Koha 16.11

Koha 16.11 Manual (en)

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[1] http://www.gnu.org/licenses/gpl.html

Introduction

1.1. *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.

Learn more about Koha by visiting the official Koha website: *http://koha-community.org*

1.2. *Koha Recommendations*

Full system recommendations can be found on the official Koha wiki along with the developer documentation: *http://wiki.koha-community.org*[1]

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.

1.3. *Using this Manual*

This manual is always changing and suggestions for edits can be sent to the Documentation Manager via the *DOCS mailing list*[2]. The manual is organized by Koha module. At the start of most sections (and throughout) you will find 'Get there' tips. These lines tell you how to get to the section in Koha.

For example: *Get there:* More > Administration > Global System Preferences

---

[1] http://wiki.koha-community.org
[2] https://lists.koha-community.org/cgi-bin/mailman/listinfo/koha-docs
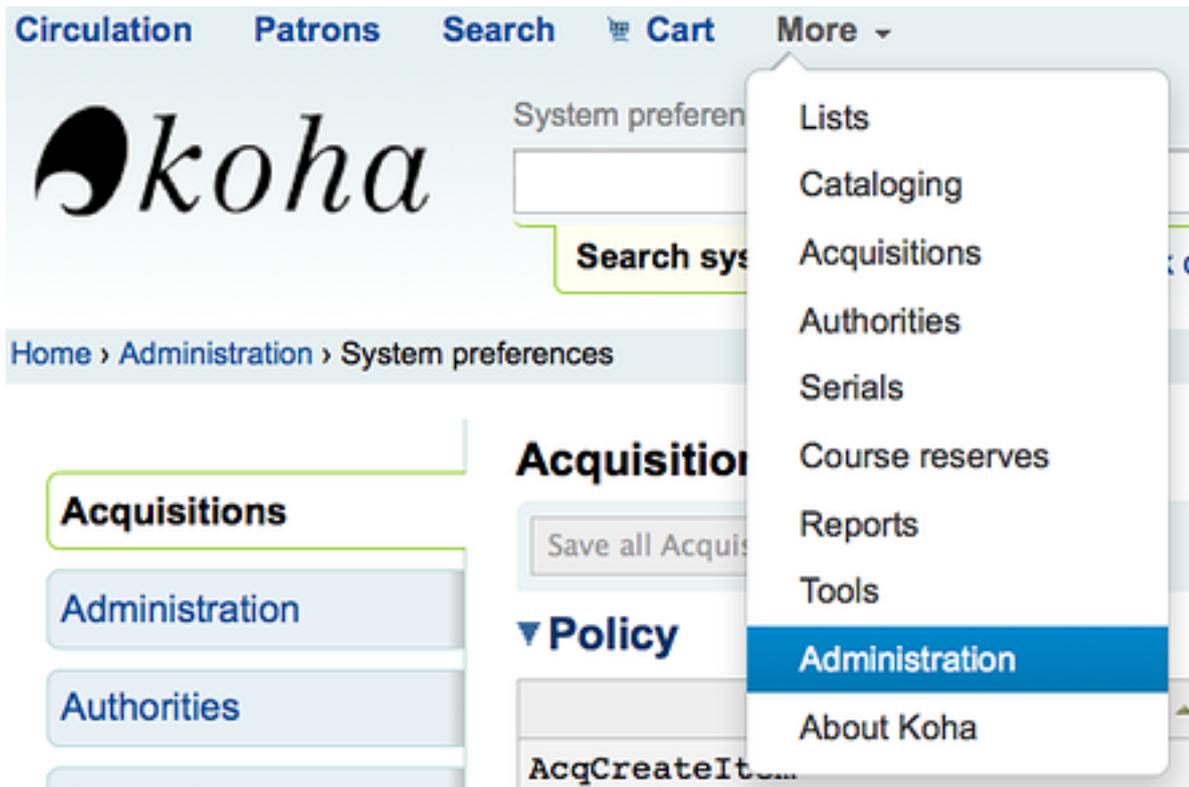
The instruction tells you where to find the necessary menu option at the top of the Koha staff client.

Links will be found throughout the manual to other sections in the manual and images will depict what should be seen on the screen.

The manual can be searched using the custom Google search on the *Koha Documentation*[3] page.

1.4. *Contributing to the Manual*

This manual is an ever-changing document and edits to the manual are welcome at any time.

The *Koha Manual*[4] is managed by the Documentation Manager, but that doesn't mean we can't all participate in making the best manual possible.

The manual is stored in git at: *http://git.koha-community.org/gitweb/?p=kohadocs.git;a=summary*

To edit the manual we recommend *oXygen*[5] or other XML/DocBook editor. We ask that every chapter and section have an ID tag associated with it to enable permanent linking and searching.

Patches to the manual should be emailed to the *DOCS mailing list*[6] and will be reviewed by the Documentation Manager before inclusion.

Administration

2.1. *Global System Preferences*

Global system preferences control the way your Koha system works in general. Set these preferences before anything else in Koha.

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

Global system preferences

Manage global system preferences like MARC flavor, date format, administrator email, and templates.

[_____] [Search]

System preferences can be searched (using any part of the preference name or description) using the search box on the 'Administration' page or the search box at the top of each system preferences page.

System preference search:

[_____] [Search]

Search system preferences   Check out   Search the catalog

When editing preferences a '(modified)' tag will appear next to items you change until you click the 'Save All' button:

TagsModeration *(modified)*	Require ▲▼ that tag
TagsShowOnDetail	Show 10 tags on
TagsShowOnList	Show 6 tags on

[Save all Enhanced Content preferences]   Cancel

After saving your preferences you'll get a confirmation message telling you what preferences were saved:

NOTE: you can only choose one source of cover images from below, otherwise Koha will show the images from all so

Saved preference FRBRizeEditions

Saved preference TagsModeration

r

Each section of preferences can be sorted alphabetically by clicking the small down arrow to the right of the word 'Preference' in the header column

▼ **Policy**

Preference ▼	
AcqCreateItem	
CurrencyFormat	
gist	

If the preference refers to monetary values (like *maxoutstanding*) the currency displayed will be the default you set in your *Currency and Exchange Rate* administration area. In the examples to follow they will all read USD for U.S. Dollars.

> **Important**
>
> For libraries systems with unique URLs for each site the system preference can be overridden by editing your koha-http.conf file this has to be done by a system administrator or someone with access to your system files. For example if all libraries but one want to have search terms highlighted in results you set the OpacHighlightedWords preference to 'Highlight' then edit the koha-http.conf for the library that wants this turned off by adding 'SetEnv OVERRIDE_SYSPREF_OpacHighlightedWords "0"'. After restarting the web server that one library will no longer see highlighted terms. Consult with your system administrator for more information.

2.1.1. *Acquisitions*

Get there: More > Administration > Global System Preferences > Acquisitions

2.1.1.1. *Policy*

2.1.1.1.1. *AcqCreateItem*

Default: placing an order

Asks: Create an item when ___.

Values:

- cataloging a record

- placing an order

- receiving an order

Description:

- This preference lets you decide when you'd like to create an item record in Koha. If you choose to add an item record when 'placing an order' then you will enter item information in as you place

records in your basket. If you choose to add the item when 'receiving an order' you will be asked for item record information when you're receiving orders in acquisitions. If you choose to add the item when 'cataloging a record' then item records will not be created in acquisitions at all, you will need to go to the cataloging module to add the items.

2.1.1.1.2. *AcqEnableFiles*

Default: Don't

Asks: ___ enable the ability to upload and attach arbitrary files to invoices.

Values:

• Do

• Don't

Description:
• This preference controls whether or not you allow the uploading of invoice files via the acquisitions module.

2.1.1.1.3. *AcqItemSetSubfieldsWhenReceiptIsCancelled*

Asks: Upon cancelling a receipt, update the item's subfields if they were created when placing an order (e.g. o=5|a="bar foo""). ___

Description:
• This preference is used in conjunction with the *AcqItemSetSubfieldsWhenReceived* preference. If you have the system set to enter default values when you receive you will want to have those values revert back if reeipt is cancelled. This preference allows you to do that.

2.1.1.1.4. *AcqItemSetSubfieldsWhenReceived*

Asks: Upon receiving items, update their subfields if they were created when placing an order (e.g. o=5|a="foo bar"). ___

Description:
• This preference allows you to set default values for items that you receive via acquisitions. Enter the data as subfield=value and split your values with a bar (|). For example you can remove the Ordered status on the item automatically when you receive it just by entering 7=0 in this preference. That will set the Not for Loan status (subfield 7) to 0 which is available.

2.1.1.1.5. *AcqViewBaskets*

Default: created by staff member

Asks: Show baskets ___

Values:

• created by staff member

• from staff member's branch

• in system, regardless of owner

Description:

• When in acquisitions this preference allows you to control whose baskets you can see when looking at a vendor. The default value of 'created by staff member' makes it so that you only see the baskets

you created. Choosing to see baskets 'from staff member's branch' will show you the baskets created by anyone at the branch you're logged in at. Finally, you can choose to set this preference to show you all baskets regardless of who created it ('in system, regardless of owner). Regardless of which value you choose for this preference, superlibrarians can see all baskets created in the system.

2.1.1.1.6. *AcqWarnOnDuplicateInvoice*

Default: Do not warn

Asks: ___ when the librarian tries to create an invoice with a duplicate number.

Values:

• Do not warn

• Warn

2.1.1.1.7. *BasketConfirmations*

Default: always ask for confirmation

Asks: When closing or reopening a basket, ___.

Values:

• always ask for confirmation

• do not ask for confirmation

Descriptions:

• This preference adds the option to skip confirmations on closing and reopening a basket. If you skip the confirmation, you do not create a new basket group.

2.1.1.1.8. *ClaimsBccCopy*

Default: Don't send

Asks: ___ blind copy (BCC) to logged in user when sending serial or acquisitions claims notices.

Values:
• Don't send

• Send

Description:
• When filing a claim in the *serials* or *acquisitions* module this preference will allow for the sending of a copy of the email to the librarian.

2.1.1.1.9. *CurrencyFormat*

Default: 360,000.00 (US)

Asks: Display currencies using the following format ___

Values:

• 360,000.00 (US)

• 360 000,00 (FR)

2.1.1.1.10. *gist*

Default: 0

Asks: The default tax rate is ___

Description:

- This preference will allow the library to define a default Goods and Services Tax rate. The default of value of 0 will disable this preference.

> **Note**
>
> Enter this value as a number (.06) versus a percent (6%).

2.1.1.1.11. *MarcFieldsToOrder*

Asks: Set the mapping values for a new order line created from a MARC record in a staged file.

Description:

- This preference includes MARC fields to check for order information to use when *ordering from a staged file* in acquisitions. You can use the following fields: price, quantity, budget_code, discount, sort1, sort2.

  For example:

  ```
  price: 947$a|947$c
  quantity: 969$h
  budget_code: 922$a
  ```

2.1.1.1.12. *UniqueItemFields*

Default: barcode

Asks:___ (space-separated list of fields that should be unique for items, must be valid SQL fields of *items*[1] table)

Description:

- If this preference is left blank when adding items in acquisitions there will be no check for uniqueness. This means that a duplicate barcode can be created in acquisitions which will cause errors later when checking items in and out.

2.1.1.2. *Printing*

2.1.1.2.1. *OrderPdfFormat*

Default: pdfformat::layout2pages

Asks: Use ___ when printing basket groups.

---

[1] http://schema.koha-community.org/tables/items.html

2.1.2. *Administration*

These preferences are general settings for your system.

Get there: More > Administration > Global System Preferences > Administration

2.1.2.1. *CAS Authentication*

The Central Authentication Service (CAS) is a single sign-on protocol for the web. If you don't know what this is, leave these preferences set to their defaults.

2.1.2.1.1. *AllowPKIAuth*

Default: no

Asks: Use ___ field for SSL client certificate authentication

Values:

- no

- the common name

- the email address

2.1.2.1.2. *casAuthentication*

Default: Don't use

Asks: ___ CAS for login authentication.

2.1.2.1.3. *casLogout*

Default: Don't logout

Asks: ___ of CAS when logging out of Koha.

2.1.2.1.4. *casServerUrl*

Asks: The CAS Authentication Server can be found at ___

2.1.2.2. *Google OpenID Connect*

Visit the *Google Developers Console*[2] to obtain OAuth 2.0 credentials such as a client ID and client secret that are known to both Google and your application.

---

[2] https://console.developers.google.com/
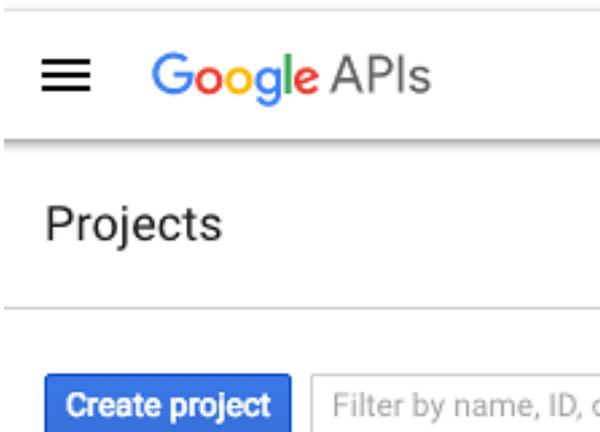
- Create a project, and give it some details to help you identify it later
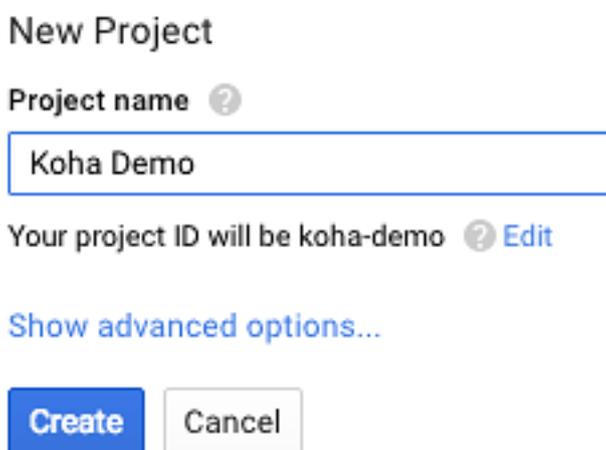
- Next search for the Google Identity and Access Management API
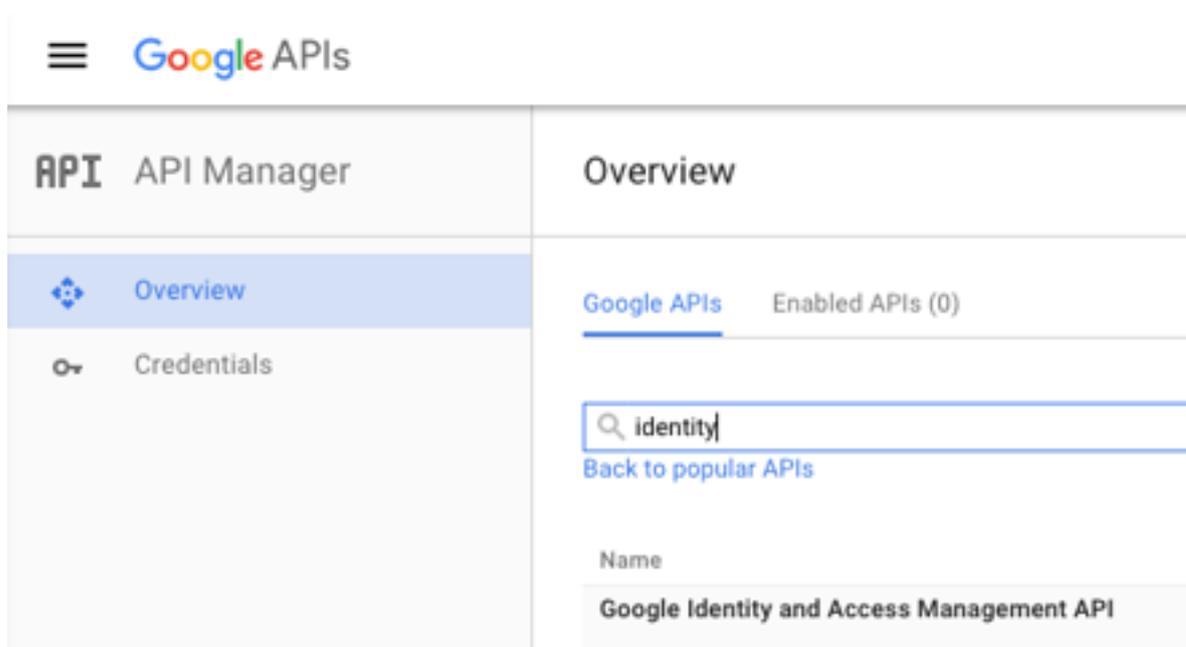
- Enable the Google Identity and Access Management API
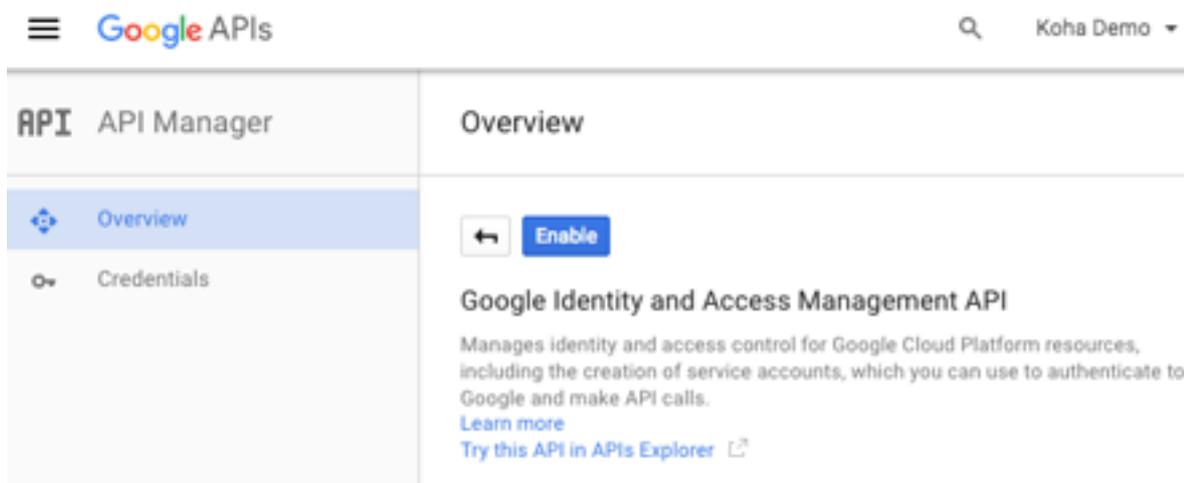
- Go to 'Credentials' and set the OAuth cosent screen values
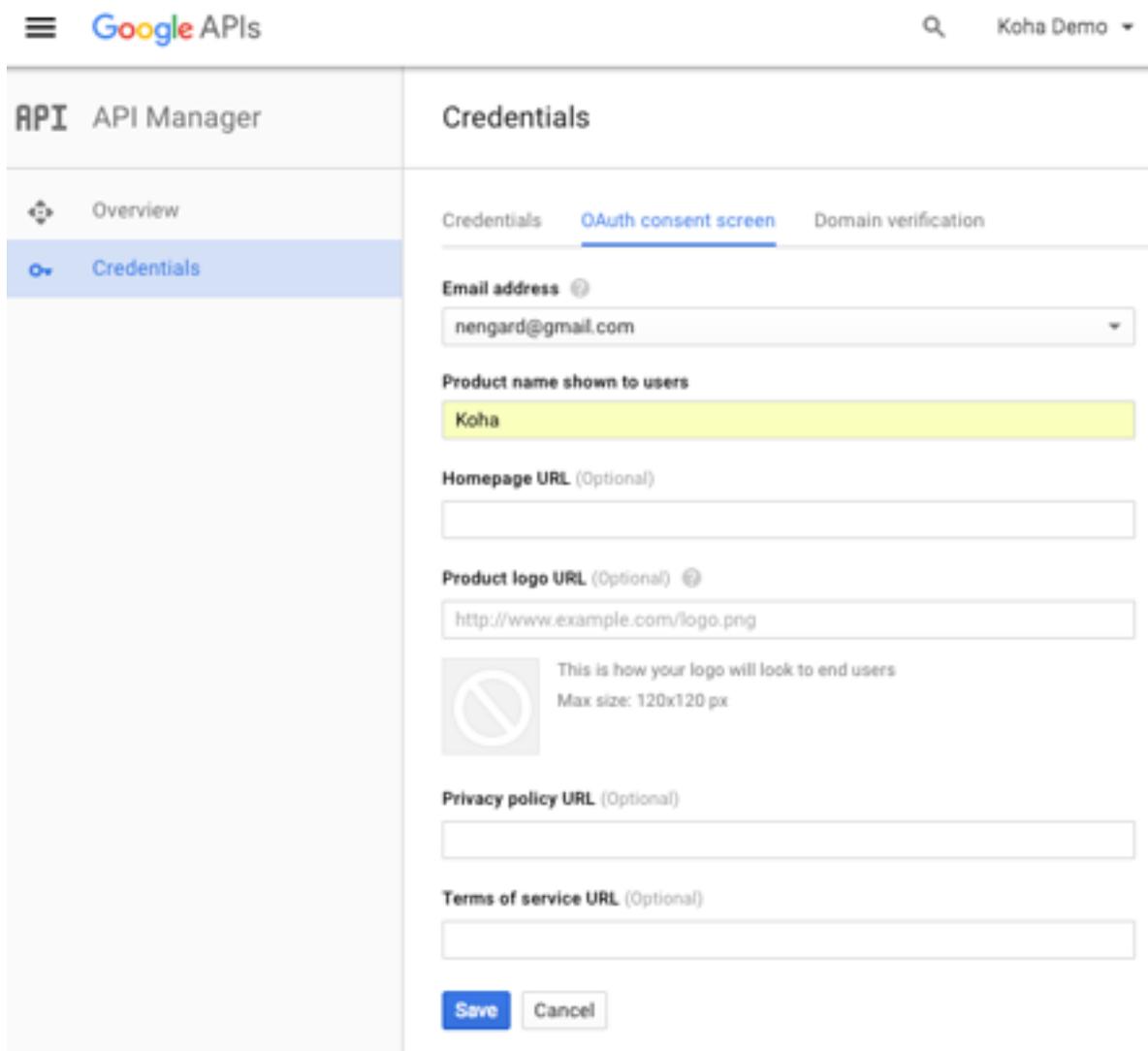
- Next choose to 'Create credentials' from the 'Credentials' page

- Choose 'Web application' from the 'Application type' menu and fill in the form presented
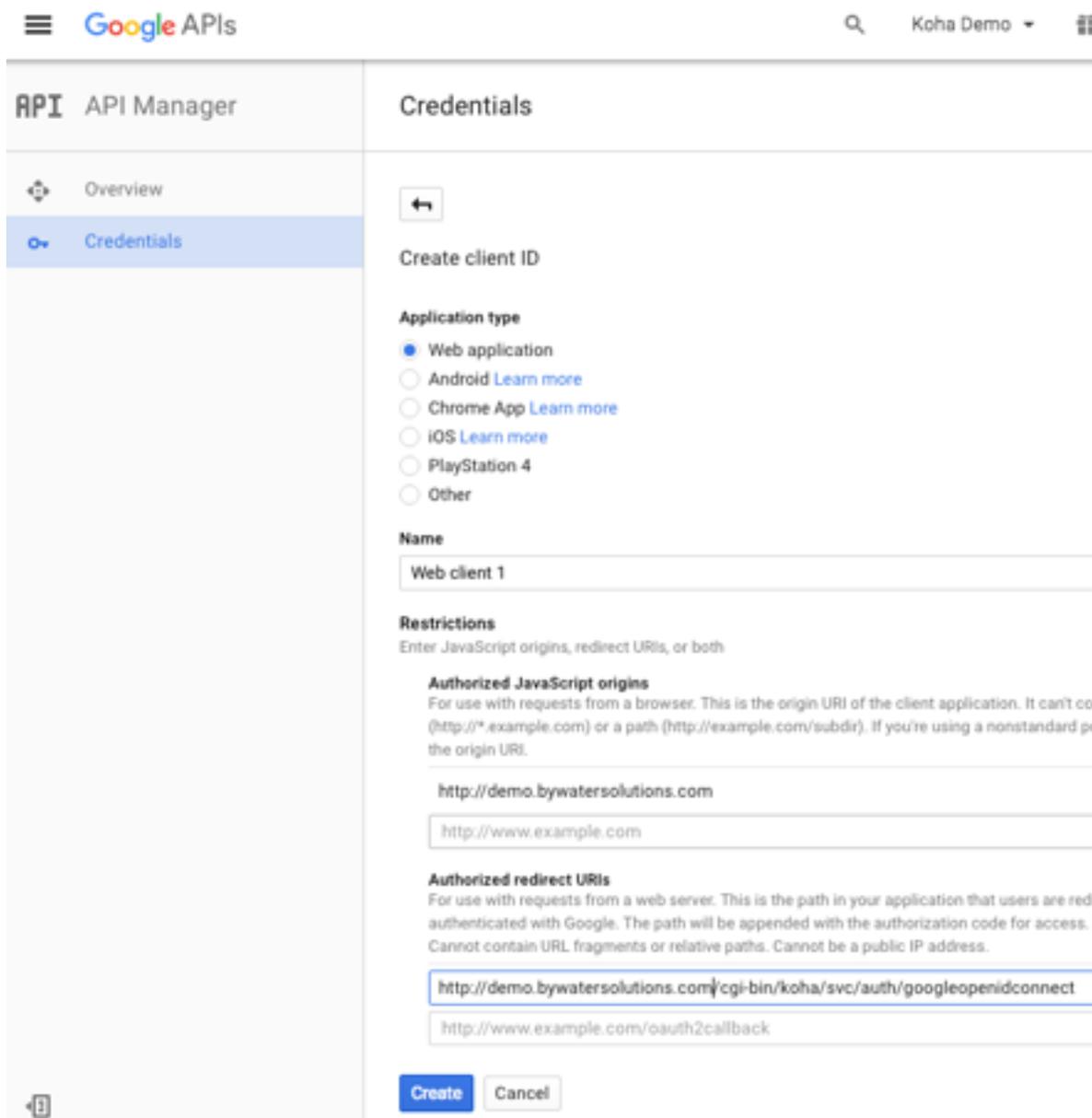
- Set 'Authorized JavaScript origins' to your OPACBaseURL

- Change the 'Authorized Redirect URIs' to http://YOUROPAC/cgi-bin/koha/svc/auth/googleopenid-connect

- You will be presented with your values for your client ID and your client secret after saving

2.1.2.2.1. *GoogleOAuth2ClientID*
Asks: Google OAuth2 Client ID ___

2.1.2.2.2. *GoogleOAuth2ClientSecret*
Asks: Google OAuth2 Client Secret ___

2.1.2.2.3. *GoogleOpenIDConnect*
Default: Don't use

Asks ___ Google OpenID Connect login.

> **⭐ Important**
>
> You will need to select OAuth2 when creating an app in the google cloud console, and set the web origin to your_opac_url and the redirect url to your_opac_url/cgi-bin/koha/svc/auth/googleopenidconnect .
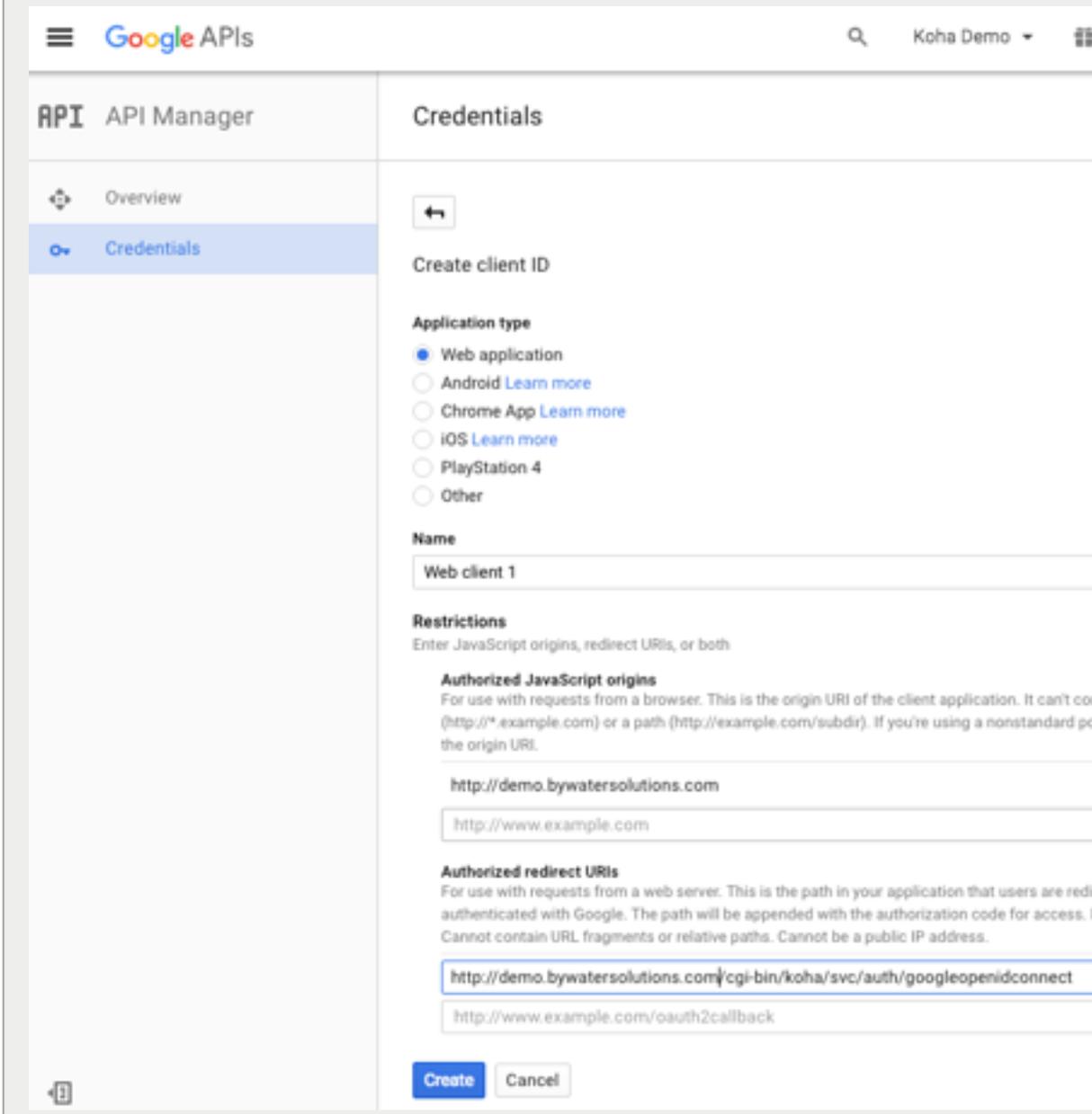
Values:

- Don't use

- Use

2.1.2.2.4. *GoogleOpenIDConnectDomain*

Asks: Google OpenID Connect Restrict to domain (or subdomain of this domain) ___.

> **Note**
>
> Leave blank for all google domains

2.1.2.3. *Interface options*

These preference are related to your Koha interface

2.1.2.3.1. *DebugLevel*

Default: lots of

Asks: Show ___ debugging information in the browser when an internal error occurs.

Values:

- lots of - will show as much information as possible

- no - will only show basic error messages

- some - will show only some of the information available

Description:

- This preference determines how much information will be sent to the user's screen when the system encounters an error. The most detail will be sent when the value level is set at 2, some detail will be sent when the value is set at 1, and only a basic error message will display when the value is set at 0. This setting is especially important when a system is new and the administration is interested in working out the bugs (errors or problems) quickly. Having detailed error messages makes quick fixes more likely in problem areas.

2.1.2.3.2. *DefaultToLoggedInLibraryCircRules*

Default: all libraries

Asks: When editing circulation rules show ___ the rules by default.

Values:
- all libraries

- logged in library's

Description:
- This preference controls the default value in the branch pull down found at the top of the *circulation and fine rules*.

2.1.2.3.3. *DefaultToLoggedInLibraryNoticesSlips*

Default: all libraries

Asks: When editing notices and slips show the ___ notices and slips by default.

Values:
- all libraries

- logged in library's

Description:
- This preference controls the default value in the branch pull down found at the top of the *notices and slips* tool.

2.1.2.3.4. *DefaultToLoggedInLibraryOverdueTriggers*
Default: all libraries

Asks: When editing overdue notice/status triggers show the ___ rules by default.

Values:
- all libraries

- logged in library's

Description:
- This preference controls the default value in the branch pull down found at the top of the *overdue notices and triggers*.

2.1.2.3.5. *delimiter*
Default: semicolons

Asks: Separate columns in an exported report file with ___ by default.

Values:

- #'s

- backslashes

- commas

- semicolons

- slashes

- tabs

Description:

- This preference determines how reports exported from Koha will separate data. In many cases you will be able to change this option when exporting if you'd like.

2.1.2.3.6. *KohaAdminEmailAddress*
This is the default 'From' address for emails unless there is one for the particular branch, and is referred to when an internal error occurs.

Asks: Use ___ as the email address for the administrator of Koha.

Description:

- This preference allows one email address to be used in warning messages set to the OPAC. If no email address is set for the branch this address will receive messages from patrons regarding modification requests, purchase suggestions, and questions or information regarding overdue notices. It is recommended that a email address that can be accessed by multiple staff members be used for

this purpose so that if one librarian is out the others can address these requests. This email address can be changed when needed.

2.1.2.3.7. *noItemTypeImages*

Default: Show

Asks: ___ itemtype icons in the catalog.

Values:

• Shows

• Don't show

Description:

• This preference allows the system administrator to determine if users will be able to set and see an *item type icon* the catalog on both the OPAC and the Staff Client. The images will display in both the OPAC and the Staff Client/Intranet. If images of item types are disabled, text labels for item types will still appear in the OPAC and Staff Client.

2.1.2.3.8. *ReplytoDefault*

Asks: Use ___ as the email address that will be set as the replyto in emails

Description:

• By default replies to notice emails will go to the *library email address*, if you would like to specify a default email address for all replies to notices you can do that here.

2.1.2.3.9. *ReturnpathDefault*

Asks: Use ___ as the email address set as the return path, if you leave this empty the KohaAdminE-mailAddress will be used.

Description:

• The return path is the email address that bounces will be delivered to. By default bounced notices will go to the *library email address*, if you would like to specify a default email address for bounces to go to then fill in this preference.

2.1.2.3.10. *virtualshelves*

Default: Allow

Asks: ___ staff and patrons to create and view saved lists of books.

Values:

• Allow

• Don't Allow

Description:

• This preference controls whether the lists functionality will be available in the staff client and OPAC. If this is set to "Don't allow" then no one will be able to save items to public or private lists.

2.1.2.4. *Login options*

These preferences are related to logging into your Koha system

2.1.2.4.1. *AutoLocation*

Default: Don't require

Asks: ___ staff to log in from a computer in the IP address range specified by their library (if any).

- Set IP address range in the library administration area

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

Values:

- Don't require

- Require

Description:

- This preference protects the system by blocking unauthorized users from accessing the staff client program and settings. Authorized and unauthorized users are determined by their computer's IP addresses. When the preference is set to 'Require', IP authorization is in effect and unauthorized IP addresses will be blocked. This means that staff cannot work from home unless their IP address has been authorized. When set to 'Don't require', anyone with a staff client login will have access no matter which IP address they are using.

2.1.2.4.2. *IndependentBranches*

Default: Don't prevent

Asks: ___ staff (but not superlibrarians) from modifying objects (holds, items, patrons, etc.) belonging to other libraries.

Values:

- Don't prevent

- Prevent

Description:

- This preference should only be used by library systems which are sharing a single Koha installation among multiple branches but are considered independent organizations, meaning they do not share material or patrons with other branches and do not plan to change that in the future. If set to 'Prevent' it increases the security between library branches by: prohibiting staff users from logging into another branch from within the staff client, filtering out patrons from patron searches who are not a part of the login branch conducting the search, limiting the location choices to the login branch when adding or modifying an item record, preventing users from other branch locations from placing holds or checking out materials from library branches other than their own, and preventing staff from editing item records which belong to other library branches. All of these security safeguards can be overridden only by the superlibrarian, the highest level of privileges.

> **⭐ Important**
>
> It is important that this value be set before going live and that it NOT be changed

2.1.2.4.3. *SessionRestrictionByIP*

Default: Enable

Asks: ___ check for change in remote IP address for session security. Disable only when remote IP address changes frequently.

Values:

• Disable

• Enable

Description:

• When this preference is set to 'Enable' Koha will log you out of the staff client if your IP address changes as a security measure. For some systems the IP address changes frequently so you'll want to set this preference to 'Disable' to prevent Koha from logging you out of the staff client every time that happens.

> **Important**
>
> This is meant to help those whose IP address changes several times during the day, setting this preference to 'Disable' is not recommended otherwise because it is removing important security features from your staff client.

2.1.2.4.4. *SessionStorage*

Default: in the MySQL database

Asks: Store login session information ___

Values:

• as temporary files

• in the MySQL database

• in the PostgreSQL database

•
> **Important**
>
> PostgreSQL is not yet supported

Description:

• This preference allows administrators to choose what format session data is stored in during web sessions.

2.1.2.4.5. *timeout*

Default: 12000000

Asks: Automatically log out users after ___ seconds of inactivity.

Description:

• This preference sets the length of time the Staff Client or OPAC accounts can be left inactive before re-logging in is necessary. The value of this preference is in seconds. At this time, the amount of time before a session times out must be the same for both the Staff Client and the OPAC.

2.1.2.5. Mozilla Persona

2.1.2.5.1. Persona

Default: Don't allow

Asks: ___ Mozilla persona for login.

Values:

• Allow

• Don't allow

Description:
• Mozilla Persona is an OpenID-like service that lets you log in to multiple websites with your Mozilla credentials. If you allow Persona log in for Koha then your patrons can log in to the OPAC using their Mozilla Persona. Learn more about Persona on the *official Mozilla site*[3].

---

[3] http://www.mozilla.org/en-US/persona/

> ⭐ **Important**
>
> For Persona log in to work you will need you *OPACBaseURL* preference to be set correctly.

2.1.2.6. *Share anonymous usage statistics*

As an open source project Koha is used all over the world. These preference will help us keep more accurate statistics on where Koha is being used. If you choose to share your information, it will be published on the *Hea Koha community website*[4]. You will need to enable the *matching cron job* to send this information at regular intervals to the community.

2.1.2.6.1. *UsageStats*

Default: Don't share

Asks: ___ anonymous Koha usage data with the Koha community.

Values:

* Don't share

* Share

Description:

* This data is stored to help track usage of Koha around the world. If you choose to share your information, it will be published on the *Hea Koha community website*[5]. This information is sent using the *Usage Sharing Cron Job*.

2.1.2.6.2. *UsageStatsCountry*

Asks: The country where your library is located: ___

Description:

* This data is stored to help track usage of Koha around the world. If you choose to share your information, it will be published on the *Hea Koha community website*[6]. This information is sent using the *Usage Sharing Cron Job*.

> ⭐ **Important**
>
> This preference depends on the *UsageStats* preference. Set that to 'Share' to share your information.

---

[4] http://hea.koha-community.org

[5] http://hea.koha-community.org

[6] http://hea.koha-community.org

2.1.2.6.3. *UsageStatsLibraryName*

Asks: The library name ___ will be shown on the *Hea Koha community website*[7].

Description:

- This data is stored to help track usage of Koha around the world. If you choose to share your information, it will be published on the *Hea Koha community website*[8]. This information is sent using the *Usage Sharing Cron Job*.

> ⭐ **Important**
>
> This preference depends on the *UsageStats* preference. Set that to 'Share' to share your information. If this field is empty data will be sent anonymously if you choose 'Share' for the *UsageStats* preference.

2.1.2.6.4. *UsageStatsLibraryType*

Default: public

Asks: The library type ___ will be shown on the *Hea Koha community website*[9].

Values:
- academic

- corporate

- government

- private

- public

- religious organization

- research

- school

- society or association

- subscription

Description:

- This data is stored to help track usage of Koha around the world. If you choose to share your information, it will be published on the *Hea Koha community website*[10]. This information is sent using the *Usage Sharing Cron Job*.

---

[7] http://hea.koha-community.org

[8] http://hea.koha-community.org

[9] http://hea.koha-community.org

[10] http://hea.koha-community.org

> **Important**
>
> This preference depends on the *UsageStats* preference. Set that to 'Share' to share your information.

2.1.2.6.5. *UsageStatsLibraryUrl*

Asks: The library URL ___ will be shown on the *Hea Koha community website*[11].

Description:

- This data is stored to help track usage of Koha around the world. If you choose to share your information, it will be published on the *Hea Koha community website*[12]. This information is sent using the *Usage Sharing Cron Job*.

> **Important**
>
> This preference depends on the *UsageStats* preference. Set that to 'Share' to share your information.

2.1.3. *Authorities*

Get there: More > Administration > Global System Preferences > Authorities

2.1.3.1. *General*

2.1.3.1.1. *AuthDisplayHierarchy*

Default: Don't display

Asks: ___ broader term/narrower term hierarchies when viewing authorities.

Values:

- Display

---

[11] http://hea.koha-community.org
[12] http://hea.koha-community.org

United States
  Pennsylvania
    Philadelphia (Pa.)

Authority #1060 (Geographic Name)

Used in 0 record(s)

| 0 | 1 | 5 | 7 |

151 ## - HEADING--GEOGRAPHIC NAME

a Geographic name Philadelphia (Pa.)

- Don't display

Description:

- If your authority records includes 5xx fields with linked references to broader and/or narrower see also references this preference will turn on a display of those authorities at the top of the record.

2.1.3.1.2. *AutoCreateAuthorities*

Default: do not generate

Asks: When editing records, ___ authority records that are missing.

Values:

- do not generate

- generate

> **Important**
>
> *BiblioAddsAuthorities* must be set to "allow" for this to have any effect

Description:

- When this and *BiblioAddsAuthorities* are both turned on, automatically create authority records for headings that don't have any authority link when cataloging. When BiblioAddsAuthorities is on and AutoCreateAuthorities is turned off, do not automatically generate authority records, but allow the user to enter headings that don't match an existing authority. When BiblioAddsAuthorities is off, this has no effect.

2.1.3.1.3. *BiblioAddsAuthorities*

Default: allow

Asks: When editing records, ___ them to automatically create new authority records if needed, rather than having to reference existing authorities.

Values:

- allow

  - This setting allows you to type values in the fields controlled by authorities and then adds a new authority if one does not exist

- don't allow

  - This setting will lock the authority controlled fields, forcing you to search for an authority versus allowing you to type the information in yourself.

2.1.3.1.4. *dontmerge*

Default: Don't

Asks: ___ automatically update attached biblios when changing an authority record.

Values:

- Do

- Don't

Description:

- This preference tells Koha how to handle changes to your Authority records. If you edit an authority record and this preference is set to 'Do' Koha will immediately update all of the bib records linked to the authority with the new authority record's data. If this is set to "Don't" then Koha won't edit bib records when changes are made to authorities, rather, this is done later by the *merge_authority.pl cronjob*.

> **Important**
>
> If this is set to "Don't automatically update" you will need to ask your administrator to enable the *merge_authority.pl cronjob*.

2.1.3.1.5. *MARCAuthorityControlField008*

Default: || aca||aabn | a|a d

Asks: Use the following text for the contents of MARC21 authority control field 008 position 06-39 (fixed length data elements).

