/ RegEx

Description:

- Choose 'Copy'
- Decide if you want to copy the first occurrence or all occurrences of the field
- Enter the field 020 and subfield c to copy
- Enter the 020 field and c subfield to copy to
- Check the 'RegEx' box and enter your regular expression (in this case s/\\$/)
- Choose 'if'
- Enter the 020 field and c subfield
- Choose "matches"
- Check the 'RegEx' box and enter your regular expression (in this case m/\\$/)
- Provide a description so you can identify this action later
- Click 'Add action'

Note

The value for an update can include variables that change each time the template is used. Currently, the system supports two variables, `__BRANCHCODE__` which is replaced with the branchcode of the library currently using the template, and `__CURRENTDATE__` which is replaced with the current date in ISO format (YYYY-MM-DD).

You could also use regular expressions to add your library's proxy URL in front of links in your MARC record.

Copy
All
field(s)
856
u
to field
856
u
RegEx

s/^
/http://proxyurl=
/ig

Description:

- Choose 'Copy'
- Decide if you want to copy the first occurrence or all occurrences of the field
- Enter the field 856 and subfield u to copy
- Enter the 856 field and u subfield to copy to
- Check the 'RegEx' box and enter your regular expression (in this case `s/~/PROXY_URL/`)
- Provide a description so you can identify this action later
- Click 'Add action'

Once your actions are saved you can view them at the top of the screen. Actions can be moved around using the arrows to the left of them.

MARC modification templates

Template:

Actions for this template

Change order	Order	Action	Description		
   	1	Update field 942\$c with value <i>EBOOK</i>	Add the biblio item type	Edit	Delete

Add a new action

field(s)

Description:

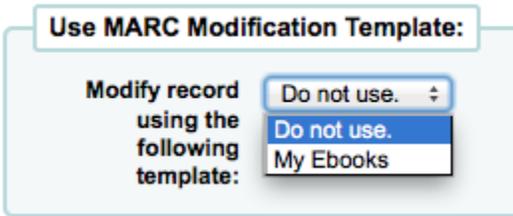
Depending on your actions the order may be very important. For example you don't want to delete a field before you copy it to another field.

To add another template you can either start fresh or click the 'Duplicate current template' checkbox to create a copy of an existing template to start with.

Create a new template

Name: Duplicate current template

Once your template is saved you will be able to pick it when using the Stage MARC Records for Import tool.



Use MARC Modification Template:

Modify record using the following template:

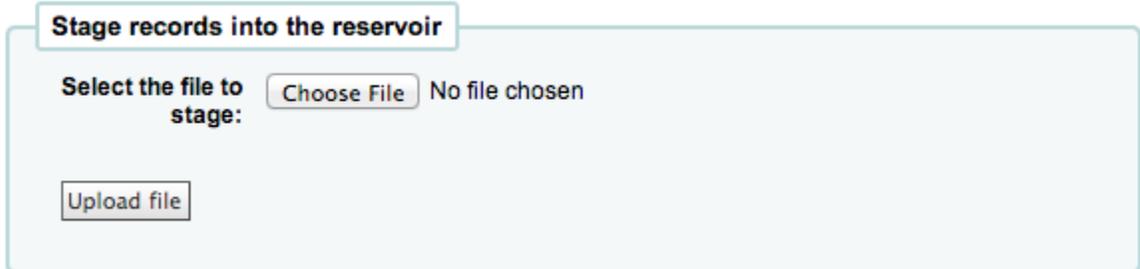
Do not use. ▾
Do not use.
My Ebooks

2.10. Stage MARC Records for Import

- *Get there:* More > Tools > Catalog > Stage MARC records for import

This tool can be used to import both bibliographic and authority records that are saved in MARC format. Importing records into Koha includes two steps. The first is to stage records for import.

- First find the MARC file on your computer



Stage records into the reservoir

Select the file to stage: No file chosen

- Next you will be presented with options for record matching and item imports

Stage records into the reservoir

Select the file to stage: No file chosen

Upload progress:

 100%

Comments about this file:

Record type:

Character encoding:

Use MARC Modification Template:

Modify record using the following template:

Look for existing records in catalog?

Record matching rule:

Action if matching record found:

Action if no match is found:

Check for embedded item record data?

Yes
 No

How to process items:

- o Enter 'Comments about this file' to identify your upload when going to the 'Manage Staged MARC Records' tool
- o Tell Koha which type of file this is, bibliographic or authority

Record type:

Character encoding:

- o Choose the character encoding

Character encoding: UTF-8 (Default) ▾
 UTF-8 (Default)
 MARC 8
 ISO 5426
 ISO 6937
 ISO 8859-1
 EUC-KR

for existing

Record matching rule:

- Choose if you would like to use a MARC Modification Template to alter the data you're about to import

Use MARC Modification Template:

Modify record using the following template: Do not use. ▾
 Do not use.
 My Ebooks

- Choose whether or not you want to look for matching records

Look for existing records in catalog?

Record matching rule: Do not look for matching records ▾

Action if matching record found: Replace existing record with incoming record ▾

Action if no match is found: Add incoming record ▾

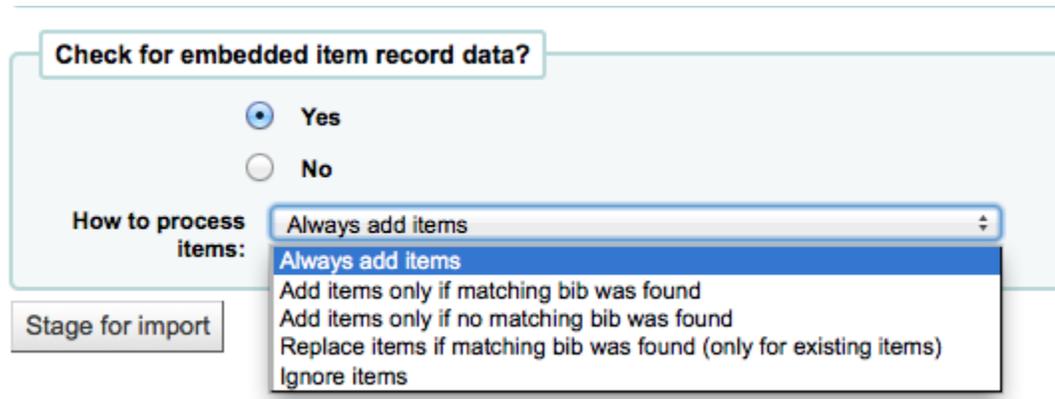
- You can set up record matching rules through the administration area

Record matching rule: Do not look for matching records ▾
 Do not look for matching records
 ISBN (020\$a)
 ISSN (022\$a)

Action if matching record found:

- When using the ISBN matching rule Koha will find only exact matches. If you find that the ISBN match is not working to your satisfaction you can change the AggressiveMatchOnISBN preference to 'Do' and then run your import again.

- Next choose what to do with matching records if they are found
 - Finally choose what to do with records that are unique
 - Next you can choose whether or not to import the item data found in the MARC records (if the file you're loading is a bibliographic file)



The screenshot shows a web form with the following elements:

- A title box: "Check for embedded item record data?"
- Two radio buttons: "Yes" (selected) and "No".
- A dropdown menu labeled "How to process items:" with the following options:
 - Always add items (highlighted)
 - Add items only if matching bib was found
 - Add items only if no matching bib was found
 - Replace items if matching bib was found (only for existing items)
 - Ignore items
- A button labeled "Stage for import" at the bottom left.

- From here you can choose to always add items regardless of matching status, add them only if a matching bib was found, add items only if there was no matching bib record, replace items if a matching bib was found (The match will look at the itemnumbers and barcodes to match on for items. Itemnumbers take precedence over barcodes), or Ignore items and not add them.
- Click 'Stage for import'
- You will be presented with a confirmation of your MARC import

Stage MARC Records For Import

MARC Staging results :

- 200 records in file
- 0 records not staged because of MARC error
- 200 records staged
- 116 records with at least one match in catalog per matching rule "ISBN"
- 263 item records found and staged
- [Manage staged records](#)
- [Back](#)

- To complete the process continue to the Managed Staged MARC Records Tool

2.11. Staged MARC Record Management

- *Get there:* More > Tools > Catalog > Staged MARC Record Management

Once you have staged your records for import you can complete the import using this tool.

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
9	koha.mrc		staged	2009-11-24 08:40:48	200	263 (Create Label Batch)	<input type="button" value="Clean"/>
8	bib-684.marc8		imported	2009-10-20 13:16:17	1	1 (Create Label Batch)	<input type="button" value="Clean"/>
7	koha(3).mrc		cleaned	2009-08-18 16:18:26	94	125 (Create Label Batch)	
6	koha(2).mrc		cleaned	2009-08-18 16:15:57	43	43 (Create Label Batch)	
5	koha.mrc		cleaned	2009-08-18 16:14:33	1000	1113 (Create Label Batch)	

- From the list of staged records, click on the file name that you want to finish importing
 - You will note that records that have already been imported will say so under 'Status'
- A summary of your import will appear along with the option to change your matching rules

File name: bib-3.utf8

Comments:

Staged: 2011-03-17 21:21:55

Status: staged

Matching rule applied:

Action if matching record found:

Action if no match found:

Item processing:

- Below the summary is the option to import the batch of bib records using a specific framework

Import this batch into the catalog

Add new bibliographic records into this framework: Default

#	Citation	Status	Match?
1	Korean-English Dictionary	staged	no_match

Default

- Books, Booklets, Workbooks
- Audio Cassettes, CDs
- Kits
- Fast Add Framework
- Binders
- Models
- CD-ROMs, DVD-ROMs, General Online Resources
- DVDs, VHS
- Serials

- Choosing a framework other than 'Default' isn't necessary, but it's helpful for running reports and having the right bib level item type selected on import.
- Below the framework selection there will be a list of the records that will be imported

#	Citation	Status	Match type	Match details	Diff	Record
384	'Salem's lot / King, Stephen. (0452267218)	Staged	No match			
355	'Tis : McCourt, Frank. (0684848783)	Staged	No match			
342	10,001 hints & tips for the home / (0789435209)	Staged	No match			

- Review your summary before completing your import to make sure that your matching rule worked and that the records appear as you expect them to
- Matches will appear with info under the 'Match details column'

#	Citation	Status	Match type	Match details	Diff	Record
334	The accidental systems librarian / Gordon, Rachel Singer. (1573871613)	Staged	Match found	Matches biblio 5 (score=1000): The accidental systems librarian / Gordon, Rachel Singer.	View	

and when clicking the 'View' link under 'Diff' you can see the difference between versions.

Original
The accidental systems librarian /

```

LDR 01146cam a2200253 a 4500
001 12995099
003 08t
005 20150122144038.0
008 021107s2003 njua b 001 0 eng
010 a 2002152865
020 a1573871613 (pbk.)
040 aDLC
cDLC
dDLC
050 00 az682.4.S94
bG67 2003
100 1 aGordon, Rachel Singer.
245 14 aThe accidental systems librarian /
cRachel Singer Gordon.
260 aMedford, N.J. :
bInformation Today, Inc.,
cc2003.
300 axvii, 262 p. :
bill. ;
c23 cm.
504 aIncludes bibliographical references (p. 223-233) and index.
505 0 aSystems librarianship 101 : defining systems librarianship
650 0 aSystems librarians.
906 a7
bebe
corignew
dl
eecip
f20

```

Imported
The accidental systems librarian /

```

LDR 01013 a2200241 4500
001 115833217
003 MePoLT
005 20150127203752.0
008 021107s2003 njua b 001 0 eng
010 a 2002152865
020 a1573871613 (pbk.)
040 aDLC
cDLC
dDLC
dMePoLT
erda
050 00 az682.4.S94
bG67 2003
100 1 aGordon, Rachel Singer.
245 14 aThe accidental systems librarian /
cRachel Singer Gordon.
260 aMedford, N.J. :
bInformation Today, Inc.,
cc2003.
300 axvii, 262 p. :
bill. ;
c23 cm.
504 aIncludes bibliographical references (p.
505 0 aSystems librarianship 101 : defining
650 0 aSystems librarians.
923 aYour library
942 cBK
999 c6620
d6620

```

- Click 'Import into catalog' to complete the import

Completed import of records

Number of records added	449
Number of records updated	4
Number of records ignored	0
Number of items added	452
Number of items replaced	0
Number of items ignored because of duplicate barcode	1

Showing 1 to 20 of 453 Show entries [First](#) [Previous](#) [1](#) [2](#) [3](#) [4](#) [5](#) ... [23](#) [Next](#) [Last](#)

#	Citation	Status	Match type
222	Wuthering heights / Brontë, Emily, (0140620125)	Imported	No match
223	Moll flanders / Defoe, Daniel, (0140620257)	Imported	No match
224	Shirley / Bronte, Charlotte. (0140620230)	Imported	No match
225	Night navigation / Howard, Ginnah. (0151014329)	Imported	No match
226	Book lust to go : Pearl, Nancy. (1570616507)	Imported	No match
227	Light on snow : Shreve, Anita. (0316781487)	Imported	No match
228	The diary / Goudge, Eileen.	Imported	No match

- Once your import is complete a link to the new bib records will appear to the right of each title that was imported
- You can also undo your import by clicking the 'Undo import into catalog' button

Records imported using this tool remain in the 'reservoir' until they are cleaned. These items will appear when searching the catalog from the Cataloging tool:

[+ New Record](#)

1 result(s) found in catalog, [3 result\(s\) found in reservoir](#)

Title	Location	preview		
Embracing insanity : Pavlicek, Russell C. - 0672319896 - SAMS, - 2000 ; Indianapolis, IN : - ix, 176 p. ; ; 23 cm.		MARC Card	Edit biblio	Add holdin

Biblios in reservoir

Title	ISBN	Date	Edition	coming from	preview	
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio

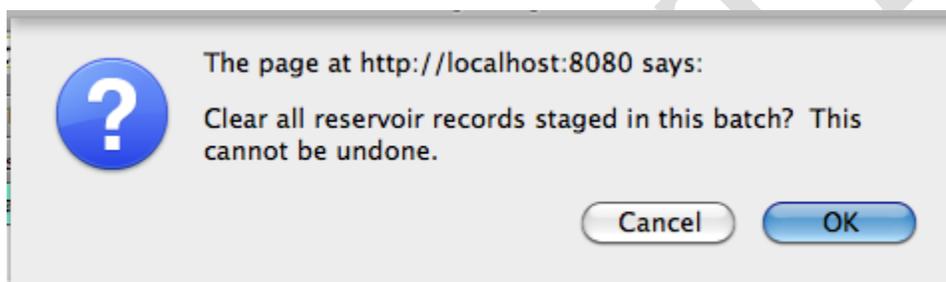
To clean items out of the 'reservoir':

- Visit the main screen of the Manage Staged MARC Records tool

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
9	koha.mrc		staged	2009-11-24 08:40:48	200	263 (Create Label Batch)	Clean
8	bib-684.marc8		imported	2009-10-20 13:16:17	1	1 (Create Label Batch)	Clean
7	koha(3).mrc		cleaned	2009-08-18 16:18:26	94	125 (Create Label Batch)	
6	koha(2).mrc		cleaned	2009-08-18 16:15:57	43	43 (Create Label Batch)	
5	koha.mrc		cleaned	2009-08-18 16:14:33	1000	1113 (Create Label Batch)	

- To clean a batch, click the 'Clean' button to the right
- You will be presented with a confirmation message



- Accept the deletion and the records will be removed from the reservoir and the status will be changed to 'cleaned'

2.12. Upload Local Cover Image

- *Get there:* More > Tools > Catalog > Upload Local Cover Image

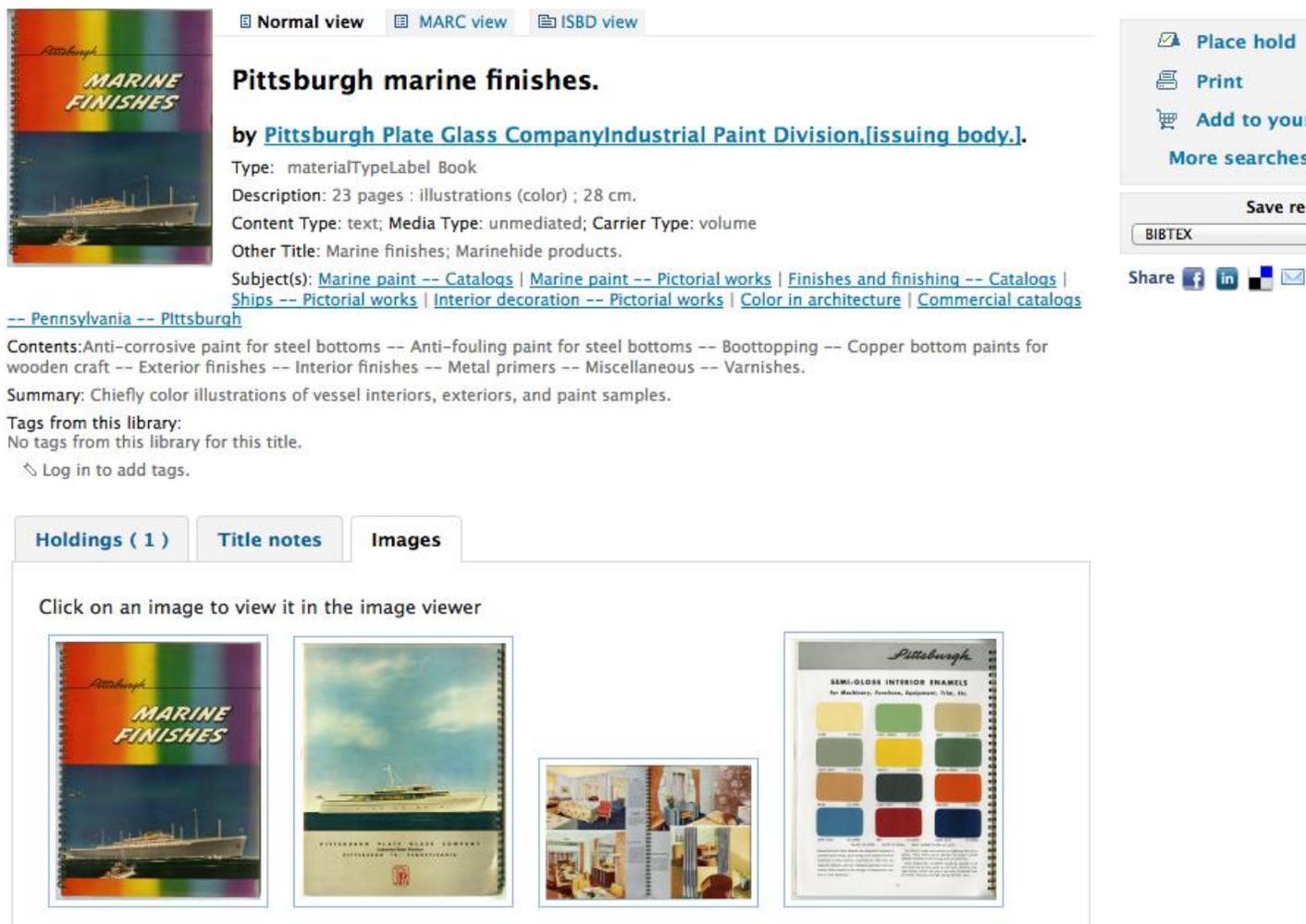
This tool will allow you to upload cover images for the materials in your catalog. To access this tool, staff will need the upload_local_cover_images permission. In order for images to show in the staff client and/or OPAC you will need to set your LocalCoverImages and/or OPACLocalCoverImages preferences to 'Display.' Images can be uploaded in batches or one by one.