> **Important**
>
> Do not include the date (position 00-05) in this preference, Koha will calculate automatically and put that in before the values in this preference.

Description:

- This preference controls the default value in the 008 field on Authority records. It does not effect bibliographic records.

2.1.3.1.6. *UNIMARCAuthorityField100*

Default: afrey50 ba0

Asks: Use the following text for the contents of UNIMARC authority field 100 position (fixed length data elements).

> ⭐ **Important**
>
> Do not include the date (position 00-07) in this preference, Koha will calculate automatically and put that in before the values in this preference.

Description:
- This preference controls the default value in the 100 field on Authority records cataloged in UNIMARC. It does not effect bibliographic records.

2.1.3.1.7. *UseAuthoritiesForTracings*

Default: Don't use

Asks: ___ authority record numbers instead of text strings for searches from subject tracings.

Values:

- Don't use

  - Search links look for subject/author keywords (example: opac-search.pl?q=su:Business%20networks)

- Use

  - Search links look for an authority record (example: opac-search.pl?q=an:354)

Description:

- For libraries that have authority files, they may want to make it so that when a link to an authorized subject or author is clicked on the OPAC or staff client it takes the searcher only to a list of results with that authority record. Most libraries do not have complete authority files and so setting this preference to 'Don't use' will allow searchers to click on links to authors and subject headings and perform a keyword search against those fields, finding all possible relevant results instead.

2.1.3.2. *Linker*

These preferences will control how Koha links bibliographic records to authority records. All bibliographic records added to Koha after these preferences are set will link automatically to authority records, for records added before these preferences are set there is a script (misc/link_bibs_to_authorities.pl) that your system administrator can run to link records together.

2.1.3.2.1. *CatalogModuleRelink*

Default: Do not

Asks: ___ automatically relink headings that have previously been linked when saving records in the cataloging module.

Values:

• Do

• Do not

Description:

• Longtime users of Koha don't expect the authority and bib records to link consistently. This preference makes it possible to disable authority relinking in the cataloging module only (i.e. relinking is still possible if link_bibs_to_authorities.pl is run). Note that though the default behavior matches the previous behavior of Koha (retaining links to outdated authority records), it does not match the intended behavior (updating biblio/authority link after bibliographic record is edited). Libraries that want the intended behavior of authority control rather than the way Koha used to handle linking should set CatalogModuleRelink to 'Do'. Once setting this to 'Do' the following preferences can also be set.

2.1.3.2.2. *LinkerKeepStale*

Default: Do not

Asks: ___ keep existing links to authority records for headings where the linker is unable to find a match.

Values:

• Do

• Do not

Description:

• When set to 'Do', the linker will never remove a link to an authority record, though, depending on the value of *LinkerRelink*, it may change the link.

2.1.3.2.3. *LinkerModule*

Default: Default

Asks: Use the ___ linker module for matching headings to authority records.

Values:

• Default

  • Retains Koha's previous behavior of only creating links when there is an exact match to one and only one authority record; if the *LinkerOptions* preference is set to 'broader_headings', it will try to link headings to authority records for broader headings by removing subfields from the end of the heading

• First match

  • Creates a link to the first authority record that matches a given heading, even if there is more than one authority record that matches

- Last match

  - Creates a link to the last authority record that matches a given heading, even if there is more than one record that matches

Description:

- This preference tells Koha which match to use when searching for authority matches when saving a record.

2.1.3.2.4. *LinkerOptions*

Asks: Set the following options for the authority linker ___

> ⭐ **Important**
>
> This feature is experimental and shouldn't be used in a production environment until further expanded upon.

Description:

- This is a pipe separated (|) list of options. At the moment, the only option available is "broader_headings." With this option set to "broader_headings", the linker will try to match the following heading as follows:

```
=600 10$aCamins-Esakov, Jared$xCoin collections$vCatalogs$vEarly works to 1800.
```

First: Camins-Esakov, Jared--Coin collections--Catalogs--Early works to 1800

Next: Camins-Esakov, Jared--Coin collections--Catalogs

Next: Camins-Esakov, Jared--Coin collections

Next: Camins-Esakov, Jared (matches! if a previous attempt had matched, it would not have tried this)

2.1.3.2.5. *LinkerRelink*

Default: Do

Asks: ___ relink headings that have previously been linked to authority records.

Values:

- Do

- Do not

Description:

- When set to 'Do', the linker will confirm the links for headings that have previously been linked to an authority record when it runs, correcting any incorrect links it may find. When set to 'Do not', any heading with an existing link will be ignored, even if the existing link is invalid or incorrect.

2.1.4. *Cataloging*

Get there: More > Administration > Global System Preferences > Cataloging

2.1.4.1. *Display*

2.1.4.1.1. *AcquisitionDetails*

Default: Display

Asks: ___ acquisition details on the biblio detail page.

Values:

• Display

• Don't display

Description:

• This preference controls whether a tab will show on the detail page in the staff client that includes detailed acquisitions information for the title. This tab will include links to order information stored in the acquisitions module.

2.1.4.1.2. *AuthoritySeparator*

Default: --

Asks: Separate multiple displayed authors, series or subjects with ___.

2.1.4.1.3. *hide_marc*

Default: Display

Asks: ___ MARC tag numbers, subfield codes and indicators in MARC views.

Values:

• Display -- shows the tag numbers on the cataloging interface

- Don't display -- shows just descriptive text when cataloging

2.1.4.1.4. *IntranetBiblioDefaultView*

Default: ISBD form

Asks: By default, display biblio records in ___

Values:

- ISBD form -- displays records in the staff client in the old card catalog format

  - See *ISBD* preference for more information

- Labelled MARC form -- displays records in the staff client in MARC with text labels to explain the different fields

- MARC form -- displays records in the staff client in MARC

- normal form -- visual display in the staff client (for the average person)

Description:

- This setting determines the bibliographic record display when searching the catalog on the staff client. This setting does not affect the display in the OPAC which is changed using the *BiblioDefaultView* preference under the OPAC preference tab. This setting changes the look of the record when first displayed. The MARC and ISBD views can still be seen by clicking in the sidebar.

2.1.4.1.5. *ISBD*

Default: *MARC21 Default Appendix* or *UNIMARC Default Appendix*

Asks: Use the following as the ISBD template:

Description:

- This determines how the ISBD information will display in the staff client. Elements in the list can be reordered to produce a different ISBD view. ISBD, the International Standard Bibliographic Description, was first introduced by IFLA (International Federation of Library Associations) in 1969 in order to provide guidelines for descriptive cataloging. The purpose of ISBD is to aid the international exchange of bibliographic records for a variety of materials.

2.1.4.1.6. *LabelMARCView*

Default: Don't

Asks: ___ collapse repeated tags of the same type into one tag entry.

Values:

- Do -- will combine all identical tag numbers under one heading in the MARC view in the OPAC and Staff Client

- Don't -- will list all of the tags individually in the MARC view in the OPAC and Staff Client

2.1.4.1.7. *MergeReportFields*

Asks: ___ fields to display for deleted records after merge

Description:
- When merging records together you can receive a report of the merge process once it's done, this preference lets you set the default values for this report.

Example: '001,245ab,600' displays:
- value of 001

- subfields a and b of fields 245

- all subfields of fields 600

2.1.4.1.8. *NotesBlacklist*

Asks: Don't show these ___ note fields in title notes separator (OPAC record details) and in the description separator (Staff client record details).

Description:
- This preference lets you define which of your note fields are hidden from the title notes (OPAC) and descriptions (Staff) tabs. Enter the values as a comma separated list. For example to hide the local note and the bibliography note in MARC21 enter 504, 590.

2.1.4.1.9. *OpacSuppression, OpacSuppressionByIPRange, OpacSuppressionRedirect, and OpacSuppressionMessage*

OpacSuppression Default: Don't hide

Asks: ___ items marked as suppressed from OPAC search results. Note that you must have the Suppress index set up in Zebra and at least one suppressed item, or your searches will be broken. Restrict the suppression to IP adresses outside of the IP range ___ (Leave blank if not used. Define a range like 192.168..) Redirect the opac detail page for suppressed records to ___ Display the following message on the redirect page for suppressed biblios ___.

OpacSuppression Values:

- Don't hide

  - Will show records in OPAC search results if they are marked suppressed

- Hide

  - Will not show records in OPAC search results if they're marked as suppressed

OpacSuppressionRedirect Values:

- an explanatory page ('This record is blocked').

- the 404 error page ('Not found').

Description:

- These preferences control hiding of bibliographic records from display in the OPAC. Each bibliogrphic record you want to hide from the OPAC simply needs to have the value "1" in the field mapped with Suppress index (942$n field in MARC21, no official field in UNIMARC). The indexer then hides it from display in OPAC but will still display it in the Staff Client. If you want to further control suppression you can set an IP address range to still show suppressed items to. Define a range like 192.168.. If you don't want to limit suppression in this way, leave the IP field blank. You can also decide what the patrons will see in the OPAC when a title is suppressed by setting the OpacSuppressionRedirect and OpacSuppressionMessage preferences. You can either show the patron a 404 page if they try to see a suppressed record or you can create a custom page by entering the HTML in the OpacSuppressionMessage part of this preference.

> **Note**
>
> An *authorized value* for the MARC21 942$n field (or the equivalent UNIMARC field) should be set to eliminate errors. One example would be to create an authorized value titled SUPPRESS with a value of 0 for don't suppress and 1 for suppress.

> **Important**
>
> If this preference is set to 'hide' and you have the 942n field set to 1, it will hide the entire bib record - not just an individual item.

> **Important**
>
> You must have the Suppress index set up in Zebra and at least one record with the value "1" in the field mapped with this index, or your searches will be completely broken in OPAC (you won't get any results at all).

> **Note**
>
> Suppressed records will show a note in the staff client indicating that they are suppressed from view in the OPAC.
>
> Suppressed in OPAC
>
> **The efficacy of existential beliefs as cognitive resources for coping with breast cancer / Lynn Wilson Brallier.**
> By: Brallier, Lynn W.
> Material type: ▊ Book
>
> This note can be styled by using the *IntranetUserCSS* preference to stand out more if you'd like.
>
> ➕ New ▾   ✏ Edit ▾   ⬇ Save ▾   Add to ▾   🖶 Print
>
> ## Suppressed in OPAC
>
> **The efficacy of existential beliefs as cognitive resources for coping with breast cancer / Lynn Wilson Brallier.**
> By: Brallier, Lynn W.

2.1.4.1.10. *SeparateHoldings & SeparateHoldingsBranch*

SeparateHoldings default: Don't separate

SeparateHoldingsBranch default: home library

Asks: ___ items display into two tabs, where the first tab contains items whose ___ is the logged in user's library. The second tab will contain all other items.

SeparateHoldings values:

- Don't separate

- Separate

SeparateHoldingsBranch values:

- holding library

- home library

Description:

- This preference lets you decide if you would like to have the holding information on the bibliographic detail page in the staff client split in to multiple tabs. The default is to show all holdings on one tab.

2.1.4.1.11. *URLLinkText*

Default: Online Resource

Asks: Show ___ as the text of links embedded in MARC records.

Description:

- If the 856 field does not have a subfield 3 or y defined, the OPAC will say 'Click here to access on-line.' If you would like the field to say something else enter that in this field.

2.1.4.1.12. *UseControlNumber*

Default: Don't use

Asks: ___ record control number ($w subfields) and control number (001) for linking of bibliographic records.

Values:

- Don't use

    - When clicking on links to titles that appear next to 'Continues' and 'Continued by' in the detail display Koha will perform a title search

- Use

    - When clicking on links to titles that appear next to 'Continues' and 'Continued by' in the detail display Koha will perform a control number (MARC field 001) search

> **Important**
>
> Unless you are going in and manually changing 773$w to match your rigorously-defined bibliographic relationships, you should set this preference to "Don't use" and instead set *EasyAnalyticalRecords* to "Display"

Description:

- If you have a serial called "Journal of Interesting Things" which has a separate record from when it was called "Transactions of the Interesting Stuff Society," you could add linking fields to indicate

the relationship between the two records. UseControlNumber allows you to use your local accession numbers for those links. In MARC21, the relevant sections of the two records might look like this:

```
    =001   12345
    =110  2_$aInteresting Stuff Society.
    =245  10$aTransactions of the Interesting Stuff Society.
    =785  00$aInteresting Stuff Society$tJournal of Interesting Things.$w12346

    =001   12346
    =110  2_$aInteresting Stuff Society.
    =245  10$aJournal of Interesting Things.
    =780  00$aInteresting Stuff Society$tTransactions of the Interesting Stuff Soci\
ety.$w12345
```

With UseControlNumber set to 'Use', the 78x links will use the Control Numbers is subfield $w, instead of doing a title search on "Journal of Interesting Things" and "Transactions of the Interesting Stuff Society" respectively.

2.1.4.2. *Exporting*

2.1.4.2.1. *BibtexExportAdditionalFields*

Asks: Include following fields when exporting BibTeX

Description:

- Use one line per tag in the format BT_TAG: TAG$SUBFIELD (e.g. lccn: 010$a)

- To specificy multiple marc tags/subfields as targets for a repeating BibTex tag, use the following format: BT_TAG: [TAG2$SUBFIELD1, TAG2$SUBFIELD2] (e.g. notes: [501$a, 505$g])

- All values of repeating tags and subfields will be printed with the given BibTeX tag.

- Use '@' (with quotes) as the BT_TAG to replace the bibtex record type with a field value of your choosing.

2.1.4.2.2. *RisExportAdditionalFields*

Asks: Include following fields when exporting RIS

Description:

- Use one line per tag in the format RIS_TAG: TAG$SUBFIELD (e.g. LC: 010$a)

- To specificy multiple marc tags/subfields as targets for a repeating RIS tag, use the following format: RIS_TAG: [TAG2$SUBFIELD1, TAG2$SUBFIELD2] (e.g. NT: [501$a, 505$g])

- All values of repeating tags and subfields will be printed with the given RIS tag.

- Use of TY (record type) as a key will *replace* the default TY with the field value of your choosing.

2.1.4.3. *Importing*

2.1.4.3.1. *AggressiveMatchOnISBN*

Default: don't

Asks: When matching on ISBN with the record import tool, ___ attempt to match aggressively by trying all variations of the ISBNs in the imported record as a phrase in the ISBN fields of already cataloged records.

Values:

• do

• don't

Description:

• This preference allows you to choose to alter the ISBN matching rule used when staging records for import to be more aggressive. This means that all text will be stripped from the ISBN field so that a pure number match is possible. If this preference is set to "Don't" then Koha will find a match only if the ISBN fields are identical.

> **Important**
>
> Note that this preference has no effect if *UseQueryParser* is on.

2.1.4.4. *Interface*

2.1.4.4.1. *advancedMARCeditor*

Default: Don't display

Asks: ___ descriptions of fields and subfields in the MARC editor.

Description:

• This preference determines whether or not MARC field names will be present when editing or creating MARC records.

Values:

• Display

• Don't display

2.1.4.4.2. *DefaultClassificationSource*

Default: Dewey Decimal System

Asks: Use ___ as the default classification source.

Values:

- ANSCR (Sound Recordings)

- Dewey Decimal Classification

- Library of Congress Classification

- Other/Generic Classification Scheme

- SuDoc Classification (U.S. GPO)

- Universal Decimal Classification

2.1.4.4.3. *EasyAnalyticalRecords*

Linda Culberson
Edited by Nicole C. Engard
October 2011
Default: Don't Display

Asks: ___ easy ways to create analytical record relationships

Values:

- Display

- Don't Display

> **⭐ Important**
>
> If you decide to use this feature you'll want to make sure that your *UseControlNumber* preference is set to "Don't use" or else the "Show analytics" links in the staff client and the OPAC will be broken.

Description:

• An analytic entry in a catalog is one that describes a part of a larger work that is also described in the catalog. In bibliographic cataloging, analytic entries may be made for chapters in books or special issues of articles in periodicals. In archival cataloging, analytic entries may be made for series or items within a collection. This feature in Koha allows for an easy way of linking analytic entries to the host records, and this system preference adds several new menu options to the staff cataloging detail pages to allow that to happen.

2.1.4.5. *Record Structure*

2.1.4.5.1. *AlternateHoldingsField & AlternateHoldingsSeparator*

Asks: Display MARC subfield ___ as holdings information for records that do not have items, with the subfields separated by ___.

Description:

• Sometimes libraries migrate to Koha with their holding info in the 852 field (OCLC holdings information field) and choose not to transfer that information into the 952 (Koha holdings information field) because they don't plan on circulating those items. For those libraries or other libraries that have data in the 852 fields of their records that they want to display, these preferences let you choose to display holdings info from a field other than the 952 field. The AlternateHoldingsField preference can contain multiple subfields to look in; for instance 852abhi would look in 852 subfields a, b, h, and i.

• With AlternateHoldingsField set to 852abhi and AlternateHoldingsSeparator set to a space the holdings would look like the following:

2.1.4.5.2. *autoBarcode*

Default: generated in the form <branchcode>yymm0001

Asks: Barcodes are ___

Values:

• generated in the form <branchcode>yymm0001

- generated in the form <year>-0001, <year>-0002

- generated in the form 1, 2, 3

- incremental EAN-13 barcodes

- not generated automatically

Description:

- This setting is for libraries wishing to generate barcodes from within Koha (as opposed to scanning in pre-printed barcodes or manually assigning them). The default behavior makes it so that when you click in the barcode field (952$p in MARC21) it will populate with the automatic barcode you have chosen. If you would rather it only enter an automatic barcode when you click on the plugin (the ... to the right of the field) you can change the plugin used for that field in the framework. Set the plugin for 952$p (if using MARC21 or equivalent field mapped to items.barcode in your local MARC format) for your frameworks to barcode_manual.pl instead of barcode.pl. Learn more about editing frameworks under the *MARC Bibliographic Frameworks* section of this manual.

2.1.4.5.3. *DefaultLanguageField008*

Default: Empty defaults to eng

Asks: Fill in the default language for field 008 Range 35-37 of MARC21 records ___.

Description:

- This preference will allow you to set the language for your MARC21 008 field by default. If this is left empty it will default to English (eng). See the *MARC Code List for Languages*[13] for additional values for this preference.

> **Note**
>
> This preference won't have any effect if your records are in UNIMARC.

2.1.4.5.4. *item-level_itypes*

Default: specific item

Asks: Use the item type of the ___ as the authoritative item type (for determining circulation and fines rules, etc).

Values:

- biblio record

- specific item

Description:

- This preference determines whether the item type Koha uses for issuing rules will be an attribute of the bibliographic record or the item record. Most libraries refer to the item record for item types. It al-

---

[13] http://www.loc.gov/marc/languages/language_code.html

so determines if the item type icon appears on the OPAC search results. If you have the preference set to 'biblio record' then Koha displays the item type icon on the search results to the left of the result info.

2.1.4.5.5. *itemcallnumber*

Default: 082ab

Asks: Map the MARC subfield to an item's callnumber.

> **Note**
>
> This can contain multiple subfields to look in; for instance 082ab would look in 082 subfields a and b.

Description:

- This setting determines which MARC field will be used to determine the call number that will be entered into item records automatically (952$o). The value is set by providing the MARC field code (050, 082, 090, 852 are all common in MARC21) and the subfield codes without the delimiters ($a, $b would be ab).

Examples:

- Dewey: 082ab or 092ab; LOC: 050ab or 090ab; from the item record: 852hi

2.1.4.5.6. *marcflavour*

Default: MARC21

Asks: Interpret and store MARC records in the ___ format.

Values:

- MARC21

- The standard style for the US, Canada, Australia, New Zealand, United Kingdom, Germany and other countries

- UNIMARC
  - The standard style used in France, Italy, Portugal, Russia, and other countries

- NORMARC
  - The standard style for Norway

Description:

- This preference defines global MARC style (MARC21, UNIMARC or NORMARC) used for encoding.

> **Important**
>
> Changing the value of this preference will not convert your records from one MARC style to another.

2.1.4.5.7. *MARCOrgCode*

Default: OSt

Asks: Fill in the MARC organization code ___ by default in new MARC21 records (leave blank to disable).

Description:

- The MARC Organization Code is used to identify libraries with holdings of titles and more.

Learn more and find your library's MARC21 code on the *MARC Code list for Organizations*[14] or in Canada on the *Canadian Symbols Directory*[15].

> **Note**
>
> This preference won't have any effect if your records are in UNIMARC.

2.1.4.5.8. *NewItemsDefaultLocation*

Asks: When items are created, give them the temporary location of ___ (should be a location code, or blank to disable).

2.1.4.5.9. *PrefillItem*

Default: the new item is not prefilled with last created item values.

Asks: When a new item is added ___

---

[14] http://www.loc.gov/marc/organizations/orgshome.html
[15] http://www.collectionscanada.gc.ca/illcandir-bin/illsear/l=0/c=1

Values:

- the new item is not prefilled with last created item values.

- the new item is prefilled with last created item values.

Description:

- This preference controls the behavior used when adding new items. Using the options here you can choose to have your next new item prefill with the values used in the last item was added to save time typing values or to have the item form appear completely blank. Using *SubfieldsToUseWhen-Prefill* you can control specifically which fields are prefilled.

2.1.4.5.10. *SubfieldsToAllowForRestrictedBatchmod*

Asks: Define a list of subfields for which editing is authorized when *items_batchmod_restricted* permission is enabled, separated by spaces. ___

Examples:

- UNIMARC: "995$f 995$h 995$j"

- MARC21: "952$a 952$b 952$c"

Description:

- This preference lets you define what fields can be edited via the *batch item modification tool* if the items_batchmod_restricted permission is enabled.

> **Note**
>
> The FA framework is excluded from the permission. If the pref is empty, no fields are restricted.

2.1.4.5.11. *SubfieldsToAllowForRestrictedEditing*

Asks: Define a list of subfields for which editing is authorized when edit_items_restricted permission is enabled, separated by spaces. ___

Examples:

- UNIMARC: "995$f 995$h 995$j"

- MARC21: "952$a 952$b 952$c"

Description:

- This preference lets you define what fields can be edited via cataloging if the *edit_items_restricted* permission is enabled

> **Note**
>
> The Fast Add (FA) framework is excluded from the permission. If the pref is empty, no fields are restricted.

2.1.4.5.12. *SubfieldsToUseWhenPrefill*

Asks: Define a list of subfields to use when prefilling items ___

> ⭐ **Important**
>
> Separate values with a space.

Description:

- When the *PrefillItem* preference is set to prefill item values with those from the last added item, this preference can control which fields are prefilled (and which are not). Enter a space separated list of fields that you would like to prefill when adding a new item.

2.1.4.5.13. *z3950NormalizeAuthor & z3950AuthorAuthFields*

Defaults: Don't copy & 701,702,700

Asks: ___ authors from the UNIMARC ___ tags (separated by commas) to the correct author tags when importing a record using Z39.50.

Description for z3950NormalizeAuthor:

- This preference allows for 'Personal Name Authorities' to replace authors as the bibliographic authority. This preference should only be considered by libraries using UNIMARC.

Values for z3950NormalizeAuthor:

- Copy

- Don't copy

Description for z3950AuthorAuthFields:

- This preference defines which MARC fields will be used for 'Personal Name Authorities' to replace authors as the bibliographic authorities. This preference only applies to those using UNIMARC encoding. The MARC fields selected here will only be used if 'z3950NormalizeAuthor' is set to "Copy". The default field are 700, 701, and 702.

2.1.4.6. *Spine Labels*

2.1.4.6.1. *SpineLabelAutoPrint*

Default: don't

Asks: When using the quick spine label printer, ___ automatically pop up a print dialog.

Values:

- do

- don't

2.1.4.6.2. *SpineLabelFormat*

Default: <itemcallnumber><copynumber>

Asks: Include the following fields on a quick-printed spine label: (Enter in columns from the biblio, biblioitems or items tables, surrounded by < and >.)

2.1.4.6.3. *SpineLabelShowPrintOnBibDetails*

Default: Don't display

Asks: ___ buttons on the bib details page to print item spine labels.

Values:

• Display

• Don't display

2.1.5. *Circulation*

Get there: More > Administration > Global System Preferences > Circulation

2.1.5.1. *Batch Checkout*

2.1.5.1.1. *BatchCheckouts*

Default: Don't allow

Asks: ___ batch checkouts

Values:
• Allow

• Don't allow

2.1.5.1.2. *BatchCheckoutsValidCategories*

Asks: Patron categories allowed to checkout in a batch ___ (list of patron categories separated with a pipe '|')

2.1.5.2. *Checkin Policy*

2.1.5.2.1. *AllowMultipleIssuesOnABiblio*

Default: Allow

Asks: ___ patrons to check out multiple items from the same record.

Values:
• Allow

• Don't allow

Description:

- If this preference is set to 'Allow' then patrons will be able to check out multiple copies of the same title at the same time. If it's set to "Don't allow" then patrons will only be allowed to check out one item attached to a record at a time. Regardless of the option chosen in this preference records with subscriptions attached will allow multiple check outs.

> **Important**
>
> This will only effect records without a subscription attached.

2.1.5.2.2. *BlockReturnOfWithdrawnItems*

Default: Block

Asks: ___ returning of items that have been withdrawn.

Values:

- Block

- Don't block

Description:

- This preference controls whether and item with a withdrawn status (952$0 in MARC21) can be checked in or not.

2.1.5.2.3. *CalculateFinesOnReturn*

Default: Do

Asks: ___ calculate and update overdue charges when an item is returned.

Values:

- Do

- Don't

Description:

- If this preference is set to "Do" and the *fines cron job* is off then Koha will calculate fines only when items are returned. If you have the fines cron job on and this preference set to "Do" then this preference will calculate fines based on the cron (usually run nightly) and then again when you check the item in. This option is best for those who are doing hourly loans. If this preference is set to "Don't" then fines will only be accrued if the fines cron job is running.

> **Important**
>
> If you are doing hourly loans then you should have this set to 'Do'.

2.1.5.2.4. *RentalFeesCheckoutConfirmation*

Default: do not ask

Asks: When checking out an item with rental fees, ___ for confirmation.

Values:
- ask

- do not ask

Description:
- If you are charging rental fees for items this preference will make it so that you can show (or not show) a confirmation before checking out an item that will incur a rental charge.

2.1.5.2.5. *UpdateNotForLoanStatusOnCheckin*

Asks: This is a list of value pairs. When an item is checked in, if the not for loan value on the left matches the items not for loan value it will be updated to the right-hand value. E.g. '-1: 0' will cause an item that was set to 'Ordered' to now be available for loan. Each pair of values should be on a separate line.

2.1.5.3. *Checkout Policy*

2.1.5.3.1. *AgeRestrictionMarker*

Asks: Restrict patrons with the following target audience values from checking out inappropriate materials: ___

Description:
- This preference defines certain keywords that will trigger Koha to restrict checkout based on age. These restrictions can be overridden by the *AgeRestrictionOverride* preference. Enter in this field a series of keywords separated by bar (|) with no spaces. For example PG|R|E|EC|Age| will look for PG followed by an age number, R folllowed by an age number, Age followed by an age number, and so on. These values can appear in any MARC field, but Library of Congress recommends the 521$a (Target Audience Note). Whatever field you decide to use you must map the word agerestriction in the biblioitems table to that field in the *Koha to MARC Mapping*. When cataloging you can enter values like PG 13 or E 10 in the 521$a and Koha will then notify circulation librarians that the material may not be recommended for the patron based on their age.

> ⭐ **Important**
>
> You must map the word agerestriction in the biblioitems table to the MARC field where this information will appear via the *Koha to MARC Mapping* administration area.

2.1.5.3.2. *AgeRestrictionOverride*

Default: Don't allow

Asks: ___ staff to check out an item with age restriction.

Values:

- Allow

> **Please confirm checkout**
> - Age restriction PG 13. Check out anyway?
>   - The patron has a debt of 32.45
>
> ✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Don't allow
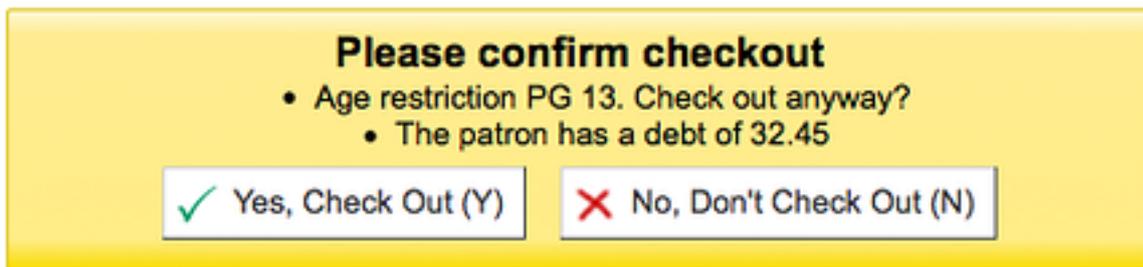
> - Age restriction PG 13.

Description:

- When the *AgeRestrictionMarker* preference is set, Koha will try to warn circulation librarians before checking out an item that might have an age restriction listed in the MARC record. This preference asks if you would like the staff to be able to still check out these items to patrons under the age limit.

2.1.5.3.3. *AllFinesNeedOverride*

Default: Require

Asks: ___ staff to manually override all fines, even fines less than *noissuescharge*.

Values:

- Don't require

- Require

Description:

- This preference let's you decide if you want to always be warned that the patron has fines when checking out. If you have it set to 'Require' then no matter how much money the patron owes a message will pop up warning you that the patron owes money.

2.1.5.3.4. *AllowFineOverride*

Default: Don't allow

Asks: ___ staff to manually override and check out items to patrons who have more than *noissuescharge* in fines.

Values:

- Allow

- Don't allow

Description:

- This preference lets you decide if you staff can check out to patrons who owe more money than you usually let them carry on their account. If set to 'Allow' staff will be warned that the patrons owes money, but it won't stop the staff from checking out to the patron.

2.1.5.3.5. *AllowItemsOnHoldCheckout*

Default: Don't allow

Asks: ___ checkouts of items reserved to someone else. If allowed do not generate RESERVE_WAITING and RESERVED warning. This allows self checkouts for those items.

Values:

- Allow

- Don't allow

> **Important**
>
> This system preference relates only to SIP based self checkout, not Koha's web based self checkout.

Description:

- When this preference is set to 'Allow' patrons will be able to use your external self check machine to check out a book to themselves even if it's on hold for someone else. If you would like Koha to prevent people from checking out books that are on hold for someone else set this preference to "Don't allow."

2.1.5.3.6. *AllowNotForLoanOverride*

Default: Allow

Asks: ___ staff to override and check out items that are marked as not for loan.

Values:

- Allow

- Don't allow

Description:

- This parameter is a binary setting which controls the ability of staff (patrons will always be prevented from checking these items out) to check out items that are marked as "not for loan". Setting it to "Allow" would allow such items to be checked out, setting it to "Don't allow" would prevent this. This

setting determines whether items meant to stay in the library, such as reference materials, and other library resources can be checked out by patrons.

2.1.5.3.7. *AllowRenewalLimitOverride*

Default: Allow

Asks: ___ staff to manually override the renewal limit and renew a checkout when it would go over the renewal limit.

Values:

• Allow

• Don't allow

Description:

• This preference is a binary setting which controls the ability of staff to override the limits placed on the number of times an item can be renewed. Setting it to "Allow" would allow such limits to be over-ridden, setting it to "Don't allow" would prevent this. This is a preference in which if it is set to "allow" it would allow the library staff to use their judgment for overriding the renew limit for special cases, setting it to "Don't allow" prevents an opportunity for abuse by the library staff.

2.1.5.3.8. *AllowReturnToBranch*

Default: to any library

Asks: Allow materials to be returned to ___

Values:

• either the library the item is from or the library it was checked out from.

• only the library the item is from.

• only the library the item was checked out from.

• to any library.

Description:

• This preference lets the library system decide how they will accept returns. Some systems allow for items to be returned to any library in the system (the default value of this preference) others want to limit item returns to only specific branches. This preference will allow you to limit item returns (checkins) to the branch(es) set in the value.

2.1.5.3.9. *AllowTooManyOverride*

Default: Allow

Asks: ___ staff to override and check out items when the patron has reached the maximum number of allowed checkouts.

Values:
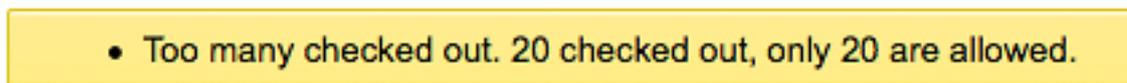
• Allow

- Don't allow

Description:
- If this preference is set to "Allow" then staff all will be presented with an option to checkout more items to a patron than are normally allowed in the *Circulation and Fine Rules*. If this preference is set to "Don't allow" then no staff member will be able to check out more than the circulation limit.

2.1.5.3.10. *AutomaticItemReturn*

Default: Do

Asks: ___ automatically transfer items to their home branch when they are returned.

Values:

- Do

- Don't

Description:

- This preference is a binary setting which determines whether an item is returned to its home branch automatically or not. If set to "Don't", the staff member checking an item in at a location other than the item's home branch will be asked whether the item will remain at the non-home branch (in which case the new location will be marked as a holding location) or returned. Setting it to "Do" will ensure that items checked in at a branch other than their home branch will be sent to that home branch.

2.1.5.3.11. *AutoRemoveOverduesRestrictions*

Default: Do not

Asks: ___ allow OVERDUES restrictions triggered by sent notices to be cleared automatically when all overdue items are returned by a patron.

Values:
- Do

- Do not

Description:
- Using the *Overdue Notice/Status Triggers* you can restrict patrons after they receive an overdue notice. This preference lets you define whether Koha will automatically remove that restriction once the overdue items in question are returned or not.

2.1.5.3.12. *CircControl*

Default: the library the item is from

Asks: Use the checkout and fines rules of ___

Values:

- the library the item is from

  - The *circulation and fines policies* will be determined by the item's library where *HomeOrHolding-Branch* chooses if item's home library is used or holding library is used.

- the library the patron is from

  - The *circulation and fines policies* will be determined the patron's home library

- the library you are logged in at

  - The *circulation and fines policies* will be determined by the library that checked the item out to the patron

2.1.5.3.13. *ConsiderOnSiteCheckoutsAsNormalCheckouts*

Default: Consider

Asks: ___ on-site checkouts as normal checkouts. If enabled, the number of checkouts allowed will be normal checkouts + on-site checkouts. If disabled, both values will be checked separately.

Values:
- Consider

- Don't consider

Description:
- This preference allows you to decide if checkouts that are *OnSiteCheckouts* are counted toward the total checkouts a patron can have. You can also set your *circulation and fine rules* to allow only a certain number of normal and OnSite checkouts.

2.1.5.3.14. *DefaultLongOverdueChargeValue*

Asks: Charge a lost item to the borrower's account when the LOST value of the item changes to ___

Description:
- Leave this field empty if you don't want to charge the user for lost items. If you want the user to be charged enter the *LOST authorized value* you are using in the *DefaultLongOverdueLostValue* preference. This preference is used when the *longoverdue cron job* is called without the --charge parameter.

2.1.5.3.15. *DefaultLongOverdueLostValue & DefaultLongOverdueDays*

Asks: By default, set the LOST value of an item to ___ when the item has been overdue for more than ___ days.

Description:
- These preferences are used when the *longoverdue cron job* is called without the --lost parameter. It allows users to set the values of the *longoverdue cron* without having to edit the crontab. Setting the

values to 1 and 30 for example will mark the item with the *LOST authorized value* of 1 after the item is 30 days overdue.

2.1.5.3.16. *HoldsInNoissuesCharge*

Default: Don't include

Asks: ___ hold charges when summing up charges for noissuescharge.

Values:

- Don't include

- Include

2.1.5.3.17. *HomeOrHoldingBranch*

Default: the library the item was checked out from

Asks: Use the checkout and fines rules of ___

Values:

- the library the item is from
  - This is equivalent to 'home library'

- the library the item was checked out from
  - This is equivalent to 'holding library'

Description:

- This preference does several things.
  - If *CircControl* is set to 'the library the item is from' then the *circulation and fines policies* will be determined by 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 this preference 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*.

> **Important**
>
> It is not recommend that this setting be changed after initial setup of Koha because it will change the behavior of items already checked out.

2.1.5.3.18. *InProcessingToShelvingCart*

Default: Don't move

Asks: ___ items that have the location PROC to the location CART when they are checked in.

Values:

- Don't move

- Move

Description:

- This preference is used to manage automatically changing item locations from processing (PROC) to the book cart (CART). A *cron job* needs to be set to run 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.) More information can be found in the *related chapter* in this manual.

-

> **Note**
>
> 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.

2.1.5.3.19. *IssuingInProcess*

Default: Don't prevent

Asks: ___ patrons from checking out an item whose rental charge would take them over the limit.

Values:

- Don't prevent

- Prevent

Description:

- This preference determines if a patron can check items out if there is an overdue fine on the account and any of the materials the patron wishes to check out will potentially tip the account balance over the maximum fines policy the library has in place.

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

2.1.5.3.20. *IssueLostItem*

Default: display a message

Asks: When issuing an item that has been marked as lost, ___.

Values:

- display a message

- do nothing

  - This option will just check the item out without notifying you that the item was marked lost.

- require confirmation

Description:

- This preference lets you define how library staff are notified that an item with a lost status is being checked out. This will help staff mark items as 'available' if you choose to 'display a message' or 'require confirmation.' If you choose to 'do nothing,' there will be no notification that the item being checked out is marked as 'lost.'

2.1.5.3.21. *ManInvInNoissuesCharge*

Default: Include

Asks: ___ MANUAL_INV charges when summing up charges for noissuescharge.

Values:
- Don't include

- Include

Description:
- This preference lets you decide if charges entered as manual invoices are included when calculating the *noissuescharge*. If this is set to include then Koha will include all manual invoices when deciding if the patron owes too much money to check anything else out of the library. If it's set to Don't include then Koha will ignore all manual invoice charges when figuring out if the patron owes too much money to checkout additional materials.

2.1.5.3.22. *maxoutstanding*

Default: 5

Asks: Prevent patrons from making holds on the OPAC if they owe more than ___ USD in fines.

2.1.5.3.23. *noissuescharge*

Default: 5

Asks: Prevent patrons from checking out books if they have more than ____ USD in fines.

Description:

- This preference is the maximum amount of money owed to the library before the user is banned from borrowing more items. Using the *ManInvInNoissuesCharge* and *RentalsInNoissuesCharge* preferences you can control which types of charges are considered in this total. This also coincides with *maxoutstanding* that limits patrons from placing holds when the maximum amount is owed to the library.

2.1.5.3.24. *NoIssuesChargeGuarantees*

Asks: Prevent a patron from checking out if the patron has guarantees owing in total more than ____ USD in fines.

Description:
- Allows a library to prevent patrons from checking out items if his or her guarantees owe too much in fines.

2.1.5.3.25. *NoRenewalBeforePrecision*

Default: date

Asks: Calculate "No renewal before" based on ____.

Values:
- date

- exact time

> **Note**
>
> Only relevant for loans calculated in days, hourly loans are not affected.

Description:
- This preference allows you to control how the 'No renewal before" option in the *Circulation and fine rules* administration area.

2.1.5.3.26. *OnSiteCheckouts*

Default: Disable

Asks: ____ the on-site checkouts feature.

Values:
- Disable

- Enable

Description:

- This preference lets you check out items that are 'not for loan' to patrons. A checkbox is added to the checkout screen when this preference is set to 'Enable' labeled 'On-site checkout'. This allows you to track who's using items that are normally not for loan or are in a closed stack setting.

2.1.5.3.27. *OnSiteCheckoutsForce*

Default: Disable

Asks: ___ the on-site for all cases (Even if a user is debarred, etc.).

Values:

- Disable

- Enable

Description:

- This preference lets the staff override any restrictions a patron might have and check out items for use within the library. The *OnSiteCheckouts* preference must first be set to 'Enable' for this preference to be considered.

2.1.5.3.28. *OverduesBlockCirc*

Default: Ask for confirmation

Asks: ___ when checking out to a borrower that has overdues outstanding

Values:

- Ask for confirmation

  - Will not let you check an item out to patrons with overdues until a librarian confirms that it is okay

- Block

  - Block all patrons with overdue items from being able to check out

- Don't block

  - Allow all patrons with overdue items to continue to check out

2.1.5.3.29. *OverduesBlockRenewing*

Default: allow renewing

Asks: When a patron's checked out item is overdue, ___

Values:

- allow renewing

- block renewing for all the patron's items

- block renewing for only this item

2.1.5.3.30. *OverdueNoticeBcc*

Asks: Send all notices as a BCC to this email address ___

This preference makes it so that a librarian can get a copy of every notice sent out to patrons.

> **Note**
>
> If you'd like more than one person to receive the blind copy you can simply enter in multiple email addresses separated by commas.

> **Note**
>
> The name of this preference is misleading, it does not only send overdues, but all notices to the BCC address.

2.1.5.3.31. *OverdueNoticeCalendar*

Default: Ignore calendar

Asks: ___ when working out the period for overdue notices

Values:

- Ignore calendar
  - Notices do not take holidays into account, so they will be sent even if holidays have meant the item is not actually overdue yet

- Use calendar
  - Notices take holidays into account, so they will not be sent if holidays mean the item is not actually overdue yet

2.1.5.3.32. *PrintNoticesMaxLines*

Asks: Include up to ___ item lines in a printed overdue notice.

> **Note**
>
> If the number of items is greater than this number, the notice will end with a warning asking the borrower to check their online account for a full list of overdue items.

> **Note**
>
> Set to 0 to include all overdue items in the notice, no matter how many there are.

> **Important**
>
> This preference only refers to the print notices, not those sent via email.

2.1.5.3.33. *RenewalPeriodBase*

Default: the old due date of the checkout

Asks: When renewing checkouts, base the new due date on ___

Values:

- the old due date of the checkout

- the current date

2.1.5.3.34. *RenewalSendNotice*

Default: Don't send

Asks: ____ a renewal notice according to patron checkout alert preferences.

Values:
- Don't send

- Send

Description:
- If a patron has chosen to receive a check out notice in their messaging preferences and this preference is set to 'Send' then those patrons will also receive a notice when they renew materials. You will want to set up a *new notice* with the code of RENEWAL (if you don't already have it) with custom text for renewing items.

> ⭐ **Important**
>
> This preference requires that you have *EnhancedMessagingPreferences* set to 'Allow'

2.1.5.3.35. *RentalsInNoissuesCharge*

Default: Include

Asks: ___ rental charges when summing up charges for noissuescharge.

Values:

- Don't include

- Include

Description:

- This preference lets you decide if rental charges are included when calculating the *noissuescharge*. If this is set to include then Koha will include all rental charges when deciding if the patron owes too much money to check anything else out of the library. If it's set to Don't include then Koha will ignore all rental charges when figuring out if the patron owes too much money to checkout additional materials.

2.1.5.3.36. *RestrictionBlockRenewing*

Default: Allow

Asks: If patron is restricted, ___ renewing of items.

Values:

- Allow

- Block

2.1.5.3.37. *ReturnBeforeExpiry*

Default: Don't require

Asks: ___ patrons to return books before their accounts expire (by restricting due dates to before the patron's expiration date).

Values:

- Don't require

- Require

Description:

- This is preference may prevent a patron from having items checked out after their library card has expired. If this is set to "Require", then a due date of any checked out item can not be set for a date which falls after the patron's card expiration. If the setting is left "Don't require" then item check out dates may exceed the expiration date for the patron's library card.