Note

Koha does not have a maximum file size limit for this tool, but Apache may limit the maximum size of uploads (talk to your sys admin).

Note

When you want to upload multiple images onto a bib record, they will display left to right (then top to bottom, depending on screen real estate) in order of uploading, and the one on the left (the first one uploaded) will be the one used as a thumbnail cover in search results and on the detail page. There is no way to reorder cover images uploaded in this way, so be sure to upload them in the order you'd like them to appear.



Pittsburgh marine finishes.

by [Pittsburgh Plate Glass Company Industrial Paint Division, \[issuing body\].](#)

Type: materialTypeLabel Book
 Description: 23 pages : illustrations (color) ; 28 cm.
 Content Type: text; Media Type: unmediated; Carrier Type: volume
 Other Title: Marine finishes; Marinehide products.

Subject(s): [Marine paint -- Catalogs](#) | [Marine paint -- Pictorial works](#) | [Finishes and finishing -- Catalogs](#) | [Ships -- Pictorial works](#) | [Interior decoration -- Pictorial works](#) | [Color in architecture](#) | [Commercial catalogs](#)

[-- Pennsylvania -- Pittsburgh](#)

Contents: Anti-corrosive paint for steel bottoms -- Anti-fouling paint for steel bottoms -- Boottopping -- Copper bottom paints for wooden craft -- Exterior finishes -- Interior finishes -- Metal primers -- Miscellaneous -- Varnishes.

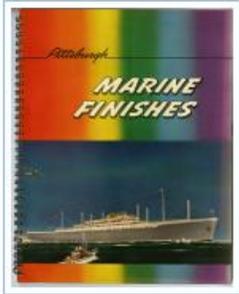
Summary: Chiefly color illustrations of vessel interiors, exteriors, and paint samples.

Tags from this library:
 No tags from this library for this title.

[Log in to add tags.](#)

Holdings (1) | **Title notes** | **Images**

Click on an image to view it in the image viewer






If uploading a single image:

- Visit the tool and click the 'Browse' button to browse to the image on your local machine.

Upload Local Cover Image

- Select an image file or ZIP file to upload. The tool will accept images in GIF, JPEG, PNG, and XPM formats.

Upload images

Select the file to upload:

Upload progress:

100%

File type

ZIP file
 Image file

Enter cover biblionumber:

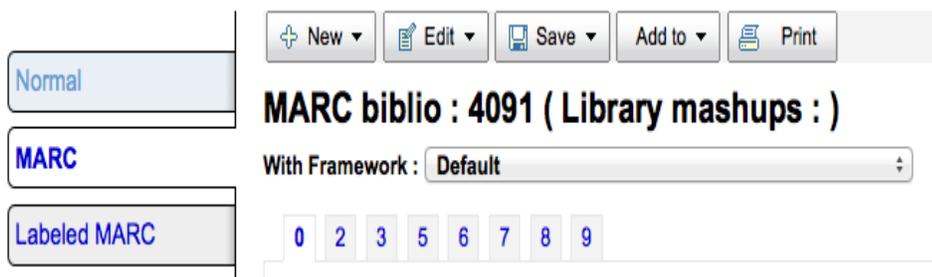
Options

Replace existing covers

- Click 'Upload file'
- Choose 'Image file' under the 'File type' section
- Enter the biblionumber for the record you're attaching this image to. This is not the same as the barcode, this is the system generated number assigned by Koha.
 - Find the biblionumber by looking at the end of the URL in the address bar when on the detail page



- or by clicking on the MARC tab on the detail page in the staff client



- If you would like to replace any other cover images you may have uploaded in the past, check the 'Replace existing covers' box under the 'Options' section
- Click 'Process images'
- You will be presented with a summary of the upload and a link to the record you have just added the image to

If uploading a batch of images at once you will need to prepare a ZIP file first.

- Enter in the ZIP file all the images you are uploading
- Also include a text file (*.TXT) named either datalink.txt or idlink.txt listing the biblionumber followed by the image name for each image one per line
 - ex. 4091,image4091.jpg



- Browse your local computer to the ZIP file
- Click 'Upload file'
- Choose 'Zip file' under the 'File type' section
- If you would like to replace any other cover images you may have uploaded in the past, check the 'Replace existing covers' box under the 'Options' section
- Click 'Process images'

- You will be presented with a summary of the upload

Upload Local Cover Image

Image upload results :

- 2 images found
- [View final record](#)
- [Back](#)

Important

The source image is used to generate a 140 x 200 px thumbnail image and a 600 x 800 px full-size image. The original sized image uploaded will not be stored by Koha

You will be able to see your cover images in the staff client on the detail page under the 'Image' tab in the holdings table at the bottom

In the OPAC the cover images will also appear in the images tab, as well as next to the title and on the search results.

If you would like to remove a cover image you can click 'Delete image' below the image if you have the upload_local_cover_images permission.

Additional Tools

3.1. Calendar

- *Get there:* More > Tools > Additional Tools > Calendar

Libraries can define library closings and holidays to be used when calculating due dates. You can make use of the Calendar by turning on the proper system preferences:

- *Get there:* More > Administration > Global System Preferences > Circulation > useDaysMode
 - Choose the method for calculating due date - either include days the library is closed in the calculation or don't include them.
- *Get there:* More > Administration > Global System Preferences > Circulation > finescalendar
 - This will check the holiday calendar before charging fines

Aligarh muslim university library Calendar

Define the holidays for: [Aligarh muslim university library ▼]

Calendar information

Aug		2016				
Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Today

Copy holidays to: [] [Copy]

3.1.1. Adding Events

Before adding events, choose the library you would like to apply the closings to. When adding events you will be asked if you would like to apply the event to one branch or all branches. To add events, simply

- Click on the date on the calendar that you would like to apply the closing to

Aligarh muslim university library Calendar

Define the holidays for: [Aligarh muslim university library ▼]

Add new holiday

Library: Aligarh muslim university library

From date: Mondays, 8/15/2016

To date : []

Title: []

Description: []

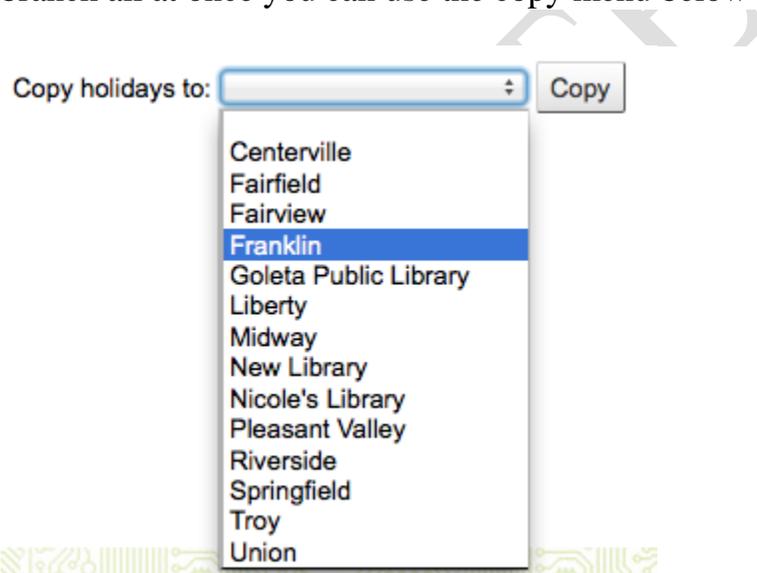
Holiday only on this day. [?]
 Holiday repeated every same day of the week. [?]
 Holiday repeated yearly on the same date. [?]
 Holidays on a range. [?]
 Holidays repeated yearly on a range. [?]
 Copy to all libraries. [?]

Save Cancel

Calendar information

- In the form that appears above the calendar, enter the closing information (for more info on each option click the question mark [?] to the right of the option)
 - Library will be filled in automatically based on the library you chose from the pull down at the top of the page
 - The day information will also be filled in automatically based on the date you clicked on the calendar
 - In the description enter the reason the library is closed
 - Next you can choose if this event is a one time event or if it is repeatable.

- If this is a one day holiday choose 'Holiday only on this day'
- If this is a weekly closing (like a weekend day) then you can choose 'Holiday repeated every same day of the week'
- If this is an annual holiday closing choose 'Holiday repeated yearly on the same date'
- If the library is going to be closed for the week or a range of time choose 'Holiday on a range' and enter a 'To Date' at the top
- If the library is going to be closed for a range of time each year (such as summer holidays for schools) choose 'Holiday repeated yearly on a range' and enter a 'To Date' at the top
- Finally decide if this event should be applied to all libraries or just the one you have originally selected
 - If you'd rather enter all the holidays and then copy them all to another branch all at once you can use the copy menu below the calendar



- After saving you will see the event listed in the summary to the right the calendar

3.2. CSV Profiles

- *Get there:* More > Tools > Additional Tools > CSV Profiles

CSV Profiles are created to define how you would like your cart or list to export.

3.2.1. Add CSV Profiles

To add a CSV Profile

- Click 'CSV Profiles' from the Tools menu

- The 'Profile type' determines what type of fields you plan to use (MARC or SQL) to define your profile
 - If you choose MARC then you will need to enter MARC fields

New profile
Edit existing profile

New CSV export profile

Profile name: *Required*

Profile type: *Required*

Profile description:

CSV separator:

Field separator:

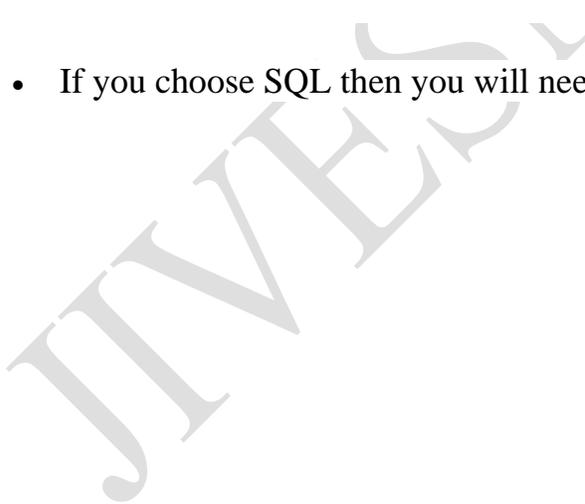
Subfield separator:

Encoding:

Profile MARC fields: *Required*

You have to define which fields or subfields you want to export, separated by pipes.
 You can also use your own headers (instead of the ones from Koha) by prefixing the field number with an header, followed by the equal sign.
 Example: Personal name=200|Entry element=210\$a|300|009
 You can use Template Toolkit tags too. See the help page for more information.

- If you choose SQL then you will need to enter SQL database fields



New profile
Edit existing profile

New CSV export profile

Profile name: Required

Profile type: SQL Required

Profile description:

CSV separator: Comma (,)

Profile SQL fields:

You have to define which fields you want to export, separated by pipes.

You can also use your own headers (instead of the ones from Koha) by prefixing the field name with an header, followed by the equal sign.

Example: Name=subscription.name|Title=subscription.title|Issue number=serial.serialseq

- The 'Profile name' will appear on the export pull down list when choosing 'Download' from your cart or list
- The 'Profile description' is for your own benefit, but will also appear in the OPAC when patrons download content, so make sure it's clear to your patrons as well
 - The 'CSV separator' is the character used to separate values and value groups

Note

The most common option here is comma because most spreadsheet applications know how to open files split by commas.

- The 'Field separator' is the character used to separate duplicate fields

- Example: You may have multiple 650 fields and this is the character that will appear in between each one in the column

- The 'Subfield separator' is the character used to separate duplicate subfields
 - Example: You may have multiple \$a subfields in a field
- The 'Encoding' field lets you define the encoding used when saving the file
- Finally format your CSV file using the 'Profile MARC' or 'Profile SQL' field
 - Define which fields or subfields you want to export, separated by pipes. Example : 200|210\$a|301 for MARC and biblio.title|biblio.author for SQL
 - **Note**

You can also use your own headers (instead of the ones from Koha) by prefixing the field number with an header, followed by the equal sign.
Example : Personal name=100|title=245\$a|300

When you have entered in all of the information for you profile, simply click 'Submit' and you will be presented with a confirmation that your profile has been saved.

The new CSV profile "TitleAuthor" has been successfully created.

3.2.2. *Modify CSV Profiles*

Once you have created at least one CSV Profile an 'Edit profile' tab will appear next to the 'New profile' button.

New profile **Edit existing profile**

Modify or delete a CSV export profile

Profile name:

Profile description:

CSV separator:

Field separator:

Subfield separator:

Encoding:

Profile MARC fields:

Delete selected profile ?

- Choose the profile you would like to edit and alter the necessary fields.
- After submitting your changes you will be presented with a confirmation message at the top of the screen

The CSV profile has been successfully modified.

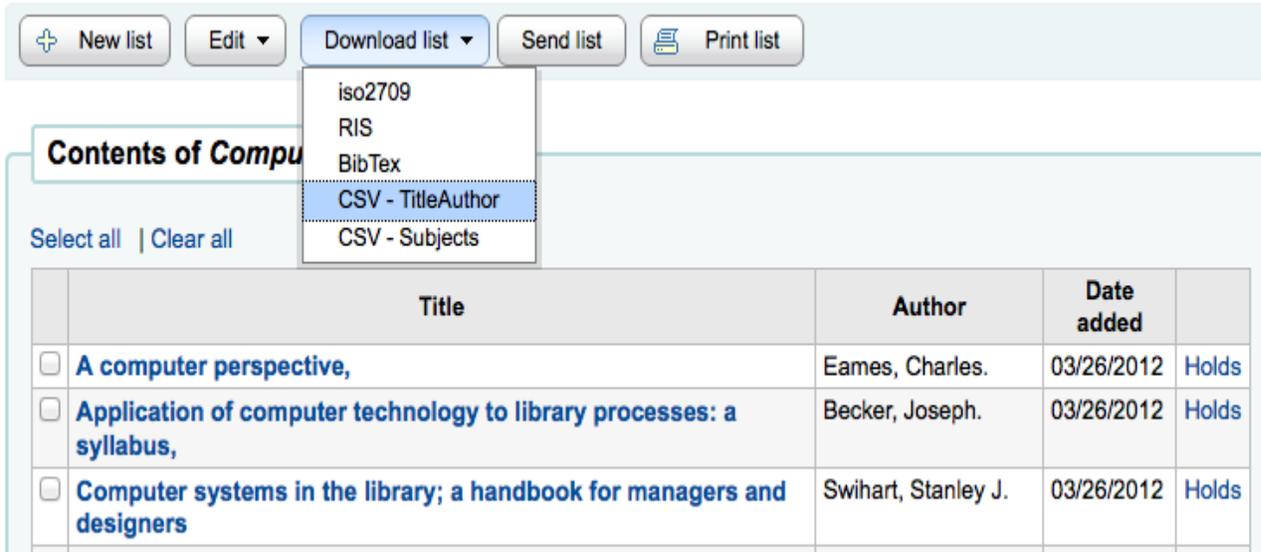
- To delete a profile, check the 'Delete selected profile' option before clicking 'Submit Query'

Profile MARC fields:

Delete selected profile ?

3.2.3. Using CSV Profiles

Your CSV Profiles will appear on the export list or cart menu under the 'Download' button in both the staff client and the OPAC



Contents of Compu
 Select all | Clear all

	Title	Author	Date added	
<input type="checkbox"/>	A computer perspective,	Eames, Charles.	03/26/2012	Holds
<input type="checkbox"/>	Application of computer technology to library processes: a syllabus,	Becker, Joseph.	03/26/2012	Holds
<input type="checkbox"/>	Computer systems in the library; a handbook for managers and designers	Swihart, Stanley J.	03/26/2012	Holds

3.3. Log Viewer

- *Get there:* More > Tools > Additional Tools > Log Viewer

Actions within the Koha system are tracked in log files. Your system preferences can be changed to prevent the logging of different actions. These logs can be viewed using the Log Viewer Tool.

Browse system logs

Librarian:

Module:
Catalog
Authorities
Patrons

Action:

Object:

Info:

Display from:
(MM/DD/YYYY)

Display to:
(MM/DD/YYYY)

Output

To screen in the browser:

To a file: Named:

Choosing different combinations of menu options will produce the log file for that query.

3.4. News

- *Get there:* More > Tools > Additional Tools > News

Koha's news module allows librarians to post news to the OPAC, staff interface and circulation receipts.

[+ New entry](#)

Display location: Library:

Showing 1 to 3 of 3 Show entries Search:

	Location	Library	Number	Creation date	Expiration date	Title	News	
<input type="checkbox"/>	Slip	All Libraries	1	08/01/2011	08/31/2011 <i>(expired)</i>	Closing Reminder	The library will be closed on Friday.	Edit
<input type="checkbox"/>	Librarian interface	All Libraries	2	10/29/2007	01/10/2099	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"/>	Librarian interface	All Libraries	1	10/29/2007	01/10/2099	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

Showing 1 to 3 of 3

To add news to either the OPAC, the Staff Client or a Circulation receipt:

- Click 'New Entry'



OPAC and Koha news

Display location:

Library:

Title:

Publication date: (MM/DD/YYYY)

Expiration date: (MM/DD/YYYY)

Appear in position:

News:

Path: p

Submit Cancel

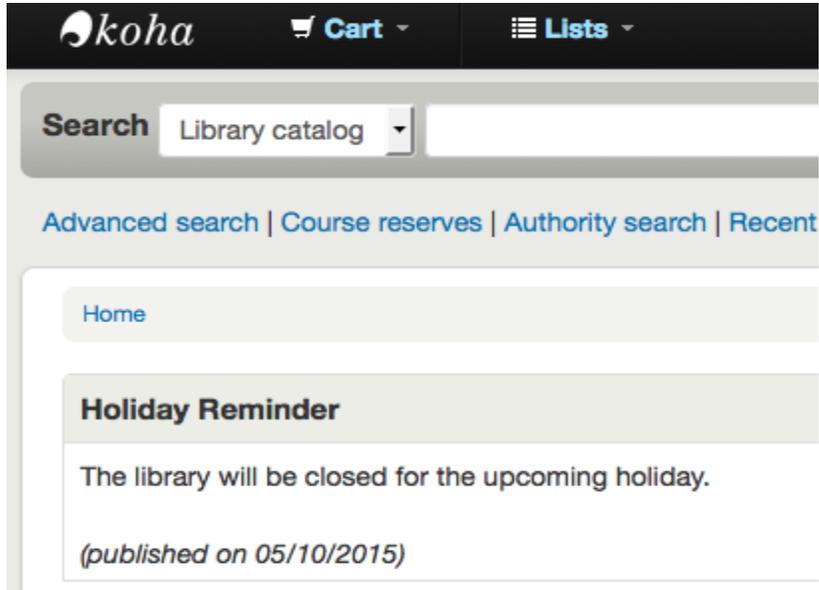
- Under 'Display Location' choose whether to put the news on the OPAC, Slip (circulation receipt) or the Librarian (Staff) Interface.