2.1.5.3.38. *ReturnToShelvingCart*

Default: Don't move

Asks: ___ all items to the location CART when they are checked in.

Values:

• Don't move

• Move

Description:
• More information can be found in the *related chapter* in this manual.

2.1.5.3.39. *StaffSearchResultsDisplayBranch*

Default: the library the item is held by

Asks: For search results in the staff client, display the branch of ___

Values:
• the library the item is from

• the library the items is held by

2.1.5.3.40. *TransfersMaxDaysWarning*

Default: 3

Asks: Show a warning on the "Transfers to Receive" screen if the transfer has not been received ___ days after it is sent.

Description:

• The TransferMaxDaysWarning preference is set at a default number of days. This preference allows for a warning to appear after a set amount of time if an item being transferred between library branches has not been received. The warning will appear in the *Transfers to Receive* report.

2.1.5.3.41. *UseBranchTransferLimits & BranchTransferLimitsType*

Defaults: Don't enforce & collection code

Asks: ___ branch transfer limits based on ___

UseBranchTransferLimits Values:

• Don't enforce

• Enforce

BranchTransferLimitsType Values:

• collection code

• item type

BranchTransferLimitsType Description:

- This parameter is a binary setting which determines whether items are transferred according to item type or collection code. This value determines how the library manager is able to restrict what items can be transferred between the branches.

2.1.5.3.42. *useDaysMode*

Default: Don't include

Asks: Calculate the due date using ___.

Values:

- circulation rules only.

- the calendar to push the due date to the next open day.

- the calendar to skip all days the library is closed.

Description:

- This preference controls how scheduled library closures affect the due date of a material. The 'the calendar to skip all days the library is closed' setting allows for a scheduled closure not to count as a day in the loan period, the 'circulation rules only' setting would not consider the scheduled closure at all, and 'the calendar to push the due date to the next open day' would only effect the due date if the day the item is due would fall specifically on the day of closure.

Example:

- The library has put December 24th and 25th in as closures on the calendar. A book checked out by a patron has a due date of December 25th according to the circulation and fine rules. If this preference is set to 'circulation rules only' then the item will remain due on the 25th. If the preference is set to 'the calendar to push the due date to the next open day' then the due date will be December 26th. If the preference is set to 'the calendar to skip all days the library is closed' then the due date will be pushed to the 27th of December to accommodate for the two closed days.

The calendar is defined on a branch by branch basis. To learn more about the calendar, check out the '*Calendar & Holidays*' section of this manual.

2.1.5.3.43. *UseTransportCostMatrix*

Default: Don't use

Asks: ___ Transport Cost Matrix for calculating optimal holds filling between branches.

Values:
- Don't use

- Use

Description:
- If the system is configured to use the *Transport cost matrix* for filling holds, then when attempting to fill a hold, the system will search for the lowest cost branch, and attempt to fill the hold with an item from that branch first. Branches of equal cost will be selected from randomly. The branch or branches of the next highest cost shall be selected from only if all the branches in the previous group are unable to fill the hold.

  The system will use the item's current holding branch when determining whether the item can fulfill a hold using the Transport Cost Matrix.

2.1.5.4. *Course Reserves*

2.1.5.4.1. *UseCourseReserves*

Default: Don't use

Asks: ___ course reserves

Values:

• Don't use

• Use

Description:
• The *Course Reserves* module in Koha allows you to temporarily move items to 'reserve' and assign different circulation rules to these items while they are being used for a specific course.

2.1.5.5. *Fines Policy*

2.1.5.5.1. *finesCalendar*

Default: not including the days the library is closed

Asks: Calculate fines based on days overdue ___

Values:

• directly

• not including the days the library is closed

Description:

• This preference will determine whether or not fines will be accrued during instances when the library is closed. Examples include holidays, library in-service days, etc. Choosing "not including the days the library is closed" setting will enable Koha to access its *Calendar* module and be considerate of dates when the library is closed. To make use of this setting the administrator must first access Koha's calendar and mark certain days as "holidays" ahead of time.

The calendar is defined on a branch by branch basis. To learn more about the calendar, check out the '*Calendar & Holidays*' section of this manual.

2.1.5.5.2. *FinesIncludeGracePeriod*

Default: Include

Asks: ___ the grace period when calculating the fine for an overdue item.

Values:
• Don't include

• Include

Description:

- This preference lets you control how Koha calculates fines when there is a grace period. If you choose to include the grace period when calculating fines then Koha will charge for the days in the grace period should the item be overdue more than those days. If you choose not to include the grace period then Koha will only charge for the days overdue after the grace period.

2.1.5.5.3. *finesMode*

Default: Calculate (but only for mailing to the admin)

Asks: ___ fines

Values:

- Calculate (but only for mailing to the admin)

- Calculate and charge

- Don't calculate

> ⭐ **Important**
>
> Requires that you have the fines cron job running (misc/cronjobs/fines.pl)

2.1.5.5.4. *RefundLostItemFeeOnReturn*

Default: Refund

Asks: ___ lost item fees charged to a borrower when the lost item is returned.

Values:
- Don't refund

- Refund

Description:
- When an item is marked lost in Koha the system charges the patron the replacement fee for the item. This preference lets you control how Koha handles returns of these items. By default when an item that was previously marked lost is checked in Koha refunds the patron the replacement fee. Change this preference to "Don't refund" if you would like Koha to not refund the replacement fee.

2.1.5.5.5. *WhenLostChargeReplacementFee*

Default: Charge

Asks: ___ the replacement price when a patron loses an item.

Values:
- Charge

- Don't charge

Description:
- This preference lets you tell Koha what to do with an item is marked lost. If you want Koha can 'Charge' the patron the replacement fee listed on the item they lost or it can do nothing in reference to the patron and just mark the item lost in the catalog.

2.1.5.5.6. *WhenLostForgiveFine*

Default: Don't forgive

Asks: ___ the fines on an item when it is lost.

Values:

• Don't forgive

• Forgive

Description:

• This preference allows the library to decide if fines are charged in addition to the replacement fee when an item is marked as lost. If this preference is set to 'Forgive' then the patron won't be charged fines in addition to the replacement fee.

2.1.5.6. *Holds Policy*

2.1.5.6.1. *AllowHoldDateInFuture*

Default: Allow

Asks: ___ hold requests to be placed that do not enter the waiting list until a certain future date.

Values:

• Allow

• Don't allow

2.1.5.6.2. *AllowHoldItemTypeSelection*

Default: Don't allow

Asks: ___ hold fulfillment to be limited by itemtype.

Values:

• Allow

• Don't allow

2.1.5.6.3. *AllowHoldsOnDamagedItems*

Default: Allow

Asks: ___ hold requests to be placed on damaged items.

Values:

• Allow

• Don't allow

Description:

• This parameter is a binary setting which controls whether or not hold requests can be placed on items that are marked as "damaged" (items are marked as damaged by editing subfield 4 on the

item record). Setting this value to "Don't allow" will prevent anyone from placing a hold on such items, setting it to "Allow" will allow it. This preference is important because it determines whether or not a patron can place a request for an item that might be in the process of being repaired or not in good condition. The library may wish to set this to "Don't allow" if they were concerned about their patrons not receiving the item in a timely manner or at all (if it is determined that the item is beyond repair). Setting it to "Allow" would allow a patron to place a hold on an item and therefore receive it as soon as it becomes available.

2.1.5.6.4. *AllowHoldsOnPatronsPossessions*

Default: Allow

Asks: _____ a patron to place a hold on a record where the patron already has one or more items attached to that record checked out.

Values:
- Allow

- Don't allow

Description:
- By setting to "Don't allow," you can prevent patrons from placing holds on items they already have out, thus preventing them from blocking anyone else from getting an item.

2.1.5.6.5. *AllowHoldPolicyOverride*

Default: Allow

Asks: ___ staff to override hold policies when placing holds.

Values:

- Allow

- Don't allow

Description:

- This preference is a binary setting which controls whether or not the library staff can override the circulation and fines rules as they pertain to the placement of holds. Setting this value to "Don't allow" will prevent anyone from overriding, setting it to "Allow" will allow it. This setting is important because it determines how strict the libraries rules for placing holds are. If this is set to "Allow", exceptions can be made for patrons who are otherwise normally in good standing with the library, but there is opportunity for the staff to abuse this function. If it is set to "Don't allow", no abuse of the system is possible, but it makes the system entirely inflexible in respect to holds.

2.1.5.6.6. *AllowRenewalIfOtherItemsAvailable*

Default: Don't allow

Asks: ___ a patron to renew an item with unfilled holds if other available items can fill that hold.

Values:
- Allow

- Don't allow

2.1.5.6.7. *AutoResumeSuspendedHolds*

Default: Allow

Asks: ___ suspended holds to be automatically resumed by a set date.

Values:

• Allow

• Don't allow

Description:

• If this preference is set to 'Allow' then all suspended holds will be able to have a date at after which they automatically become unsuspended. If you have this preference set to 'Allow' you will also need the *Unsuspend Holds* cron job running.

> **Important**
>
> The holds will become unsuspended the date after that entered by the patron.

2.1.5.6.8. *canreservefromotherbranches*

Default: Allow

Asks: ___ a user from one library to place a hold on an item from another library

Description:

• This preference is a binary setting which determines whether patrons can place holds on items from other branches. If the preference is set to "Allow" patrons can place such holds, if it is set to "Don't allow" they cannot. This is an important setting because it determines if users can use Koha to request items from another branch. If the library is sharing an installation of Koha with other independent libraries which do not wish to allow interlibrary borrowing it is recommended that this parameter be set to "Don't allow".

Values:

• Allow

• Don't allow (with *independent branches*)

2.1.5.6.9. *ConfirmFutureHolds*

Default: 0

Asks: Confirm future hold requests (starting no later than ___ days from now) at checkin time.

Description:
• When confirming a hold at checkin time, the number of days in this preference is taken into account when deciding which holds to show alerts for. This preference does not interfere with renewing, checking out or transferring a book.

> **Note**
>
> This number of days will be used too in calculating the default end date for the Holds to pull-report. But it does not interfere with issuing, renewing or transferring books.

> **Important**
>
> This preference is only looked at if you're allowing hold dates in the future with *AllowHoldDateIn-Future* or *OPACAllowHoldDateInFuture*

2.1.5.6.10. *decreaseLoanHighHolds, decreaseLoanHighHoldsDuration, decreaseLoanHighHoldsValue, decreaseLoanHighHoldsControl, and decreaseLoanHighHoldsIgnoreStatuses*

Asks: ___ the reduction of loan period ___ to days for items with more than ___ holds ___ . Ignore items with the following statuses when counting items ___

decreaseLoanHighHolds default: Don't enable

decreaseLoanHighHoldsControl default: on the record

decreaseLoanHighHolds values:
Don't enable

- Enable

decreaseLoanHighHoldsControl values:
- over the number of holdable items on the records

- on the record

decreaseLoanHighHoldsIgnoreStatuses values:
- [Select All]

- Damages

- Lost

- Not for loan

- Withdrawn

Description:
- These preferences let you change the loan length for items that have many holds on them. This will not effect items that are already checked out, but items that are checked out after the decreaseLoanHighHoldsValue is met will only be checked out for the number of days entered in the decreaseLoanHighHoldsDuration preference.

2.1.5.6.11. *DisplayMultiPlaceHold*

Default: Don't enable

Asks: ___ the ability to place holds on multiple biblio from the search results

Values:

- Don't enable

- Enable

2.1.5.6.12. *emailLibrarianWhenHoldIsPlaced*

Default: Don't enable

Asks: ___ sending an email to the Koha administrator email address whenever a hold request is placed.

Values:

- Don't enable

- Enable

Description:

- This preference enables Koha to email the library staff whenever a patron requests an item to be held. While this function will immediately alert the librarian to the patron's need, it is extremely impractical in most library settings. In most libraries the hold lists are monitored and maintained from a separate interface. That said, many libraries that allow on shelf holds prefer to have this preference turned on so that they are alerted to pull an item from the shelf.

> **Important**
>
> In order for this email to send you must have a *notice* template with the code of HOLDPLACED

> **Important**
>
> This notice will only be sent if the *process_message_queue.pl cronjob* being run periodically to send the messages.

2.1.5.6.13. *ExpireReservesMaxPickUpDelay*

Default: Don't allow

Asks: ___ holds to expire automatically if they have not been picked by within the time period specified in *ReservesMaxPickUpDelay*

Values:

- Allow

- Don't allow

Description:

- If set to 'allow' this will cancel holds that have been waiting for longer than the number of days specified in the *ReservesMaxPickUpDelay* system preference. Holds will only be cancelled if the *Expire Holds cron job* is runnning.

2.1.5.6.14. *ExpireReservesMaxPickUpDelayCharge*

Default: 0

Asks: If using *ExpireReservesMaxPickUpDelay*, charge a borrower who allows his or her waiting hold to expire a fee of ___ USD

Description:

- If you are expiring holds that have been waiting too long you can use this preference to charge the patron for not picking up their hold. If you don't charge patrons for items that aren't picked up you can leave this set to the default which is 0. Holds will only be cancelled and charged if the *Expire Holds cron job* is running.

2.1.5.6.15. *ExpireReservesOnHolidays*

Default: Allow

Asks: ___ expired holds to be cancelled on days the library is closed.

Values:
- Allow

- Don't allow

2.1.5.6.. *LocalHoldsPriority, LocalHoldsPriorityPatronControl, LocalHoldsPriorityItemControl*

Asks: ___ priority for filling holds to patrons whose ___ matches the item's ___

LocalHoldsPriority Values:
- Don't give

- Give

LocalHoldsPriorityPatronControl Values:
- home library

- pickup library

LocalHoldsPriorityItemControl Values:

- holding library

- home library

Description:
- This feature will allow libraries to specify that, when an item is returned, a local hold may be given priority for fulfillment even though it is of lower priority in the list of unfilled holds.

2.1.5.6.17. *maxreserves*
Default: 50

Asks: Patrons can only have ___ holds at once.

2.1.5.6.18. *OPACAllowHoldDateInFuture*
Default: Allow

Asks: ___ patrons to place holds that don't enter the waiting list until a certain future date.

Values:

- Allow

    - *AllowHoldDateInFuture* must also be enabled for this to work

- Don't allow

2.1.5.6.19. *OPACAllowUserToChooseBranch*
Default: Allow

Asks: ___ a user to choose the branch to pick up a hold from.

Values:

- Allow

- Don't allow

Description:

- Changing this preference will not prevent staff from being able to transfer titles from one branch to another to fill a hold, it will only prevent patrons from saying they plan on picking a book up at a branch other than their home branch.

2.1.5.6.20. *ReservesControlBranch*
Default: item's home library

Asks: Check the ___ to see if the patron can place a hold on the item.

Values:

- item's home library.

- patron's home library.

2.1.5.6.21. *ReservesMaxPickUpDelay*
Default: 7

Asks: Mark a hold as problematic if it has been waiting for more than ___ days.

Description:

- This preference (based on calendar days, not the *Koha holiday calendar*) puts an expiration date on an item a patron has on hold. After this expiration date the staff will have the option to release the unclaimed hold which then may be returned to the library shelf or issued to the next patron on the item's hold list. Items that are 'expired' by this preference are moved to the 'Holds Over' tab on the '*Holds Awaiting Pickup*' report.

2.1.5.6.22. *ReservesNeedReturns*

Default: Don't automatically

Asks: ___ mark holds as found and waiting when a hold is placed specifically on them and they are already checked in.

Values:

- Automatically

- Don't automatically

Description:

- This preference refers to 'item specific' holds where the item is currently on the library shelf. This preference allows a library to decide whether an 'item specific' hold is marked as "Waiting" at the time the hold is placed or if the item will be marked as "Waiting" after the item is checked in. This preference will tell the patron that their item is 'Waiting' for them at their library and ready for check out.

2.1.5.6.23. *StaticHoldsQueueWeight, HoldsQueueSkipClosed & RandomizeHoldsQueueWeight*

StaticHoldsQueueWeight Default: 0

HoldsQueueSkipClosed Default: open or closed

RandomizeHoldsQueueWeight Default: in that order

Asks: Satisfy holds using items from the libraries ___ (as branchcodes, separated by commas; if empty, uses all libraries) when they are ___ ___.

HoldsQueueSkipClosed Values:
- open or closed

- open

RandomizeHoldsQueueWeight Values:

- in random order

  - If StaticHoldsQueueWeight is left at the default Koha will randomize all libraries, otherwise it will randomize the libraries listed.

- in that order

  - If StaticHoldsQueueWeight is left at the default then this will use all of your branches in alphabetical order, otherwise it will use the branches in the order that you entered them in the StaticHoldsQueueWeight preference.

Descriptions:

- These preferences control how the *Holds Queue report* is generated using *a cron job*.

  If you do not want all of your libraries to participate in the on-shelf holds fulfillment process, you should list the the libraries that *do* participate in the process here by inputting all the participating library's branchcodes, separated by commas (e.g. "MPL,CPL,SPL,BML" etc.).

  By default, the holds queue will be generated such that the system will first attempt to hold fulfillment using items already at the pickup library if possible. If there are no items available at the pickup library to fill a hold, build_holds_queue.pl will then use the list of libraries defined in StaticHoldsQueueWeight. If RandomizeHoldsQueueWeight is disabled (which it is by default), the script will assign fulfillment requests in the order the branches are placed in the StaticHoldsQueueWeight system preference.

  For example, if your system has three libraries, of varying sizes (small, medium and large) and you want the burden of holds fulfillment to be on larger libraries before smaller libraries, you would want StaticHoldsQueueWeight to look something like "LRG,MED,SML".

  If you want the burden of holds fulfillment to be spread out equally throughout your library system, simply enable RandomizeHoldsQueueWeight. When this system preference is enabled, the order in which libraries will be requested to fulfill an on-shelf hold will be randomized each time the list is re-generated.

  Leaving StaticHoldsQueueWeight empty is contraindicated at this time. Doing so will cause the build_holds_queue script to ignore RandomizeHoldsQueueWeight, causing the script to request hold fulfillment not randomly, but by alphabetical order.

> **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. To use the Transport Cost Matrix simply set your *UseTransportCostMatrix* preference to 'Use'

2.1.5.6.24. *SuspendHoldsIntranet*

Default: Allow

Asks: ___ holds to be suspended from the intranet.

Values:

- Allow

- Don't allow

Description:

- The holds suspension feature can be turned on and off in the staff client by altering this system preference. If this is set to 'allow' you will want to set the *AutoResumeSuspendedHolds* system preference.

2.1.5.6.25. *SuspendHoldsOpac*

Default: Allow

Asks: ___ holds to be suspended from the OPAC.

Values:

- Allow

- Don't allow

Description:

- The holds suspension feature can be turned on and off in the OPAC by altering this system preference. If this is set to 'allow' you will want to set the *AutoResumeSuspendedHolds* system preference.

2.1.5.6.26. *TransferWhenCancelAllWaitingHolds*

Default: Don't transfer

Asks: ___ items when cancelling all waiting holds.

Values:
- Don't transfer

- Transfer

Description:
- When TransferWhenCancelAllWaitingHolds is set to "Don't transfer", no branch transfer records are created. Koha will not allow the holds to be transferred, because that would orphan the items at the library where the holds were awaiting pickup, without any further instruction to staff as to what items are at the library or where they need to go. When that system preference set to "Transfer", branch transfers are created, so the holds may be cancelled.

2.1.5.7. *Interface*

2.1.5.7.1. *AllowAllMessageDeletion*

Default: Don't allow

Asks: ___ staff to delete messages added from other libraries.

Values:

- Allow

- Don't allow

2.1.5.7.2. *AllowOfflineCirculation*

Default: Do not enable

Asks: ___ offline circulation on regular circulation computers.

Values:
- Do not enable

- Enable

Description:

- Setting this preference to 'Enable' allows you to use the Koha interface for *offline circulation*. This system preference does not affect the *Firefox plugin* or the *desktop application*, any of these three options can be used for offline circulation without effecting the other.

2.1.5.7.3. *AudioAlerts*

Default: Don't enable

Asks: ___ audio alerts for events defined in the audio alerts section of administration.

Values:

- Don't enable

- Enable

> **Important**
>
> This feature is not supported by all browsers. Requires an HTML5 compliant browser.

2.1.5.7.4. *CircAutocompl*

Default: Try

Asks: ___ to automatically fill in the member when entering a patron search on the circulation screen.

Description:

- This preference is a binary setting which determines whether auto-completion of fields is enabled or disabled for the circulation input field. Setting it to "Try" would enable a staff member to begin typing a name or other value into the field and have a menu pop up with suggestions for completing it. Setting it to "Don't try" would disable this feature. This preference can make staff members' jobs easier or it could potentially slow down the page loading process.

Values:

- Don't try

- Try

2.1.5.7.5. *CircAutoPrintQuickSlip*

Default: open a print quick slip window

Asks: When an empty barcode field is submitted in circulation ___

Values:

- clear the screen

- open a print quick slip window

- open a print slip window

Description:

- If this preference is set to open a quick slip (*ISSUEQSLIP*) or open a slip (*ISSUESLIP*) for printing it will eliminate the need for the librarian to click the print button to generate a checkout receipt for the patron they're checking out to. If the preference is set to clear the screen then "checking out" an empty barcode will clear the screen of the patron you were last working with.

2.1.5.7.6. *FilterBeforeOverdueReport*

Default: Don't require

Asks: ___ staff to choose which checkouts to show before running the overdues report.

Description:

- Koha's overdue report shows you all of the overdue items in your library system. If you have a large library system you'll want to set this preference to 'Require' to force those running the report to first limit the data generated to a branch, date range, patron category or other such filter. Requiring that the report be filtered before it's run prevents your staff from running a system heavy report and slowing down other operations in the system.

Values:

- Don't require

- Require

2.1.5.7.7. *FineNotifyAtCheckin*

Default: Don't notify

Asks: ___ librarians of overdue fines on the items they are checking in.

Values:

- Don't notify

- Notify

Description:

- With this preference set to 'Notify' all books that have overdue fines owed on them will pop up a warning when checking them in. This warning will need to acknowledged before you can continue checking items in. With this preference set to 'Don't notify,' you will still see fines owed on the patron record, you just won't have an additional notification at check in.
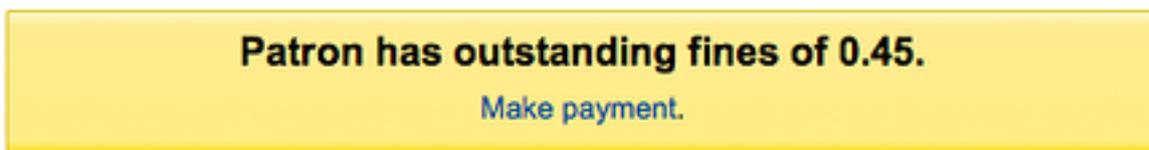
2.1.5.7.8. *DisplayClearScreenButton*

Default: Show

Asks: ___ a button to clear the current patron from the screen on the circulation screen.

Values:

- Don't show
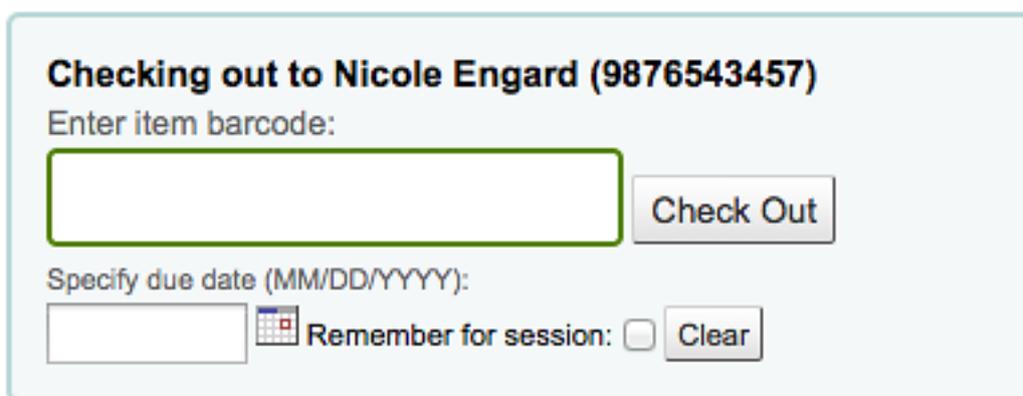
- Show

2.1.5.7.9. *ExportRemoveFields*

Asks: The following fields should be excluded from the patron checkout history CSV or iso2709 export ___

Description:

- This space separated list of fields (e.g. 100a 245b) will automatically be excluded when exporting the patron's current checkout history.

2.1.5.7.10. *ExportWithCsvProfile*

Asks: Use the ___ CSV profile when exporting patron checkout history

Description:

- Use this preference to define which *CSV profile* should be used when exporting patron's current checkout data. Enter the CSV Profile name as the value for this preference. If this preference is left blank you will not be able to export the patron's current checkout summary.
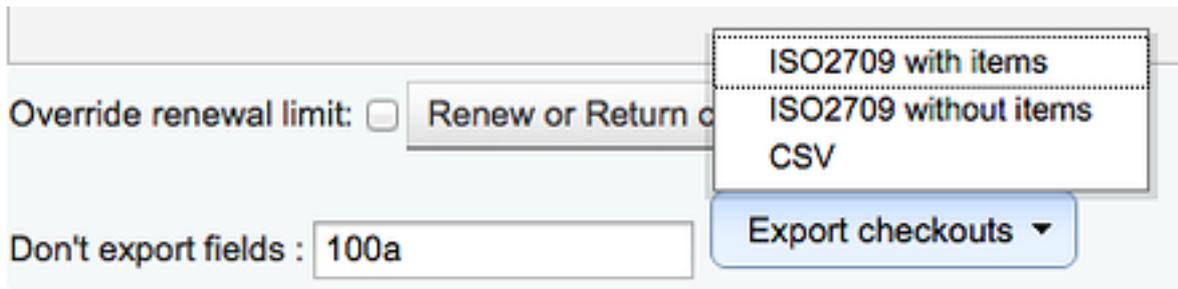
2.1.5.7.11. *HoldsToPullStartDate*

Default: 2

Asks: Set the default start date for the Holds to pull list to ___ day(s) ago.

Description:

- The *Holds to Pull* report in circulation defaults to filtering holds placed 2 days ago. This preference allows you to set this default filter to any number of days.

2.1.5.7.12. *itemBarcodeFallbackSearch*

Default: Don't enable

Asks: ___ the automatic use of a keyword catalog search if the phrase entered as a barcode on the checkout page does not turn up any results during an item barcode search.

Values:

- Don't enable
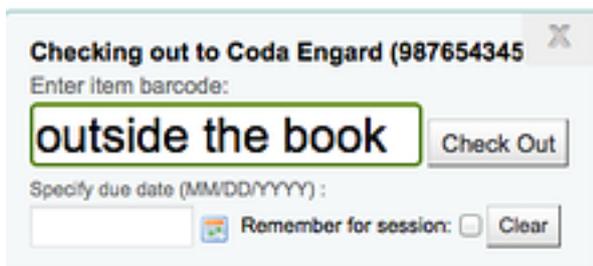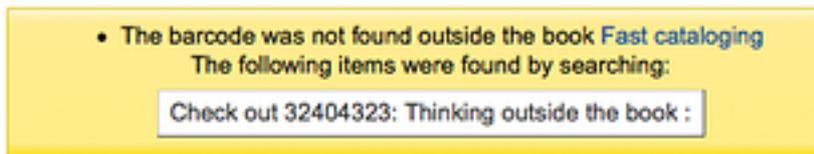
- Enable

Description:

- Sometimes libraries want to checkout using something other than the barcode. Enabling this preference will do a keyword search of Koha to find the item you're trying to check out. You can use the call number, barcode, part of the title or anything you'd enter in the keyword search when this preference is enabled and Koha will ask you which item you're trying to check out.

> **Important**
>
> While you're not searching by barcode a barcode is required on every title you check out. Only titles with barcodes will appear in the search results.

2.1.5.7.13. *itemBarcodeInputFilter*

Default: Don't filter

Asks: ___ scanned item barcodes.

Values:

- Convert from CueCat format

- Convert from Libsuite8 form

- Don't filter

- EAN-13 or zero-padded UPC-A from

- Remove spaces from

- Remove the first number from T-prefix style

    - This format is common among those libraries migrating from Follett systems

2.1.5.7.14. *NoticeCSS*

Asks: Include the stylesheet at ___ on Notices.

> **Important**
>
> This should be a complete URL, starting with http://

Description:

- If you would like to style your notices with a consistent set of fonts and colors you can use this preference to point Koha to a stylesheet specifically for your notices.

2.1.5.7.15. *numReturnedItemsToShow*

Default: 20

Asks : Show the ___ last returned items on the checkin screen.

2.1.5.7.16. *previousIssuesDefaultSortOrder*

Default: earliest to latest

Asks: Sort previous checkouts on the circulation page from ___ due date.

Values:

- earliest to latest

- latest to earliest

2.1.5.7.17. *RecordLocalUseOnReturn*

Default: Don't record

Asks: ___ local use when an unissued item is checked in.

Values:

- Don't record

- Record

Description:

- When this preference is set to "Don't record" you can record local use of items by checking items out to the statistical patron. With this preference set to "Record" you can record local use by checking out to the statistical patron and/or by checking in a book that is not currently checked out.

2.1.5.7.18. *ShowAllCheckins*

Default: Do not show

Asks: ___ all items in the "Checked-in items" list, even items that were not checked out.

Values:
- Do not show

- Show

Description:
- When items that are not currently checked out are checked in they don't show on the list of checked in items. This preference allows you to choose how you'd like the log of checked in items displays.

2.1.5.7.19. *SpecifyDueDate*

Default: Allow

Asks: ___ staff to specify a due date for a checkout.

Due dates are calculated using your circulation and fines rules, but staff can override that if you allow them to specify a due date at checkout.

Description:

- This preference allows for circulation staff to change a due date from the automatic due date to another calendar date. This option would be used for circumstances in which the due date may need to be decreased or extended in a specific circumstance. The "Allow" setting would allow for this option to be utilized by staff, the "Don't allow" setting would bar staff from changing the due date on materials.

Values:

- Allow

- Don't allow

2.1.5.7.20. *SpecifyReturnDate*

Default: Don't allow

Asks: ___ staff to specify a return date for a check in.

Values:
- Allow

- Don't allow
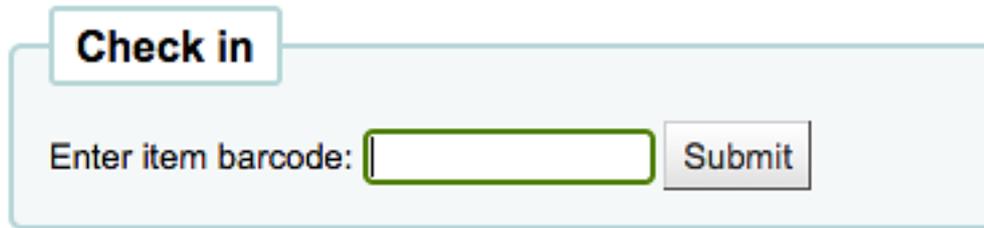
Description:

- This preference lets you decide if staff can specify an arbitrary return date when checking in items.

2.1.5.7.21. *todaysIssuesDefaultSortOrder*

Default: latest to earliest

Asks: Sort today's checkouts on the circulation page from ___ due date.

Values:

- earliest to latest

- latest to earliest

2.1.5.7.22. *UpdateTotalIssuesOnCirc*

Default: Do not

Asks: ___ update a bibliographic record's total issues count whenever an item is issued

Values:

- Do

  > **Important**
  >
  > This increases server load significantly; if performance is a concern, use the *cron job* to update the total issues count instead.

- Do not

Description:

- Koha can track the number of times and item is checked out and store that on the item record in the database. This information is not stored by default. Setting this preference to 'Do' will tell Koha to track that info everytime the item is checked out in real time. Otherwise you could use the *cron job* to have Koha update that field nightly.

2.1.5.7.23. *WaitingNotifyAtCheckin*

Default: Don't notify

Asks: ___ librarians of waiting holds for the patron whose items they are checking in.

Values:

- Don't notify

- Notify

Description:

- When checking in books you can choose whether or not to have a notice pop up if the patron who returned the book has a hold waiting for pick up. If you choose 'Notify' for WaitingNotifyAtCheckin then every time a hold is found for the patron who had the book out last a message will appear on your check in screen.

2.1.5.8. *Self Checkout*

2.1.5.8.1. *AllowSelfCheckReturns*

Default: Don't allow

Asks: ___ patrons to return items through web-based self checkout system.

Values:

- Allow

- Don't allow

Description:

- This preference is used to determine if you want patrons to be allowed to return items through your self check machines. By default Koha's self check interface is simply for checking items out.

2.1.5.8.2. *AutoSelfCheckAllowed, AutoSelfCheckID & AutoSelfCheckPass*

> **Important**
>
> Most libraries will want to leave this set to 'Don't allow.' This preference turns off the requirement to log into the self checkout machine with a staff username and password by storing the user-name and password for automatic login.

AutoSelfCheckAllowed Default: Don't allow

Asks: ___ the web-based self checkout system to automatically login with this staff login ___ and this password ___ .

AutoSelfCheckAllowed Values:

- Allow

- Don't allow

AutoSelfCheckID Value:
- The username of a staff patron with 'circulate' *permissions*.

AutoSelfCheckPass Value:
- The password of a staff patron with 'circulate' *permissions*.

2.1.5.8.3. *SCOUserCSS*

Asks: Include the following CSS on all pages in the web-based self checkout

Description:
- The CSS entered in this preference will be used on all of your Koha self checkout screens.

2.1.5.8.4. *SCOUserJS*

Asks: Include the following JavaScript on all pages in the web-based self checkout

Description:
- The JavaScript entered in this preference will effect all of your Koha self checkout screens.

2.1.5.8.5. *SelfCheckHelpMessage*

Asks: Include the following HTML in the Help page of the web-based self checkout system

Description:

- Clicking the 'Help' link in the top right of the self checkout interface opens up a three step process for using the self check interface. Adding HTML to this system preference will print that additional help text above what's already included.

2.1.5.8.6. *SelfCheckoutByLogin*

Default: Barcode

Asks: Have patrons login into the web-based self checkout system with their ___

Values:

- Barcode

- Username and password

Description:

- This preference lets you decide how your patrons will log in to the self checkout machine. Barcode is the patron's card number and their username and password is set using the opac/staff username and password fields on the patron record.

2.1.5.8.7. *SelfCheckReceiptPrompt*

Default: Show

Asks: ___ the print receipt popup dialog when self checkout is finished.

Values:
- Don't show

- Show

Description:
- This preference controls whether a prompt shows up on the web based self check out when the patron clicks the 'Finish' button.

2.1.5.8.8. *SelfCheckTimeout*

Default: 120

Asks: Time out the current patron's web-based self checkout system login after ___ seconds.

Description:

- After the machine is idle for the time entered in this preference the self check out system will log out the current patron and return to the starting screen.

2.1.5.8.9. *ShowPatronImageInWebBasedSelfCheck*

Default: Don't show

Asks: ___ the patron's picture (if one has been added) when they use the web-based self checkout.

Values:

- Don't show

- Show

2.1.5.8.10. *WebBasedSelfCheck*

Default: Don't enable

Asks: ___ the web-based self checkout system.

Values:

- Don't enable

- Enable

Enabling this preference will allow access to the *self checkout* module in Koha.

2.1.6. *Enhanced Content*

Get there: More > Administration > Global System Preferences > Enhanced Content

> **Important**
>
> Always read the terms of service associated with external data sources to be sure that you are using the products within the allowed limits.

> **Note**
>
> You cannot have more than one service for cover images (including local cover images) set up. If you set up more than one you will get multiple cover images. Instead choose only one source for cover images.

2.1.6.1. *All*

2.1.6.1.1. *FRBRizeEditions*

Default: Don't show

Asks: ___ other editions of an item on the staff client

Values:

- Don't show

- Show

Description:

- Using the rules set forth in the Functional Requirements for Bibliographic records, this option, when enabled, pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.. According to *Libraries Unlimited's Online Dictionary for Library and Information Science* (*http://lu.com/odlis/*), FRBRizing the catalog involves collating MARC records of similar materials. FRBRization brings together entities (sets of Works, Expressions, or Manifestations), rather than just sets of Items. It can aid patrons in selecting related items, expressions, and manifestations that will serve their needs. When it is set to "Show", the OPAC will query one or more ISBN web services for associated ISBNs and display an Editions tab on the details pages. Once this preference is enabled, the library must select one of the ISBN options (*ThingISBN* and/or *XISBN*). This option is only for the Staff Client; the *OPACFRBRizeEditions* option must be enabled to have the Editions tab appear on the OPAC.

> **Important**
>
> Requires that you turn on one or more of the ISBN services (*ThingISBN* and/or *XISBN*)

2.1.6.1.2. *OPACFRBRizeEditions*

Default: Don't show

Asks: ___ other editions of an item on the OPAC.

Description:

- Using the rules set forth in the Functional Requirements for Bibliographic records, this option, when enabled, pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.. According to *Libraries Unlimited's Online Dictionary for Library and Information Science* (*http://lu.com/odlis/*), FRBRizing the catalog involves collating MARC records of similar materials. FRBRization brings together entities (sets of Works, Expressions, or Manifestations), rather than just sets of Items. It can aid patrons in selecting related items, expressions, and manifestations that will serve their needs. When it is set to "Show", the OPAC will query one or more ISBN web services for associated ISBNs and display an Editions tab on the details pages. Once this preference is enabled, the library must select one of the ISBN options (*ThingISBN* and/or *XISBN*). This option is only for the OPAC; the *FRBRizeEditions* option must be turned "On" to have the Editions tab appear on the Staff Client.

Values:

- Don't show

- Show
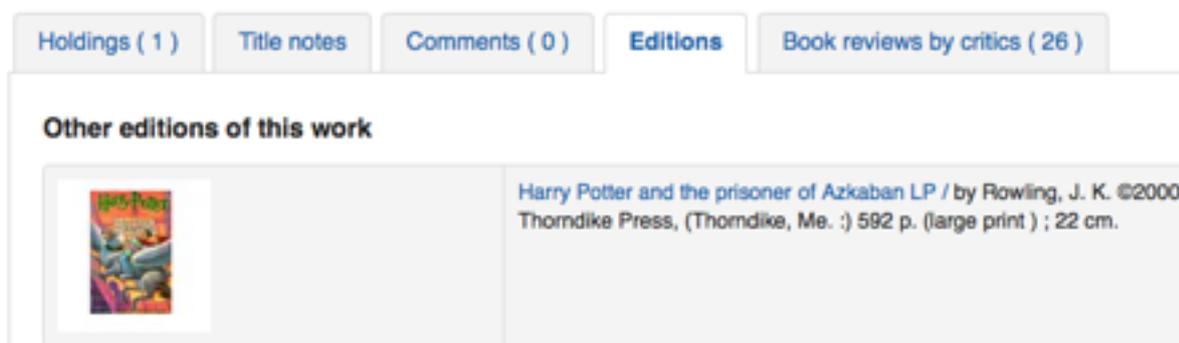
This preference pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.

> **Important**
>
> Requires that you turn on one or more of the ISBN services (*ThingISBN* and/or *XISBN*)

2.1.6.2. *Amazon*

2.1.6.2.1. *AmazonAssocTag*

Asks: Put the associate tag ___ on links to Amazon.

> **Note**
>
> This can net your library referral fees if a patron decides to buy an item after clicking through to Amazon from your site.

Description:

- An Amazon Associates Tag allows a library to earn a percentage of all purchases made on Amazon when a patron accesses Amazon's site via links on the library's website. More information about the Amazon Associates program is available at Amazon's Affiliate Program's website, *https://affiliate-program.amazon.com/*. Before a tag can be obtained, however, the library must first apply for an Amazon Web Services (AWS) account. Applications are free of charge and can be made at *http://aws.amazon.com*. Once an AWS account has been established, the library can then obtain the Amazon Associates Tag.

Sign up at: *https://affiliate-program.amazon.com/*

2.1.6.2.2. *AmazonCoverImages*

Default: Don't show

Asks: ___ cover images from Amazon on search results and item detail pages on the staff interface.

Values:

- Don't show

- Show

Description:

- This preference makes it possible to either allow or prevent Amazon cover images from being displayed in the Staff Client. Cover images are retrieved by Amazon, which pulls the content based on the first ISBN number in the item's MARC record. Amazon offers this service free of charge. If the value for this preference is set to "Show", the cover images will appear in the Staff Client, and if it is set to "Don't show", the images will not appear. Finally, if you're using Amazon cover images, all other cover image services must be disabled. If they are not disabled, they will prevent AmazonCoverImages from functioning properly.

2.1.6.2.3. *AmazonLocale*

Default: American

Asks: Use Amazon data from its ___ website.

Value:

- American

- British

- Canadian

- French

- German

- Japanese

2.1.6.2.4. *OPACAmazonCoverImages*

Default: Don't show

Asks: ___ cover images from Amazon on search results and item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- This preference makes it possible to either allow or prevent Amazon cover images from being displayed in the OPAC. Cover images are retrieved by Amazon, which pulls the content based on the first ISBN number in the item's MARC record. Amazon offers this service free of charge. If the value for this preference is set to "Show", the cover images will appear in the OPAC, and if it is set to "Don't show", the images will not appear. Finally, if you're using Amazon cover images, all other cover image services must be disabled. If they are not disabled, they will prevent AmazonCoverImages from functioning properly.

2.1.6.3. *Babelthèque*

2.1.6.3.1. *Babeltheque*

Default: Don't

Asks: ___ include information (such as reviews and citations) from Babelthèque in item detail pages on the OPAC.

Description:

• This preference makes it possible to display a Babeltheque tab in the OPAC, allowing patrons to access tags, reviews, and additional title information provided by Babeltheque. The information which Babeltheque supplies is drawn from the French language-based *Babelio.com*[16], a French service similar to LibraryThing for Libraries. More information about Babeltheque is available through its website, *http://www.babeltheque.com*[17]. Libraries that wish to allow access to this information must first register for the service at *http://www.babeltheque.com*. Please note that this information is only provided in French.

Values:

• Do

• Don't

2.1.6.3.2. *Babeltheque_url_js*

Asks: ___ Defined the url for the Babeltheque javascript file (eg. http://www.babeltheque.com/bw_XX.js)

---

[16] http://www.babelio.com/
[17] http://www.babeltheque.com/

2.1.6.3.3. *Babeltheque_url_update*

Asks: ___ Defined the url for the Babeltheque update periodically (eq. http://www.babeltheque.com/.../ file.csv.bz2).

2.1.6.4. *Baker & Taylor*

> ⭐ **Important**
>
> This is a pay service, you must contact Baker & Taylor to subscribe to this service before setting these options.

2.1.6.4.1. *BakerTaylorEnabled*

Default: Don't add

Asks: ___ Baker and Taylor links and cover images to the OPAC and staff client. This requires that you have entered in a username and password (which can be seen in image links).

Values:

- Add

- Don't add

Description:

- This preference makes it possible to display Baker & Taylor content (book reviews, descriptions, cover images, etc.) in both the Staff Client and the OPAC. Libraries that wish to display Baker & Taylor content must first register and pay for this service with Baker & Taylor (*http://www.btol.com*). If Baker & Taylor content is enabled be sure to turn off other cover and review services to prevent interference.