Display location:

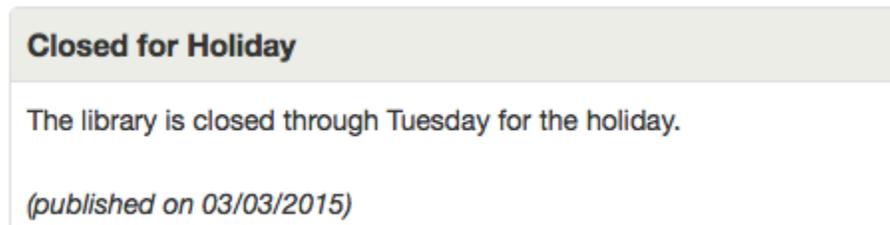
Library:

Title:

- Choose the library this news item will show for
- Choose a title for your entry
- Using the publication and expiration date fields you can control from which date and for how long your news item appears
 - Examples: (these assume today's date as 07-May-2015)
 - Publish on current date: set publication date as 07-May-2015
 - Schedule for publishing in future: set date later than 07-May-2015
 - Backdate the news item: set date earlier than 07-May-2015
 - 'Appear in position' lets you decide what order your news items appear in
 - The 'News' box allows for the use of HTML for formatting of your news item
- After filling in all of the fields, click 'Submit'
- News in the OPAC will appear above the OpacMainUserBlock



- Below the news in the OPAC there will be an RSS icon allowing you to subscribe to library news



 RSS feed for Nicole's Library and system-wide library news.

- News in the Staff Client will appear on the far left of the screen

[Circulation](#)
[Patrons](#)
[Search](#)
[Cart](#)
[More ▾](#)


 Enter patron card number or partial name:

[Check out](#)
[Check in](#)
[Search patrons](#)
[Search the catalog](#)

Home

News

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 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

What's Next?
 Now that you've installed Koha, what's next? Here are some suggestions:

- [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](#)

Posted on 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

Circulation

Patrons

Advanced search

Lists

Cataloging

Authorities

Suggestions pending approval: **5**
 Comments pending approval: **1**
 Tags pending approval: **3**

- News on the circulation receipts will appear below the items that are checked out

Fairview
 Checked out to Coda ENGARD
 (23529001223643)

Checked Out

Finding statistics online :
 Barcode: 10044445
 Date due: 12/22/2010

Overdues

Harry Potter and the chamber of secrets.
 Barcode: CPL10054445
 Date due: 10/02/2010

This book
 Barcode: CPL10077667
 Date due: 09/30/2010

Britannica book of the year.
 Barcode: 10101000000415
 Date due: 10/13/2010

News

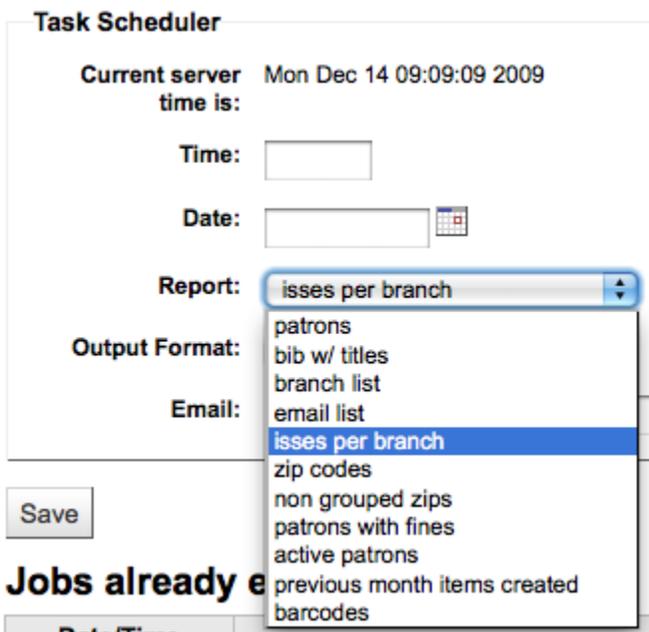
The library will be closed over the upcoming holidays. Normal library hours will resume on the 2nd of January. Happy Holidays! *Posted on 12/12/2010*

3.5. Task Scheduler

- *Get there:* More > Tools > Additional Tools > Task Scheduler

The task scheduler is a way to schedule reports to run whenever you want.

To schedule a task, visit the Task Scheduler and fill in the form



Task Scheduler

Current server time is: Mon Dec 14 09:09:09 2009

Time:

Date: 

Report:

- issues per branch
- patrons
- bib w/ titles
- branch list
- email list
- issues per branch
- zip codes
- non grouped zips
- patrons with fines
- active patrons
- previous month items created
- barcodes

Output Format:

Email:

Jobs already e

Date/Time

- Current Server Time shows the time on your server (schedule all of your reports to run based on that time - not on your local time)
- Time should be entered as hh:mm (2 digit hour, 2 digit minute)
- Date should be entered using the calendar pop up
- From Report choose the report you want to schedule
- Choose whether to receive the text of or a link to the results
- In the Email filed enter the email of the person you want to receive your report

Below the task scheduler form, there is a list of scheduled reports

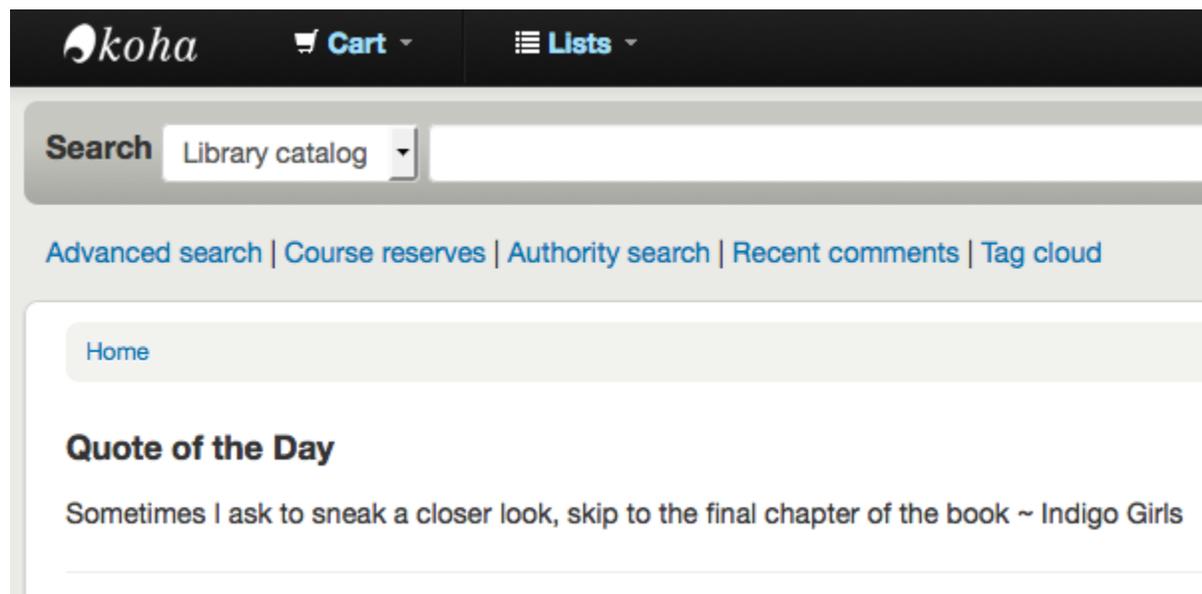
You can also schedule reports directly from the list of saved reports by clicking the 'Schedule' link

3.6. Quote of the Day (QOTD) Editor

- *Get there:* More > Tools > Additional Tools > Edit quotes for QOTD feature

This tool will allow you to add and edit quotes to show on the OPAC if you're using the Quote of the Day (QOTD) feature.

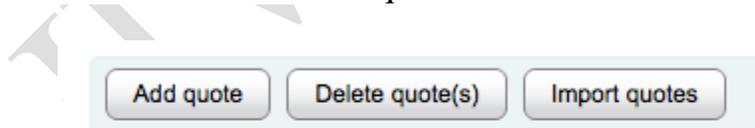
To turn this feature on set the QuoteOfTheDay preference to 'Enable' and add at least one quote via the Quote of the Day Editor. Once these steps are complete you will see your quotes above theOpacMainUserBlock in the OPAC:



3.6.1. Add a Quote

To add a quote:

- Click the 'Add quote' button in the toolbar and an empty quote entry will be added to the end of the current quote list.



Quote editor

- **Important**

Both the 'Source' and the 'Text' fields must be filled in in order to save the new quote.

Show entries Search:

ID ▲	Source ▼	Text ▼	Last displayed ▼
1	Indigo Girls	Sometimes I ask to sneak a closer look, skip to the final chapter of the book.	2012-09-20 13:13:50
NA	<input type="text"/>	<input type="text"/>	0000-00-00 00:00:00

Showing 1 to 2 of 2 entries **1**

- When finished filling in both fields, press the <Enter> key on your keyboard to save the new quote.
- The list will update and the new quote should now be visible in the list.

Note

You may cancel the addition of a new quote any time prior to saving it simply by pressing the <Esc> key on your keyboard.

3.6.2. Edit/Delete a Quote

Once the current quote pool has been loaded into the editing table, you may edit the quote source and text.

- Edit either the 'Source' or 'Text' fields by clicking on the desired field.

Show entries Search:

ID ▲	Source ▼	Text ▼	Last displayed ▼
1	<input type="text" value="Indigo Girls"/>	Sometimes I ask to sneak a closer look, skip to the final chapter of the book.	2012-09-20 13:13:50

Showing 1 to 1 of 1 entries **1**

- When you are finished editing a field, press the <Enter> key on your keyboard to save the changes.

The list will be updated, the edits saved, and visible.

If you'd like you can also delete quote(s).

- Select the quote(s) you desire to delete by clicking on the corresponding quote id.
- Once quote selection is finished, simply click the 'Delete quote(s)' button.
- You will be prompted to confirm the deletion.
- After confirming the deletion, the list will update and the quote(s) will no longer appear.

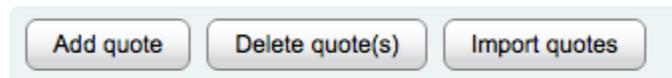
3.6.3. Import Quotes

If you'd like you can import a batch of quotes as a CSV file. Your file must contain two columns in the form: "source","text" with no header row.