> ⭐ **Important**
>
> To use this you will need to also set the *BakerTaylorUsername & BakerTaylorPassword* system preferences

2.1.6.4.2. *BakerTaylorBookstoreURL*

Asks: Baker and Taylor "My Library Bookstore" links should be accessed at https:// ___ isbn

Description:

- Some libraries generate additional funding for the library by selling books and other materials that are purchased from or have been previously leased from Baker & Taylor. These materials can be accessed via a link on the library's website. This service is often referred to as "My Library Bookstore." In order to participate in this program, the library must first register and pay for the service with Baker & Taylor. Additional information about this and other services provided by Baker & Taylor is available at the Baker & Taylor website, *http://www.btol.com*. The BakerTaylorBookstoreURL

preference establishes the URL in order to link to the library's Baker & Taylor-backed online bookstore, if such a bookstore has been established. The default for this field is left blank; if no value is entered, the links to My Library Bookstore will remain inactive. If enabling this preference, enter the library's Hostname and Parent Number in the appropriate location within the URL. The "key" value (key=) should be appended to the URL, and https:// should be prepended.

This should be filled in with something like koha.mylibrarybookstore.com/MLB/actions/searchHandler.do?nextPage=bookDetails&parentNum=10923&key=

> **Note**
>
> Leave it blank to disable these links.

> **Important**
>
> Be sure to get this information from Baker & Taylor when subscribing.

2.1.6.4.3. *BakerTaylorUsername & BakerTaylorPassword*

Asks: Access Baker and Taylor using username ___ and password ___

Descriptions:

- This setting in only applicable if the library has a paid subscription to the external Content Café service from Baker & Taylor. Use the box provided to enter in the library's Content Café username and password. Also, ensure that the *BakerTaylorBookstoreURL* and *BakerTaylorEnabled* settings are properly set. The Content Café service is a feed of enhanced content such as cover art, professional reviews, and summaries that is displayed along with Staff Client/OPAC search results. For more information on this service please see the Baker & Taylor website: *http://www.btol.com*

> **Important**
>
> Be sure to get this information from Baker & Taylor when subscribing.

2.1.6.5. *Coce Cover images cache*

Coce is a remote image URL cache. With this option, cover images are not fetched directly from Amazon, Google, and so on. Their URLs are requested via a web service to Coce which manages a cache of URLs.

2.1.6.5.1. *Coce*

Default: Don't enable

Asks: ___ a Coce image cache service.

Values:

- Don't enable

- Enable

Description:
- Coce has many benefits when it comes to choosing and displaying cover images in Koha:
  - If a book cover is not available from a provider, but is available from another one, Koha will be able to display a book cover, which isn't the case now

  - Since URLs are cached, it isn't necessary for each book cover to request, again and again, the provider, and several of them if necessary.

  - Amazon book covers are retrieved with Amazon Product Advertising API, which means that more covers are retrieved (ISBN13).

> ⭐ **Important**
>
> Coce does not come bundled with Koha. Your Koha install with not already have a Coce server set up. Before enabling this functionality you will want to be sure to have a Coce server set up. Instructions on installing and setting up Coce can be found on the official github page at *https://github.com/fredericd/coce*.

2.1.6.5.2. *CoceHost*
Asks: Coce server URL ___

Description:
- This will be the full URL (starting with http://) to your Coce server.

2.1.6.5.3. *CoceProviders*
Asks: Use the following providers to fetch the covers ___

Values:
- [Select all]

- Amazon Web Services

- Google Books

- Open Library

Description:
- The providers chosen here will be used to gather cover images for display in your Koha catalog.

2.1.6.6. *Google*

2.1.6.6.1. *GoogleJackets*
Default: Don't add

Asks: ___ cover images from Google Books to search results and item detail pages on the OPAC.

Values:

- Add

- Don't add

Description:

- This setting controls the display of applicable cover art from the free Google Books database, via the Google Books API. Please note that to use this feature, all other cover services should be turned off.

2.1.6.7. *HTML5 Media*

2.1.6.7.1. *HTML5MediaEnabled*

Default: not at all

Asks: Show a tab with a HTML5 media player for files catalogued in field 856 ___

Values:
- in OPAC and staff client

- in the OPAC
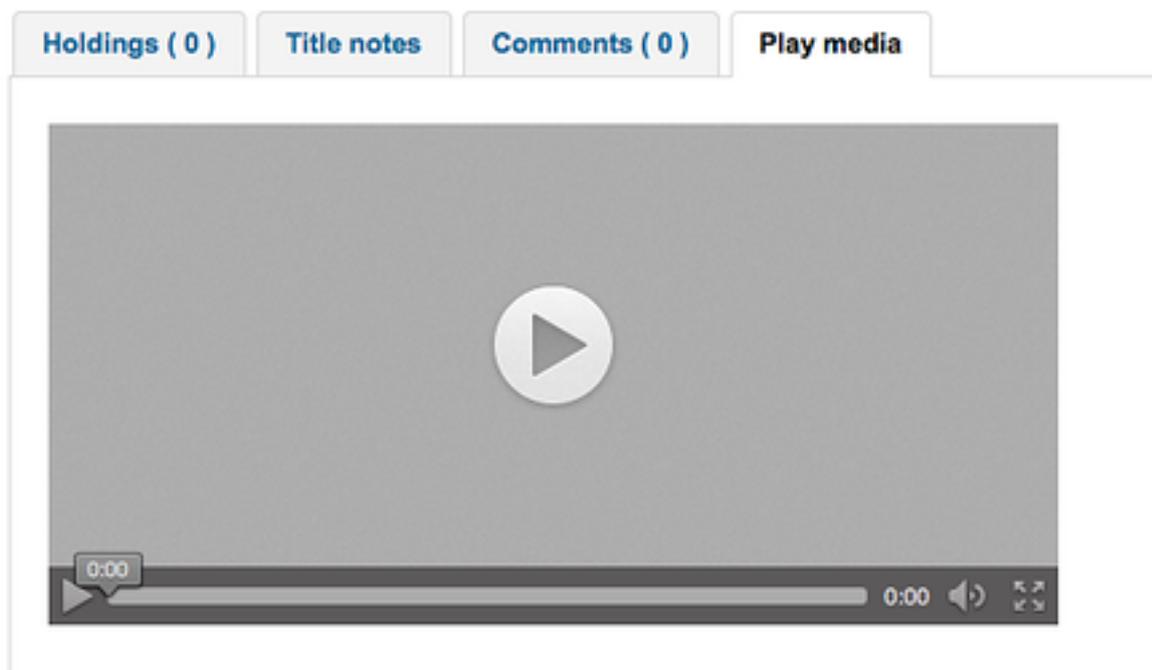
- in the staff client
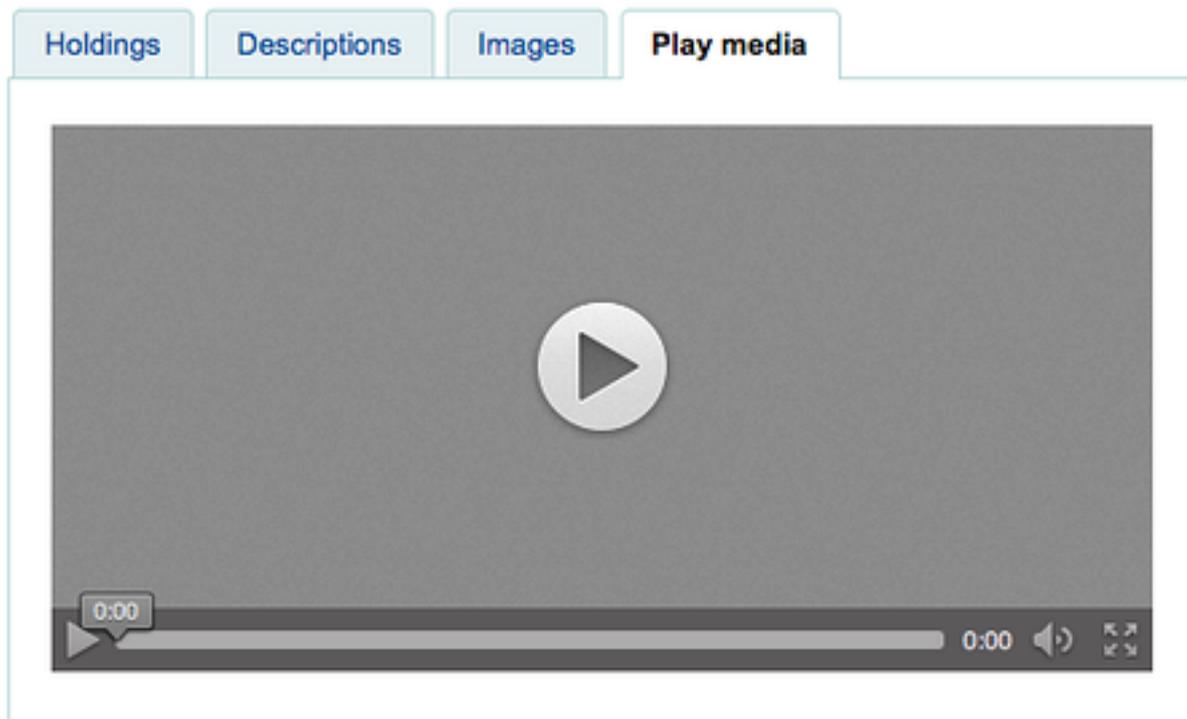
- not at all

Description:
- If you have media elements in the 856 of your MARC record this preference can run/show those media files in a separate tab using HTML5.

2.1.6.7.2. *HTML5MediaExtensions*

Default: webm|ogg|ogv|oga|vtt

Asks: Media file extensions ___

Description:
- Enter in file extensions separated with bar (|)

2.1.6.8. *HTML5MediaYouTube*

Default: Don't embed

> **Important**
>
> To turn this on first enable *HTML5MediaEnabled*

Asks: ___ YouTube links as videos.

Values:
- Don't embed

- Embed

Description:
- This preference will allow MARC21 856$u that points to YouTube to appear as a playable video on the pages defined in *HTML5MediaEnabled*.

2.1.6.9. *IDreamLibraries*

IDreamBooks.com[18] aggregates book reviews by critics to help you discover the very best of what's coming out each week. These preferences let you integrated content from *IDreamBooks.com*[19] in to your Koha OPAC.

> **Note**
>
> This is a new website and has limited content, so you may only see these features on new popular titles until the database grows some more.

2.1.6.9.1. *IDreamBooksReadometer*

Default: Don't add

Asks: ___ a "Readometer" that summarizes the reviews gathered by IDreamBooks.com to the OPAC details page.

Values:
- Add

- Don't add

2.1.6.9.2. *IDreamBooksResults*

Default: Don't add

Asks: ___ the rating from IDreamBooks.com to OPAC search results.

Values:

---

[18] http://idreambooks.com/
[19] http://IDreamBooks.com

- Add

- Don't add

2.1.6.9.3. *IDreamBooksReviews*

Default: Don't add

Asks: ___ a tab on the OPAC details with book reviews from critics aggregated by IDreamBooks.com.

Values:
- Add

- Don't add

2.1.6.10. *LibraryThing*

LibraryThing for Libraries is a pay service. You must first contact LibraryThing directly for pricing and subscription information. Learn more at *http://www.librarything.com/forlibraries*. Also, for further config-uration instructions please see the LibraryThing Wiki: *http://www.librarything.com/wiki/index.php/Koha*

2.1.6.10.1. *LibraryThingForLibrariesEnabled*

Default: Don't show

Asks: ___ reviews, similar items, and tags from Library Thing for Libraries on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- This setting is only applicable if the library has a paid subscription to the external LibraryThing for Libraries service. This service can provide patrons with the display of expanded information on catalog items such as book recommendations. It also can offer advanced features like tagged browsing, patron written reviews, and a virtual library display accessed from the details tab.

> ⭐ **Important**
>
> If this is set to 'show' you will need to enter a value in the '*LibraryThingForLibrariesID*' system preference.

2.1.6.10.2. *LibraryThingForLibrariesID*

Asks: Access Library Thing for Libraries using the customer ID ___

Description:

- This setting is only applicable if the library has a paid subscription to the external LibraryThing for Libraries service. Use the box provided to enter in the library's LibraryThing for Libraries ID as provided to the library by LibraryThing. The ID number is a series of numbers in the form ###-#########, and can be found on the library's account page at LibraryThing for Libraries. This service can provide patrons with the display of expanded information on catalog items such as book recommendations and cover art. It also can offer advanced features like tagged browsing, patron written reviews, and a virtual library display accessed from the details tab.

2.1.6.10.3. *LibraryThingForLibrariesTabbedView*

Default: in line with bibliographic information

Asks: Show Library Thing for Libraries content ___

Values:

- in line with bibliographic information

- in tabs

Description:

- This setting is only applicable if the library has a paid subscription to the external LibraryThing for Libraries service. This service can provide patrons with the display of expanded information on catalog items such as book recommendations and cover art. It also can offer advanced features like tagged browsing, patron written reviews, and a virtual library display accessed from the details tab.

2.1.6.10.4. *ThingISBN*

Default: Don't use

Asks: ___ the ThingISBN service to show other editions of a title

Values:

- Don't use

- Use

Description:

- Set to 'Use' to display an "Editions" tab on the item's detail page. Editions are listed, complete with cover art (if you have one of the cover services enabled) and bibliographic information. The feed comes from LibraryThing's ThingISBN web service. This is a free service to non-commercial sites with fewer than 1,000 requests per day.

> **Important**
>
> Requires *FRBRizeEditions* and/or *OPACFRBRizeEditions* set to 'show'

> **Important**
>
> This is separate from Library Thing for Libraries and does not have a cost associated with it.

2.1.6.11. *Local Cover Images*

2.1.6.11.1. *AllowMultipleCovers*

Default: Don't allow

Asks: ___ multiple images to be attached to each bibliographic record.

Values:

- Allow

- Don't allow

Description:

- If this preference is set to 'Allow' then you can upload multiple images that will appear in the images tab on the bib record in the OPAC and the staff client. This preference requires that either one or both *LocalCoverImages* and *OPACLocalCoverImages* are set to 'Display.'
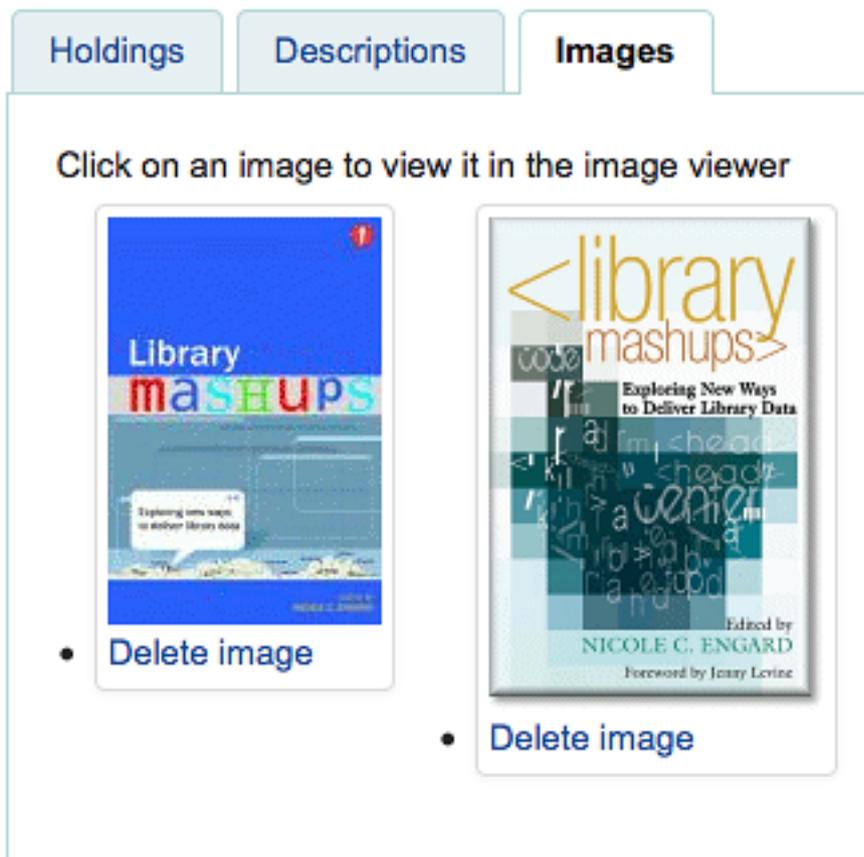
2.1.6.11.2. *LocalCoverImages*

Default: Don't display

Asks: ___ local cover images on intranet search and details pages.

Values:

- Display

- Don't display

Description:

- Setting this preference to 'Display' allows you to upload your own cover images to bib records and display them on the detail page in the staff client. At this time the cover will only show under the 'Images' tab on the holdings table on the detail display, not next to the title at the top left or on the search results.

2.1.6.11.3. *OPACLocalCoverImages*

Default: Don't display

Asks: ___ local cover images on OPAC search and details pages.

Values:

- Display

- Don't display

Description:

- Setting this preference to 'Display' allows you to upload your own cover images to bib records and display them on the detail page and search results in the OPAC.

2.1.6.12. *Novelist Select*

Novelist Select is not a free service. Contact your Ebsco representitive to get your log in information to embed this content in the OPAC.

> **Important**
>
> Novelist Select does not include cover images for the search results and bibliographic detail pages. You can choose any other cover image service for this content or you can contract with Ebsco to get access to the *Baker & Taylor Content Cafe* for an added fee.

2.1.6.12.1. *NovelistSelectEnabled*

Default: Don't add

Asks: ___ Novelist Select content to the OPAC.

Values:

- Add

- Don't add

> **Important**
>
> Enabling this requires that you have entered in a user profile and password in the *NovelistSelect-Profile & NovelistSelectPassword* preferences

Description:

- Novelist Select from Ebsco is a subscription service that can provide additional content in the OPAC.

2.1.6.12.2. *NovelistSelectProfile & NovelistSelectPassword*

Asks: Access Novelist Select using user profile ___ and password ___.

> **Important**
>
> This information will be visible if someone views the source code on your OPAC.

Description:

- Novelist Select from Ebsco is a subscription service that can provide additional content in the OPAC.

2.1.6.12.3. *NovelistSelectView*

Default: in an OPAC tab

Asks: Display Novelist Select content ___

Description:

- Novelist Select provides a lot of content, for that reason you have four choices of where to display this content. The default view is in a tab in the holdings table.

The content is the same if you choose to show it above the holdings table or below it. If shown in the right column of the page it's the same content, but displays a bit differently since space is limited.

Values:

- above the holdings table

- below the holdings table

- in an OPAC tab

- under the Save Record dropdown on the right

2.1.6.13. *OCLC*

2.1.6.13.1. *XISBN*

Default: Don't use

Asks: ___ the OCLC xISBN service to show other editions of a title

Description:

- Set to 'Use' to display an "Editions" tab on the item's detail page. Editions are listed, complete with cover art and bibliographic information. The feed comes from OCLC's xISBN web service. The feed limit for non-commercial sites is 1000 requests per day.

Values:

- Don't use

- Use

> **Important**
>
> Requires *FRBRizeEditions* and/or *OPACFRBRizeEditions* set to 'show'

2.1.6.13.2. *OCLCAffiliateID*

Asks: Use the OCLC affiliate ID ___ to access the xISBN service.

Description:

- This setting is only applicable if the library has an OCLC Affiliate ID. This allows WorldCat searching in the OPAC via the XISBN programming interface. Simply enter the library's OCLC Affiliate ID in the box provided. Please note that using this data is only necessary if *FRBRizeEditions* and/ or *OPACFRBRizeEditions* and *XISBN* settings are enabled. For more information on this service please visit the OCLC website: *http://www.worldcat.org/affiliate/default.jsp*.

> **Important**
>
> Unless you have signed up for an ID with OCLC, you are limited to 1000 requests per day. Available at: *http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp*

2.1.6.13.3. *XISBNDailyLimit*

Default: 999

Asks: Only use the xISBN service ___ times a day.

> **Important**
>
> Unless you have signed up for an ID with OCLC, you are limited to 1000 requests per day. Available at: *http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp*

2.1.6.14. *Open Library*

2.1.6.14.1. *OpenLibraryCovers*

Default: Don't add

Asks: ___ cover images from Open Library to search results and item detail pages on the OPAC.

Values:

- Add

- Don't add

Description:

- This setting controls the display of applicable cover art from the free Open Library database, via the Open Library API. Please note that to use this feature, all other cover services should be turned off.

2.1.6.14.2. *OpenLibrarySearch*

Default: Don't show

Asks: ___ search results from Open Library on the OPAC.

Values:
- Don't show

- Show

2.1.6.15. *Overdrive*

OverDrive is an pay service. You must first contact OverDrive directly for pricing and subscription information. Enabling this service will integrate Overdrive results in to your OPAC searches. You will have to apply for these 3 pieces of information through an application as an API developer. Overdrive API applications are evaluated once a week so you may not be able to use this feature immediately after signing up. To learn more please contact your OverDrive representative.

2.1.6.15.1. *OverDriveClientKey and OverDriveClientSecret*

Asks: Include OverDrive availability information with the client key __ and client secret ___

Description:

- OverDrive customers can get this information by visiting the *OverDrive Developer Portal*[20] and following the instructions found there to apply as an API developer. Once this data and the *OverDriveLibraryID* are populated you will see OverDrive results on your OPAC searches.

2.1.6.15.2. *OverDriveLibraryID*

Asks: Show items from the OverDrive catalog of library # ___

Description:

- OverDrive customers can get this information by visiting the *OverDrive Developer Portal*[21] and following the instructions found there to apply as an API developer. Once this data and the *OverDriveClientKey and OverDriveClientSecret* are populated you will see OverDrive results on your OPAC searches.

2.1.6.16. *Plugins*

2.1.6.16.1. *UseKohaPlugins*

Default: Don't enable

Asks: ___ the ability to use Koha Plugins.

Values:

- Don't enable

- Enable

> **Note**
>
> The plugin system must also be enabled in the Koha configuration file to be fully enabled. Learn more in the *Plugins chapter*.

2.1.6.17. *Syndetics*

Syndetics is a pay service. You must first contact Syndetics directly for pricing and subscription information.

2.1.6.17.1. *SyndeticsEnabled*

Default: Don't use

Asks: ___ content from Syndetics.

Values:

- Don't use

- Use

Description:

---

[20] https://developer.overdrive.com/docs/getting-started
[21] https://developer.overdrive.com/docs/getting-started

- When this option is enabled any of the Syndetics options can be used.

> ⭐ **Important**
>
> Requires that you enter your *SyndeticsClientCode* before this content will appear.

2.1.6.17.2. *SyndeticsClientCode*

Asks: Use the client code ___ to access Syndetics.

Description:

- Once the library signs up for Syndetics' services, Syndetics will provide the library with an access code. (Visit the Syndetics homepage at *http://www.bowker.com/syndetics/* for more information.) This is the code that must be entered to access Syndetics' subscription services. Syndetics is a paid subscription service. This value must be entered before *SyndeticsEditions* can be enabled. If the code is lost, corrupted, or forgotten, a new one can be obtained from *http://www.bowker.com/syndetics/*.

> ⭐ **Important**
>
> You will need to get your client code directly from Syndetics.

2.1.6.17.3. *SyndeticsCoverImages & SyndeticsCoverImageSize*

SyndeticsCoverImages Default: Don't show

SyndeticsCoverImageSize Default: medium

Asks: ___ cover images from Syndetics on search results and item detail pages on the OPAC in a ___ size.

Descriptions:

- When enabled, SyndeticsCoverImages, allows libraries to display Syndetics' collection of full-color cover images for books, videos, DVDs and CDs on their OPAC. For each book or item that comes up during a user search, the cover image for that title will be displayed. Since these cover images come in three sizes, the optimum size must be selected using the SyndeticsCoverImageSize preference after SyndeticsCoverImages are enabled. Syndetics cover images come in two sizes: mid-size (187 x 187 pixels), and large (400 x 400 pixels). Syndetics is a paid subscription service. The *SyndeticsClientCode* must be entered and the *SyndeticsEnabled* option must be activated before this service can be used. Other cover image preferences should also be disabled to avoid interference.

SyndeticsCoverImages Values:

- Don't show

- Show

SyndeticsCoverImageSize Values:

- medium

- large

2.1.6.17.4. *SyndeticsAuthorNotes*

Default: Don't show

Asks: ___ notes about the author of a title from Syndetics on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- When this option is set to "Show", Syndetics provides notes and short author biographies for more that 300,000 authors, in both fiction and nonfiction. With this option enabled the library can display Syndetics Author Notes on the OPAC. According to the Syndetics Solutions website (*http://www.bowker.com/syndetics/*), Author Notes include lists of contributors for many multi-author texts and compilations. The *SyndeticsClientCode* must be entered and the *SyndeticsEnabled* option must be activated before this service can be used.

2.1.6.17.5. *SyndeticsAwards*

Default: Don't show

Asks: ___ information from Syndetics about the awards a title has won on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- When this option is set to "Show", Syndetics provides its clients with a list of awards that any title has won. With this service enabled the library can display those awards for each book on its website. For each book or item that comes up during a user search, the list of awards for that title will be displayed. When a user clicks on a given award, information about that award is presented along with a list of the other titles that have won that award. If the user clicks on any title in the list, they will see holdings information about that title in their region. This option is a paid subscription service. The *SyndeticsClientCode* must be entered and the *SyndeticsEnabled* option must be activated before this service can be used.

2.1.6.17.6. *SyndeticsEditions*

Default: Don't show

Asks: ___ information about other editions of a title from Syndetics on item detail pages on the OPAC

Description:

- When enabled this option shows information on other editions of a title from Syndetics on the item detail pages of the OPAC. Syndetics is a paid subscription service. The *SyndeticsClientCode* must be entered and the *SyndeticsEnabled* option must be activated before this service can be used.

Values:

- Don't show

- Show

> ⭐ **Important**
>
> Requires *OPACFRBRizeEditions* set to 'show'

2.1.6.17.7. *SyndeticsExcerpt*

Default: Don't show

Asks: ___ excerpts from of a title from Syndetics on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- This preference allows Syndetics to display excerpts given to them from selected publishers. The excerpts are available from prominently reviewed new titles, both fiction and non-fiction. The excerpts include poems, essays, recipes, forwards and prefaces. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (*http://www.bowker.com/syndetics/*).

2.1.6.17.8. *SyndeticsReviews*

Default: Don't show

Asks: ___ reviews of a title from Syndetics on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- Syndetics Reviews is an accumulation of book reviews available from a variety of journals and serials. The reviews page displays colored images of reviewed books dust jackets, partnered with the names of the journal or serial providing the review. Clicking on an icon opens a window revealing the book title, author's name, book cover icon and the critic's opinion of the book. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (*http://www.bowker.com/syndetics/*).

2.1.6.17.9. *SyndeticsSeries*

Default: Don't show

Asks: ___ information on other books in a title's series from Syndetics on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- Each fiction title within a series is linked to the complete series record. The record displays each title in reading order and also displays the publication order, if different. Alternate series titles are also displayed. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high- speed Internet servers to the library OPACs. For more information see (*http://www.bowker.com/syndetics/*).

2.1.6.17.10. *SyndeticsSummary*

Default: Don't show

Asks: ___ a summary of a title from Syndetics on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- Providing more than 5.6 million summaries and annotations derived from book jackets, edited publisher copy, or independently written annotations from Book News, Inc. Covering fiction and non-fiction, this summaries option provides annotations on both trade and scholarly titles. For more information see (*http://www.bowker.com/syndetics/*).

2.1.6.17.11. *SyndeticsTOC*

Default: Don't show

Asks: ___ the table of contents of a title from Syndetics on item detail pages on the OPAC.

Values:

- Don't show

- Show

Description:

- This preference allows staff and patrons to review the Table of Contents from a wide variety of publications from popular self-help books to conference proceedings. Specific Information access is the main purpose for this option, allowing patrons guidance to their preferred section of the book. Special arrangements with selected book services is used to obtain the table of contents for new publications each year. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (*http://www.bowker.com/syndetics/*).

2.1.6.18. *Tagging*

2.1.6.18.1. *TagsEnabled*

Default: Allow

Asks: ___ patrons and staff to put tags on items.

Values:

• Allow

• Don't allow

Description:

• Set to 'Allow' enable tagging. A tag is metadata, a word added to identify an item. Tags allow patrons to classify materials on their own. TagsEnabled is the main switch that permits the tagging features. TagsEnable must be set to 'Allow' to allow for other tagging features.

2.1.6.18.2. *TagsModeration*

Default: Don't require

Asks: ___ that tags submitted by patrons be reviewed by a staff member before being shown.

Values:

• Don't require

• Require

Description:

• When set to 'Require,' all tags to be first filtered by the tag moderator. Only approved tags will be visible to patrons. When set to 'Don't require' tags will bypass the tag moderator and patrons' tags to be immediately visible. When this preference is enabled the moderator, a staff member, would approve the tag in the Staff Client. The moderator will have the option to approve or reject each pending tag suggestion.

When moderation is required all tags go through the tag moderation tool before becoming visible.

• *Get there:* More > Tools > *Tags*

2.1.6.18.3. *TagsShowOnList*

Default: 6

Asks: Show ___ tags on search results on the OPAC.

> **Note**
>
> Set the value to 0 (zero) to turn this feature off.

2.1.6.18.4. *TagsInputOnList*

Default: Allow

Asks: ___ patrons to input tags on search results on the OPAC.

Values:

- Allow

- Don't allow

2.1.6.18.5. *TagsShowOnDetail*

Default: 10

Asks: Show ___ tags on item detail pages on the OPAC.

> **Note**
>
> Set the value to 0 (zero) to turn this feature off.

2.1.6.18.6. *TagsInputOnDetail*

Default: Allow

Asks: ___ patrons to input tags on item detail pages on the OPAC.

Values:

- Allow

- Don't allow

2.1.6.18.7. *TagsExternalDictionary*

Asks: Allow tags in the dictionary of the ispell executable ___ on the server to be approved without moderation.

Description:

- The dictionary includes a list of accepted and rejected tags. The accepted list includes all the tags that have been pre-allowed. The rejected list includes tags that are not allowed. This preference identifies the "accepted" dictionary used. Ispell is an open source dictionary which can be used as a list of accepted terms. Since the dictionary allows for accurately spelled obscenities, the libraries policy may dictate that modifications are made to the Ispell dictionary if this preference is use. For more information about Ispell *http://www.gnu.org/software/ispell/ispell.html*. Enter the path on your server to a local ispell executable, used to set $Lingua::Ispell::path.

2.1.7. *I18N/L10N*

These preferences control your Internationalization and Localization settings.

Get there: More > Administration > Global System Preferences > I18N/L10N

2.1.7.1. *AddressFormat*

Default: US style ([Street number], [Address] - [City], [Zip/Postal Code], [Country])

Asks: Format postal addresses using ___

Values:
- German style ([Address] [Street number] - [Zip/Postal Code] [City] - [Country])

- US style ([Street number], [Address] - [City], [Zip/Postal Code], [Country])

Description:
- This preference will let you control how Koha displays patron addresses given the information entered in the various fields on their record.

2.1.7.2. *alphabet*

Default: 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

Asks: Use the alphabet ___ for lists of browsable letters. This should be a space separated list of uppercase letters.

Description:

- This preference allows you define your own alphabet for browsing patrons in Koha.

2.1.7.3. *CalendarFirstDayOfWeek*

Default: Sunday

Asks: Use ___ as the first day of week in the calendar.

Values:

- Sunday

- Monday

- Tuesday

- Wednesday

- Thursday

- Friday

- Saturday

Description:

- Using this preference you can control what day shows as the first day of the week in the calendar pop ups throughout Koha and on the Calendar tool. If you change this preference and don't see a change in your browser try clearing your cache since it makes changes to the Javascript on these pages.

2.1.7.4. *dateformat*

Default: mm/dd/yyyy

Asks: Format dates like ___

Values:

- dd.mm.yyyy

- dd/mm/yyyy

- mm/dd/yyyy

- yyyy/mm/dd

Description:

- This preference controls how the date is displayed. The options are the United States method, mm/dd/yyyy (04/24/2010), the metric method, dd/mm/yyyy (24/04/2010) or ISO, which is the International Standard of Organization, yyyy/mm/dd (2010/04/24). The International Standard of Organization would primarily be used by libraries with locations in multiple nations that may use different date formats, to have a single display type, or if the library would be in a region that does not use the United States or metric method. More information regarding the ISO date format can be found at *http://www.iso.org/iso/iso_catalogue.htm*.

2.1.7.5. *language*

Default: English

Asks: Enable the following languages on the staff interface

Values:

- English

To install additional languages please refer to *http://wiki.koha-community.org/wiki/Installation_of_additional_languages_for_OPAC_and_INTRANET_staff_client*

2.1.7.6. *opaclanguages*

Default: English

Asks: Enable the following languages on the OPAC

Values:

- English

> **Note**
>
> To install additional languages you need to run misc/translation/install-code.pl. For example, to install French you would run the following command install-code.pl fr-FR to make the templates, once they exist and are in the right place then they will show up as an option in this preference.

2.1.7.7. *opaclanguagesdisplay*

Default: Don't allow

Asks: ___ patrons to select their language on the OPAC.

Values:

- Allow
  - Patrons can choose their language from a list at the bottom of the public catalog

Languages: English | | Français | Deutsch | Español

- Don't allow
  - The public catalog will not give an option to choose a language

Description:
- Using the *OpacLangSelectorMode* preference you can decide where these language options will appear in the public catalog.

2.1.7.8. *TimeFormat*

Default: 24 hour format

Asks: Format times in ___

Values:
- 12 hour format (eg 02:18PM)

- 24 hour format (eg 14:18)

2.1.8. *Labs*

Get there: More > Administration > Global System Preferences > Labs

The preferences in this section are for experimental features that need additional testing and debugging.

2.1.8.1. *EnableAdvancedCatalogingEditor*

Default: Don't enable

Asks: ___ the advanced cataloging editor.

Description:

- This preference will allow you to choose between a basic editor and a advanced editor for cataloging.

> ⭐ **Important**
>
> This feature is currently experimental, and may have bugs that cause corruption of records. It also does not include any support for UNIMARC or NORMARC fixed fields. Please help us test it and report any bugs, but do so at your own risk.

2.1.9. *Local Use*

These preferences are defined locally.

Get there: More > Administration > Global System Preferences > Local Use

> 💬 **Note**
>
> Sometimes preferences which are either new or outdated will appear in this tab, if you didn't add any preferences to this tab then it's best to ignore preferences listed here.

2.1.10. *Logs*

Logs keep track of transaction on the system. You can decide which actions you want to log and which you don't using these preferences. Logs can then be viewed in the *Log Viewer* under Tools.

Get there: More > Administration > Global System Preferences > Logs

2.1.10.1. *Debugging*

2.1.10.1.1. *DumpTemplateVarsIntranet*

Default: Don't

Asks: ___ dump all Template Toolkit variable to a comment in the html source for the staff intranet.

Value:

- Don't

- Do

2.1.10.1.2. *DumpTemplateVarsOpac*

Default: Don't

Asks: ___ dump all Template Toolkit variable to a comment in the html source for the OPAC.

Value:

- Don't

• Do

2.1.10.2. *Logging*

2.1.10.2.1. *AuthoritiesLog*

Default: Don't log

Asks: ___ changes to authority records.

Values:

• Don't log

• Log

2.1.10.2.2. *BorrowersLog*

Default: Log

Asks: ___ changes to patron records.

Values:

• Don't log

• Log

2.1.10.2.3. *CataloguingLog*

Default: Don't log

Asks: ___ any changes to bibliographic or item records.

Values:

• Don't log

• Log

> **Important**
>
> Since this occurs whenever a book is cataloged, edited, or checked in or out it can be very resource intensive - slowing down your system.

2.1.10.2.4. *CronjobLog*

Default: Don't log

Asks: ___ information from cron jobs.

Values:

• Don't log

• Log

2.1.10.2.5. *FinesLog*

Default: Log

Asks: ___ when overdue fines are charged or automatically forgiven.

Values:

• Don't log

• Log

2.1.10.2.6. *IssueLog*

Default: Log

Asks: ___ when items are checked out.

Values:

• Don't log

• Log

2.1.10.2.7. *LetterLog*

Default: Log

Asks: ___ when an automatic claim notice is sent.

Values:

• Don't log

• Log

> **Note**
>
> This log tracks all notices that go to patrons including the overdue notices.

2.1.10.2.8. *ReportsLog*

Default: Don't log

Asks: ___ when reports are added, deleted or changed.

Values:

• Don't log

• Log

2.1.10.2.9. *ReturnLog*

Default: Log

Asks: ___ when items are returned.

Values:

• Don't log

• Log

2.1.10.2.10. *SubscriptionLog*

Default: Log

Asks: ___ when serials are added, deleted or changed.

Values:

• Don't log

• Log

2.1.11. *OPAC*

Get there: More > Administration > Global System Preferences > OPAC

2.1.11.1. *Advanced Search Options*

2.1.11.1.1. *OpacAdvSearchMoreOptions*

Default: Select All

Asks: Show search options for the expanded view ___

Values:
• [Select all]

• Item types

• Language

• Location and availability

• Publication date

• Sorting

• Subtypes

Description:
• The settings in this preference will determine which search fields will show when the patron is using the 'More options' mode on the advanced search page.

2.1.11.1.2. *OpacAdvSearchOptions*

Default: Item types, Language, Location and availability, Publication date, Sorting

Asks: Show search options ___

Values:

- [Select all]

- Item types

- Language

- Location and availability

- Publication date

- Sorting

- Subtypes

Description:

- The settings in this preference will determine which search fields will show when the patron is using the 'Fewer options' mode on the advanced search page.

2.1.11.2. *Appearance*

These preferences control how things appear in the OPAC.

2.1.11.2.1. *AuthorisedValueImages*

Default: Don't show

Asks: ___ images for authorized values (such as lost statuses and locations) in search results and item detail pages on the OPAC.

Values:

- Don't show

- Show

Get there: More > Administration > *Authorized Values*

2.1.11.2.2. *BiblioDefaultView*

Default: in simple form

Asks: By default, show bib records ___

Values:

- as specified in the ISBD template.

  - See *ISBD* preference for more information

- in simple form.

- in their MARC format.

Description:

- This preference determines the level of bibliographic detail that the patron will see on the OPAC detail page. The simple form displays the graphical interface; MARC format displays the MARC21 cataloging view; ISBD displays the ISBD (International Standard Bibliographic Description, AACR2) view.

2.1.11.2.3. *COinSinOPACResults*

Default: Include

Asks: ___ COinS / OpenURL / Z39.88 in OPAC search results.

Values:

- Don't include

    - If you choose not to include COinS on the search results, it will still be loaded on the individual bibliographic records.

- Include

    - Enabling this feature will slow OPAC search response times.

Description:

- COinS stands for ContextObjects in Spans. COinS is a method to embed bibliographic metadata in the HTML code of web pages. This allows bibliographic software to publish machine-readable bibliographic items and client reference management software (such as Zotero) to retrieve bibliographic metadata. The metadata can also be sent to an OpenURL resolver. This allows, for instance, searching for a copy of a book in one's own library.

2.1.11.2.4. *DisplayOPACiconsXSLT*

Default: Don't show

Asks: On pages displayed with XSLT stylesheets on the OPAC, ___ icons for itemtype and authorized values.

> **Important**
>
> *OPACXSLTResultsDisplay* and/or *OPACXSLTDetailsDisplay* must be set to use an XSLT stylesheet for this to show (default or custom)

Values:

- Don't show

- Show

Type: 📘 Book; Format: print bibliography ≔ ; Literary form: not fiction

> **Note**
>
> See the *XSLT Icon Guide* for more information on these icons.

2.1.11.2.5. *hidelostitems*

Default: Don't show

Asks: ___ lost items on search and detail pages.

Description:

• Items that are marked lost by the library can either be shown or not shown on the OPAC. By setting the value to "Don't show," the lost item is not shown on the OPAC. By setting the value "Show," the lost item is shown on the OPAC for patrons to view with a status of 'lost.'

Values:

• Don't show

• Show

2.1.11.2.6. *HighlightOwnItemsOnOPAC & HighlightOwnItemsOnOPACWhich*

HighlightOwnItemsOnOPAC Default: Don't emphasize

HighlightOwnItemsOnOPACWhich Default: patron's home library

Asks: ___ results from the ___ by moving the results to the front and increasing the size or highlighting the rows for those results.

HighlightOwnItemsOnOPAC Values:
• Don't emphasize

• Emphasize

HighlightOwnItemsOnOPACWhich Values:
• OPAC's branch based via the URL
  • The library is chosen based on the Apache environment variable BRANCHCODE. For example, this could be added to the OPAC section of koha-httpd.conf: SetEnv BRANCHCODE "CPL"

• patron's home library
  • The items emphasized will be those of the same library as the patron's library. If no one is logged into the OPAC, no items will be highlighted.

> **Important**
>
> This preference will only effect sites that are not using an XSLT stylesheet. XSLT stylesheets are defined in the *OPACXSLTResultsDisplay* and *OPACXSLTDetailsDisplay* preferences.

2.1.11.2.7. *GoogleIndicTransliteration*

Default: Don't show

Asks: ___ GoogleIndicTransliteration on the OPAC.

Values:

- Don't show
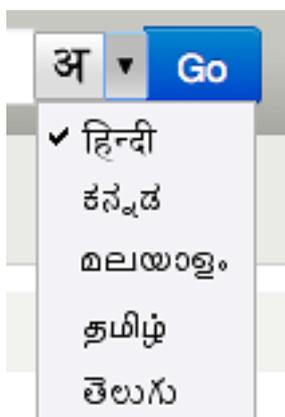
- Show

2.1.11.2.8. *LibraryName*

Asks: Show ____ as the name of the library on the OPAC.

> **Note**
>
> This value will appear in the title bar of the browser

> **Note**
>
> Edit '*opacheader*' if you'd like to add a library name above your search box on the OPAC
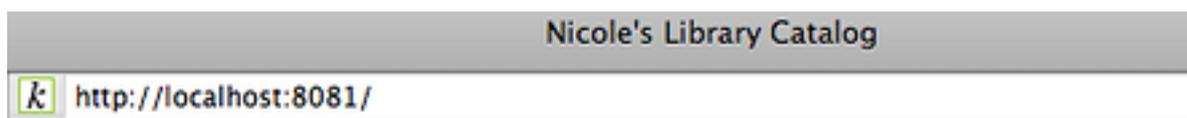
2.1.11.2.9. *NoLoginInstructions*

Asks: Show the following HTML on the OPAC login form when a patron is not logged in:

Description:

- This preference allows you to override the default text seen on the log in page in the Koha OPAC. The default HTML is:

```
<h5>Don't have a password yet?</h5>
<p> If you don't have a password yet, stop by the circulation desk the next time you're in
 the library. We'll happily set one up for you.</p>
<h5>Don't have a library card?</h5>
<p> If you don't have a library card, stop by your local library to sign up.</p>
```

Any HTML in this box will replace the above text below the log in box.

Login

Password

Log in

Don't have a password yet?

If you don't have a password yet, stop by the circulation desk the next time you're in the library. We'll happily set one up for you.

Don't have a library card?

If you don't have a library card, stop by your local library to sign up.

2.1.11.2.10. *OpacAddMastheadLibraryPulldown*

Default: Don't add

Asks: ___ a library select pulldown menu on the OPAC masthead.

Values:

• Add

Search   Library catalog ▾   All libraries   ▾   Go

• Don't Add

Search   Library catalog ▾   Go

2.1.11.2.11. *OPACBaseURL*

Asks: The OPAC is located at ___

Description:

• This preference is looking for the URL of your public catalog (OPAC) with the http:// in front of it (enter http://www.mycatalog.com instead of www.mycatalog.com). Once it is filled in Koha will use it to generate permanent links in your RSS feeds, for your social network share buttons and in your staff client when generating links to bib records in the OPAC.

> **Important**
>
> Do not include a trailing slash in the URL this will break links created using this URL. (example: http://www.google.com not http://www.google.com/)

> **Important**
>
> This must be filled in with the URL of your public catalog for RSS, unAPI, and search plugins to work.

> **Important**
>
> This must be filled in with the URL of your public catalog to show 'OPAC View' links from bib records in the staff client:

2.1.11.2.12. *OpacAdditionalStylesheet*

Asks: Include the additional CSS stylesheet ___ to override specified settings from the default stylesheet.

Description:

- The preference can look for stylesheets in the template directory for your OPAC language, for instance: /koha-tmpl/opac-tmpl/prog/en/css. If you upload a custom file, opac-mystyles.css to this directory, you can specify it by entering opac-mystyles.css in your opaccolorstylesheet system preference. This adds your custom stylesheet as a linked stylesheet alongside the OPAC's default CSS files. This method is preferable because linked stylesheets are cached by the user's browser, meaning upon repeat visits to your site the user's browser will not have to re-download the stylesheet, instead using the copy in the browser's cache.

- If you would rather, you can upload your CSS to another server and enter the full URL pointing to it's location remember to begin the URL with http://

> **Note**
>
> Leave this field blank to disable it

> **Note**
>
> This file will add a linked CSS, not replace the existing default CSS.

2.1.11.2.13. *opaccredits*

Asks: Include the following HTML in the footer of all pages in the OPAC:

> **Note**
>
> Click the 'Click to edit; link to enter HTML to appear at the bottom of every page in the OPAC

Description:

- This setting is for credits that will appear at the bottom of your OPAC pages. Credits traditionally encompass copyright information, last date updated, hyperlinks or other information represented in an HTML format. This is static information and any updates must be entered manually.

Learn more in the *OPAC Editable Regions* section.

2.1.11.2.14. *OpacCustomSearch*

Asks: Replace the search box at the top of OPAC pages with the following HTML

Description:

- This preference allows you to replace the default search box at the top of the OPAC :

with any HTML you would like :
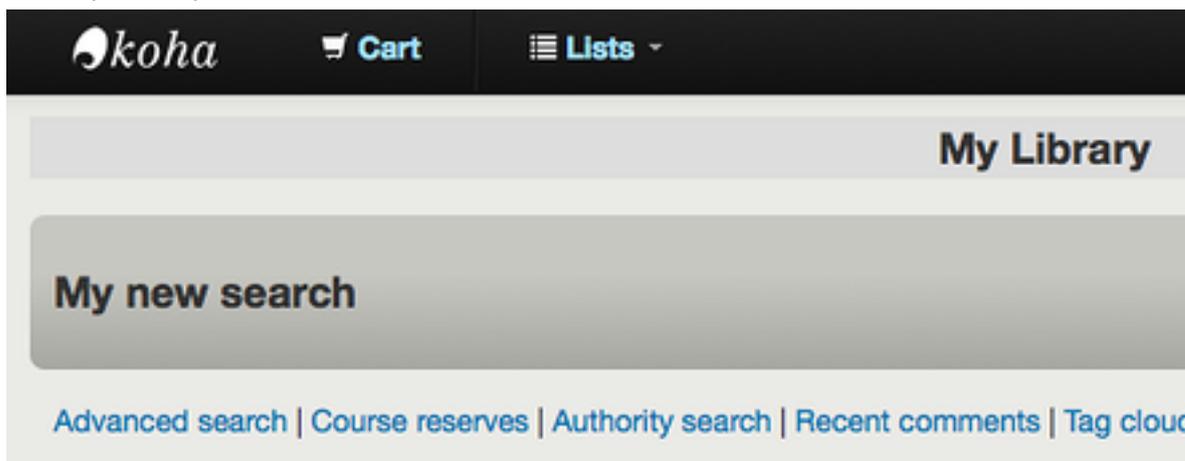
2.1.11.2.15. *OPACDisplay856uAsImage*

Default: Neither details or results page

Asks: Display the URI in the 856u field as an image on: ___

Values:

- Both results and details pages

  -

    > **Important**
    >
    > Not implemented yet

- Detail page only

  -

    > **Important**
    >
    > *OPACXSLTDetailsDisplay* needs to have a value in it for this preference to work.

No cover image available

⊞ Normal View | ⊞ MARC View | ⊞ ISBD View

IPod Touch

Type: ▦ Visual Material

Description: 1 IPod .

Online Resources:

Tags from this library:
No tags from this library for this title.

Add

Item type ▽	Location ⇕	Call Number ⇕	Status ⇕
KIT Mixed Materials	Fairview		Available

- Neither details or results page

- Results page only

-

> **Important**
>
> Not yet implemented

Description:

- In addition to this option being set, the corresponding XSLT option must be turned on. Also, the corresponding 856q field must have a valid MIME image extension (e.g., "jpg") or MIME image type (i.e. starting with "image/"), or the generic indicator "img" entered in the field. When all of the requirements are met, an image file will be displayed instead of the standard link text. Clicking on the image will open it in the same way as clicking on the link text. When you click on the image it should

open to full size, in the current window or in a new window depending on the value in the system pref *OPACURLOpenInNewWindow*.

2.1.11.2.16. *OpacExportOptions*

Default:
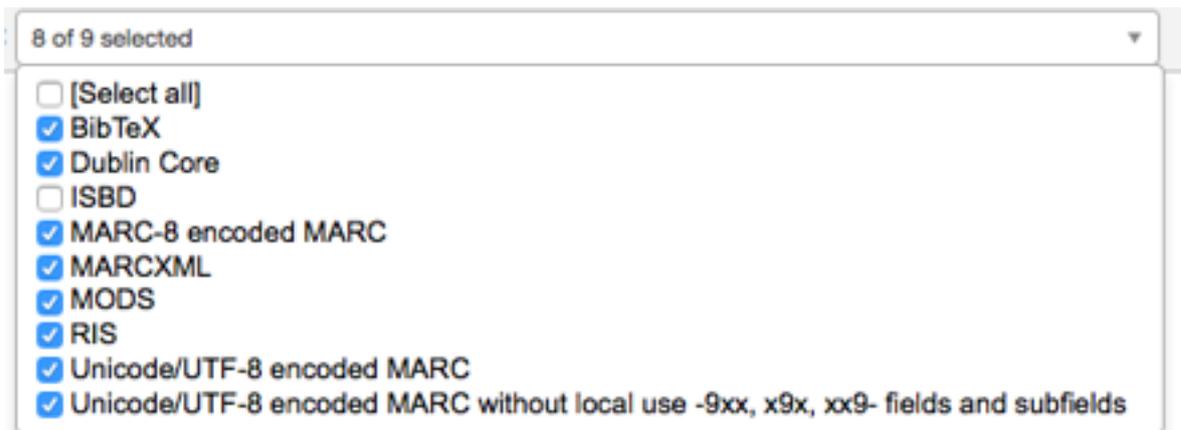
Asks: List export options that should be available from OPAC detail page : ___

Description:

- In the OPAC on the right of each bib record there is a menu that allows for saving the record in various formats. This patch will allow you to define which options are in the pull down menu. Available options are: BIBTEX (bibtex), Dublin Core (dc), MARCXML (marcxml), MARC-8 encoded MARC (marc8), Unicode/UTF-8 encoded MARC (utf8), Unicode/UTF-8 encoded MARC without local use -9xx, x9x, xx9- fields and subfields (marcstd), MODS (mods), and RIS (ris).

2.1.11.2.17. *OPACFallback*

Default: bootstrap

Asks: Use the ___ theme as the fallback theme on the OPAC.

Description:
- This preference has no use right now, as Koha has only one theme, but if your library has a custom theme it will show here as an option. The purpose of this preference is to provide a way to choose to what theme to fallback on when you have a partial theme in place.

2.1.11.2.18. *OpacFavicon*

Asks: Use the image at ___ for the OPAC's favicon.

> **Important**
>
> This should be a complete URL, starting with http://

> **Note**
>
> Turn your logo into a favicon with the *Favicon Generator*[22].

Description:

- The favicon is the little icon that appears next to the URL in the address bar in most browsers. The default value for this field (if left blank) is the small 'K' in the Koha logo.

2.1.11.2.19. *opacheader*

Asks: Include the following HTML in the header of all pages in the OPAC

> **Note**
>
> This value will appear above the main content of your page

---

[22] http://antifavicon.com/
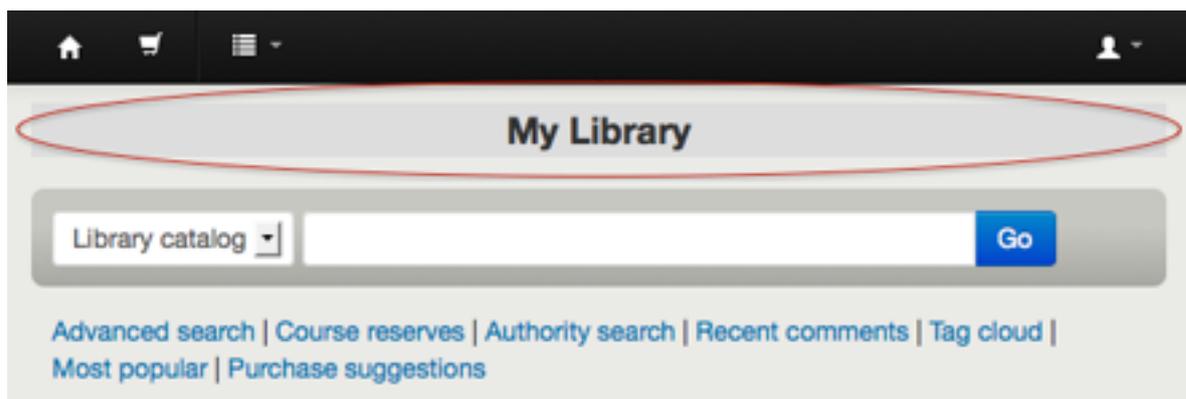
> **Note**
>
> Edit '*LibraryName*' if you'd like to edit the contents of the <title> tag

Learn more in the *OPAC Editable Regions* section.

2.1.11.2.20. *OpacHighlightedWords & NotHighlightedWords*

OpacHighlightedWords Default: Don't highlight

NotHighlightedWords Default: and|or|not

Asks: ___ words the patron searched for in their search results and detail pages; To prevent certain words from ever being highlighted, enter a list of stopwords here ___ (separate columns with |)

OpacHighlightedWords Values:

* Don't highlight

* Highlight

2.1.11.2.21. *OpacKohaUrl*

Default: Don't show

Values:

* Don't show

* Show

Description:

* When this preference is set to 'Show' text will appear in the bottom right of the OPAC footer stating 'Powered by Koha' and linking to the official Koha website.

2.1.11.2.22. *OpacLangSelectorMode*

Default: only footer

Asks: Display language selector on ___.

Values:
- both top and footer

- only footer

- top

Description:
- If you have the *opaclanguagesdisplay* preference set to display language options in the public cat-laog, then this preference will allow you to control where the language selector shows. You can choose to show it only on the top or bottom or in both places.

2.1.11.2.23. *opaclayoutstylesheet*

Default: opac.css

Asks: Use the CSS stylesheet /css/ ___ on all pages in the OPAC, instead of the default

Description:

- This setting's function is to point to the *.css file used to define the OPAC layout. A *.css file is a cascading stylesheet which is used in conjunction with HTML to set how the HTML page is for-matted and will look on the OPAC. There are two stylesheets that come with the system; opac.css and opac2.css. A custom stylesheet may also be used. The stylesheets listed in the opaclayout-stylesheet preference are held on the Koha server.

> **Note**
>
> Leave this field blank to disable it and let Koha use the default file instead

> **Important**
>
> Using a custom value in this preference causes Koha to completely ignore the default layout stylesheet.

2.1.11.2.24. *OpacLocationBranchToDisplay*

Default: holding library

Asks: Display the ___ for items on the OPAC record details page.

Values:
- holding library

- home and holding library

• home library

Description:
• Defines whether to display the holding library, the home library, or both for the opac details page.

2.1.11.2.25. *OpacLocationBranchToDisplayShelving*
Default: holding library

Asks: Display the shelving location under the ___ for items on the OPAC record details page.

Values:

• holding library

• home and holding library

• home library

Description:
• Defines where the shelving location should be displayed, under the home library, the holding library, or both.

2.1.11.2.26. *OpacMaintenance*
Default: Don't show

Asks: ___ a warning that the OPAC is under maintenance, instead of the OPAC itself.

> **Note**
>
> this shows the same warning as when the database needs to be upgraded, but unconditionally.

Description:

• This preference allows the system administrator to turn off the OPAC during maintenance and display a message to users. When this preference is switched to "Show" the OPAC is not usable. The text of this message is not editable at this time.

Values:

• Don't show

• Show

  • When this preference is set to show the maintenance message the ability to search the OPAC is disabled and a message appears. The default message can be altered by using the *OpacMaintenanceNotice* preference.

2.1.11.2.27. *OpacMaintenanceNotice*

Asks: Show the following HTML when OpacMaintenance is enabled

Descritpion:

- This preference will allow you to set the text the OPAC displays when the *OpacMaintenance* prefer-ence is set to 'Show.'

2.1.11.2.28. *OpacMainUserBlock*

Default: Welcome to Koha... <hr>

Asks: Show the following HTML in its own column on the main page of the OPAC

Description:

- HTML entered in this field will appear in the center of the main page of your OPAC
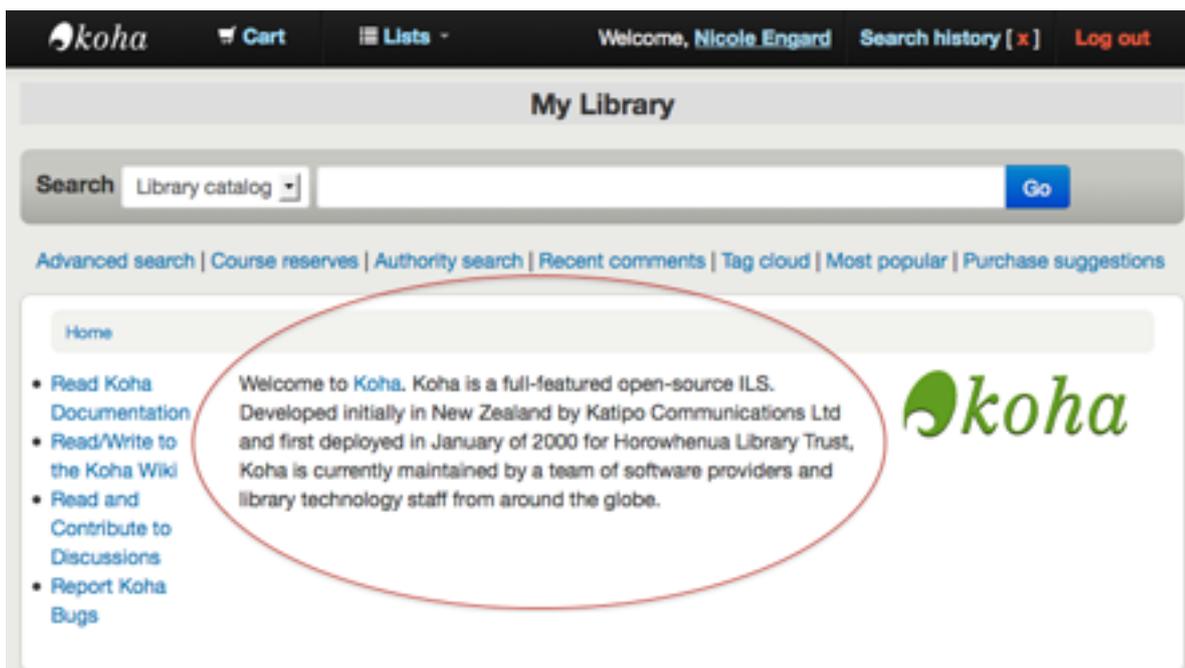
Learn more in the *OPAC Editable Regions* section.

2.1.11.2.29. *OpacMaxItemsToDisplay*

Default: 50

Asks: Display up to ___ items on the biblio detail page

Description:

- This preference will help with slow load times on the bibliographic detail pages by limiting the number of items to display by default. If the biblio has more items than this, a link is displayed instead that allows the user to choose to display all items.

2.1.11.2.30. *OPACMySummaryHTML*

Asks: Include a "Links" column on the "my summary" tab when a user is logged in to the OPAC, with the following HTML (leave blank to disable).

Description:

- In this preference you can enter HTML that will appear on the 'Checked Out' tab on the 'My Summary' section when logged in to the OPAC. The placeholders {BIBLIONUMBER}, {TITLE}, {ISBN} and {AUTHOR} will be replaced with information from the displayed record. This can be used to enter in 'share' links for social networks or generate searches against other library catalogs.

Sample Data:

```
<p><a href="http://www.facebook.com/sharer.php?u=http://YOUROPAC.ORG/cgi-bin/koha/opac-
detail.pl?biblionumber={BIBLIONUMBER}">Share on Facebook</a>
<br />TITLE: {TITLE}
<br />AUTHOR: {AUTHOR}
<br />ISBN: {ISBN}
<br />BIBLIONUMBER: {BIBLIONUMBER}</p>
```

2.1.11.2.31. *OPACMySummaryNote*

Asks: Note to display on the patron summary page.

Description:

- This preference will display text above the patron's summary and below the welcome message when the patron logs in to the OPAC and view their 'my summary' tab.

Hello, Nicole Engard

Click here if you're not Nicole Engard

This is your account information, below you can view what you have checked out, renew titles and see what you owe in fines.

Checked out (5)	Overdue (5)	Fines (54.04)	Holds (8)

5 Item(s) checked out

2.1.11.2.32. *OpacNav*

Default: Important links here.

Asks: Show the following HTML on the left hand column of the main page and patron account on the OPAC (generally navigation links)
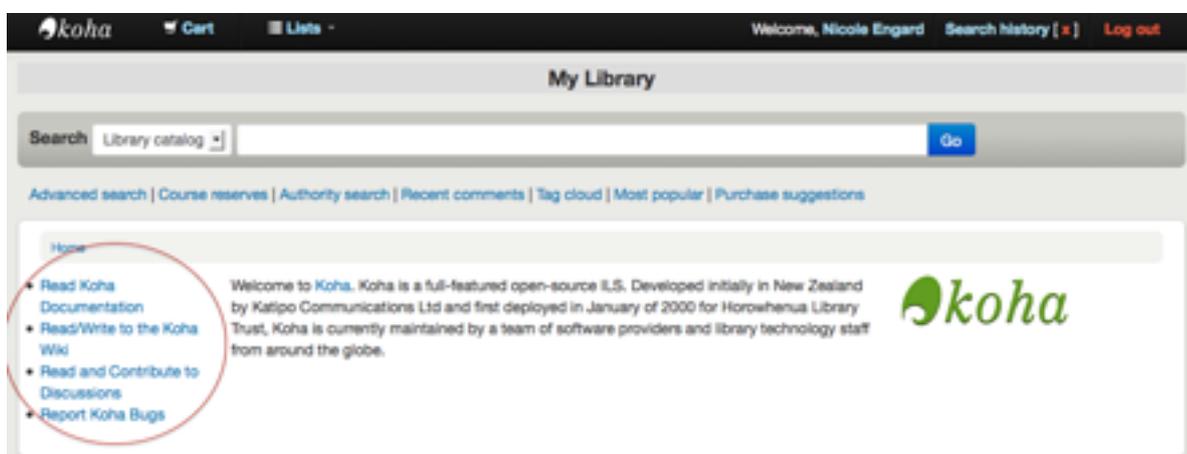
Learn more in the *OPAC Editable Regions* section.

2.1.11.2.33. *OpacNavBottom*

Asks: Show the following HTML on the left hand column of the main page and patron account on the OPAC, after *OpacNav*, and before patron account links if available:

Description: When a patron is logged in to their account they see a series of tabs to access their account information. *OpacNav* appears above this list of tabs and OpacNavBottom will appear below them. When not on the patron account pages the HTML in OpacNavBottom will just appear right below *OpacNav*.

Home › Nicole Engard › Your summary

- Read Koha Documentation
- Read/Write to the Koha Wiki
- Read and Contribute to Discussions
- Report Koha Bugs

your summary

your fines

your personal details

your tags

change your password

your search history

your reading history

your privacy

your purchase suggestions

your messaging

your lists

2.1.11.2.34. *OpacNavRight*

Asks: Show the following HTML in the right hand column of the main page under the main login form.

Description: HTML entered in this preference will appear on the right hand side of the OPAC under the log in form. If the log in form is not visible this content will move up on the right column.

2.1.11.2.35. *OPACNoResultsFound*

No Default

Asks: Display this HTML when no results are found for a search in the OPAC

This HTML will display below the existing notice that no results were found for your search.

Note

You can insert placeholders {QUERY_KW} that will be replaced with the keywords of the query.

2.1.11.2.36. *OpacPublic*

Default: Enable

Asks: ___ Koha OPAC as public. Private OPAC requires authentication before accessing the OPAC.

Values:

* Don't enable

* Enable

Description:

* This preference determines if your OPAC is accessible and searchable by anyone or only by members of the library. If set to 'Don't enable' only members who are logged into the OPAC can search. Most libraries will leave this setting at its default of 'Enable' to allow their OPAC to be searched by anyone and only require login for access to personalized content.

2.1.11.2.37. *OPACResultsSidebar*

Asks: Include the following HTML under the facets in OPAC search results

Description:

* The HTML entered in this preference will appear on the search results pages below the list of facets on the left side of the screen.

2.1.11.2.38. *OPACSearchForTitleIn*

Default: Other Libraries (World-Cat) Other Databases (Google Scholar) Online Stores (Bookfinder.com)

Asks: Include a "More Searches" box on the detail pages of items on the OPAC, with the following HTML (leave blank to disable)

> **Note**
>
> The placeholders {BIBLIONUMBER}, {CONTROLNUMBER}, {TITLE}, {ISBN}, {ISSN} and {AUTHOR} will be replaced with information from the displayed record.

2.1.11.2.39. *OpacSeparateHoldings & OpacSeparateHoldingsBranch*

OpacSeparateHoldings default: Don't separate

OpacSeparateHoldingsBranch default: home library

Asks: ___ items display into two tabs, where the first tab contains items whose ___ is the logged in user's library. The second tab will contain all other items.

OpacSeparateHoldings values:
* Don't separate

- Separate

OpacSeparateHoldingsBranch values:
- holding library

- home library

Description:
- This preference lets you decide if you would like to have the holding information on the bibliographic detail page in the OPAC split in to multiple tabs. The default is to show all holdings on one tab.

2.1.11.2.40. *OPACShowBarcode*

Default: Don't show

Asks: ___ the item's barcode on the holdings tab.

Values:

- Don't show

- Show

Description:

- This preference allows you to control whether patrons can see items' barcodes in the OPAC.

2.1.11.2.41. *OPACShowCheckoutName*

Default: Don't show

Asks: ___ the name of the patron that has an item checked out on item detail pages on the OPAC.

Values:

* Don't show

* Show

Description:

* This preference allows all patrons to see who has the item checked out if it is checked out. In small corporate libraries (where the OPAC is behind a firewall and not publicly available) this can be help- ful so coworkers can just contact the patron with the book themselves. In larger public and academic libraries setting this to 'Show' would pose serious privacy issues.

2.1.11.2.42. *OPACShowHoldQueueDetails*

Default: Don't show any hold details

Asks: ___ to patrons in the OPAC.

Values:

* Don't show any hold details

* Show holds

* Show holds and priority level

* Show priority level

Hello, Nicole Engard

Click here if you're not Nicole Engard

This is your account information, below you can view what you have checked out, renew titles and see what you owe in fines.

| Checked out (6) | Overdue (6) | Fines (54.04) | **Holds (6)** |

Holds (6 total)

Title	Placed on	Expires on	Pick up location	Priority	Status	Suspend	Modify
SQL / McGrath, Mike.	03/16/2011	Never expires	Nicole's Library	3	Pending	❚❚ Suspend	✖ Cancel
Practical open source software for libraries / Engard, Nicole C.,	03/17/2014	Never expires	Nicole's Library	1	Pending	❚❚ Suspend	✖ Cancel
Blood Rites (The Dresden Files, Book 6). Butcher, Jim.	03/29/2012	Never expires	Nicole's Library		Item waiting at **Nicole's Library** since 12/17/2013		

- *opacuserlogin* needs to be set to 'allow'

2.1.11.2.43. *OpacShowRecentComments*

Default: Don't show

Asks: ___ a link to recent comments in the OPAC masthead.

Values:

- Don't show

- Show

Description:

- If you have chosen to allow comments in your OPAC by setting *reviewson* to 'Allow' you can include a link to the recent comments under the search box at the top of your OPAC with this preference.

Search Library catalog ▾

Advanced search | Course reserves | Authority search | Recent comments |

2.1.11.2.44. *OPACShowUnusedAuthorities*

Default: Show

Asks: ___ unused authorities in the OPAC authority browser.

Values:

- Do not show

- Show

-
>
> **Important**
>
> Requires that the *OpacAuthorities* preference is set to 'Allow'

Description:

- When patrons search your authority file via the OPAC they will see all authorities in your system even if you don't have them linked to any bibliographic records. This preference lets you determine what the default behavior is when searching authorities via the OPAC. If you choose 'Do not show' it will only show patrons authority records that are linked to bib records in the search results. Otherwise the system will show all authority records even if they aren't linked to records.

2.1.11.2.45. *OpacStarRatings*

Default: no

Asks: Show star-ratings on ___ pages.

Values:

- no

- only details

- results and details

Description:

- Star ratings are a way for your patrons to leave ratings without having to leave a full review. Patrons who are not logged in will only be able to see the stars, once logged in patrons can click on the stars on the details page to leave their own rating. Clicking on the stars on the search results will not submit a rating.

2.1.11.2.46. *OpacSuggestionManagedBy*

Default: Show

Asks: ___ the name of the staff member who managed a suggestion in OPAC.

Values:
- Don't show

- Show

Description:
- If you're *allowing patrons to make purchase suggestions* then they will see the 'my suggestions' tab when logged in. This tab shows the patron the librarian who approved or rejected the purchase suggestion. This preference controls if the patron sees the librarian's name or not.

2.1.11.2.47. *opacthemes*

Default: bootstrap

Asks: Use the ___ theme on the OPAC.

Values:

- bootstrap
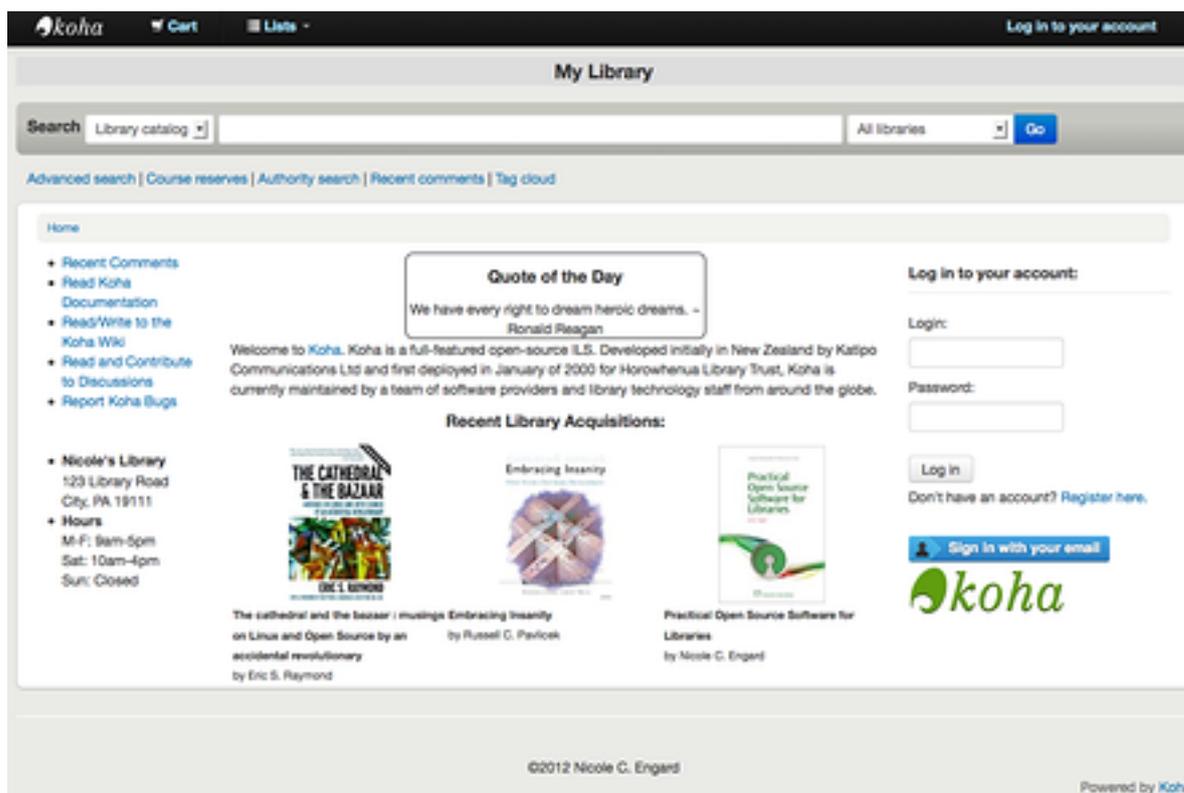
This theme is completely responsive

2.1.11.2.48. *OPACURLOpenInNewWindow*

Default: don't

Asks: When patrons click on a link to another website from your OPAC (like Amazon or OCLC), ___ open the website in a new window.

Values:

- do

- don't

Description:

- This preference determines if URLs in the OPAC will open in a new window or not. When clicking on a link in the OPAC, a patron does not need to worry about navigating away from their search results.

2.1.11.2.49. *OPACUserCSS*

Asks: Include the following CSS on all pages in the OPAC

Description:

- OPACUserCSS allows the administrator to enter styles that will overwrite the OPAC's default CSS as defined in 'opaclayoutstylesheet' or 'opacstylesheet'. Styles may be entered for any of the selectors found in the default style sheet. The default stylesheet will likely be found at http:// your_koha_address/opac-tmpl/bootstrap/css/opac.css. Unlike *OpacAdditionalStylesheet* and *opaclayoutstylesheet* this preference will embed the CSS directly on your OPAC pages.

2.1.11.2.50. *OPACUserJS*

Asks: Include the following JavaScript on all pages in the OPAC

Log in to Your Account:

Login:

Password:

Log In

Include the following JavaScript on all pages in the OPAC:
```
$(document).ready(function(){
$("label[for='userid']").html("Card Number:");
$("label[for='password']").html("PIN:");
});
```

opacuserjs

Log in to Your Account:

Card Number:

PIN:

Log In

Description:

- This preference allows the administrator to enter JavaScript or JQuery that will be embedded across all pages of the OPAC. Administrators may use this preference to customize some of the interactive sections of Koha, customizing the text for the login prompts, for example. Sample JQuery scripts used by Koha libraries can be found on the wiki: *http://wiki.koha-community.org/wiki/JQuery_Library*.

2.1.11.2.51. *OPACXSLTDetailsDisplay*

Default: default

Asks: Display OPAC details using XSLT stylesheet at ___

Values:

- leave empty to not use the XSLT stylesheet

  - In previous versions of Koha this was the setting that read 'normally'

- enter "default" for the default one

- put a path to define a XSLT file

  - ex: /path/to/koha/and/your/stylesheet.xsl

  - If in a multi-language system you can enter {langcode} in the path to tell Koha to look in the right language folder

    - ex: /home/koha/src/koha-tmpl/opac-tmpl/bootstrap/{langcode}/xslt/ MARC21slim2OPACDetail.xsl

    - ex. http://mykohaopac.org/{langcode}/stylesheet.xsl

- put an URL for an external specific stylesheet

  - ex: http://mykohaopac.org/stylesheet.xsl

Description:

- XSLT stylesheets allow for the customization of the details shows on the screen when viewing a bib record. This preference will allow you either use the default look that comes with Koha or design your own stylesheet.

2.1.11.2.52. *OPACXSLTResultsDisplay*

Default: default

Asks: Display OPAC results using XSLT stylesheet at ___

Values:

- leave empty to not use the XSLT stylesheet

  - In previous versions of Koha this was the setting that read 'normally'

- enter "default" for the default one

- put a path to define a XSLT file

  - ex: /path/to/koha/and/your/stylesheet.xsl

  - If in a multi-language system you can enter {langcode} in the path to tell Koha to look in the right language folder

    - ex: /home/koha/src/koha-tmpl/opac-tmpl/bootstrap/{langcode}/xslt/ MARC21slim2OPACResults.xsl

    - ex. http://mykohaopac.org/{langcode}/stylesheet.xsl

- put an URL for an external specific stylesheet

  - ex: http://mykohaopac.org/stylesheet.xsl

Description:

- XSLT stylesheets allow for the customization of the details shows on the screen when viewing the search results. This preference will allow you either use the default look that comes with Koha or design your own stylesheet.

2.1.11.3. *Features*

2.1.11.3.1. *numSearchRSSResults*

Default: 50

Asks: Display ___ search results in the RSS feed.

Description:

- By default the RSS feed that is automatically generated for every search results page will list 50 items. This can sometimes be too much for some RSS feed readers and for some people this isn't enough. This preference allows you to adjust this number to show the best number of results for your patrons.

2.1.11.3.2. *OPACAcquisitionDetails*

Default: Don't display

Asks: ___ the acquisition details on OPAC detail pages.

Values:
- Display
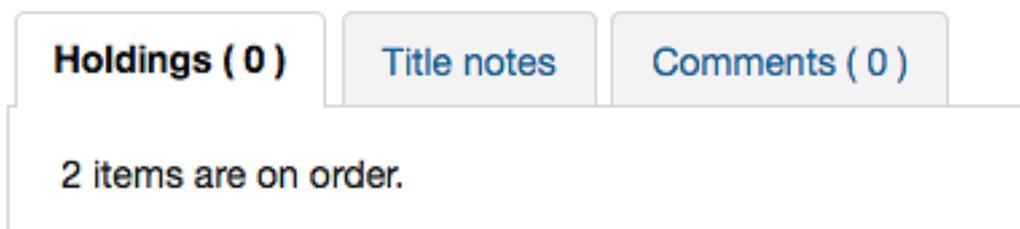
- Don't display

Description:
- This preference shows the patrons how many items are on order in the Holdings tab if you have the *AcqCreateItem* set to 'cataloging the record'

2.1.11.3.3. *OpacAuthorities*

Default: Allow

Asks: ___ patrons to search your authority records.

Description:

- This preference displays the link on the OPAC for the authority search. By setting the preference to "Allow" patrons can use this search link of the OPAC.

Values:

- Allow

  - A link labeled 'Authority search' will appear at the top of your OPAC under the search box

- Don't allow

2.1.11.3.4. *opacbookbag*

Default: Allow

Asks: ___ patrons to store items in a temporary "Cart" on the OPAC.

Values:

- Allow

- Don't allow

Description:

- This preference allows the user to temporarily save a list of items found on the catalog. By using the Book Bag, or Cart, the user can print out or email a list of items found. The user does not need to be logged in. This list is temporary and will be emptied, or cleared, at the end of the session.

2.1.11.3.5. *OpacBrowser*

> **Important**
>
> This preference only applies to French systems at this time.

Default: Don't allow

Asks: ___ patrons to browse subject authorities on OPAC

Values:

• Allow

• Don't allow

> **Important**
>
> run the *Authorities Browser Cron Job* to create the browser list

2.1.11.3.6. *OpacBrowseResults*

Default: enable

Asks: ___ browsing and paging search results from the OPAC detail page.

Values:

• disable

• enable

Description:

• This preference will control the option to return to your results and/or browse them from the detail page in the OPAC.

2.1.11.3.7. *OpacCloud*

> **Important**
>
> This preference only applies to French systems at this time.

Default: Don't show

Asks: ___ a subject cloud on OPAC

Values:

- Don't show

- Show

> **Important**
>
> run the *Authorities Browser Cron Job* to create the browser list

2.1.11.3.8. *OPACFinesTab*

Default: Allow

Asks: ___ patrons to access the Fines tab on the My Account page on the OPAC.

Values:

- Allow

    - *opacuserlogin* needs to be set to 'allow'

- Don't allow

2.1.11.3.9. *OpacHoldNotes*

Default: Do not allow

Asks: ___ users to add a note when placing a hold.

Values:

- Allow

- Do not allow

2.1.11.3.10. *OPACISBD*

Default: *MARC21 Default Appendix*

Asks: Use the following as the OPAC ISBD template:

Description:

- This determines how the ISBD information will display in the OPAC. Elements in the list can be re-ordered to produce a different ISBD view. ISBD, the International Standard Bibliographic Description, was first introduced by IFLA (International Federation of Library Associations) in 1969 in order to provide guidelines for descriptive cataloging. The purpose of ISBD is to aid the international exchange of bibliographic records for a variety of materials.

2.1.11.3.11. *OpacItemLocation*

Default: call number only

Asks: Show _____ for items on the OPAC search results.

Values:
- call number only

- collection code

- location

Description:

- This setting allows users of the OPAC results XSLT stylesheet to choose to display collection code or location in addition to call number.

2.1.11.3.12. *OpacPasswordChange*

Default: Allow

Asks: ___ patrons to change their own password on the OPAC.

Values:

- Allow

  - *opacuserlogin* needs to be set to 'allow'

- Don't allow

> ⭐ **Important**
>
> Enabling this will break LDAP authentication.

2.1.11.3.13. *OPACPatronDetails*

Default: Allow

Asks: ___ patrons to notify the library of changes to their contact information from the OPAC.

Values:

- Allow

  - *opacuserlogin* needs to be set to 'allow'

- Don't allow

Description:

- If patrons are allowed to notify the library of changes to their account then staff will need to approve the changes via the staff client. Notification of patron account requests will appear on the dashaboard below the list of modules with other pending actions.

Suggestions pending approval: **1**
Comments pending approval: **1**
Tags pending approval: **1**
Patrons requesting modifications: **1**

Once you click the notification you will be presented with the changes the patron would like to make to their account and from there you can choose how to proceed.

Update patron records

▾ **Engard, Nicole**

○ Approve ○ Deny ⦿ Ignore

Field	From	To
Alternate address		123
Other names		NCE
State		PA
City	Philadelphia, PA	Philadelphia

Submit

> **Note**
>
> You can control what fields patrons see and can modify via the OPAC by setting the *PatronSelfRegistrationBorrowerMandatoryField PatronSelfRegistrationBorrowerUnwantedField* preferences.

2.1.11.3.14. *OPACpatronimage*

Default: Don't show

Asks: ___ patron images on the patron information page in the OPAC.

Values:

• Don't show

• Show

Description:

• If *patronimages* is set to allow the upload of patron images via the staff client, then setting this preference to 'show' will show the patron what image you have on file for them when they view their personal information on their account in the OPAC.

2.1.11.3.15. *OPACPopupAuthorsSearch*

Default: Don't display

Asks: ___ the list of authors/subjects in a popup for a combined search on OPAC detail pages.

Values:

• Display

•

| ⭐ **Important** |

> This will only display the pop up if you are not using an XSLT stylesheet. Review your *OPACXSLTDetailsDisplay* to find out what stylesheet you're using.

• Don't display
    • Authors and subjects will display as search links instead of pop up menus.

Description:

• If this preference is set to 'Display' then clicking a subject or author from the details page in the OPAC will present the searcher with a pop up box. From this box you can check off any of the subjects or authors listed and search them all at once by clicking 'Search' at the bottom of the pop up. The default behavior is for Koha to search just the clicked author or subject.

2.1.11.3.16. *OpacResetPassword*

Default: not allowed

Asks: Library users are ___ to recover their password via e-mail in the OPAC.

Values:

- allowed

Log in to your account:

Login:

Password:

Log in

Don't have an account? Register here.

Forgot your password?

- not allowed

Description:

- This preference controls whether you present users of the public catalog with a 'Forgot your password' link or not. Learn more in the *OPAC section* of this manual.

2.1.11.3.17. *OpacTopissue*

Default: Don't allow

Asks: ___ patrons to access a list of the most checked out items on the OPAC.

Values:

- Allow

  - A link to 'Most Popular' will appear at the top of your OPAC

Search   Library catalog

Advanced search | Course reserves | Authority search | Recent comments | Tag cloud | Most popular

- Don't allow

Description:

- This preference allows the administrator to choose to show the "Most Popular" link at the top of the OPAC under the search box. The "Most Popular" page shows the top circulated items in the library,

as determined by the number of times a title has been circulated. This allows users to see what titles are popular in their community. It is recommended that you leave this preference set to 'Don't allow' until you have been live on Koha for a couple of months, otherwise the data that it shows will not be an accurate portrayal of what's popular in your library.

2.1.11.3.18. *opacuserlogin*

Default: Allow

Asks: ___ patrons to log in to their accounts on the OPAC.

Values:

- Allow

- Don't allow

  - The OPAC will still be searchable if patrons can't log in, this just disables the patron account access via the OPAC

2.1.11.3.19. *QuoteOfTheDay*

Default: Disable

Asks: ___ Quote of the Day display on OPAC home page

Values:

- Disable

- Enable

Description:

- This feature will allow you to enter a series of quotes that will then show on the OPAC homepage in random order. To add/edit quotes, visit the *Quote of the Day Editor* under Tools.

2.1.11.3.20. *RequestOnOpac*

Default: Allow

Asks: ___ patrons to place holds on items from the OPAC.

Values:

- Allow

  - *opacuserlogin* needs to be set to 'allow'

- Don't allow

2.1.11.3.21. *reviewson*

Default: Allow

Asks: ___ patrons to make comments on items on the OPAC.

Values:

- Allow

  - Patrons comments/reviews all require moderation before they appear in the OPAC

  - *opacuserlogin* needs to be set to 'Allow'

- Don't allow

Description:

- This button allows the patrons to submit comments on books they have read via the OPAC. If this preference is set to "Allow" reviews are first sent to the staff client for staff approval before the review is displayed in the OPAC. The staff member who reviews and approves comments may find the pending comments on the *Comments* tool. The staff member can then choose to approve or delete the comments.

2.1.11.3.22. *ShowReviewer*

Default: full name

Asks: Show ___ of commenter with comments in OPAC.

Values:

- first name

- first name and last initial

- full name

- last name

- no name

- username

Description:

- If you would like to protect your patron's privacy in the OPAC you can choose to hide their names or parts of their names from any of the comments they leave on bib records in your system. *reviewson* needs to be set to 'Allow' for this to preference to come in to play

2.1.11.3.23. *ShowReviewerPhoto*

Default: Show

Asks: ___ reviewer's photo beside comments in OPAC.