Note

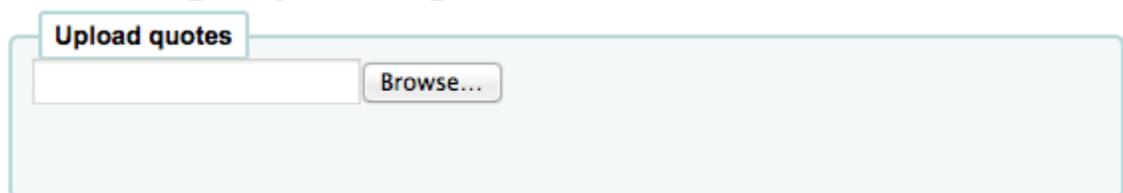
You will be prompted to confirm upload of files larger than 512KB.

- To start the import process click the 'Import quotes' button at the top of the screen



Quote editor

- Once on the import quotes screen you can browse your computer for the file you would like to import



- After selecting the CSV file, click the 'Open' button and the file will be uploaded into a temporary editing table.

Show entries Search:

Number	Source	Quote
1	George Washington	As Mankind becomes more liberal, they will be more apt to allow that all those who conduct themselves as worthy members of the community are equally entitled to the protections of civil government. I hope ever to see America among the foremost nations of justice and liberality.
2	George Washington	The time is now and near at hand which must probably determine whether Americans are to be freemen or slaves; whether they are to have property they can call their own; whether their houses and farms are to be pillaged and destroyed, and themselves consigned to a state of wretchedness from which no human efforts will deliver them. The fate of unborn millions will now depend, under God, on the courage and conduct of this army. Our cruel and unrelenting enemy leaves us no choice but a brave resistance, or the most abject submission. . . . We have, therefore, to resolve to conquer or to die.

- From the listing you can edit either the 'Source' or 'Text' fields by clicking on the desired field. When you are finished editing a field, press the <Enter> key on your keyboard to save the changes.

Show entries Search:

Number	Source	Quote
1	<input type="text" value="George Washington"/>	As Mankind becomes more liberal, they will be more apt to allow that all those who conduct themselves as worthy members of the community are equally entitled to the protections of civil government. I hope ever to see America among the foremost nations of justice and liberality.

- You can also delete quotes from this listing before completing the import.
 - Select the quote(s) you desire to delete by clicking on the corresponding quote id.

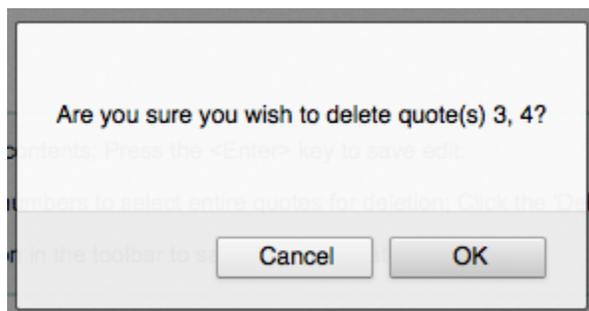
Show entries Search:

Number	Source	Quote
1	George Washington	As Mankind becomes more liberal, they will be more apt to allow that all those who conduct themselves as worthy members of the community are equally entitled to the protections of civil government. I hope ever to see America among the foremost nations of justice and liberality.
2	George Washington	The time is now and near at hand which must probably determine whether Americans are to be freemen or slaves; whether they are to have property they can call their own; whether their houses and farms are to be pillaged and destroyed, and themselves consigned to a state of wretchedness from which no human efforts will deliver them. The fate of unborn millions will now depend, under God, on the courage and conduct of this army. Our cruel and unrelenting enemy leaves us no choice but a brave resistance, or the most abject submission. . . . We have, therefore, to resolve to conquer or to die.
3	George Washington	I conceive that a knowledge of books is the basis on which all other knowledge rests.
4	George Washington	Precedents are dangerous things; let the reins of government then be braced and held with a steady hand, and every violation of the Constitution be reprehended: If defective let it be amended, but not suffered to be trampled upon whilst it has an existence.

- Once quote selection is finished, simply click the 'Delete quote(s)' key.



- You will be prompted to confirm the deletion.



- After confirming the deletion, the list will update and the quote(s) will no longer appear.
- Once you are satisfied with the quotes, click the 'Save quotes' button in the toolbar at the top and the quotes will be saved.



Home > Tools > Aligarh muslim university library Calendar

Tools home

Patrons and circulation

- Comments
- Import patrons
- Notices & slips
- Overdue notice/status triggers
- Patron card creator
- Batch patron deletion/anonymization
- Batch patron modification
- Tag moderation
- Upload patron images

Catalog

- Batch item deletion
- Batch item modification
- Export data
- Inventory/stocktaking
- Label creator
- Quick spine label creator
- Stage MARC for import

Aligarh muslim university library Calendar
Define the holidays for: Aligarh muslim university library

Calendar information

Aug 2016

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Today

Copy holidays to:

Hints

- Search in the calendar the day you want to set as holiday.
- Click the date to add or edit a holiday.
- Enter a title and description for the holiday.
- Specify how the holiday should repeat.
- Click Save to finish.

Key

Working day Unique holiday Holiday repeating weekly Holiday repeating yearly Holiday exception

Yearly - Repeatable Holidays

Month/Day	Title	Description
08/11	Independence Day	All student are invited to celebrate independent day...

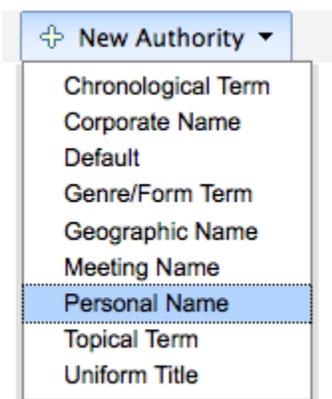
Activate Windows

Authorities

Authority records are a way of controlling fields in your MARC records. Using authority records will provide you with control over subject headings, personal names and places.

3.1. Adding Authorities

To add a new authority record, choose the authority type from the 'New Authority' button.



The form that appears will allow you to enter all of the necessary details regarding your authority record.

JIVESNA

Adding authority Personal Name

Save

0
1
2
3
4
5
6
7
8

000 - LEADER

001 - CONTROL NUMBER

003 - CONTROL NUMBER IDENTIFIER

005 - DATE AND TIME OF LATEST TRANSACTION

008 - FIXED-LENGTH DATA ELEMENTS

010 - LIBRARY OF CONGRESS CONTROL NUMBER -

014 - LINK TO BIBLIOGRAPHIC RECORD FOR SERIAL OR MULTIPART ITEM +-

016 - NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBER +-

020 - INTERNATIONAL STANDARD BOOK NUMBER +-

022 - INTERNATIONAL STANDARD SERIAL NUMBER +-

024 - OTHER STANDARD IDENTIFIER +-

031 - MUSICAL INCIPITS INFORMATION +-

To expand collapsed values simply click on the title and the subfields will appear.

3.2. Searching Authorities

From the authorities page you can search for existing terms and the bibliographic records they are attached to.

Enter authority heading (\$a):

Default

contains

Heading A-Z

Submit

[Search Authorities](#)

[Search Main Heading](#)

[Search All Headings](#)

From the results you will see the authority record, how many bibliographic records it is attached to, and a delete link (if there are not bibliographic records attached).

Authority search results

<< < 1 **2** > >>

Results 1 to 20 of 25

Summary	Used in	Delete
\$aAutomatisation	0 biblio(s)	Delete
\$aAutomatisation	1 biblio(s)	
\$aBibliothèques \$xAutomatisation \$vPériodiques.	0 biblio(s)	Delete
\$aBibliothèques \$xAutomatisation \$vPériodiques.	1 biblio(s)	
\$aCOMPUTER APPLICATIONS.	0 biblio(s)	Delete
\$aCOMPUTER APPLICATIONS.	1 biblio(s)	
Dietel, Alfred.	0 biblio(s)	Delete
\$aLibraries and the Internet.	0 biblio(s)	Delete
\$aLibraries and the Internet.	0 biblio(s)	Delete
\$aLibraries and the Internet.	0 biblio(s)	Delete
\$aLibraries and the Internet.	1 biblio(s)	
\$aLibraries and the Internet.	1 biblio(s)	
\$aLibraries \$xAutomation \$vPeriodicals.	0 biblio(s)	Delete
\$aLibraries \$xAutomation \$vPeriodicals.	1 biblio(s)	
\$aLIBRARY AUTOMATION.	0 biblio(s)	Delete
\$aLIBRARY AUTOMATION.	1 biblio(s)	
\$aMashups (World Wide Web) \$xLibrary applications.	0 biblio(s)	Delete
\$aMashups (World Wide Web) \$xLibrary applications.	0 biblio(s)	Delete
\$aMashups (World Wide Web) \$xLibrary applications.	0 biblio(s)	Delete
\$aMashups (World Wide Web) \$xLibrary applications.	1 biblio(s)	

<< < 1 **2** > >>

Clicking on the authority record summary will open the full record and the option to edit the record.



Authority #7943935 (Topical Term)

Used in [1 record\(s\)](#)

150 ## - HEADING--TOPICAL TERM
 a Topical term or geog Mashups (World Wide Web)
 x General subdivision Library applications.

3.3. Editing Authorities

Authorities can be edited by clicking on the authority summary from the search results and then clicking the 'Edit' button above the record.

Modify authority #7943939 Personal Name

100 - HEADING--PERSONAL NAME -

▲ a	Personal name	Engard, Nicole C.,
▲ d	Dates associated with	1979-

Once you've made the necessary edits, simply click 'Save' and all of the records that use this authority record will be updated.

To delete an authority record you first must make sure it's not linked to any bibliographic records. If it is not used by any bibliographic records a 'Delete' link will appear to the right of the record on the search results and as a button that appears after clicking on the summary of the authority record.

Reports

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1. Custom Reports

Koha's data is stored in a MySQL database which means that librarians can generate nearly any report they would like by either using the Guided Reports Wizard or writing their own SQL query.

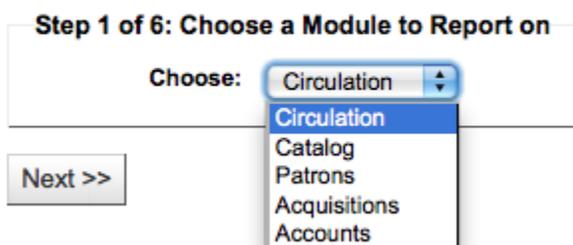
1.1. Add Custom Report

1.1.1. Guided Report Wizard

The guided report wizard will walk you through a six step process to generate a report.

Step 1: Choose the module you want to report on. This will determine what tables and fields are available for you to query.

Build A Report



Step 1 of 6: Choose a Module to Report on

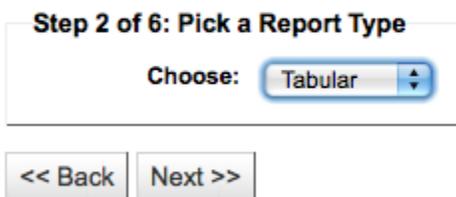
Choose:

- Circulation
- Catalog
- Patrons
- Acquisitions
- Accounts

Next >>

Step 2: Choose a report type. For now, Tabular is the only option available.

Build A Report



Step 2 of 6: Pick a Report Type

Choose:

<< Back Next >>

Step 3: Choose the fields you want in your report. You can select multiple fields and add them all at once by using CTRL+Click on each item you want to add before clicking the Add button.

Step 3 of 6: Select Columns for Display

Note: Be careful selecting when selecting columns. If your choice is too broad it could result in a very large report that will be incomplete, or slow your system down.

<p>borrowers</p> <ul style="list-style-type: none"> Borrower Number Card Number Surname Firstname Title borrowers.othernames Initials borrowers.streetnumber borrowers.streettype borrowers.address borrowers.address2 City Zip/Post Code 2? borrowers.country borrowers.email Phone borrowers.mobile borrowers.fax 	<input type="button" value="Add"/> <input type="button" value=" << Delete"/>	<ul style="list-style-type: none"> Surname Firstname
--	---	--

Step 4: Choose any limits you might want to apply to your report (such as item types or branches). If you don't want to apply any limits, simply click Next instead of making an option.

Step 4 of 6: Select Criteria to Limit on

<input type="checkbox"/> Item-level Item Type	BK	<input type="button" value="v"/>
<input type="checkbox"/> Type	issue	<input type="button" value="v"/>
<input type="checkbox"/> Borrowers Category	EMP	<input type="button" value="v"/>
<input type="checkbox"/> Branch Code	FPL	<input type="button" value="v"/>
<input type="checkbox"/> Publication Date		<input type="button" value="calendar"/>
<input type="checkbox"/> Accession Date		<input type="button" value="calendar"/>

Step 5: Perform math functions. If you don't want to do any calculations, simply click Next instead of making an option.

Step 5 of 6: Pick which columns to total

<input type="checkbox"/> borrowers.surname	sum
<input type="checkbox"/> borrowers.firstname	sum

<< Back Next >>

Step 6: Choose data order. If you want the data to print out in the order it's found in the database, simply click Finish.

Step 6 of 6: Choose how you want the report ordered

<input checked="" type="checkbox"/> borrowers.surname	asc
<input type="checkbox"/> borrowers.firstname	asc desc

Finish

When you are finished you will be presented with the SQL generated by the report wizard. From here you can choose to save the report by clicking 'Save' or copy the SQL and make edits to it by hand.

Confirm Custom Report

Your report will be generated with the following SQL statement.

```
SELECT borrowers.surname,borrowers.firstname FROM borrowers LEFT JOIN statistics on
(statistics.borrowernumber=borrowers.borrowernumber) LEFT JOIN items on (items.itemnumber = statistics.itemnumber) LE
biblioitems on (biblioitems.biblioitemnumber = items.biblioitemnumber) ORDER BY borrowers.surname asc
```

You will need to save the report before you can execute it

Save

If you choose to save the report you will be asked to name your report and enter any notes regarding it.

Save Your Custom Report

Report Name:

Notes:

Once your report is saved it will appear on the 'Use Saved' page with all other saved reports.

Saved Reports

Choose the report to run from the list

Report Name	Type	Notes	Author	Creation Date	Saved Results	Saved SQL			
patrons			Engard, Nicole (51)	09/22/2009		Show SQL Edit SQL	Run	Schedule	Delete
bib w/ titles	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
branch list	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
email list	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
patrons with fines	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
active patrons	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
barcodes			Engard, Nicole (51)	12/14/2009		Show SQL Edit SQL	Run	Schedule	Delete
Number of Checkouts Per Patron			Engard, Nicole (51)	12/15/2009		Show SQL Edit SQL	Run	Schedule	Delete
Circ Report			Engard, Nicole (51)	12/18/2009		Show SQL Edit SQL	Run	Schedule	Delete

From here you can make edits, run the report, or schedule a time to have the report run.

1.1.2. Report from SQL

In addition to the report wizard, you have the option to write your own queries using SQL. To find reports written by other Koha users, visit the Koha Wiki: http://wiki.koha-community.org/wiki/SQL_Reports_Library. You can also find your database structure in `/installer/data/mysql/kohastructure.sql` or online at: http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD.

To add your query, simply fill in the form presented

Create Report From SQL

Report Name:

Notes:

Type:

SQL:

If you feel that your report might be too resource intensive you might want to consider using runtime parameters to your query. Runtime parameters basically make a filter appear before the report is run to save your system resources.

There is a specific syntax that Koha will understand as 'ask for values when running the report'. The syntax is <<Question to ask|authorized_value>>.

- The << and >> are just delimiters. You must put << at the beginning and >> at the end of your parameter
- The 'Question to ask' will be displayed on the left of the string to enter.
- The authorized_value can be omitted if not applicable. If it contains an authorized value category, or branches or itemtype or categorycode, a list with the Koha authorized values will be displayed instead of a free field Note that you can have more than one parameter in a given SQL Note that entering nothing at run time won't probably work as you expect. It will be considered as "value empty" not as "ignore this parameter". For example entering nothing for : "title=<<Enter title>>" will display results with title="" (no title). If you want to have to have something not mandatory, use "title like <<Enter title>>" and enter a % at run time instead of nothing

Examples:

- SELECT surname,firstname FROM borrowers WHERE branchcode=<<Enter patrons library|branches>> AND surname like <<Enter filter for patron surname (% if none)>>
- SELECT * FROM items WHERE homebranch = <<Pick your branch|branches>> and barcode like <<Partial barcode value here>>

Tip

You have to put "%" in a text box to 'leave it blank'. Otherwise, it literally looks for "" (empty string) as the value for the field.

Important

The only supported dropdowns at this time are Branches, Item Types and Patron Categories.

1.2. Edit Custom Reports

Every report can be edited from the reports lists. To see the list of reports already stored in Koha, click 'Use Saved.'

Saved Reports

Choose the report to run from the list

Report Name	Type	Notes	Author	Creation Date	Saved Results	Saved SQL			
patrons			Engard, Nicole (51)	09/22/2009		Show SQL Edit SQL	Run	Schedule	Delete
bib w/ titles	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
branch list	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
email list	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
isses per branch	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete
zip codes	1		Engard, Nicole (51)	11/06/2009		Show SQL Edit SQL	Run	Schedule	Delete

From this list you can edit any custom report by clicking 'Edit SQL'

Edit SQL

Report Name:

Notes:

```
SELECT firstname,surname,email FROM borrowers WHERE email != "" ORDER BY surname ASC
```

istic reports will show you counts and sums. These reports are all about numbers and statistics, for reports that return more detailed data, use the Guided Report Wizard.

2.1. Acquisitions Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

Acquisitions statistics

Title	Row	Column	Filter
Placed On	<input type="radio"/>	<input type="radio"/>	From <input type="text"/>  To <input type="text"/> 
	group by <input type="text" value="None"/>		
Received On	<input type="radio"/>	<input type="radio"/>	From <input type="text"/>  To <input type="text"/> 
	group by <input type="text" value="None"/>		
Supplier	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text" value="All Suppliers"/>
Item Type	<input type="radio"/>	<input type="radio"/>	<input type="text" value="All Item Types"/>
Budget	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="All budgets"/>

Cell value

- Count items
- Amount

Output

- To screen into the browser:

To a file: Named: Into an application ;

If you choose to output to the browser your results will print to the screen.

Acquisitions statistics

aqbooksellers.name / aqbudgets.budget_code	CHILD	GEN	REF	TOTAL
Baker & Taylor		2	9	11
Borders	8	3		11
TOTAL	8	5	9	22

You can also choose to export to a file that you can manipulate to your needs.

When generating your report, note that you get to choose between counting or summing the values.

Cell value

 Count items

 Amount

Choosing amount will change your results to appear as the sum of the amounts spent.

Acquisitions statistics

aqbooksellers.name / aqbudgets.budget_code	CHILD	GEN	REF	TOTAL
Baker & Taylor		24.98	365.1	390.08
Borders	80	66.99		146.99
TOTAL	80	91.97	365.1	537.07

2.2. Patron Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

Patrons statistics

Title	Row	Column	Filter
Patron category	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Patron status			<input type="text"/>
Patron activity	<input type="text" value="1"/> years of activity		<input type="text"/>
Zip Code	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
	<input type="text" value=""/> digits		
Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>
Date of Birth			From <input type="text"/> To <input type="text"/>
Sex	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Output

To screen into the browser:

To a file: Named: Into an application ;

If you choose to output to the browser your results will print to the screen.