Values:

• Hide

• Show

  • *reviewson* needs to be set to 'Allow' and *ShowReviewer* needs to be set to 'Show' for this to preference to come in to play
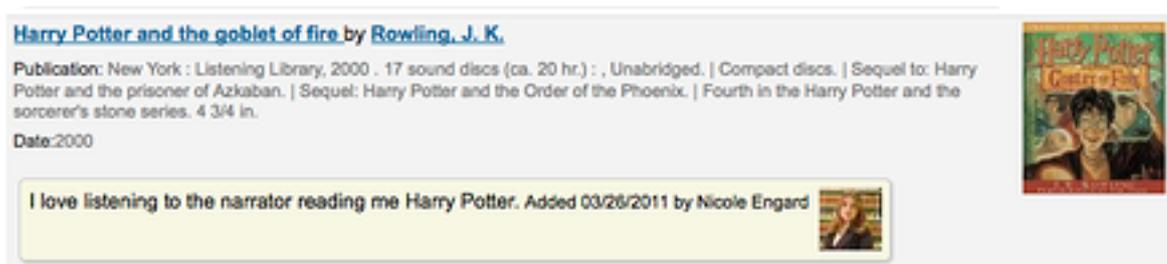
Description:

• This system preference allows libraries to show avatars next to patron's comments in the OPAC. These avatars are pulled from the *Libravatar*[23] library, an open source powered product that allows Internet users to choose a small icon to display next to their name on various different websites. The library has no control over the images the patron chooses to display.

2.1.11.3.24. *SocialNetworks*

Default: Disable

Asks: ___ social network links in opac detail pages

Values:

• Disable

• Enable

---

[23] https://www.libravatar.org
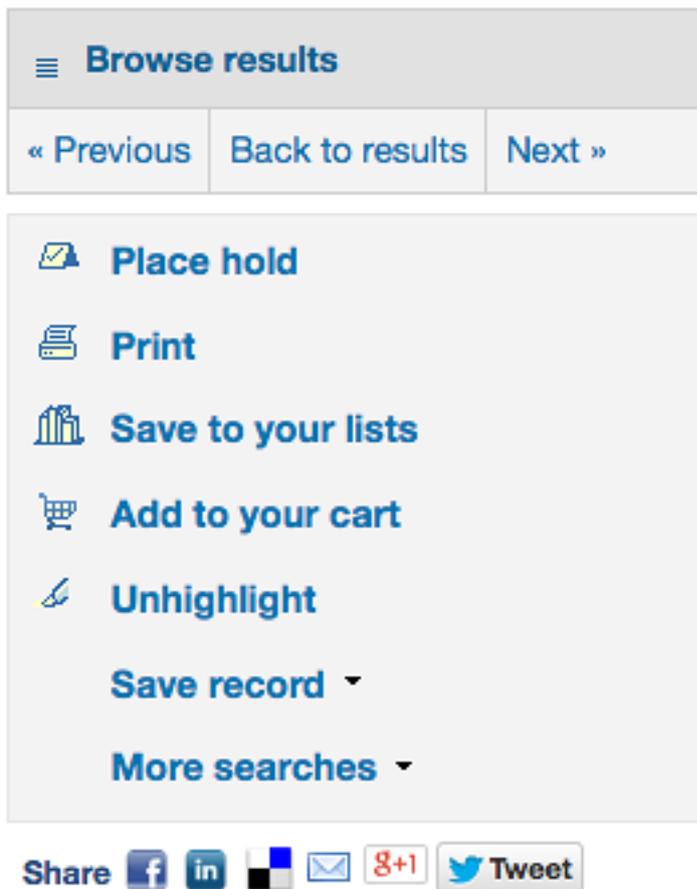
Description:

- This preference will enable a line of social network share buttons below the right hand column on the detail pages of records in the OPAC.

Important

In order for these share buttons to work when clicked you must have filled in your *OPACBaseURL* preference.

2.1.11.3.25. *suggestion*

Default: Allow

Asks: ___ patrons to make purchase suggestions on the OPAC.

Values:

- Allow

  - *opacuserlogin* needs to be set to 'allow' unless *AnonSuggestions* is set to 'allow'

- Don't allow

2.1.11.4. *Payments*

These preferences will allow you control the tools you use to accept online payments from your patrons via the OPAC.

2.1.11.4.1. *EnablePayPalOpacPayments & PayPalSandboxMode*

EnablePayPalOpacPayments Default: Don't all

PayPalSandboxMode Default: Sandbox

Asks: ___ patrons to make payments from the OPAC via PayPal in ___ mode.

EnablePayPalOpacPayments values:
• Allow

• Don't allow

PayPalSandboxMode values:
• Production
    • Visit *https://developer.paypal.com/* to get information for accepting payments in production

• Sandbox
    • Visit *https://developer.paypal.com/developer/accounts/* to get information for your sandbox account

Description:
• This preference will allow you to accept credit card payments via the OPAC for fines via PayPal. You will need to set up your PayPal account and it is recommended that you run tests before using this in production.

> **★ Important**
>
> PayPayl's terms of service state that you cannot charge your patrons for the processing fees and so this plugin will not add additional fees to the charges.

2.1.11.4.2. *PayPalChargeDescription*

Default: Koha fee payment

Asks: The patron should see the charge description as ___

Description
• This preference controls what the patron will see on their PayPal account/Bank account for this charge.

2.1.11.4.3. *PayPalPwd*

Asks: The password for the PayPal account to receive payments is ___

2.1.11.4.4. *PayPalSignature*

Asks: The signature for the PayPal account to receive payments is ___

2.1.11.4.5. *PayPalUser*

Asks: The email address to receive PayPal payments is ___

2.1.11.5. *Policy*

2.1.11.5.1. *AllowPurchaseSuggestionBranchChoice*

Default: Don't allow

Asks: ___ patrons to select branch when making a purchase suggestion

Values:

- Allow

- Don't allow

Description:

- If your library system lets patrons make purchase suggestions for a specific branch you can set this preference to 'Allow' to add a branch selection option to the purchase suggestion form.

2.1.11.5.2. *BlockExpiredPatronOpacActions*

Default: Don't block

Asks: ___ expired patrons from OPAC actions such as placing a hold or renewing.

Values:
- Block

- Don't block

Description:
- This preference lets you set a default value for how Koha handles permissions for patrons who are expired. This preference can be overwritten by the setting on *individual patron categories*.

2.1.11.5.3. *OpacAllowPublicListCreation*

Default: Allow

Asks: ___ opac users to create public lists

Values:

- Allow

- Don't allow

Description:

- Public lists are visible to anyone who visits your OPAC. With this preference you can control whether or now patrons are allowed to create these public lists. If this is set to "Don't allow" then only staff will be able to create public lists.

> **Important**
>
> This preference will only be taken in to account if you have *virtualshelves* set to 'Allow'

2.1.11.5.4. *OpacAllowSharingPrivateLists*

Default: Don't allow

Asks: ___ opac users to share private lists with other patrons.

Values:

- Allow

- Don't allow

Description:

- This feature will add the option for patrons to share their lists with other patrons. When this is set to 'Allow' patrons will see a share link at the top of their list. When they click that link it will ask for the email of the patron they would like to share with. Koha will then email the patron an invitation to see the list.

2.1.11.5.5. *OPACFineNoRenewals*

Default: 99999

Asks: Only allow patrons to renew their own books on the OPAC if they have less than ___ USD in fines

> **Note**
>
> Leave this field blank to disable

> **Important**
>
> To allow renewals in the OPAC, *opacuserlogin* needs to be set to 'allow'

2.1.11.5.6. *OpacHiddenItems*

Asks: Allows to define custom rules for hiding specific items at opac.

> **Note**
>
> See docs/opac/OpacHiddenItems.txt in your Koha install directory for more information

Description:

- In this field you can enter criteria for items you would like to hide from display in the OPAC. This field takes any combination of item fields (from the items table in the Koha database) for blocking. For example a value of:

```
itype: [07, 10]
location: [STAFF, ISO]
```

Will block items with an itype code of 07 or 10 as well as items that have a shelving location of STAFF or ISO.

In items my items.itype 07 is defined in Item Types Administration as Staff Assigned My items.itype 10 in Item Types is Archival Copy The locations STAFF and ISO are in Authorized Values for category=LOC STAFF means it's assigned to the staff reading room and ISO means it is in the isolation room.

2.1.11.5.7. *OpacRenewalAllowed*

Default: Don't allow

Asks: ___ patrons to renew their own books on the OPAC.

Values:

- Allow

  - *opacuserlogin* needs to be set to 'allow'

- Don't allow

  - Staff will still be able to renew items for patrons via the staff client

Description:

- This preference allows the administration to choose if patrons can renew their checked out materials via their checked out history in the OPAC. It allows patrons to renew their materials without having to contact the library or having to return to the library.

2.1.11.5.8. *OpacRenewalBranch*

Default: the branch the item was checked out from

Asks: Use ___ as branchcode to store in the statistics table

Values:

- NULL

- 'OPACRenew'

- the item's home branch

- the patron's home branch

- the branch the item was checked out from

Description:

- This value is used in the statistics table to help with reporting. The statistics table in Koha keeps track of all checkouts and renewals, this preference defines which branch is entered in to the table when a patron renews an item for themselves via the OPAC.

2.1.11.5.9. *OPACViewOthersSuggestions*

Default: Don't show

Asks: ___ purchase suggestions from other patrons on the OPAC.

Values:

- Don't show

- Show

  - *opacuserlogin* needs to be set to 'allow'

2.1.11.5.10. *SearchMyLibraryFirst*

Default: Don't limit

Asks: ___ patrons' searches to the library they are registered at.

Values:

- Don't limit

  - Searching the OPAC will show results from all libraries

  - If you're a one branch system, choose 'Don't limit'

- Limit

  - Patrons will still be able to search other libraries via the Advanced search page - but will be limited to searches for their library only from the basic search box

  - *opacuserlogin* needs to be set to 'allow'

2.1.11.6. *Privacy*

2.1.11.6.1. *AllowPatronToSetCheckoutsVisibilityForGuarantor*

Default: Don't allow

Asks: ___ patrons to choose their own privacy settings for showing the patron's checkouts to the patron's guarantor".

Values:

- Allow

- Don't allow

Description:

- By default staff can see checkouts to family members via the staff client. This preference will allow guarantees (children) to grant permission to guarantors (guardians) to view their current checkouts via the public catalog. This preference requires that you allow patrons to se their own privacy with the *OPACPrivacy* preference.

2.1.11.6.2. *AnonSuggestions*

Default: Don't allow

Asks: ___ patrons that aren't logged in to make purchase suggestions.

> **Important**
>
> If set to 'Allow', suggestions are connected to the *AnonymousPatron*

Values:

- Allow

- Don't allow

2.1.11.6.3. *AnonymousPatron*

Default: 0

Asks: Use borrowernumber ___ as the Anonymous Patron (for anonymous suggestions and reading history)

> **Note**
>
> Before setting this preference *create a patron* to be used for all anonymous suggestions and/or reading history items. This patron can be any type and should be named something to make it clear to you that they're anonymous (ex. Anonymous Patron).

> **⭐ Important**
>
> Remember to use the borrowernumber note the patron's cardnumber for this value. The borrowernumber can be found on the patron record under 'Library use' on the right.

Library use

Card number:	23529001223637
Borrowernumber:	51
Category:	Staff (S)
Registration date:	01/14/2015
Expiration date:	04/14/2023
Library:	Centerville
Username:	nce
Password:	******

Edit

2.1.11.6.4. *EnableOpacSearchHistory*

Default: Keep

Asks: ___ patron search history in the OPAC.

Values:

- Don't keep

- Keep

2.1.11.6.5. *OPACPrivacy*

Default: Don't allow

Asks: ___ patrons to choose their own privacy settings for their reading history.

> **⭐ Important**
>
> This requires *opacreadinghistory* set to 'Allow' and *AnonymousPatron* to be set to your anonymous patron's borrowernumber.

Values:

- Allow

- Don't allow

Description:

- The default privacy setting for each patron category can be set in the *Patrons Categories* area. If you set this preference to 'allow' then patrons can change that for themselves via the OPAC.

> ⭐ **Important**
>
> If patron has chosen to have their reading history anonymized and you have *StoreLastBorrower* set to "Don't store" then as soon as the item is checked in the last borrower will be anonymized.

2.1.11.6.6. *opacreadinghistory*

Default: Allow

Asks: ___ patrons to see what books they have checked out in the past.

> ⭐ **Important**
>
> Enabling this will make it so that patrons can view their circulation history in the OPAC unless you have *OPACPrivacy* set to 'Allow.'

> ⭐ **Important**
>
> This data is stored in the system regardless of your choice, unless your patrons have chosen to never have their reading history kept.

2.1.11.6.7. *StoreLastBorrower*

Default: Don't store

Asks: ___ the last patron to return an item.

Values:

- Don't store

- Store

Description:

- This preference allows you to store the last patron to borrow an item even if the patron has chosen to have their reading history anonymized.

> **Note**
>
> This setting is independent of *opacreadinghistory* and/or *AnonymousPatron*.

2.1.11.6.8. *TrackClicks*

Default: Don't track

Asks: ___ links that patrons click on.

Values:

• Don't track

• Track

• Track anonymously

Description:

• By setting this preference to one of the track options you will allow Koha to track every link clicked in Koha. This data will be stored in a database table so that you can run reports against that data. If you choose to 'Track' clicks then Koha will record both the link clicked and the logged in user who clicked the link. If you choose to 'Track anonymously' then the borrowernumber will not be recorded, but the rest of the data will.

> **Note**
>
> Remember to update your local privacy policies and link to them from the OPAC to notify your users that you are tracking their information.

2.1.11.7. *Restricted Page*

Using the following preference you can create a page within your Koha system that is accessible by only specific IP addresses. This can be used to house links to databases that can only be accessed from with the library or other licensed content.

2.1.11.7.1. *RestrictedPageContent*

Asks: HTML content of your restricted page.

2.1.11.7.2. *RestrictedPageLocalIPs*

Asks: Access from IP addresses beginning with ___ do not need to be authenticated

Description:

• You can enter individual IPS as a comma separated list (ex: '127.0.0,127.0.1') or just the beginning of the IP range allowed (ex: '127.0.')

2.1.11.7.3. *RestrictedPageTitle*

Asks: Use ___ as title of your restricted page

Description:

- This title will appear in the breadcrumb and on the top of the restricted page.

2.1.11.8. *Self Registration*

2.1.11.8.1. *PatronSelfModificationBorrowerUnwantedField*

Default: password

Asks: The following *database columns*[24] will not appear on the patron self-modification screen: ___

Description:

- This preference allows you to define what fields patrons can edit if you're allowing them to update their personal information via the public catalog with the *OPACPatronDetails* preference.

> ⭐ **Important**
>
> Separate columns with |

2.1.11.8.2. *PatronSelfRegistration*

Default: Don't allow

Asks: ___ library patrons to register an account via the OPAC.

Values:

- Allow

- Don't allow

Description:

- Setting this preference to 'Allow' will provide a link on the OPAC to register for a new account. Using the other *Self Registration* system preferences you can control how this preference will function.

Log in to your account:

Login:

Password:

Log in

Don't have an account? Register here.

> ⭐ **Important**
>
> Patrons registering via the OPAC will not need to be approved by a librarian. For this reason it is recommended that you set up a provisional *patron category* with no *circulation rights*. That way patrons will have to come in to the library to verify their identity before given circulation rights at the library. Once the patron confirms their identiy the library staff can change the category to one with permissions to check items out and place holds.

2.1.11.8.3. *PatronSelfRegistrationAdditionalInstructions*

Asks: Display the following additional instructions for patrons who self register via the OPAC (HTML is allowed):

Description:

- This preference takes any HTML you'd like to display on the page the patron sees after successfully registering for their library card.

2.1.11.8.4. *PatronSelfRegistrationBorrowerMandatoryField*

Default: surname|firstname

Asks: The following database columns must be filled in on the patron entry screen: ___

Description:

- This preference allows you to define what fields patrons must fill in on their self regisration form. If any of the required fields are blank Koha will not let the patron register.

> **Important**
>
> Separate columns with |

> **Note**
>
> For help with field names, ask your system administrator or *view the database structure*[25] associated with the borrowers table.

> **Note**
>
> If you're going to require that patrons verify their accounts via email with the *PatronSelfRegistrationVerifyByEmail* preference the email field will automatically be marked as required.

2.1.11.8.5. *PatronSelfRegistrationBorrowerUnwantedField*

Default: password

Asks: The following database columns will not appear on the patron entry screen: ___

Description:

- Using this preference you can hide fields from the patron registraion and update form in the OPAC.

> **Important**
>
> Separate columns with |

> **Note**
>
> For help with field names, ask your system administrator or *view the database structure*[26] associated with the borrowers table.

---

[25] http://schema.koha-community.org/tables/borrowers.html
[26] http://schema.koha-community.org/tables/borrowers.html

2.1.11.8.6. *PatronSelfRegistrationDefaultCategory*

Asks: Use the patron category code ___ as the default patron category for patrons registered via the OPAC.

Description:

- Enter in the patron category code for the category that all new patrons registered via the OPAC will be put in to.

> **Important**
>
> Patrons registering via the OPAC will not need to be approved by a librarian. For this reason it is recommended that you set up a provisional *patron category* with no *circulation rights*. That way patrons will have to come in to the library to verify their identity before given circulation rights at the library. Once the patron confirms their identiy the library staff can change the category to one with permissions to check items out and place holds.

> **Important**
>
> If you leave this blank or enter in an invalid code your patrons will still be able to register but will not be given a username. There will be no errors on the page to explain this, so be sure to enter a valid patron category code.

2.1.11.8.7. *PatronSelfRegistrationExpireTemporaryAccountsDelay*

Default: 0

Asks: Delete patrons registered via the OPAC, but not yet verified after ___ days.

Description:

- This prefence links to the *delete_expired_opac_registrations.pl cron job*. If that cron is set to run nightly it will clean up any registrations that have not been verified via email in the number of days entered on this preference. This is dependent on *PatronSelfRegistrationVerifyByEmail* preference.

2.1.11.8.8. *PatronSelfRegistrationVerifyByEmail*

Default: Don't require

Asks: ___ that a self-registering patron verify his or herself via email.

Values:
- Don't require

- Require

Description:

- If you require patrons to verify their accounts via email they will not be able to log in to the OPAC until they acknowledge the email sent by Koha. If you don't require this then patrons will be able to log in as soon as they fill in the registration form. You can set the *PatronSelfRegistrationExpireTemporaryAccountsDelay* preference to delete the un-verified self registrations after a certain number of days.

> **Note**
>
> If you're going to require that patrons verify their accounts via email then the email field will automatically be marked as required.

2.1.11.9. *Shelf Browser*

2.1.11.9.1. *OPACShelfBrowser*

Default: Show

Asks: ___ a shelf browser on item details pages, allowing patrons to see what's near that item on the shelf.

Values:

- Don't show

- Show

Description:

- This preference allows patrons to view what is located on the shelf near the item they looked up. The shelf browser option appears on the details page to the right of each items' call number. Clicking the 'Browse Shelf' link allows for a virtual shelf browsing experience via the OPAC and lets patrons see other books that may relate to their search and items that sit on the shelf near the item they are looking at.

> **Important**
>
> This uses up a fairly large amount of resources on your server, and should be avoided if your collection has a large number of items.

2.1.11.9.2. *ShelfBrowserUsesCcode*

Default: Don't use

Asks: ___ the item collection code when finding items for the shelf browser.

Values:

- Don't use

- Use

Description:

- If your library uses collection codes then you might want the shelf browser to take into consideration what collection the books belong to when populating the virtual shelf browser.

2.1.11.9.3. *ShelfBrowserUsesHomeBranch*

Default: Use

Asks: ___ the item home branch when finding items for the shelf browser.

Values:

- Don't use

- Use

Description:

- If you have a multiple branch system you may want to make sure that Koha takes into consideration what branch owns the books when populating the virtual shelf browser for accuracy.

2.1.11.9.4. *ShelfBrowserUsesLocation*

Default: Use

Asks: ___ the item location when finding items for the shelf browser.

Values:

- Don't use

- Use

Description:

- If your library uses shelving locations then you might want the shelf browser to take into consideration what shelving location the books belong to when populating the virtual shelf browser.

2.1.12. *Patrons*

Get there: More > Administration > Global System Preferences > Patrons

2.1.12.1. *General*

2.1.12.1.1. *AutoEmailOpacUser*

Default: Don't send

Asks: ___ an email to newly created patrons with their account details.

Description:

- AutoEmailOpacUser allows library users to be notified by email of their account details when a new account is opened at the email address specified in the *AutoEmailPrimaryAddress* preference. The email contains the username and password given to or chosen by the patron when signing up for their account and can be customized by editing the *ACCTDETAILS [334]* notice.

Values:

- Don't send

- Send

2.1.12.1.2. *AutoEmailPrimaryAddress*

Default: alternate

Asks: Use ___ patron email address for sending out emails.

Values:

- alternate

- first valid

- home

- work

Description:

- If you choose 'first valid' as the value for AutoEmailPrimaryAddress the system will check the email fields in this order: home, work, then alternate. Otherwise the system will use the email address you specify.

2.1.12.1.3. *autoMemberNum*

Default: Do

Asks: ___ default the card number field on the patron addition screen to the next available card number

Values:

- Do

  - If the largest currently used card number is 26345000012941, then this field will default to 26345000012942 for the next patron

- Don't

Description:

- This preference determines if the patron's barcode is automatically calculated. This prevents the person setting up the library card account from having to assign a number to the new card. If set to 'Do' the system will calculate a new patron barcode by adding 1 to the maximum barcode already present in the database.

2.1.12.1.4. *BorrowerMandatoryField*

Default: surname|cardnumber|barcode

Asks: The following database columns must be filled in on the patron entry screen: ___

Description:

• This preference enables the system administrator to choose which fields your library would like required for patron accounts. Enter field names separated by | (bar). This ensures that basic information is included in each patron record. If a patron leaves one of the required fields blank an error message will issue and the account will not be created.

> **Important**
>
> Separate columns with |

> **Note**
>
> For help with field names, ask your system administrator or *view the database structure*[27] associated with the borrowers table.

2.1.12.1.5. *borrowerRelationship*

Default: father|mother

Asks: Guarantors can be the following of those they guarantee ___

Description:

• This preference enables the system administrator to define valid relationships between a guarantor (usually a parent) & a guarantee (usually a child). Defining values for this field does not make the guarantor field required when adding a guarantee type patron. This preference creates a drop down list identifying the relationship of the guarantor to the guarantee. To disable the ability to add children types in Koha you can leave this field blank.

> **Important**
>
> Input multiple choices separated by |

2.1.12.1.6. *BorrowerRenewalPeriodBase*

Default: current date

Asks: When renewing borrowers, base the new expiry date on ___

---

[27] http://schema.koha-community.org/tables/borrowers.html

Values:

• current date.

• current membership expiry date.

Description:

• This preference controls what the patron's new expiration date will be when you renew their card. Using the 'current date' will add the subscription period to today's date when calculating the new expiration date. Using 'current membership expiry date' will add the subscription period to the old expiration date for the patron when renewing their account.

2.1.12.1.7. *BorrowersTitles*

Default: Mr|Mrs|Miss|Ms

Asks: Borrowers can have the following titles ___

Description:

• This preference allows the staff to choose the titles that can be assigned to patrons. The choices present as a drop down list when creating a patron record.

> **Important**
>
> Input multiple choices separated by |

2.1.12.1.8. *BorrowerUnwantedField*

Asks: The following database columns will not appear on the patron entry screen: ___

Description:

• This preference enables the system administrator to choose which fields your library doesn't need to see on the patron entry form. Enter field names separated by | (bar).

> **Important**
>
> Separate columns with |

> **Note**
>
> For help with field names, ask your system administrator or *view the database structure*[28] associated with the borrowers table.

2.1.12.1.9. *CardnumberLength*

Asks: Card numbers for patrons must be ___ characters long.

Description:
- The length can be a single number to specify an exact length, a range separated by a comma (i.e., 'Min,Max'), or a maximum with no minimum (i.e., ',Max'). If 'cardnumber' is included in the *Borrower-MandatoryField* list, the minimum length, if not specified here, defaults to one.

2.1.12.1.10. *checkdigit*

Default: Don't

Asks: ___ check and construct borrower card numbers in the Katipo style.

Values:

- Do

- Don't

> **Important**
>
> This overrides *autoMemberNum* if on.

2.1.12.1.11. *EnableBorrowerFiles*

Default: Don't

Asks: ___ enable the ability to upload and attach arbitrary files to a borrower record.

Values:

- Do

- Don't

Description:

- When enabled this will add a 'Files' tab to the left of the patron detail page where you can view and upload files to the patron record.

---

[28] http://schema.koha-community.org/tables/borrowers.html

2.1.12.1.12. *EnhancedMessagingPreferences*

Default: Allow

Asks: ___ staff to manage which notices patrons will receive and when they will receive them.

Values:

- Allow

- Don't allow

> **Important**
>
> This only applies to certain kinds of notices, overdue notices will be sent based on the library's rules, not the patron's choice.

> **Note**
>
> To manage if patrons have also access to these settings, use *EnhancedMessagingPreferencesOPAC*.

Description:

- These messages are in addition to the overdue notices that the library sends. The difference between these notices and overdues is that the patron can opt-in and out of these. Setting this preference to 'Allow' will allow staff to choose for patrons to receive any one of the following messages:

  - Item Checkout : A notice that lists all the of the items the patron has just checked out and/or renewed, this is an electronic form of the checkout receipt

  - Item Due : A notice on the day and item is due back at the library

  - Hold Filled : A notice when you have confirmed the hold is waiting for the patron

  - Item Checkin : A notice that lists all the of the items the patron has just checked in

  - Advanced Notice : A notice in advance of the patron's items being due (Staff can choose the number of days in advance)

2.1.12.1.13. *EnhancedMessagingPreferencesOPAC*

Default: Show

Asks: ___ patron messaging setting on the OPAC

Values:
- Don't show

- Show

Important

EnhancedMessagingPreferences must be enabled for messaging options to show in the OPAC

Description:

- These messages are in addition to the overdue notices that the library sends. The difference between these notices and overdues is that the patron can opt-in and out of these. Setting this preference to 'Allow' will allow patrons to choose to receive any one of the following messages:

  - Item Checkout : A notice that lists all the of the items the patron has just checked out and/or renewed, this is an electronic form of the checkout receipt

  - Item Due : A notice on the day and item is due back at the library

  - Hold Filled : A notice when you have confirmed the hold is waiting for the patron

  - Item Checkin : A notice that lists all the of the items the patron has just checked in

  - Advanced Notice : A notice in advance of the patron's items being due (The patron can choose the number of days in advance)

2.1.12.1.14. *ExtendedPatronAttributes*
Default: Enable

Asks: ___ searching, editing and display of custom attributes on patrons.

Values:

- Don't enable

- Enable

  - Define attributes in Koha administration

  - Get there: More > Administration > *Patron Attribute Types*

Description:

- Patron attributes are library-defined custom fields that can be applied to patron records.

Note

Use custom attributes for fields that the default patron record does not support such as driver's license number or student ID number.

2.1.12.1.15. *FeeOnChangePatronCategory*
Default: Do

Asks: ___ charge a fee when a patron changes to a category with an enrollment fee.

Values:

- Do

- Don't

2.1.12.1.16. *intranetreadinghistory*

Default: Allow

Asks: ___ staff to access a patron's checkout history.

> **Important**
>
> If you have the *OPACPrivacy* preference set to 'Allow' and the patron has decided to not have their history kept staff will only see currently checked out items.

Values:

- Allow

- Don't allow

> **Important**
>
> Reading history is still stored, regardless of staff being allowed access or not unless the patron has chosen to have their history anonymized via their *privacy page*.

2.1.12.1.17. *MaxFine*

Default: 9999

Asks: The late fine for all checkouts will only go up to ___ USD.

Description:

- This preference controls the default cap on fines accrued by the patron. Leaving this preference blank means that there is no cap on the amount of fines a patron can accrue. If you'd like, single item caps can be specified in the *circulation rules matrix*.

2.1.12.1.18. *MembershipExpiryDaysNotice*

Asks: Send an account expiration notice when a patron's card will expire in ___ days.

Description:
- If you would like to notify patrons that their accounts are about to expire then you can enter a number of days before expiration in this preference. The notice text can be customized in the *Notices & Slips* tool.

> **Important**
>
> You will need to enable the *membership expiry cron job* for this notice to send.

2.1.12.1.19. *minPasswordLength*

Default: 3

Asks: Login passwords for staff and patrons must be at least ___ characters long.

> **Important**
>
> This applies to both the staff login and the patron OPAC login.

2.1.12.1.20. *NotifyBorrowerDeparture*

Default: 30

Asks: Show a notice that a patron is about to expire ___ days beforehand.

Description:

- When the patron attempts to check out materials, a warning will appear in the check out window of the Staff Client telling the librarian that the patrons account is about to expire.

> **Important**
>
> This notice will appear on the patron's record in the staff client.

2.1.12.1.21. *patronimages*

Default: Allow

Asks: ___ images to be uploaded and shown for patrons on the staff client.

Values:

- Allow

- Don't allow

Description:
- If this preference is set to 'Allow' the staff will be able to upload images of patrons either *one by one* or *in bulk*. Patrons images will show on the detail page to the left of the patron information. They can also show in the OPAC if you set the *OPACpatronimage* preference or in the self check out module if you set the *ShowPatronImageInWebBasedSelfCheck* preference.

2.1.12.1.22. *PatronsPerPage*

Default: 20

Asks: By default, show ____ results per page in the staff client.

Description:

• This preference will let you define how many patrons to show on patron search results pages.

2.1.12.1.23. *SMSSendDriver, SMSSendUsername, and SMSSendPassword*

Asks: Use the SMS::Send:: ____ driver to send SMS messages. Define a username/login ____ and a password ____.

> ⭐ **Important**
>
> Please refer to your national laws concerning the sending of bulk SMS messages before enabling this feature.

Descritpion:

• There are two options for using SMS in Koha. You can use the Email protocol for free by entering 'Email' as the SMSSendDriver or you can pay for a SMS driver. Some examples of values for the driver are:

  • SMS::Send::Us::Ipipi

  • SMS::Send::US::TMobile

  • SMS::Send::US::Verizon

  • SMS::Send::IN::Unicel

  Additional values can be found here: *http://search.cpan.org/search?query=sms%3A %3Asend&mode=all* [29]

> ⭐ **Important**
>
> Only drivers available as Perl modules will work in this preference, so make sure a Perl module is available before choosing an SMS service.

Once a driver is entered in the preference an option will appear in the staff client and the OPAC on the patron messaging form to choose to receive messages as SMS

---

[29] http://search.cpan.org/search?query=sms%3A%3Asend&mode=all

Important

You must allow *EnhancedMessagingPreferences* for this to work.

2.1.12.1.24. *StatisticsFields*

Default: location|itype|ccode

Asks: Show the following fields from the items database table as columns on the statistics tab on the patron record: ___

Important

Enter the values separated by bars (|)

Description:

- This preference lets you set which fields will show on the patron record on the Statistics tab.

2.1.12.1.25. *TalkingTechItivaPhoneNotification*

Default: Disable

Asks: ___ patron phone notifications using Talking Tech i-tiva (overdues, predues and holds notices currently supported).

Values:

• Disable

• Enable

Description:

• To learn more about setting up this third party product view the *Talking Tech Appendix*.

> **Important**
>
> Requires that you have *EnhancedMessagingPreferences* set to Allow to use.

2.1.12.1.26. *uppercasesurnames*

Default: Don't

Asks: ___ store and display surnames (last names) in upper case.

Values:

• Do

• Don't

2.1.12.1.27. *useDischarge*

Default: Don't allow

Asks: ___ librarians to discharge borrowers and borrowers to request a discharge.

Values:
• Allow

• Don't allow

Description:
• A discharge is a certificate that says the patron has no current checkouts, no holds and owe no money.

> **Note**
>
> In France a "quitus" ("discharge") is needed if you want to register for an account in a library or a university).

> **Note**
>
> Academic libraries often require that you have a clear record at the library before you can graduate.

2.1.12.2. *Norwegian patron database*

2.1.12.2.1. *NorwegianPatronDBEnable & NorwegianPatronDBEndpoint*

NorwegianPatronDBEnable Default: Disable

Asks: ___ the ability to communicate with the Norwegian national patron database via the ___ endpoint.

Values:

• Disable

• Enable

2.1.12.2.2. *NorwegianPatronDBSearchNLAfterLocalHit*

Default: Don't

Asks: ___ search the Norwegian national patron database after a local search result was found.

Values:

• Do

• Don't

2.1.12.2.3. *NorwegianPatronDBUsername & NorwegianPatronDBPassword*

Asks: Communicate with the Norwegian national patron database using the username ___ and the password ___.

Description:
• You can get these from "Base Bibliotek", which is maintained by the Norwegian National Library.

2.1.13. *Searching*

Get there: More > Administration > Global System Preferences > Searching

2.1.13.1. *Features*

2.1.13.1.1. *EnableSearchHistory*

Default: Don't keep

Asks: ___ patron search history in the staff client.

Values:

- Don't keep

- Keep
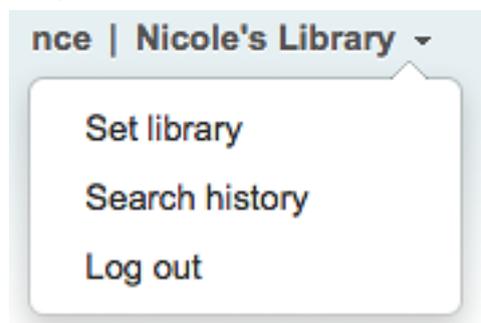
Description:

- This preference controls whether the staff client keeps search history for logged in users. Search history will be accessible under the link to your account in the top right of the staff client.

2.1.13.1.2. *IncludeSeeFromInSearches*

Default: Don't include

Asks: ___ *see from* (non-preferred form) headings in bibliographic searches.

Values:

- Don't include

- Include

Description:

- When this preference is set to include the search engine indexer will insert *see from* headings from authority records into bibliographic records when indexing, so that a search on an obsolete term will turn up relevant records. For example when you search for cookery (the old term) you get titles with the heading of cooking (the new term).

> **Important**
>
> You will need to reindex your bibliographic database when changing this preference.

2.1.13.1.3. *OpacGroupResults*

Default: Don't use

Asks: ___ PazPar2 to group similar results on the OPAC.

Values:

- Don't use

- Use

Important

This requires that *PazPar2*[30] is set up and running.

2.1.13.1.4. *QueryAutoTruncate*

Default: automatically

Asks: Perform wildcard searching (where, for example, Har would match Harry and harp) ___ (The * character would be used like so: Har* or *logging.)

Values:

- automatically

- only if * is added

Description:

- This setting allows for searches to be automatically truncated or for additional characters to be added to the end of a search string. When set to "automatically" the search string automatically ends with a wildcard function. For example, a search for the word "invent" with auto truncation enabled will also retrieve results for inventor, invention, inventory, etc. If you don't want this to happen automatically you can still be perform wildcard searches manually by adding an asterisk (*). Typing "invent*" even with auto truncation disabled will retrieve the same inventor, invention, inventory results. Auto truncation bypasses the necessity to type long search strings in their entirety.

2.1.13.1.5. *QueryFuzzy*

Default: Try

Asks: ___ to match similarly spelled words in a search (for example, a search for flang would also match flange and fang)

Values:

- Don't try

- Try

Description:

- This preference enables "fuzzy" searching, in which the search engine returns results that are similar to, but not exactly matching, the word or words entered by the user. This preference enables the search function to compensate for slightly misspelled names or phrases.

---

[30] http://www.indexdata.com/pazpar2

> ⭐ **Important**
>
> Requires that *UseICU* set to 'Not using'

2.1.13.1.6. *QueryStemming*

Default: Try

Asks: ___ to match words of the same base in a search

Values:

- Don't try

- Try

  - A search for enabling would also match enable and enabled

Description:

- This preference enables word stemming. Stemming allows the search function to return multiple versions of the same word, as well as related terms (i.e., both fish and fishing would be returned).

2.1.13.1.7. *QueryWeightFields*

Default: Enable

Asks: ___ ranking of search results by relevance

Values:

- Disable

- Enable

2.1.13.1.8. *TraceCompleteSubfields*

Default: Force

Asks: ___ subject tracings in the OPAC and Staff Client to search only for complete-subfield matches.

Values:

- Don't force

  - Searches for subject keywords (example: opac-search.pl?q=su:World%20Wide%20Web)

- Force

  - Searches for complete subject fields (example: opac-search.pl?q=su,complete-subfield:World%20Wide%20Web)

Description:

- When TraceCompleteSubfields is set to "force," clicking on links in non-authority controlled subject tracings will only find other records where the entire subfields match. Leaving it at "don't force" does a keyword search of the subject indexes.

> **Important**
>
> This preference assumes that you're using XSLT stylesheets as set in the *OPACXSLTDetailsDisplay* preference.

2.1.13.1.9. *TraceSubjectSubdivisions*

Default: Include

Asks: ___ subdivisions for searches generated by clicking on subject tracings.

Values:

- Don't include

  - Searches for subject keywords (example: opac-search.pl?q=su,complete-subfield:%22Web%20sites%22)

- Include

  - Searches for complete subject fields (example: opac-search.pl?q=(su,complete-subfield:%22Web%20sites%22)%20and%20(su,complete-subfield:%22Design.%22))

Description:

- When TraceSubjectSubdivisions is set to "Include," if you click on a subject with subdivisions (subfields other than 'a') they will be searched along with the subject heading (subfield 'a'). To have only the subject heading (subfield 'a') searched, set this preference to "Don't include."

> **Important**
>
> This preference assumes that you're using XSLT stylesheets as set in the *OPACXSLTDetailsDisplay* preference.

2.1.13.1.10. *UseICU*

Default: Not using

Asks: ___ ICU Zebra indexing.

Values:

- Not using

- Using

Description:

- ICU is a set of code libraries providing Unicode and Globalization support for software applications. What this means is ICU Zebra indexing is only necessary if you use non-roman characters in your cataloging. If using ICU Zebra indexing you will want to not use *QueryFuzzy*.

> **Important**
>
> This setting will not affect Zebra indexing, it should only be used to tell Koha that you have activated ICU indexing if you have actually done so, since there is no way for Koha to figure this out on its own.

> **Important**
>
> Talk to your system administrator when changing this preference to make sure that your system is set up properly for this to work.

2.1.13.1.11. *UseQueryParser*

Default: Do not try

Asks: ___ to use the QueryParser module for parsing queries.

> **Note**
>
> Enabling this will have no impact if you do not have QueryParser installed, and everything will continue to work as usual.

Values:

- Do not try

- Try

Description:

- This preference enables an experimental new query parser which opens the door for a more expressive and more-effective search syntax.

2.1.13.2. *Results Display*

2.1.13.2.1. *defaultSortField & defaultSortOrder*

defaultSortField Default: author

defaultSortOrder Default: ascending

Asks: By default, sort search results in the staff client by ___, ____

Description:

- These preferences set the default sort field and sort order for searches on the staff side. Regardless of your choice, the other sort options are still available in the drop down list on the advanced search page.

defaultSortField Values:

- author

- call number

- date added

- date of publication

- relevance

- title

- total number of checkouts

defaultSortOrder Values:

- ascending

- descending

- from A to Z

- from Z to A

2.1.13.2.2. *displayFacetCount*

Default: Don't show

Asks: ___ facet counts.

Description:

- This preference lets you decide if you show how many times a facet is used in your search results in the OPAC and the staff client. The relevance of these numbers highly depends on the value of the *maxRecordsForFacets* preference. Showing these numbers can potentially effect the performance of your searching, so test your system with different values for this preference to see what works best.

Values:

- Don't show

- Show

Authors

Austen, Jane, (5)
Burroughs, Edgar Ric... (4)
Dickens, Charles, (7)
Doyle, Arthur Conan, (6)
Poe, Edgar Allan, (7)
Show More

2.1.13.2.3. *DisplayLibraryFacets*

Default: holding library

Asks: Show facets for ___

Values:
- both home and holding library

- holding library

- home library

Description:
- This preferenc controls the libraries facet that displays on search results in the staff and opac. The value selected here will determin which library(s) show in the facets when a search is run.

2.1.13.2.4. *FacetLabelTruncationLength*

Default: 20

Asks: Truncate facets length to ___ characters, in OPAC/staff interface.

Description:

- In the OPAC and the staff client your facets are cut off at 20 characters by default. Depending on your layout this may be too many or two few letters, this preference lets you decide what number is best for your library's design.

2.1.13.2.5. *FacetMaxCount*

Default: 20

Asks: Show up ___ to facets for each category.

Description:
- This preference allows you to control how many possible limits show under each heading (Author, Series, Topics, etc) on the facets in the OPAC.

2.1.13.2.6. *maxItemsInSearchResults*

Default: 20

Asks: Show up to ___ items per biblio in the search results

Description:

- This preference will let you set how many results display by default when a search is run on the Staff Client.

2.1.13.2.7. *maxRecordsForFacets*

Default: 20

Asks: Build facets based on ___ records from the search results.

Description:

- By default Koha only bases facets on the first page of results (usually 20 results). This preference lets you tell Koha to based the facet descriptions and numbers on any number of search results returned. The higher this number the longer it will take for your search results to return, so test with various different values to find the best balance for your library.

2.1.13.2.8. *MaxSearchResultsItemsPerRecordStatusCheck*

Default: 20

Asks: For records with many items, only check the availability status for the first ___ items.

Description:

- Availability statuses may show incorrectly in search results if a record has more items than the limit set. Statuses will display correctly in the record details. Leave empty for no limit.

2.1.13.2.9. *numSearchResults*

Default: 20

Asks: By default, show ___ results per page in the staff client.

2.1.13.2.10. *OPACdefaultSortField & OPACdefaultSortOrder*

OPACdefaultSortField Default: relevance

OPACdefaultSortOrder Default: ascending

Asks: By default, sort search results in the OPAC by ___, ___

Description:

- These preferences set the default sort field and sort order for searches on the OPAC. Regardless of your choice, the other sort options are still available in the drop down list on the advanced search page.

OPACdefaultSortField Values:

- author

- call number

- date added

- date of publication

- relevance

- title

- total number of checkouts

OPACdefaultSortOrder Values:

- ascending

- descending

- from A to Z

• from Z to A

2.1.13.2.11. *OPACItemsResultsDisplay*

Default: Don't show

Asks: ___ an item's branch, location and call number in OPAC search results.

Values:

• Don't show

• Show

Description:

• This setting selects the information about an item that will display in the search results page of the OPAC. The results can display the status of an item and/or full details including branch, location, and call number. While the 'Show' option allows for more information to be displayed on the search results page, the information can be overwhelming for large collections with multiple branches.

2.1.13.2.12. *OPACnumSearchResults*

Default: 20

Asks: By default, show ___ results per page in the OPAC.

2.1.13.2.13. *SearchWithISBNVariations*

Default: don't search

Asks: When searching on the ISBN index, ___ on all variations of the ISBN.

Values:
• don't search

• search

Descriptions:
• With this preference set to search you'll be able to search for ISBNs even if there are dash- es or spaces in the field. So if you search for 9781843345855 but the ISBN was cataloged as 978-1843345855 you'll still be able to find it if this preference is set to 'search'.

> ⭐ **Important**
>
> This preference has no effect if *UseQueryParser* is on

2.1.13.3. *Search Form*

2.1.13.3.1. *AdvancedSearchLanguages*

Asks: Limit the languages listed in the advanced search drop-down to the ___ ISO 639-2 language codes (separate values with | or ,).

Description:

- This preference will allow you to decide what languages show in the pull down menu on the advanced search page in the OPAC and the staff client. If this preference is left blank, all languages will show. To limit the languages that are shown enter their *ISO 639-2 language codes*[31] separated by comma (,) or bar (|). For example to limit listing to French and Italian, enter ita|fre.

2.1.13.3.2. *AdvancedSearchTypes*

Default: itemtype

Asks: Show tabs in OPAC and staff-side advanced search for limiting searches on the ___ fields (separate values with |).