JIVESNA

Patrons statistics

Filtered on

Branches = CPL FFL FPL FRL IPT LPL MMM MPL PVL RPL SPL TPL UPL

(line, column) = (categorycode,branchcode)

%cathash = Board (B), Employee (EMP), Home Bound (HB), Inter-Library Loan (IL), In House (INHS), Juvenile (J), Kid (K), Library (L), Patron (PT), Staff (S), School (SC), Student (ST), Teacher (T), Young Adult (YA)

Query = SELECT distinctrow categorycode FROM borrowers WHERE categorycode IS NOT NULL order by categorycode

Query = select distinctrow branchcode from borrowers where branchcode is not null order by branchcode

Query = SELECT categorycode, branchcode, count(*) FROM borrowers WHERE 1 group by categorycode, branchcode

categorycode / branchcode	FPL	FRL	MPL	PVL	SPL	TOTAL
Employee (EMP)	1					1
Inter-Library Loan (IL)		1				1
In House (INHS)			1			1
Juvenile (J)			1		3	4
Kid (K)		1	2			3
Patron (PT)	2	3	9		10	24
Staff (S)	2		2		3	7
Student (ST)		3	3		1	7
Teacher (T)		1	1	1	3	6
Young Adult (YA)			1		2	3
TOTAL	5	9	20	1	22	57

Based on your selections, you may see some query information above your results table. You can also choose to export to a file that you can manipulate to your needs.

2.3. Catalog Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

Catalog statistics

Title	Row	Column	Filter	
Koha Full Call Number	<input type="radio"/>	<input type="radio"/>	From	To
	<input type="text" value="characters"/>			
Item Type	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>	
Publisher	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	
Publication Year	<input type="radio"/>	<input type="radio"/>	From	To
Home Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>	
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	
Filter barcode			like	<input type="text"/> (use * to do a fuzzy search)

Output

To screen into the browser:

To a file:

Named:

Into an application: ;

If you choose to output to the browser your results will print to the screen.

Catalog statistics

items.itype / items.homebranch	CPL	FFL	FPL	FRL	LPL	MMM	MPL	PVL	RPL	SPL	TPL	TOTAL
BK	20	1	48		1	228	5	2	4	31	1	341
CR			10							4		14
Donated by	1		1			1	1					4
MU	1		3				1			4		9
REF			3	2								5
REF-BK						24						24
VID						5						5
VM			8				1		1	13		23
NULL	1											1
TOTAL	23	1	73	2	1	258	8	2	5	52	1	426

You can also choose to export to a file that you can manipulate to your needs.

2.4. Circulation Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

Circulation statistics

Title	Row	Column	Filter
Period	<input checked="" type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
Type: <input type="text" value="Checkout"/>	group by	<input type="text" value="None"/>	Select Day: <input type="text"/> Select Month: <input type="text"/>
Patron Category	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Type	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Call Number			From <input type="text"/> (inclusive) to <input type="text"/> (exclusive)
Patron sort1	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Patron sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Cell value

Count total items

Count unique items

Output

To screen into the browser:

To a file: Named: Into an application ;

If you choose to output to the browser your results will print to the screen.

Circulation statistics

Filtered on

- Event return
- Display by 2

datetime / branch	FPL	MPL	SPL	TOTAL
August	1	0	0	1
October	1	0	0	1
November	1	0	0	1
December	10	4	1	15
TOTAL	13	4	1	18

You can also choose to export to a file that you can manipulate to your needs.

2.4.1. Tracking in house use

Using the Circulation statistics reporting wizard you can run reports on in house usage of items simply by choosing 'Local Use' from the 'Type' pull down:

Circulation statistics

Title	Row	Column	Filter
Period	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/> (MM/DD/YYYY)
Type:	<input type="radio"/>	group by	Select Day: <input type="text"/> Select Month: <input type="text"/>
Patron (<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Ty	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Library	<input type="radio"/>	<input type="radio"/>	Fairview <input type="text"/>
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Call Number	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> (inclusive) to <input type="text"/> (exclusive)
Patron sort1	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Patron sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Note: In the screenshot, the 'Type' dropdown menu is open, showing options: Checkout, Renewal, Checkin, and Local Use (which is highlighted).

2.5. Serials Statistics

Using the form provided, choose how you would like to list the serials in your system.

Serials subscriptions

Vendor:

Branch:

Include expired subscriptions:

Output

To screen into the browser:

To a file: **Named:** **Into an application:** ;

If you choose to output to the browser your results will print to the screen.

Serials subscriptions

Bookseller	Title	Subscription id	Branch	Callnumber	Subscription Begin	Subscription End
	Computers in libraries.	1	FPL	MAG	01/15/2009	01/15/2010
	Computers in libraries.	2	LPL		01/01/2009	01/01/2010
Baker & Taylor	Library mashups :	3	PVL		12/15/2009	12/14/2010

You can also choose to export to a file that you can manipulate to your needs.

2.6. Patrons with the most checkouts

This report will simply list the patrons who have the most checkouts.

Patrons with the most Checkouts

Checkout date from: To:
 Check-in date from: To:
 Library:
 Item Type:
 Patron Category:
 Day:
 Month:
 Year:

Limit to:
 By:

Output
 To screen into the browser:
 To a file: Named: Into an application: Delimiter:

If you choose to output to the browser your results will print to the screen.

Top 5 List patrons for Checkouts

Filtered on

Issue From =06/01/2009

Issue To =12/31/2009

Rank	FPL		SPL	
	Patron	Issues count	Patron	Issues count
1	Engard, Nicole	8	Engard, Nicole	
2	Acosta, Edna	4	Acosta, Edna	1
3	WALKER, Andrea	2	WALKER, Andrea	
4		1		
5	Harper, Ruben	1	Harper, Ruben	

You can also choose to export to a file that you can manipulate to your needs.

2.7. Most Circulated Items

This report will simply list the items that have the been checked out the most.

Most-Circulated Items

Checkout date from:	<input type="text" value="01/01/2009"/>		To:	<input type="text" value="12/31/2009"/>	
Check-in date from:	<input type="text"/>		To:	<input type="text"/>	
Library:	<input type="text" value="Any Library"/>				
Item Type:	<input type="text" value="Any item type"/>				
Patron Category:	<input type="text" value="Any Category code"/>				
Day:	<input type="text"/>				
Month:	<input type="text"/>				
Year:	<input type="text"/>				

Limits

Limit to:	<input type="text" value="5"/>
By:	<input type="text" value="None"/>

Output

To screen into the browser:	<input checked="" type="radio"/>					
To a file:	<input type="radio"/>	Named:	<input type="text" value="Export"/>	Into an application	<input type="text" value="EXCEL"/>	<input type="text" value=";"/>

If you choose to output to the browser your results will print to the screen.

Top 5 Most-Circulated Items

Filtered on

Issue From =01/01/2009

Issue To =12/31/2009

Rank/Biblioitemnumbers	Global	
	Item	Count of Checkouts
1	The Big book of holiday plays /	3
2	The Baltimore book:	3
3	Library mashups :	2
4	Information representation and retrieval in the digital age /	1
5	The skeptical business searcher :	1

You can also choose to export to a file that you can manipulate to your needs.

2.8. Patrons with no checkouts

2.9. Items with no checkouts

This report will list items in your collection that have never been checked out.

Items with no checkouts

Library:

Document Type:

Limits

Limit to:

By:

Output

To screen into the browser:

To a file: Named: Into an application: ;

If you choose to output to the browser your results will print to the screen.

Items with no checkouts

Filtered on

Branch = CPL

Doc Type = BK

limit = 10

Summary

Group	Call Number Range	Number of Items Displayed	Total Items in Group
NULL	SF As to 025.5/24	10	
TOTAL		10	0

NULL

#	Call Number	Barcode	Item Details
1	SF As	10101000000084	The Asimov chronicles: at CPL
2	R Md.975.294A	10101000000079	Allegany County : a history / at CPL
3	F Am	10101000000052	America and I: at CPL
4	959.70433A	10101000000098	The American experience in Vietnam : at CPL
5	809.3872T	10101000000011	10 women of mystery / at CPL
6	797.1E	10101000000031	80 years of Yachting / at CPL
7	796.352N	10101000000006	The 19th hole : at CPL

You can also choose to export to a file that you can manipulate to your needs.

2.10. Catalog by Item Type

This report will list the total number of items of each item type per branch.

View catalog group by item types

Select a branch Select none to see all branches

Submit

If you choose to output to the browser your results will print to the screen.

Reports on item types for branch = FPL

Item type	count
Books	54
Continuing Resources	10
Music	4
Reference	3
Visual Materials	8
TOTAL	79

You can also choose to export to a file that you can manipulate to your needs.

2.11. Lost Items

This report will allow you to generate a list of items that have been marked as Lost within the system

Lost Items

2 lost items found

Title	Author	Lost Code	Barcode	Date last seen	Price	Rep.Price	Library	Itemtype	Holdingbranch	Location	Notes
The skeptical business searcher :	Berkman, Robert I.	Lost	88377264409309	08/23/2009			FPL	BK	FPL	GEN	
Elva S. Smith's The history of children's literature :	Smith, Elva Sophronia,	Lost		12/19/2009			CPL	BK	CPL	CART	

2.12. Average Loan Time

This report will list the average time items are out on loan based on the criteria you enter:

Average checkout period statistics

Title	Row	Column	Filter	
Issue date	<input type="radio"/>	<input type="radio"/>	From	<input type="text"/> To <input type="text"/>
	by <input type="text"/>			
Returns	<input type="radio"/>	<input type="radio"/>	From	<input type="text"/> To <input type="text"/>
	by <input type="text"/>			
Patron category	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>	
Item type	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	
Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>	
Sort1	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	
Sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	

Output

To screen into the browser:

To a file: Named: Into an application ;

If you choose to output to the browser your results will print to the screen.

Average Checkout Period

borrowers.categorycode / old_issues.branchcode	FPL	TOTAL
		0
IL		0
PT	34.25	34.25
S	19.38	19.38
TOTAL	17.88	0

You can also choose to export to a file that you can manipulate to your needs.

JIVESNA TECH