Description:

- On the advanced search page you can choose to allow filters on one or all of the following: Item types (itemtypes), Collection Codes (ccode) and Shelving Location (loc). If you would like to be able to limit searches on item type and shelving location for example you would enter itemtypes|loc in the preference input box. The order of these fields will determine the order of the tabs in the OPAC and staff client advanced search screens. Values within the search type are OR'ed together, while each different search type is AND'ed together in the query limits. The current stored values are supported without any required modification.Each set of advanced search fields are displayed in tabs in both the OPAC and staff client. The first value in the AdvancedSearchTypes syspref is the selected tab; if no values are present, "itemtypes" is used. For non-itemtype values, the value in AdvancedSearchTypes must match the Authorised Value name, and must be indexed with 'mc-' prefixing that name.
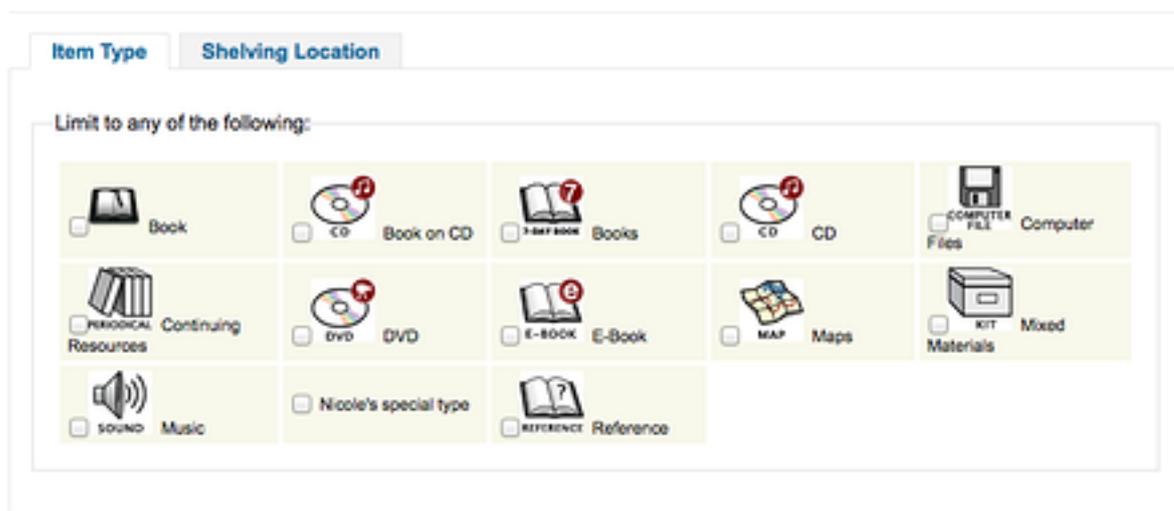
2.1.13.3.3. *expandedSearchOption*

Default: don't show

Asks: By default, ___ "More options" on the OPAC and staff advanced search pages.

Values:

- don't show

• show

2.1.13.3.4. *IntranetNumbersPreferPhrase*

Default: don't use

Asks: By default, ___ the operator "phr" in the callnumber and standard number staff client searches

Values:

• don't use

• use

Description:

• When searching by call number and standard number (biblionumber) in Koha Staff Client you can choose to force the search to be a phrase search by setting this preference to 'use.' This will allow for more accurate results over doing a general keyword field search.

2.1.13.3.5. *OPACNumbersPreferPhrase*

Default: don't use

Asks: By default, ___ the operator "phr" in the callnumber and standard number OPAC searches

Values:

• don't use

• use

Description:

• When searching by call number and standard number (biblionumber) in the Koha OPAC you can choose to force the search to be a phrase search by setting this preference to 'use.' This will allow for more accurate results over doing a general keyword field search.

2.1.14. *Serials*

Get there: More > Administration > Global System Preferences > Serials

2.1.14.1. *opacSerialDefaultTab*

Default: Subscriptions tab

Asks: Show ___ as default tab for serials in OPAC.

Values:

• Holdings tab

• Serial Collection tab

> **Important**
>
> Please note that the Serial Collection tab is currently available only for systems using the UNI-MARC standard.

- Subscriptions tab

2.1.14.2. *OPACSerialIssueDisplayCount*

Default: 3

Asks: Show the ___ previous issues of a serial on the OPAC.

Description:

- This preference allows the administrator to select the number of recent issues for each serial which appear in the OPAC when the serial is accessed. This is just the default value, patrons can always click to see a full list of serials.

2.1.14.3. *RenewSerialAddsSuggestion*

Default: Don't add

Asks: ___ a suggestion for a biblio when its attached serial is renewed.

Values:

- Add

- Don't add

Description:

- If set to "Add", this preference will automatically add a serial to the Acquisitions Purchase Suggestions menu when clicking the 'renew' option. If you don't use the Acquisitions module to manage serials purchases it's best to leave this set as 'Don't add.'

2.1.14.4. *RoutingListAddReserves*

Default: Place

Asks: ___ received serials on hold if they are on a routing list.

Values:

- Place

- Don't place

2.1.14.5. *RoutingListNote*

Asks: Include following note on all routing lists

Description:

- Text entered in this box will appear below the routing list information.

2.1.14.6. *RoutingSerials*

Default: Don't add

Asks: ___ received serials to the routing list.

Description:

- This preference determines if serials routing lists are enabled or disabled for the library. When set to "Add", serials routing is enabled and a serial can be directed through a list of people by identifying who should receive it next. The list of people can be established for each serial to be passed using the Serials module. This preference can be used to ensure each person who needs to see a serial when it arrives at the library will get it. Learn more in the *routing list* section of this manual.

Values:

- Add

- Don't add

2.1.14.7. *StaffSerialIssueDisplayCount*

Default: 3

Asks: Show the ___ previous issues of a serial on the staff client.

Description:

- This preference allows the administrator to select the number of recent issues for each serial which appear in the Staff Client when the serial is accessed. This is just the default value, staff members can always click to see a full list of serials.

2.1.14.8. *SubscriptionDuplicateDroppedInput*

Asks: List of fields which must not be rewritten when a subscription is duplicated (Separated by pipe |) ___

Description:

- When duplicating a subscription sometimes you don't want all of the fields duplicated, using this preference you can list the fields that you don't want to be duplicated. These field names come from the subscription table in the Koha database. Learn what fields are in that table on the *Koha DB Schema*[32] site.

2.1.14.9. *SubscriptionHistory*

Default: full history

Asks: When showing the subscription information for a bibliographic record, preselect ___ view of serial issues.

Values:

- brief history

Issues for a subscription

☐ Normal view   Brief history   Full history

Subscription information for Computers in libraries.

The current subscription began on 01/01/2012 and is issued every month for 12 months

The first subscription was started on

The subscription expired on 01/01/2013

Fairfield Combined issues in Jan/Feb and Jul/Aug.

Available issues

V. 31, N. 1; V. 31, N. 4; V. 31, N. 3; V. 31, N. 5; V. 31, N. 2; V. 31, N. 6; V. 31, N. 7; Testing; V. 31, N. 9; V. 32, N. 3; V. 32, N. 2; V. 32, N. 1

- full history

Subscription information for Computers in libraries.

☐ Normal view   Brief history   Full history

Show year: 2012   2011

Date ▾	Library ⬦	Notes ⬦	Date received ⬦	Number ⬦	Status ⬦	Subscription ⬦
01/15/2012			02/23/2012	V. 32, N. 1	Arrived	1
01/15/2012			11/08/2011	Volume 36 / Number 1	Arrived	5
01/15/2012			11/27/2011	Volume 31, Number 1	Arrived	6
03/15/2012			02/23/2012	V. 32, N. 2	Arrived	1
03/15/2012				Volume 36 / Number 2	Waiting	5
03/15/2012				Volume 31, Number 2	Waiting	6
03/15/2012			03/13/2012	V 39, N 2	Arrived	8

---

[32] http://schema.koha-community.org/tables/subscription.html

Description:

- This preference determines what information appears in the OPAC when the user clicks the More Details option. The 'brief' option displays a one-line summary of the volume and issue numbers of all issues of that serial held by the library. The 'full' option displays a more detailed breakdown of issues per year, including information such as the issue date and the status of each issue.

2.1.15. *Staff Client*

Get there: More > Administration > Global System Preferences > Staff Client

2.1.15.1. *Appearance*

2.1.15.1.1. *Display856uAsImage*

Default: Neither details or results page

Asks: Display the URI in the 856u field as an image on: ___

Values:

- Both results and details pages

  -
    > **Important**
    >
    > Not implemented yet

- Detail page only

  -
    > **Important**
    >
    > *XSLTDetailsDisplay* needs to be on for this preference to work.

- Neither details or results page

- Results page only

-

> **Important**
>
> Not yet implemented

Description:

- In addition to this option being set, the corresponding XSLT option must be turned on. Also, the corresponding 856q field must have a valid MIME image extension (e.g., "jpg") or MIME image type (i.e. starting with "image/"), or the generic indicator "img" entered in the field. When all of the requirements are met, an image file will be displayed instead of the standard link text. Clicking on the image will open it in the same way as clicking on the link text. When you click on the image it should open to full size, in the current window or in a new window depending on the value in the system pref *OPACURLOpenInNewWindow*.

2.1.15.1.2. *DisplayIconsXSLT*

Default: Show

Asks: ___ the format, audience, and material type icons in XSLT MARC21 results and detail pages in the staff client.

> **Important**
>
> *XSLTResultsDisplay* and/or *XSLTDetailsDisplay* must be set to use an XSLT stylesheet (default or custom) for these icons to show.

Values:

- Don't show

- Show

Type: 🔊 Sound; Literary form: fiction ; Audience: Juvenile;

> **Note**
>
> See the *XSLT Icon Guide* for more information on these icons.

2.1.15.1.3. *intranet_includes*

Default: includes

Asks: Use include files from the _____ directory in the template directory, instead of includes/. (Leave blank to disable)

2.1.15.1.4. *IntranetCirculationHomeHTML*

Asks: Show the following HTML in its own div on the bottom of the home page of the circulation module:

2.1.15.1.5. *intranetcolorstylesheet*

Asks: Include the additional CSS stylesheet _____ to override specified settings from the default stylesheet

Description:

- This preference is used to set the background color and style of the Staff Client. The value is a .css file. The system administrator should determine which file is appropriate. Enter just a filename, a full local path or a complete URL starting with http:// (if the file lives on a remote server). Please note that if you just enter a filename, the file should be in the css subdirectory for each active theme and language within the Koha templates directory. A full local path is expected to start from your HTTP document root.

> ⭐ **Important**
>
> Leave this field blank to disable.

2.1.15.1.6. *IntranetFavicon*

Asks: Use the image at ___ for the Staff Client's favicon.

> ⭐ **Important**
>
> This should be a complete URL, starting with http://

> 💬 **Note**
>
> Turn your logo into a favicon with the *Favicon Generator*[33].

Description:

- The favicon is the little icon that appears next to the URL in the address bar in most browsers. The default value for this field (if left blank) is the small 'K' in the Koha logo.

2.1.15.1.7. *IntranetmainUserblock*

Asks: Show the following HTML in its own column on the main page of the staff client

---

[33] http://antifavicon.com/

2.1.15.1.8. *IntranetNav*

Asks: Show the following HTML in the More menu at the top of each page on the staff client (should be a list of links or blank)

2.1.15.1.9. *IntranetReportsHomeHTML*

Asks: Show the following HTML in its own div on the bottom of the home page of the reports module:

2.1.15.1.10. *IntranetSlipPrinterJS*

Asks: Use the following JavaScript for printing slips.

Description:

- The most logical use of this preference is in conjunction with the *jsPrintSetup*[34] Firefox add-on. Learn more about this preference and the add-on setup on the Koha wiki at *http://wiki.koha-community.org/wiki/Setting_up_slip_printer_to_print_silently*.

2.1.15.1.11. *intranetstylesheet*

Asks: Use the CSS stylesheet ___ on all pages in the staff interface, instead of the default css (used when leaving this field blank).

Description:

- The Intranetstylesheet preference is a layout and design feature for the intranet or staff client. This preference allows a library to customize the appearance of the Staff Client. Enter just a filename, a full local path or a complete URL starting with http:// (if the file lives on a remote server). Please note that if you just enter a filename, the file should be in the css subdirectory for each active theme and language within the Koha templates directory. A full local path is expected to start from your HTTP document root.

2.1.15.1.12. *IntranetUserCSS*

Asks: Include the following CSS on all pages in the staff client

2.1.15.1.13. *IntranetUserJS*

Asks: Include the following JavaScript on all pages in the staff interface

Description:

---

[34] http://jsprintsetup.mozdev.org/

- This preference allows the administrator to enter JavaScript or JQuery that will be embedded across all pages of the Staff Client. Administrators may use this preference to customize some of the interactive sections of Koha, customizing the text for the login prompts, for example. Sample JQuery scripts used by Koha libraries can be found on the wiki: *http://wiki.koha-community.org/wiki/JQuery_Library*.

2.1.15.1.14. *SlipCSS*

Asks: Include the stylesheet at ___ on Issue and Reserve Slips.

> ⭐ **Important**
>
> This should be a complete URL, starting with http://

Description:

- If you would like to style your receipts or slips with a consistent set of fonts and colors you can use this preference to point Koha to a stylesheet specifically for your slips.

2.1.15.1.15. *StaffAuthorisedValueImages*

Default: Show

Asks: ___ images for authorized values (such as lost statuses and locations) in search results.

Values:

- Don't show

- Show

2.1.15.1.16. *staffClientBaseURL*

Asks: The staff client is located at http:// ___

2.1.15.1.17. *template*

Default: prog

Asks: Use the ___ theme on the staff interface.

Values:

- prog

> ⭐ **Important**
>
> Do not include a trailing slash in the URL this will break links created using this URL. (example: www.google.com not www.google.com/)

2.1.15.1.18. *XSLTDetailsDisplay*

Default: default

Asks: Display details in the staff client using XSLT stylesheet at ___

Values:

- leave empty to not use the XSLT stylesheet

  - In previous versions of Koha this was the setting that read 'normally'

- enter "default" for the default one

Library mashups : exploring new ways to deliver library data /

by **Engard, Nicole C** .

Type: Book

Publisher: Information Today, Inc., c2009 .

Description: 334 p. cm .

ISBN: 9781573873727.

Related Subjects: Mashups (World Wide Web) -- Library applications | Libraries and the Internet | Library Web sites -- Design | Web site development

Online Resources: Click here to access online

Contents: What is a mashup? / Darlene Fichter -- Behind the scenes : some technical details on mashups / Bonaria Biancu -- Making your data available to be mashed up / Ross Singer -- Mashing up with librarian knowledge / Thomas Brevik -- Information in context / Brian Herzog -- Mashing up the library website / Lichen Rancourt -- Piping out library data / Nicole C. Engard -- Mashups @ Libraries interact / Corey Wallis -- Library catalog mashup : using Blacklight to expose collections / Bess Sadler, Joseph Gilbert, and Matt Mitchell -- Breaking into the OPAC / Tim Spalding -- Mashing up open data with biblios.net Web services / Joshua Ferraro -- SOPAC 2.0 : the thrashable, mashable catalog / John Blyberg -- Mashups with the WorldCat Affiliate Services / Karen A. Coombs -- Flickr and digital image collections / Mark Dahl and Jeremy McWilliams -- Blip.tv and digital video collections in the library / Jason A. Clark -- Where's the nearest computer lab? : mapping up campus / Derik A. Badman -- The repository mashup map / Stuart Lewis -- The LibraryThing API and libraries / Robin Hastings -- ZACK bookmaps / Wolfram Schneider -- Federated database search mashup / Stephen Hedges, Laura Solomon, and Karl Jendretzky -- Electronic dissertation mashups using SRU / Michael C. Witt.

- put a path to define a XSLT file

  - ex: /path/to/koha/and/your/stylesheet.xsl

  - If in a multi-language system you can enter {langcode} in the path to tell Koha to look in the right language folder

    - ex: /home/koha/src/koha-tmpl/intranet-tmpl/prog/{langcode}/xslt/intranetDetail.xsl

    - ex. http://mykoha.org/{langcode}/stylesheet.xsl

- put an URL for an external specific stylesheet

  - ex: http://mykoha.org/stylesheet.xsl

Description:

- XSLT stylesheets allow for the customization of the details shows on the screen when viewing a bib record. This preference will allow you either use the default look that comes with Koha or design your own stylesheet.

2.1.15.1.19. *XSLTResultsDisplay*

Default: default

Asks: Display results in the staff client using XSLT stylesheet at ___

Values:

- leave empty to not use the XSLT stylesheet

  - In previous versions of Koha this was the setting that read 'normally'

- enter "default" for the default one

- put a path to define a XSLT file

  - ex: /path/to/koha/and/your/stylesheet.xsl

  - If in a multi-language system you can enter {langcode} in the path to tell Koha to look in the right language folder

    - ex: /home/koha/src/koha-tmpl/intranet-tmpl/prog/{langcode}/xslt/intranetDetail.xsl

    - ex. http://mykoha.org/{langcode}/stylesheet.xsl

- put an URL for an external specific stylesheet

  - ex: http://mykoha.org/stylesheet.xsl

Description:

- XSLT stylesheets allow for the customization of the details shows on the screen when viewing the search results. This preference will allow you either use the default look that comes with Koha or design your own stylesheet.

2.1.15.2. *Options*

2.1.15.2.1. *HidePatronName*

Default: Show

Asks: ___ the names of patrons that have items checked out or on hold on detail pages or the "Place Hold" screen.

Values:

- Don't show

- Show

2.1.15.2.2. *intranetbookbag*

Default: Show

Asks: ___ the cart option in the staff client.

Values:

* Don't show

* Show

2.1.15.2.3. *StaffDetailItemSelection*

Default: Enable

Asks: ___ item selection in record detail page.

Values:
* Disable

* Enable

Description:
* This preference lets you choose to show (or not show) checkboxes to the left of every item in the holdings tab on the detail display of a record in the staff client. Showing these checkboxes allows the staff members to select multiple items to edit or delete at once.
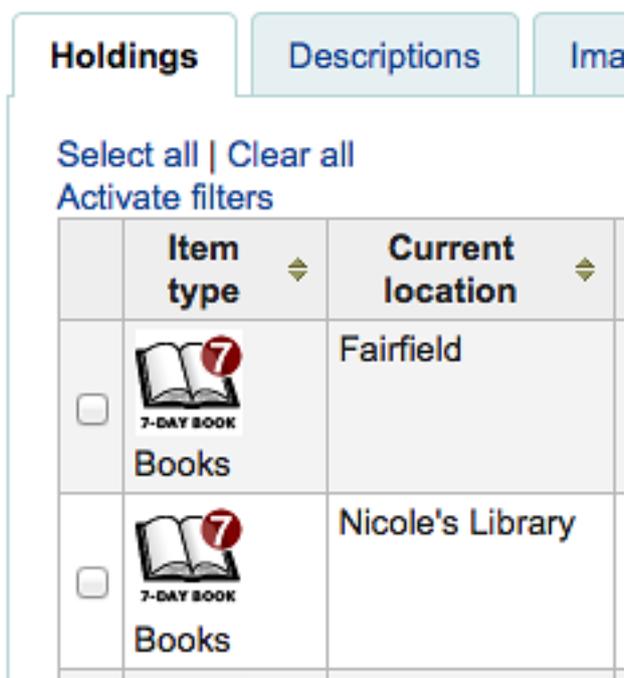
2.1.15.2.4. *UseWYSIWYGinSystemPreferences*

Default: Don't show

Asks: ___ WYSIWYG editor when editing certain HTML system preferences.

Values:
* Don't show

* Show
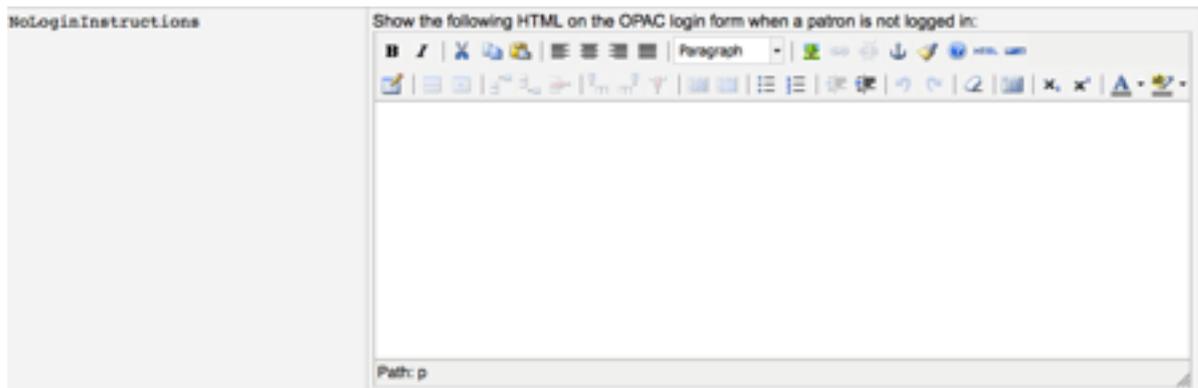
Description:

- This preference allows you to chang system preferences with HTML in them to WYSIWYG editors instead of plain text boxes.

2.1.15.2.5. *viewISBD*

Default: Allow

Asks: ___ staff to view records in ISBD form on the staff client.

Values:

- Allow

- Don't allow

2.1.15.2.6. *viewLabeledMARC*

Default: Allow

Asks: ___ staff to view records in labeled MARC form on the staff client.

Values:

- Allow

- Don't allow

2.1.15.2.7. *viewMARC*

Default: Allow

Asks: ___ staff to view records in plain MARC form on the staff client.

Values:

- Allow

- Don't allow

2.1.16. *Tools*

Get there: More > Administration > Global System Preferences > Tools

2.1.16.1. *Batch Item Modification*

These preferences are in reference to the *Batch Item Modification* tool.

2.1.16.1.1. *MaxItemsForBatch*

Default: 1000

Asks: Process up to ___ items in a single modification or deletion batch.

Description:
- In the *batch item delete tool* this will prevent the display of more than the items you entered in this preference, but you will be able to delete more than the number you enter here. In the *batch item modification tool* this preference will prevent the editing of more than the number entered here.

2.1.16.2. *News*

2.1.16.2.1. *NewsAuthorDisplay*

Default: not at all

Asks: Show the author for news items: ___

Values:
- Both OPAC and staff client

- Not at all

- OPAC only

- Staff client only

2.1.16.3. *Patron Cards*

These preferences are in reference to the *Patron Card Creator* tool.

2.1.16.3.1. *ImageLimit*

Asks: Limit the number of creator images stored in the database to ___ images.

2.1.17. *Web Services*

Get there: More > Administration > Global System Preferences > Web Services

2.1.17.1. *IdRef*

Default: Disable

Asks: ___ the IdRef webservice from the opac detail page. IdRef allows to request authorities from the Sudoc database.

Values:
- Disable

- Enable

Description:
- IdRef is a French service for Sudoc autorities. Using the *Sudoc database*[35], it allows to request / modify / add authorities. If a record comes from the Sudoc (so 009 is filled with an integer), at the

---

[35] http://www.sudoc.abes.fr/

OPAC you will see "Author: Idref" if a 7..$3 (unimarc author) if filled with a ppn. On clicking on the Idref link, a popup will display.
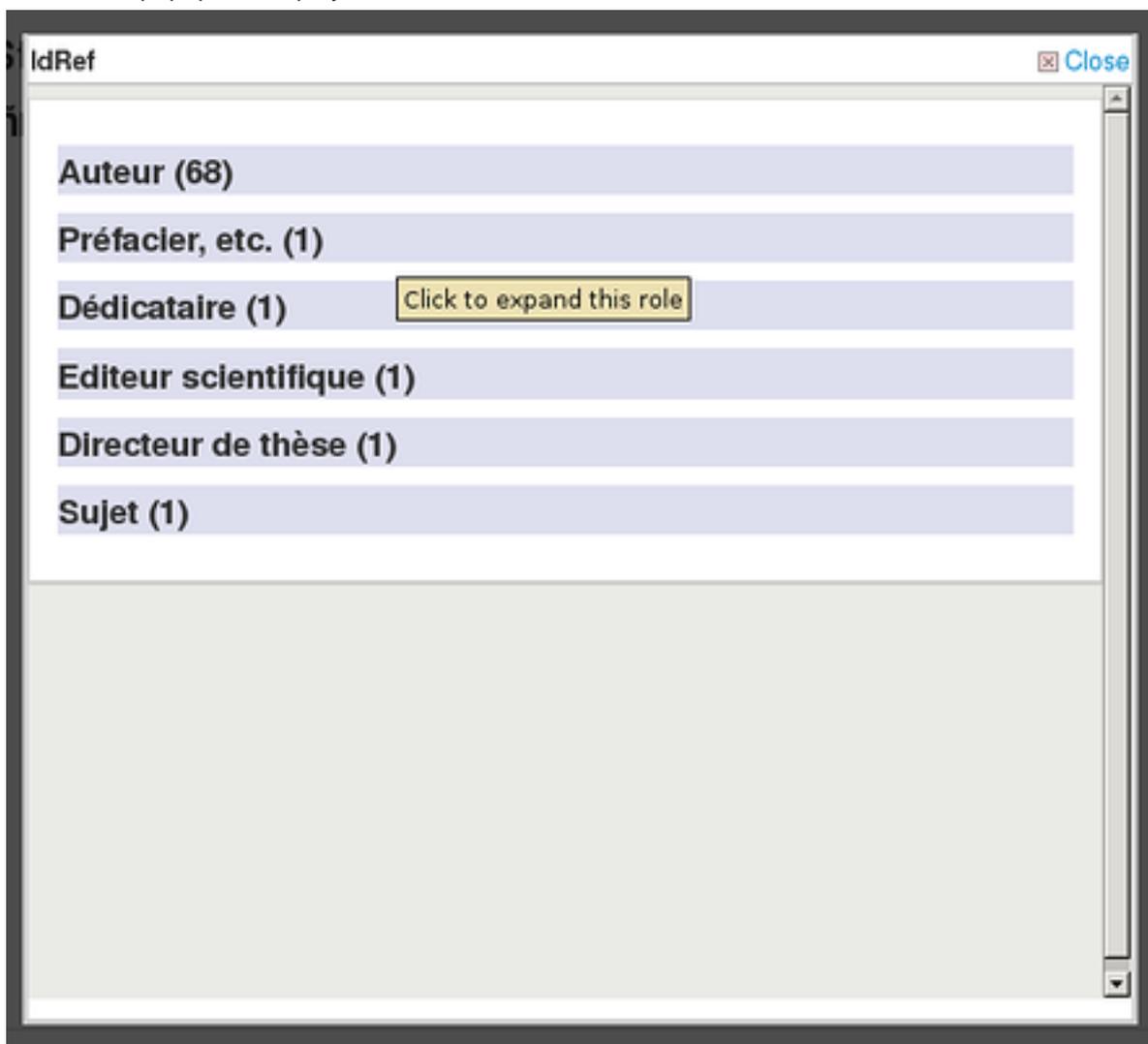
The Idref webservice is requested and all records (by roles) for this author will be displayed

There is 1 line / record and 2 links at the end. 1 will request Koha (cgi-bin/koha/opac-search.pl?
q=ident:003381862), the other one will redirect to the sudoc page (http://www.sudoc.fr/003381862).

-

  Important

  Please note that this feature is available only for libraries using UNIMARC.

-

  Note

  The French Sudoc database should not be confused with the US Superintendent of Documents
  (SuDocs) Classification Scheme.

2.1.17.2. *ILS-DI*

2.1.17.2.1. *ILS-DI*

Default: Disable

Asks: ___ ILS-DI services for OPAC users

Values:

- Disable

- Enable

2.1.17.2.2. *ILS-DI:AuthorizedIPs*

Asks: ___ allowed IPs to use the ILS-DI services

2.1.17.3. *OAI-PMH*

2.1.17.3.1. *OAI-PMH*

Default: Disable

Asks: ___ Koha's OAI-PMH server.

Values:

- Disable

- Enable

Description:

- Once enabled you can visit http://YOURKOHACATALOG/cgi-bin/koha/oai.pl to see your file. For the Open Archives Initiative-Protocol for Metadata Harvesting (OAI-PMH) there are two groups of 'participants': Data Providers and Service Providers. Data Providers (open archives, repositories) provide free access to metadata, and may, but do not necessarily, offer free access to full texts or other resources. OAI-PMH provides an easy to implement, low barrier solution for Data Providers. Service Providers use the OAI interfaces of the Data Providers to harvest and store metadata. Note that this means that there are no live search requests to the Data Providers; rather, services are based on the harvested data via OAI-PMH. Koha at present can only act as a Data Provider. It can not harvest from other repositories. The biggest stumbling block to having Koha harvest from other repositories is that MARC is the only metadata format that Koha indexes natively. Visit *http://www.oaforum.org/tutorial/english/page3.htm* for diagrams of how OAI-PMH works.

Learn more about OAI-PMH at: *http://www.openarchives.org/pmh/*

2.1.17.3.2. *OAI-PMH:archiveID*

Default: KOHA-OAI-TEST

Asks: Identify records at this site with the prefix ___ :

2.1.17.3.3. *OAI-PMH:AutoUpdateSets*

Default: Disable

Asks: ___ automatic update of OAI-PMH sets when a bibliographic record is created or updated.

Values:

• Disable

• Enable

2.1.17.3.4. *OAI-PMH:ConfFile*

If this preference is left empty, Koha's OAI Server operates in normal mode, otherwise it operates in extended mode. In extended mode, it's possible to parameter other formats than marcxml or Dublin Core. OAI-PMH:ConfFile specify a YAML configuration file which list available metadata formats and XSL file used to create them from marcxml records.

For more information, see the *sample conf file* in the appendix.

2.1.17.3.5. *OAI-PMH:DeletedRecord*

Default: will never be emptied or truncated (persistent)

Asks: Koha's deletedbiblio table ___

Values:
• will never have any data in it (no)

• will never be emptied or truncated (persistent)

• might be emptied or truncated at some point (transient)

2.1.17.3.6. *OAI-PMH:MaxCount*

Default: 50

Asks: Only return ___ records at a time in response to a ListRecords or ListIdentifiers query.

Description:

• This is the maximum number of records that would be returned based on ListRecord or ListIdentifier queries from harvesters. ListRecords harvest the entire records while the ListIdentifier is an abbreviated form of ListRecords, retrieving only headers rather than records.

2.1.17.4. *Reporting*

2.1.17.4.1. *SvcMaxReportRows*

Default: 10

Asks: Only return ___ rows of a report requested via the reports web service.

Description:
• This value will be used to limit the number of results returned by *public reports*.

2.2. *Basic Parameters*

Get there: More > Administration

> ⭐ **Important**
>
> Configure all 'parameters' in the order they appear.

2.2.1. *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.

2.2.1.1. *Adding a Library*

To add a new library:

- Click 'New Library'

- The top of the form asks for some basics about the library

- 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
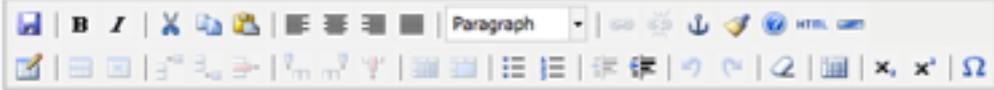
- The address and contact fields can be used to make notices custom for each library

- The email address field is not required, but it should be filled for every library in your system

-

> **Important**
>
> 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

- The OPAC Info box is for you to put information about the library that will appear in the OPAC when the branch name is moused over in the holdings table

- IP Address does not have be filled in unless you plan on limiting access to your staff client to a specific IP Address

-
> **Important**
>
> An IP address is required if you have enabled *AutoLocation*

- Finally, if you have any notes you can put them here. These will not show in the OPAC

> **Note**
>
> Of the fields listed, only 'Library code' and 'Name' are required

2.2.1.2. *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'

2.2.1.3. *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:	searchdomain ⬍
Show in search pulldown:	☐

Update

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 *OpacAddMastheadLibraryPulldown* set to 'Add') and on the advanced search page you can check the 'Show in search pulldown' box.

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

2.2.1.3.1. *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.

Group(s): Search Domain

Name	Code	Description		
Smith County Libraries	SMITH		Edit	Delete

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

Location and availability:

Only items currently available ☐

Individual Libraries: All Libraries ⬍

OR

Groups of Libraries: -- none -- ⬍

-- none --
Smith County Libraries

2.2.1.3.2. *Library Property Groups*

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

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

2.2.2. *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.

2.2.2.1. *Adding Item Types*

To add a new item type, simply click the 'New Item Type' button at the top of the Item Types page.

Add item type

Item type:	[ ] *Required*
Description:	[ ] *Required* ☑ Translate into other languages
Search category	None [ ] (Options are defined as the authorized values for the ITEMTYPECAT category)

Choose an icon:

None	npl	crystal-clear	**carredart**	liblime-kids	colors	Seshat	bridge	vokal	Remote image

Hide in OPAC:	☐ (If checked, items of this type will be hidden as filters in OPAC's advanced search)
Not for loan:	☐ (If checked, no item of this type can be issued. If not checked, every item of this type can be issued unless notforloan is set for a specific item)
Rental charge:	0.00
Checkin message:	
Checkin message type:	Message [ ]
SIP media type:	[ ]
Summary:	

Enter a summary that will overwrite the default one in search results lists. Example, for a website itemtype :

open site will show the link just below the title

[Save changes] [Cancel]

- In the 'Item Type' field, enter a short code for your item type

- The description is the plain text definition of the item type (for those with multiple languages installed you can translate the item type description in to all of those languages using the 'Translate in to other languages' link)

- Item types and can grouped together for searching at the same time. For example you can put DVDs and Bluray in to a group called Movie and then they can be searched together. These groups are defined in the ITEMTYPECAT authorized value.

- You can choose to have an image associated with your item type

  - You can choose from a series of image collections

  - You can link to a remote image

  - Or you can just have no image associated with the item type

-

> **Important**
>
> To have your item type images appear in the OPAC you need to set *noItemTypeImages* to 'Show'

  - *Get there:* More > Administration > Global System Preferences > *Admin*

- For items that you are suppressing from the OPAC you can hide their item type from being searched in the OPAC

- For items that do not circulate, check the 'Not for loan' options

  - Items marked 'Not for loan' will appear in the catalog, but cannot be checked out to patrons

- For items that you charge a rental fee for, enter the total fee you charge in the 'Rental charge' field

-

> **Important**
>
> Do not enter symbols in this field, only numbers and decimal points (ex. $5.00 should be entered as 5 or 5.00)

  - This will charge the patron on checkout

- If you would like a message or alert to appear when items of this type are checked in you can enter that in the 'Checkin message' box

Checkin message: This is a book

Checkin message type: Alert

- 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

and an Alert is yellow.

- 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

2.2.2.2. *Editing Item Types*

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

> **Important**
>
> 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.

2.2.2.3. *Deleting Item Types*

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

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

2.2.3. *Authorized Values*

Authorized values can be used in several areas of Koha. One reason you would add an authorized value category would be to control the values that can be entered into MARC fields by catalogers.

- *Get there:* More > Administration > Basic Parameters > Authorized Values

2.2.3.1. *Existing Values*

Koha installs with pre-defined values that your library is likely to use, for instance 'Lost'.

- Asort1

  - Used for acquisitions statistical purposes

- Asort2

  - Used for acquisitions statistical purposes

- BOR_NOTES

- Values for custom patron messages that appear on the circulation screen and the OPAC. The value in the Description field should be the message text and is limited to 200 characters.

- 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)

  -
    > ⭐ **Important**
    >
    > Values given to lost statuses should be numeric and not alphabetical in order for statuses to appear properly

- MANUAL_INV

  - Values for manual invoicing types

  -
    > ⭐ **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. Enter monetary amounts in the description without currency symbols.

- NOT_LOAN

  - Reasons why a title is not for loan

  -
    > ⭐ **Important**
    >
    > 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

- ORDER_CANCELLATION_REASON
  - Reasons why an order might have been cancelled

- 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, Acquitisions, Catalog, Circulation, Patrons)

Show category: REPORT_GROUP

Authorized values for category REPORT_GROUP:

Page(s): 1/1 Entries/page: 50

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: REPORT_SUBGROUP

Authorized values for category REPORT_SUBGROUP:

Page(s): 1/1 Entries/page: 50

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.

2.2.3.2. *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'

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

-

> ⭐ **Important**
>
> 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

    -

    > ⭐ **Important**
    >
    > 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

2.2.3.3. *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 ...'

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

-
  > **Important**
  >
  > 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

2.3. *Patrons & Circulation*

Settings for controlling circulation and patron information.

2.3.1. *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

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.

2.3.1.1. *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: [0.00]

Overdue notice required: [No ⬍]

Lost items in staff client: [Shown ⬍]

Hold fee: [0.00]

Category type: [Select a 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 [Follow system preference BlockExpiredPatronOpacActions ⬍] 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: [Default ⬍] 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	[0 ⬍]	☐	☐	☐	☐
Item checkout	-	☐	☐	-	☐
Hold filled	-	☐	☐	-	☐
Item due	-	☐	☐	☐	☐
Item check-in	-	☐	☐	-	☐

[Save]

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

-

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

-

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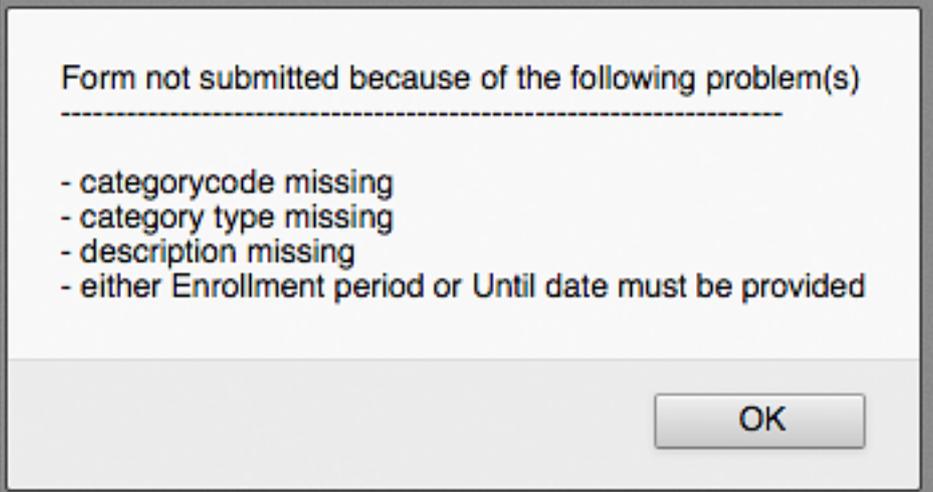
- Enter a plain text version of the category in the 'Description' field.

-

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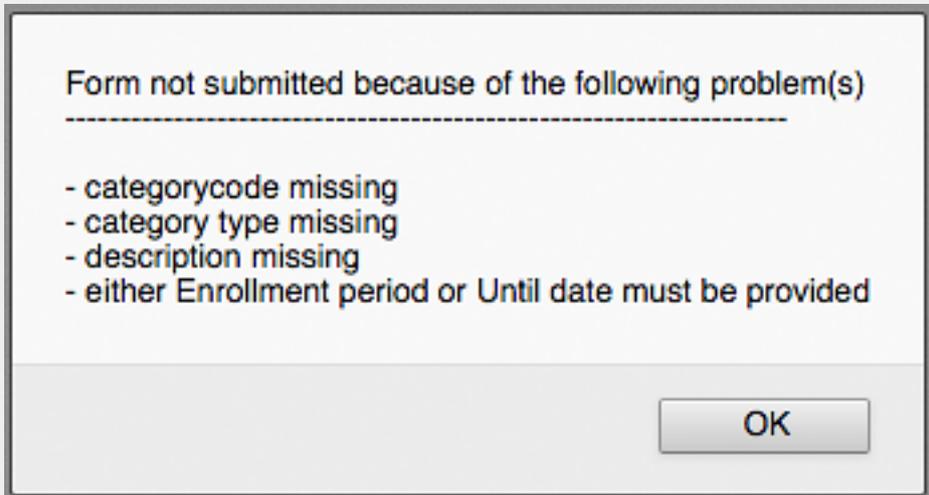
- Enrollment period (in months) should be filled in if you have a limited enrollment period for your patrons (eg. Student cards expire after 9 months or until a specific date)

-

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

-

  Important

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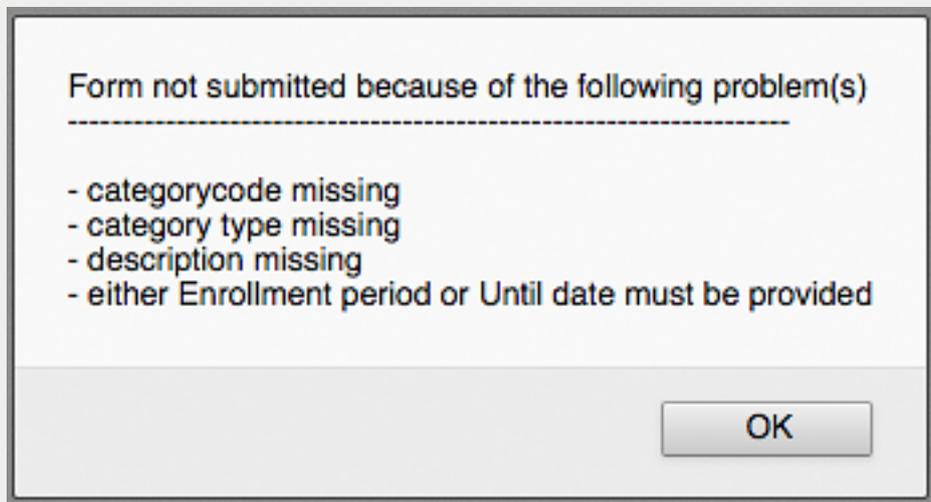
- Some patron categories can have a minimum age (in years) requirement associated with them, enter this age in the 'Age required'

-

  Important

  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'

-

  Important

  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.

-

  Important

  Only enter numbers and decimals in this field

-

  Note

  Depending on your value for the *FeeOnChangePatronCategory* preference this fee will be charged on patron renewal as well as when they are first enrolled.

- 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

Lost items in staff client

Shown

Shown
Hidden by default

Hold fee: 0.00

-
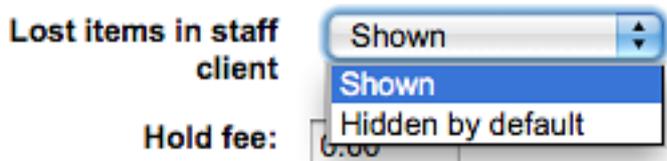
  Important

  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.

-

  Important

  Only enter numbers and decimals in this field

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

-

Important

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

- 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 the *BlockExpiredPatronOpacActions* preference

- 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.

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

-
> ⭐ **Important**
>
> 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 the *misc/main-tenance* folder. Ask your system administrator for assistance with this script.

2.3.2. *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.

2.3.2.1. *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

- 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

- If you're allowing *OnSiteCheckouts* then you may also want to set a limit on the number of items patron's can have onsite.
  -
    > **Note**
    >
    > This setting also depends on the *ConsiderOnSiteCheckoutsAsNormalCheckouts* preference

- 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)

- 'When to charge' is most handy in libraries that have a fine charging interval of more than 1 day.
  - End of interval
    - Given a grace period of 2 days and a fine interval of 7 days, the first fine will appear 7 days after the due date, it will always take one fine interval (7 days), before the first fine is charged

  - Start of interval

- Given a grace period of 2 days and a fine interval of 7 days, the first fine will appear 2 days after the due date and the second fine 7 days after the due date.

- 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 you would like to prevent overcharging patrons for a lost items, you can check the box under 'Cap fine at replacement price.' This will prevent the patron's fines from going above the replacement price on the item.

-
> **Note**
>
> If the 'Overdue fines cap' is also set, the fine will be the lesser of the two, if both apply to the given overdue checkout.

- 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.

  - To control this value on a more granular level please set the *NoRenewalBeforePrecision* preference.

- 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

- Next you can decide if this patron/item combo are allowed to place holds on items that are on the shelf (or available in the library) or not. If you choose 'no' then items can only be placed on hold if checked out

- You can also decide if patrons are allowed to place item specific holds on the item type in question. The options are:
  - Allow: Will allow patrons the option to choose next available or item specific

  - Don't allow: Will only allow patrons to choose next available

  - Force: Will only allow patrons to choose an specific item

- Finally, if you charge a *rental fee [229]* 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 fule and edit the values that appear filled in at the bottom of the form.

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.

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

2.3.2.2. *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.

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

- In 'Total current on-site checkouts allowed' enter the total number of items patrons can have checked out on site at a time (*OnSiteCheckouts* needs to be set to 'Enable')

- 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 if there is a limit to filling a hold based on the item's library
  - any library

  - item's home library

- item's holding library

-

>
> **Note**
>
> The patron's home library should not affect whether a patron can place the hold, instead the hold will only be fillable when an item matching the pickup location becomes available.

- 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

2.3.2.3. *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.

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	Total current on-site checkouts allowed	
Board			+ 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.

2.3.2.4. *Item Hold Policies*

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

Default holds policy by item type

For this library, you can edit rules for given itemtypes, regardless of the patron's category.

Currently, this means hold policies. The various 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.

Note: If the system preference 'AllowHoldPolicyOverride' is enabled, these policies can be overridden by your circulation staff.
Important: The policies are based on the patron's home library, not the library where the hold is being placed.

Item type	Hold policy	Hold pickup library match	Return policy	
Archival Copy	From any library	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.

Control if there is a limit to filling a hold based on the item's library
- any library

- item's home library

- item's holding library

-
> **💬 Note**
>
> The patron's home library should not affect whether a patron can place the hold, instead the hold will only be fillable when an item matching the pickup location becomes available.

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.

2.3.3. *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.

2.3.3.1. *Adding Patron Attributes*

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

Add patron attribute type

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

-
> ### ⭐ Important
>
> This field is limited to 10 characters (numbers and letters only)

-
  Important

  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

Nicole Engard (9876543457)
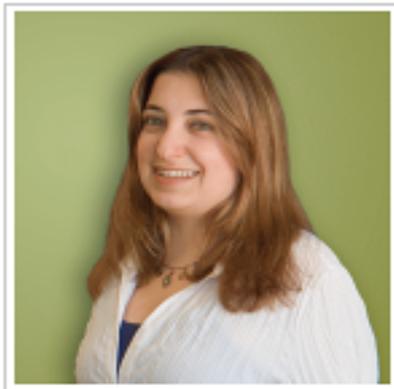
123 My Street
Philadelphia, PA 19101
555.111.2345
nengard@gmail.com   ...
Student ID : 12345675432
Category: Staff (S)
Home Library: Nicole's Library

- 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)		Clear
HBR (Home Branch)		Clear
RES (Resident)	‡	Clear
SHOW_BCODE (Show Barcode in OPAC)	‡	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)		Clear
RES (Resident)	‡	Clear
SHOW_BCODE (Show Barcode in OPAC)	‡	Clear

Students

Type	Value	
STUID (Student ID)		Clear

2.3.3.2. *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

2.3.4. *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 : Centerville ⇅ Choose

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: CCODE ⇅
Values for collection codes

Authorized values for category CCODE:

Page(s): ⏮ ◀ 1/2 ▶ ⏭ Entries/page: 10 ⇅

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 : [Centerville ⬍] [Choose]

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	☑
FFL - Fairfield	☑
FPL - Fairview	☑
FRL - Franklin	☐
IPT - Institut Protestant de Théologie	☑
LPL - Liberty	☐
MMM - Main	☑
MPL - Midway	☑
PVL - Pleasant Valley	☑
RPL - Riverside	☑
SPL - Springfield	☑
TPL - Troy	☑
UPL - Union	☑

[Save] Cancel

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

2.3.5. *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'

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).

2.3.6. *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

- 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   Check-in

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.

2.3.7. *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

2.3.7.1. *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:	

Submit   Cancel

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

Cities can be edited or deleted at any time.

2.3.7.2. *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.

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

2.4. *Catalog Administration*

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

- *Get there:* More > Administration > Catalog

2.4.1. *MARC Bibliographic Frameworks*

Think of Frameworks as templates for creating new bibliographic records. Koha comes with some pre-defined 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 : 20 ⇅

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	

(dropdown: 10, 20, 30, 40, 50, 100)

2.4.1.1. *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 [Default ▼] 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 in-structions for *editing subfields*

2.4.1.2. *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 [Books, Booklets, Workbooks]

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*

2.4.1.3. *Add subfields to Frameworks*

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

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

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

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.

2.4.1.4. *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

- 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

- 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

- 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.

  -

    > **Note**
    >
    > If you would like a field to fill in with today's date you can use the YYYY MM DD syntax in the 'Default value'. For example: a default of "Year:YYYY Month:MM Day:DD" (without quotes) will print as "Year:2015 Month:11 Day:30"

- 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.

- 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

- Authorized value

    - means the value cannot by 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
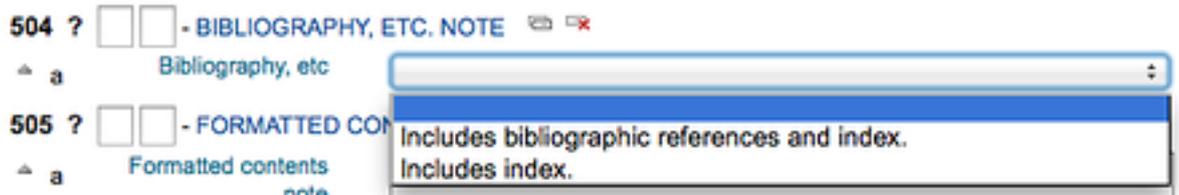
- Thesaurus

    - 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.

    - Examples:
        - For call numbers there is an option to add a call number browser next to the the call number subfield so that you can identify which call numbers are in use and which are not. Simply choose the cn_browser.pl plugin. Learn more in the *cataloging section* of this manual.

    - If you'd like to let file uploads via cataloging you can choose the upload.pl plugin and this will allow you to *upload files to Koha to link to your records*.

- In UNIMARC there are plugins for every 1xx fields that are coded fields. The plug-in 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

2.4.1.5. *Import/Export Frameworks*

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

2.4.1.5.1. *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 |
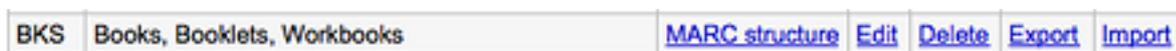
When you click 'Export' you will be prompted to choose what format to export the file in.
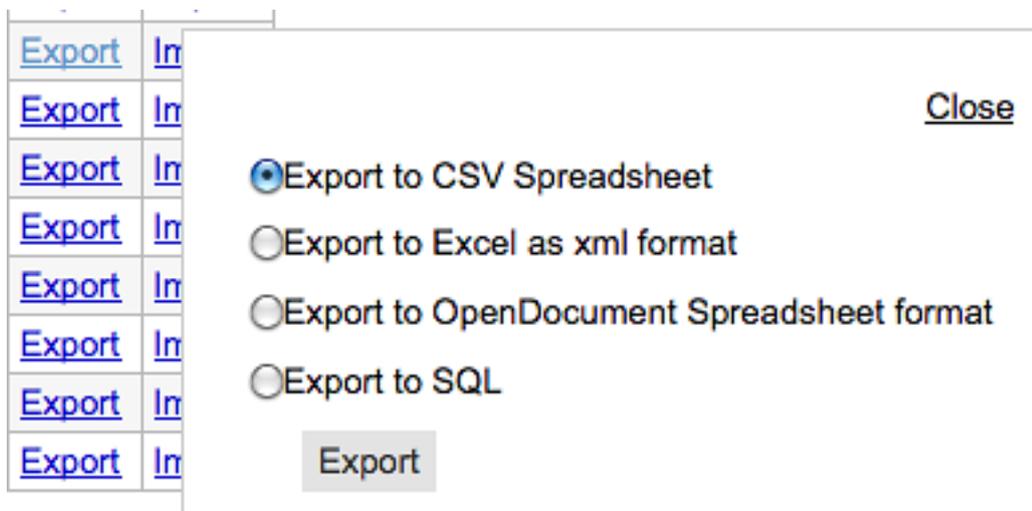
A framework exported this way can be imported into any other Koha installation using the import framework option.

2.4.1.5.2. *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 |
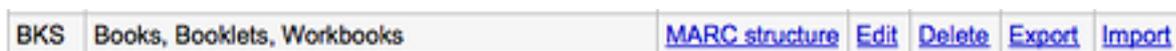
You will be prompted to find a file on your computer to import into the framework.
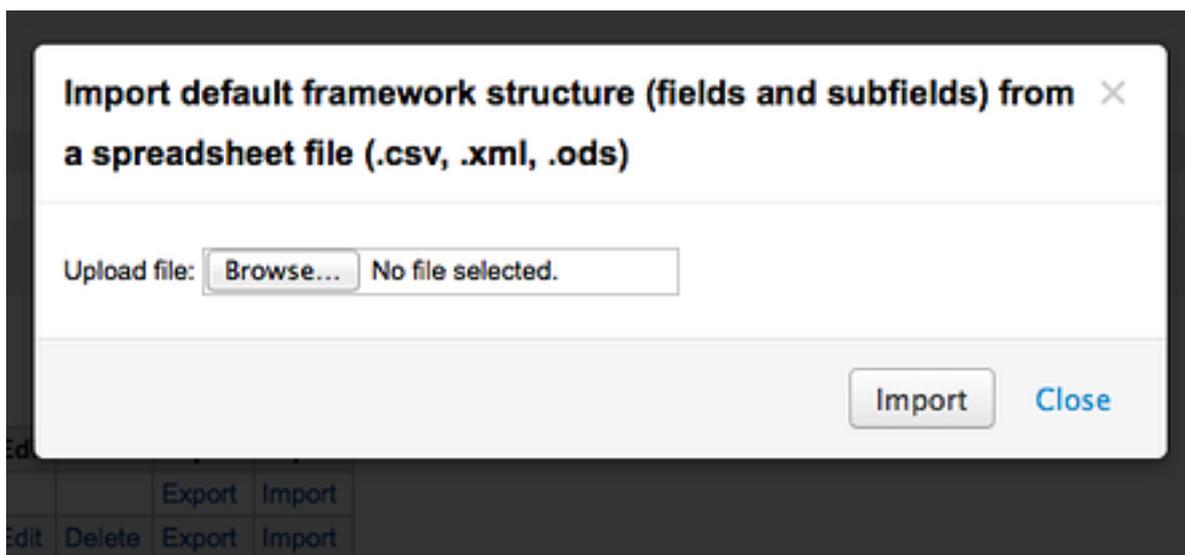
You will be asked to confirm your actions before the file is imported.
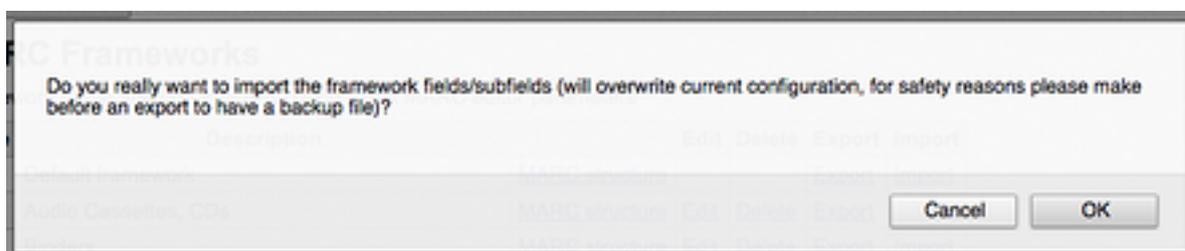
As your file is uploaded you will see an image that will confirm that the system is working.
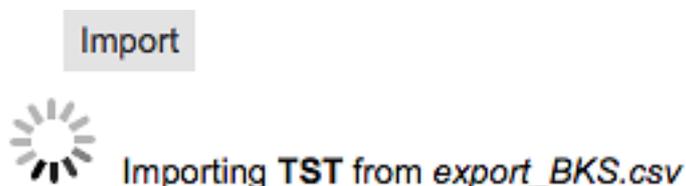
Once your import is complete you will be brought to the framework edit tool where you can make any changes you need to the framework you imported.

2.4.2. *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

	Tag	Subfield	Lib	
	999	c	Koha biblionumber	Edit
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.
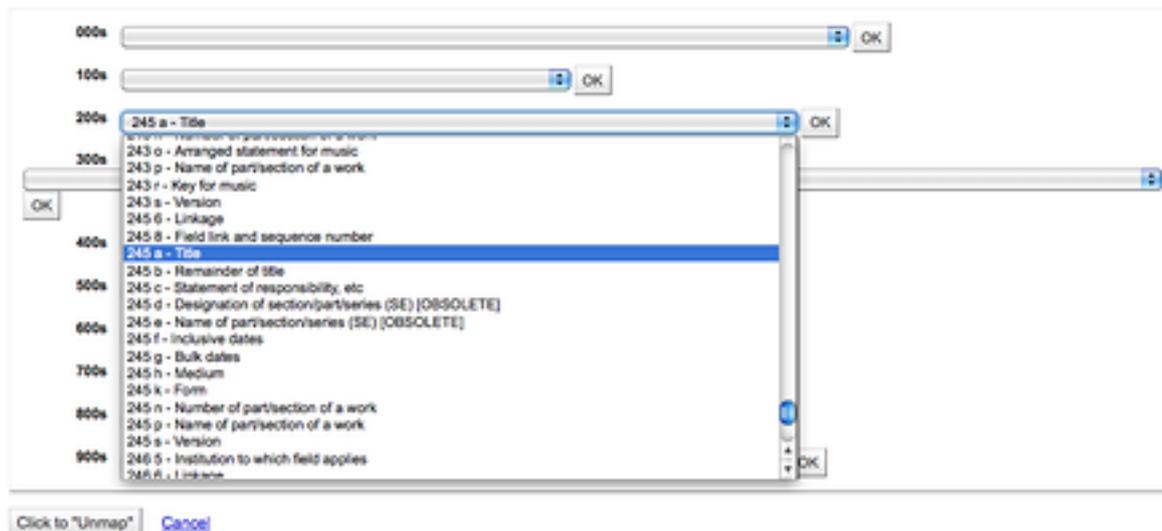
Choose which MARC field you would like to map to this Koha Field and click the 'OK' button. If you would like to clear all mappings, click the 'Click to "Unmap"' button.

> **⭐ 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.

2.4.3. *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.

However the subtitle for DVDs appears in 245$p

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

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.

2.4.4. *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

2.4.5. *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

2.4.6. *Classification Sources*

Savitra Sirohi
Edited by Nicole C. Engard
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

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

2.4.6.1. *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.

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.

2.4.6.2. *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

2.4.7. *Record Matching Rules*

Joy Nelson
Edited by Nicole C. Engard
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:

Table 2.1. Authority Indexes

Index name	Matches Marc Tag
LC-cardnumber	010$a
Personal-name	100$a
Corporate-name-heading	110$a
Meeting-name	111$a
Title-uniform	130$a
Chronological-term	148$a
Subject-topical	150$a
Name-geographic	151$a
Term-genre-form	155$a

2.4.7.1. *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: [Bibliographic record ‡] *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 semi-colons. The value you enter in this field is irrelevant to the normalization process.

- 'Required match checks' - ??

2.4.7.2. *Sample Bibliographic Record Matching Rule: Control Number*

Add record matching rule

Matching rule code: `LOC` *Required*

Description: `Library of Congress ID Number` *Required*

Match threshold: `100` *Required*

Record type: `Bibliographic record` *Required*

Match points

Match point 1 | Add match point | Remove this match point

Search index: `Control-number`

Score: `101`

Matchpoint components

Tag: `001`

Subfields: `a`

Offset: `0`

Length: `0`

Normalization rule: `Control-number`

Required match checks

Add match check

Save   Cancel

• 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)

2.4.8. *OAI Sets Configuration*

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

2.4.8.1. *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'

2.4.8.2. *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.

2.4.8.3. *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'.

2.4.8.4. *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.

2.4.9. *Item search fields*

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

To add a new search term simply click the 'New search field' button

- 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

2.5. *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

2.5.1. *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	ISO code	Last updated	Active	Actions	
CAD	1.02207	$		02/18/2011		Edit	Delete
EUR	0.87400	€		02/18/2011		Edit	Delete
GBP	1.99290	£		02/18/2011		Edit	Delete
USD	1.00000	$	USD	05/12/2014	✓	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.

No active currency is defined

Please edit one currency and mark it as active.

2.5.2. *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.

2.5.2.1. *Adding budgets*

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

2.5.2.1.1. *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.

- 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.

2.5.2.1.2. *Duplicate a budget*

To duplicate a budget from a previous year, click on the link for the budget name from the list of budgets

On the screen listing the budget breakdown click the Edit button at the top and choose to Duplicate budget

You can also click the 'Actions' button to the right of the budget and choose 'Duplicate'.

In both cases you will be presented with a form where you simply need to enter the new start and end date and save the budget.

Check the box for 'Mark the original budget as inactive' if the original budget should no longer be used.

Check the box for 'Set all funds to zero' if you wish the new budget to contain all the same fund structures as the previous budget but no allocations until you manually enter an amount in the fund.

This will not only duplicate your budget, but all of the funds associated with that budget so that you can reuse budgets and funds from year to year and so that you can move unreceived orders and if desired unspent funds from a previous budget to the new budget.

2.5.2.1.3. *Close a budget*

Denise Hannibal
Edited by Nicole C. Engard
2014
Close a budget to move or roll over unreceived orders and if desired unspent funds from a previous budget to a new budget. Before closing your budget you might want to *duplicate the previous year's budget* so that you have somewhere for the unreceived orders to roll to.

Find the previous budget with unreceived orders on the Active budgets or the Inactive budgets tab and select 'Close' under 'Actions'.

Budgets administration

Currency = USD

> **Note**
>
> In order for the unreceived orders to be automatically moved to the new budget, the fund structures in the previous budget must exist in the new budget. Budgets without unreceived orders cannot be closed.

When you select 'Close' you will be presented with a form.

The unreceived orders from the following funds will be moved

Fund list of budget 2014:

Fund id ▲	Fund code ⇕	Fund name ⇕	Unreceived orders ⇕
1		Books	1
2		Audio/Visual	0

Use the 'Select a budget' drop down to choose the new budget for the unreceived orders.

Check the box for 'Move remaining unspent funds' to move the unspent amounts from the funds of the budget being closed to the selected budget.

Once you have made your choices, click the 'Move unreceived orders' button. You will be presented with a dialog box that says 'You have chosen to move all unreceived orders from 'Budget X' to 'Budget Y'. This action cannot be reversed. Do you wish to continue?' Budget X is the budget to be closed and Budget Y is the selected budget.
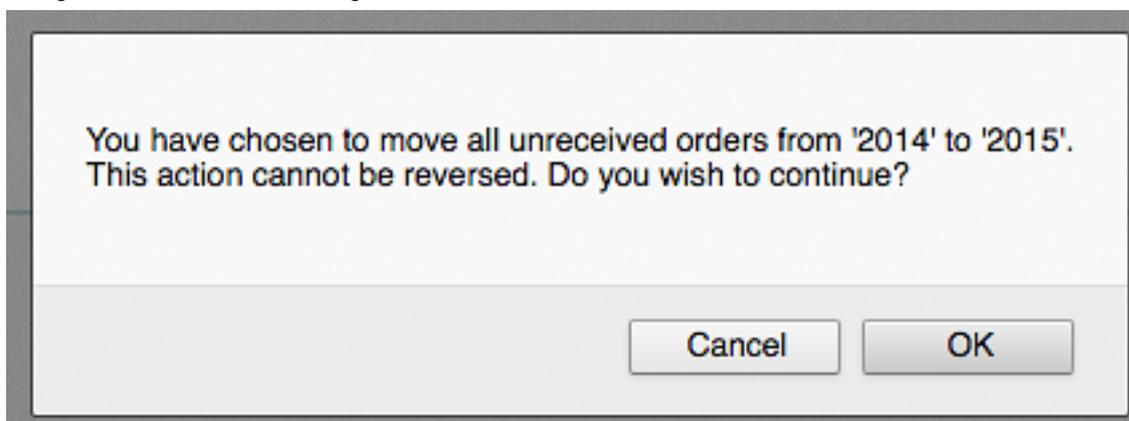
If everything seems correct click 'OK' and the unreceived orders and, if selected, unspent funds will be moved.

Wait until the 'Report after moving unreceived orders from budget X to Y' displays. This will list the order numbers which have been impacted (grouped by fund) and detail if the unreceived order was moved or if there was a problem. For example, if the new budget does not contain a fund with the same name as the previous budget, the order will not be moved.

2.5.3. *Funds*

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

2.5.3.1. *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.
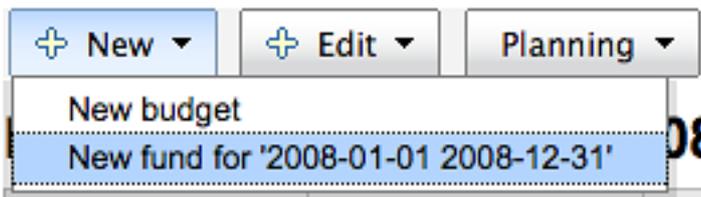
In the form that appears you want to enter the basics about your fund.

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

-

>
>
> **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.

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.

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.

2.5.3.2. *Budget Planning*

When viewing the list of funds click the 'Planning' button and choose how you would like to plan to spend your budget.
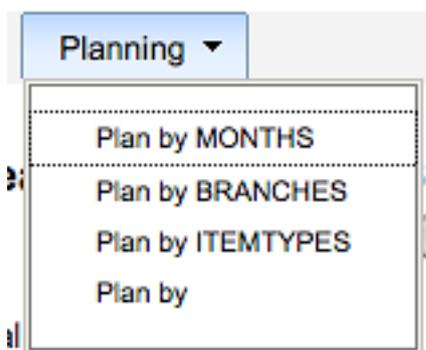
If you choose 'Plan by MONTHS' you will see the budgeted amount broken down by months:

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.

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.

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.

2.5.4. *EDI Accounts*

From here you can set up the information needed to connect to your acquisitions vendors.

Before you begin you will need at least one *Vendor set up in Acquisitions*.

To add account information click the 'New account' button.

In the form that appears you will want to enter your vendor information.

Each vendor will have one account.

2.5.5. *Library EANs*

A library EAN is the identifier the vendor gives the library to send back to them so they know which account to use when billing. One EDI account can have multiple EANs.

To add an EAN click the 'New EAN' button.

Home › Administration › Library EANs

System preferences

› System preferences

+ New EAN

Basic parameters

› Libraries and groups

› Item types

› Authorized values

In the form that appears enter the information provided by your vendor.

New EAN

Library: Centerville

Description:

EAN:

Qualifier: EAN International (14)

Submit   Cancel

2.6. *Additional Parameters*

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

2.6.1. *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	
COLUMBIA UNIVERSITY	clio-db.cc.columbia.edu:7090	voyager			No	0	USMARC	MARC-8	0	Bibliographic	Actions ▾
LIBRARY OF CONGRESS	lx2.loc.gov:210	LCDB			Yes	1	USMARC	utf8	0	Bibliographic	Actions ▾
LIBRARY OF CONGRESS NAMES	lx2.loc.gov:210	NAF			Yes	1	USMARC	utf8	0	Authority	Actions ▾
LIBRARY OF CONGRESS SRU	lx2.loc.gov:210	LCDB			No		USMARC	utf8	0	Bibliographic	Actions ▾
LIBRARY OF CONGRESS SUBJECTS	lx2.loc.gov:210	SAF			Yes	2	USMARC	utf8	0	Authority	Actions ▾
SMITHSONIAN INSTITUTION LIBRARIES	siris-libraries.si.edu:210	Default			No	0	USMARC	MARC-8	0	Bibliographic	Actions ▾

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*[36] or the Library of Congress's List of Targets *http://www.loc.gov/z3950/*

2.6.1.1. *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):	UNIMARC ▾
Encoding (z3950 can send records in various encodings. Choose one):	utf8 ▾
Timeout (0 its like not set):	[____] seconds
Record type:	Bibliographic ▾
XSLT File(s) for transforming results:	[_____]
	Separate multiple filenames by commas.

Save   Cancel

- '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)

2.6.1.2. *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

2.6.1.3. *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

2.6.1.4. *Add a SRU Target*

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

- '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)

2.6.2. *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.

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.
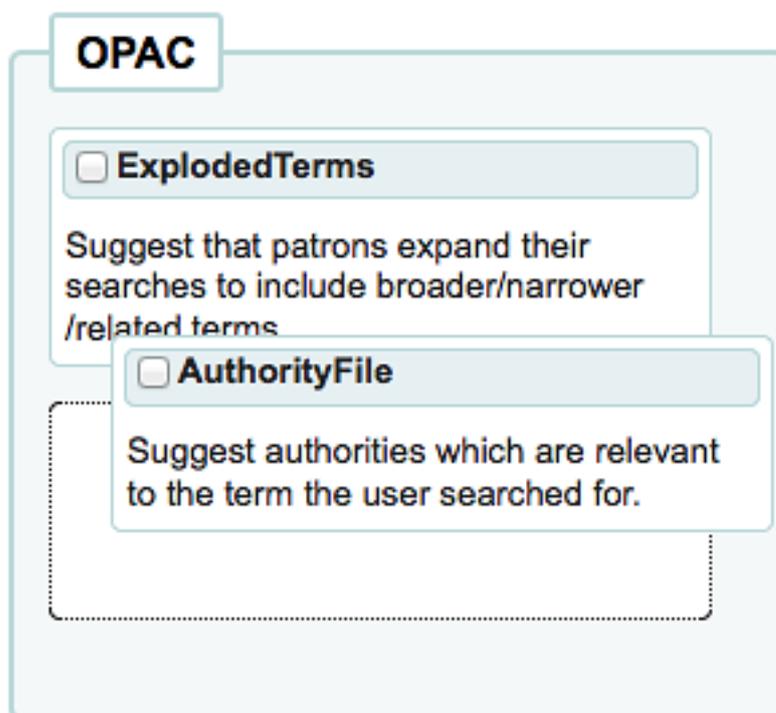
If you choose both plugins you will see several options at the top of your search results
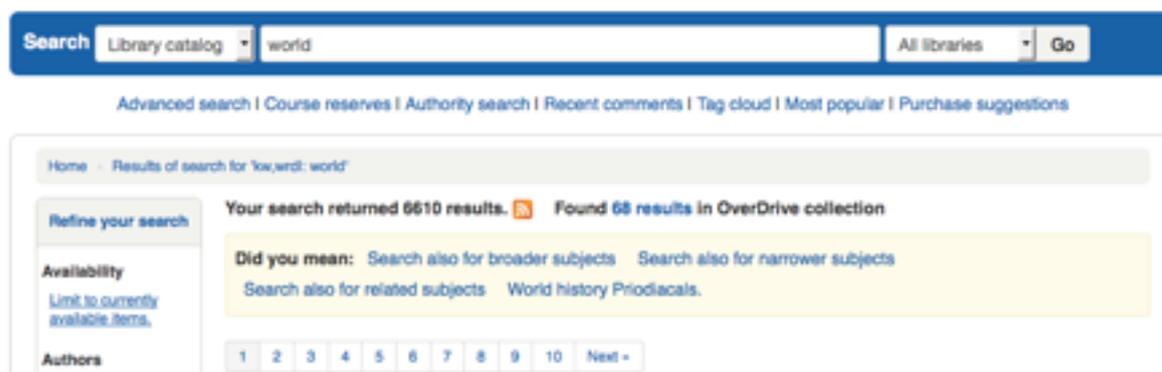
If you choose just the AuthorityFile you'll see just authorities.
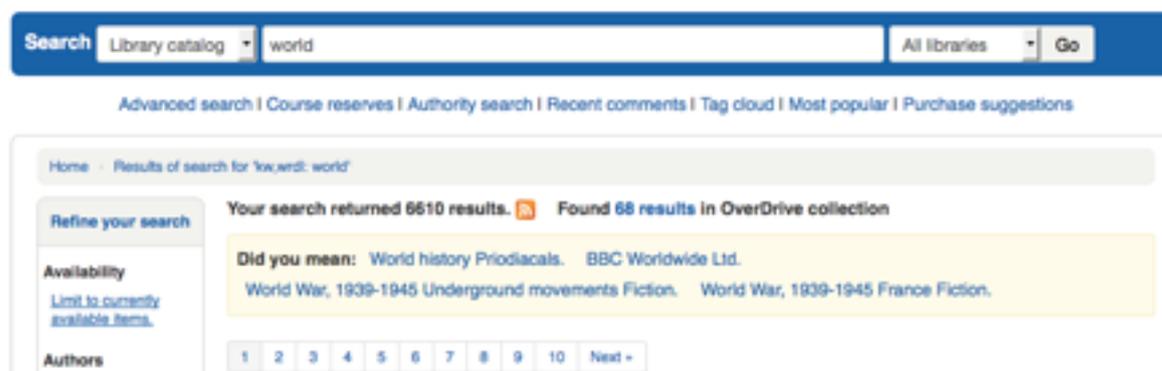
2.6.3. *Column settings*

This administration area will help you hide or display columns on fixed tables throughout the staff client.

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

Clicking on the module you'd like to edit tables for will show you the options available to you.

This area lets you control the columns that show in the table in question. If nothing is hidden you will see no check marks in the 'is hidden by default' column.

Columns settings

▶ **Acquisition**

▼ **Administration**

Administration tables

currency

Currency (id=currencies-table)

Column name	Is hidden by default	Cannot be toggled
currency	☐	☑
rate	☐	☑
symbol	☐	☐
iso_code	☐	☐
last_updated	☐	☐
active	☐	☐
actions	☐	☐

Save

▶ **Authorities**

▶ **Catalog**

▶ **Cataloging**

▶ **Circulation**

And will see all of the columns when viewing the table on its regular page.

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 have checks in the 'is hidden by default' column.

Columns settings

> ▸ **Acquisition**

> ▾ **Administration**

Administration tables

currency

Currency (id=currencies-table)

Column name	Is hidden by default	Cannot be toggled
currency	☐	☑
rate	☐	☑
symbol	☑	☐
iso_code	☑	☐
last_updated	☐	☐
active	☐	☐
actions	☐	☐

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

2.6.4. *Audio alerts*

If you have your *AudioAlerts* preference set to 'Enable' you will be able to control the various alert sounds that Koha uses from this area.

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

Each dialog box in Koha has a CSS class assigned to it that can be used as a selector for a sound.

You can edit the defaults by clicking the 'Edit' button to the right of each alert

You can assign alerts to other CSS classes in Koha by entering that information in the selector box. For example if you enter

```
body:contains('Check in message')
```

Then when you visit the checkin page you will hear an alert.

Every page in Koha has a unique ID in the body tag which can be used to limit a sound to a specific page

Any ID selector (where html contains id="name_of_id") and can also be a trigger as: #name_of_selector

2.6.5. *SMS cellular providers*

> ⭐ **Important**
>
> This option will only appear if the *SMSSendDriver* preference is set to 'Email'

From here you can enter as many cellular providers as you need to send SMS notices to your patrons using the email protocol.

SMS cellular providers

Name	Domain	Patrons	
		+ Add new	⊘ Cancel

Some examples in the US are:

Table 2.3. SMS Provider Examples

Mobile Carrier	SMS Gateway Domain
Alltel	sms.alltelwireless.com
AT&T	txt.att.net
Boost Mobile	sms.myboostmobile.com
Project Fi	msg.fi.google.com
Republic Wireless	text.republicwireless.com
Sprint	messaging.sprintpcs.com
T-Mobile	tmomail.net
U.S. Cellular	email.uscc.net
Verizon Wireless	vtext.com
Virgin Mobile	vmobl.com

To add new providers enter the details in the form and click 'Add new' to save.

SMS cellular providers

Name	Domain	Patrons		
Verizon	vtext.com	0	✎ Edit	🗑 Delete
T-Mobile	tmomail.net		+ Add new	⊘ Cancel

These options will appear in the OPAC for patrons to choose from on the *messaging tab* if you have *EnhancedMessagingPreferences* enabled.

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

3.1. *Patrons and Circulation*

3.1.1. *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.

To create a new list of patrons click the 'New patron list' button

Enter a list name and save the list.

Each list has an 'Actions' menu with more list options.

To add patrons to the list click the 'Add patrons' link in the 'Actions' menu.

My Patrons

Enter the patron's name or cardnumber in the search box and click on the right result to add the patron.

test

Once you have all of the patrons you would like to add you can click the 'Add patrons' button to save them to the list.

3.1.2. *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.

If there are no comments to moderate you will see a message saying just that

You can also review and unapprove comments you have approved in the past by choosing the 'Approved comments' tab

3.1.3. *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.

3.1.3.1. *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.

3.1.3.2. *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

- Choose to match on 'Cardnumber' or 'Username' to prevent adding of duplicate card numbers to the system
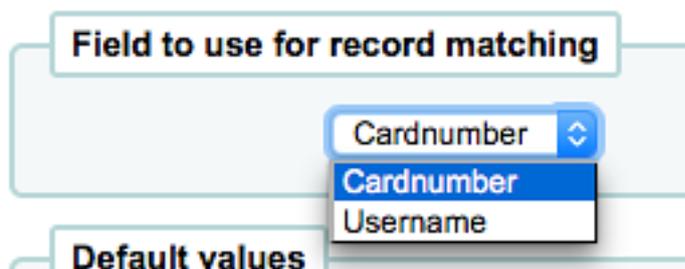
- Next you can choose default values to apply to all patrons you are importing

  - 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.

- 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.

3.1.4. *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.

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.

3.1.4.1. *Adding Notices & Slips*

To add a new notice or slip

- Click 'New Notice'

- Choose which library this notice or slip is for
  -

> **Important**
>
> Not all notices can be branch specific for more information review the *Notices & Slips Field Guide* in this manual.

- Choose the module this notice is related to

- The Code is limited to 20 characters

-

  > **Important**
  >
  > 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

  - If you're using the *TalkingTechItivaPhoneNotification* service you can set up a Phone notification

- If you plan on printing this notice you can set the Print template next

- If you have enabled SMS notices with the *SMSSendDriver* preference you can set the text for your SMS notices next

- 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.

  -
  Note

  Review the *Notices & Slip Field Guide* for info on what fields can be used here.

  -
  Important

  Overdue notices can use <<items.content>> tags by themselves, or use <item></item> to span all of the tags. Learn more about the *Overdue Notice Markup*

  - On overdue notices make sure to use <<items.content>> tags to print out the data related to all items that are overdue.

  - The other option, only for overdue notices, is to use the <item></item> tags to span the line so that it will print out multiple lines One example for the <item></item> tag option is:

    <item>"<<biblio.title>>" by <<biblio.author>>, <<items.itemcallnumber>>, Barcode: <<items.barcode>> , Checkout date: <<issues.issuedate>>, Due date: <<issues.date_due>> Fine: <<items.fine>> Due date: <<issues.date_due>> </item>

  -
  Important

  Only the overdue notices take advantage of the <item></item> tags, all other notices referencing items need to use <<items.content>>

-

> **Note**
>
> To add today's date you can use the <<today>> syntax

-

> **Note**
>
> If you don't want to print the patron's full name on your slips or notice you can enter data in the Other name or Initials field for each patron and use that value instead.

3.1.4.1.1. *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. You will also want to review the *Notices & Slips Field Guide* for information on formatting item information in these notices.

> **Important**
>
> 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>
```

Which, assuming two items were overdue, would result in a notice like:

```
  The following item(s) is/are currently overdue:

  "A Short History of Western Civilization" by Harrison, John B, 909.09821 H2451, Barcode:
08030003 Fine: 3.50
  "History of Western Civilization" by Hayes, Carlton Joseph Huntley, 909.09821 H3261 v.1,
Barcode: 08030004 Fine: 3.50
```

3.1.4.2. *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.

- MEMBERSHIP_EXPIRY
    - This notice can be sent to patrons to warn them that their cards are expiring soon.

    - Requires that you have the *MembershipExpiryDaysNotice* set and the *related cron job* set.

- 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'

- TO_PROCESS
  - Used to notify a staff member if a purchase suggestion has been moved to the fund they manage

- Requires the *notice_unprocessed_suggestions* cron job

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

- HOLD_SLIP

  - 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

3.1.5. *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.

> **Important**
>
> In order to have overdue notices sent to your patrons, you need to *set that patron category* to require overdue notices.

> **Important**
>
> 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

- Delay is the number of days after an issue is due before an action is triggered.

- > **Important**
  >
  > 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.

- See a *Sample Overdue Notice*

3.1.6. *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

3.1.6.1. *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.

3.1.6.1.1. *Add a Layout*

If you have no layouts defined, you will add a new layout by clicking the 'New' button and choosing 'Layout'.
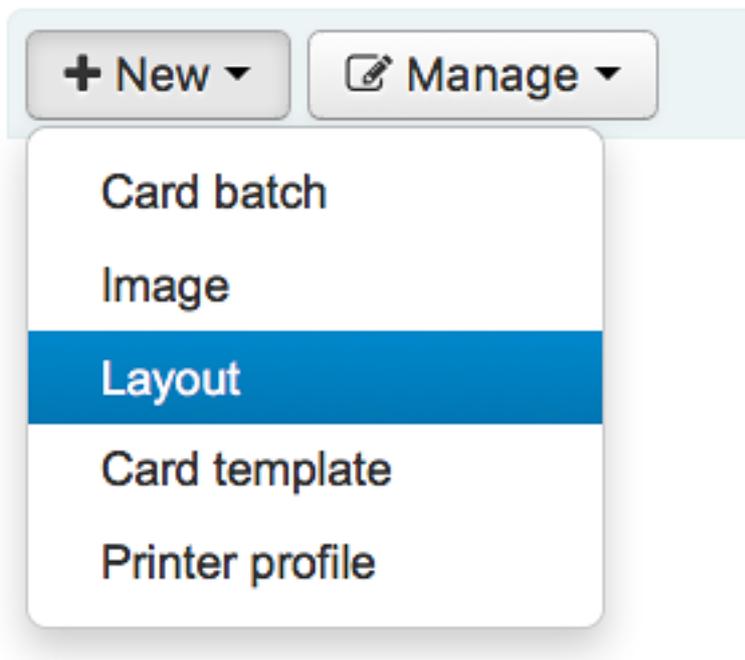
You may also choose to press 'Manage layout' on the left side. Here you are offered a list of available layouts you can select for editing. But at the top of the page there is still the 'New layout' button.
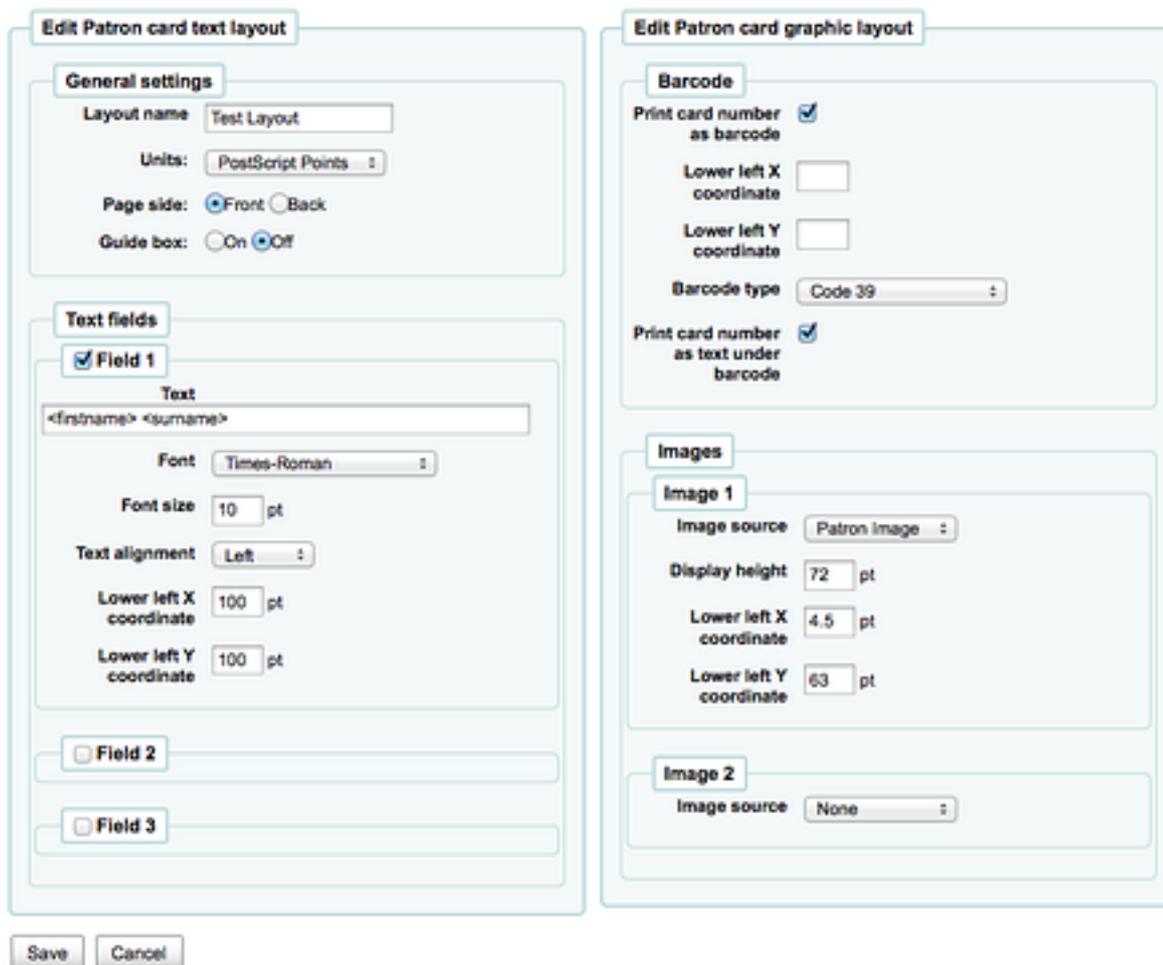
- The name you assign to the layout is for your benefit, name it something that will be easy to identify at a later date

- The Units pull down is used to define what measurement scale you're going to be using for your layout.
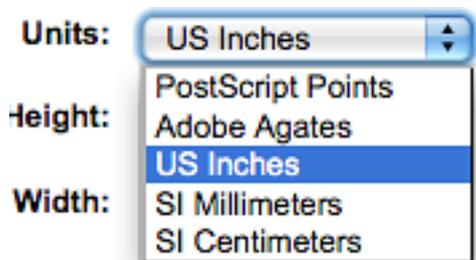
-
  > **Note**
  >
  > A Postscript Point is 1/72" an Adobe Agate is 1/64", an Inch is 25.4 SI Millimeters

- 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.
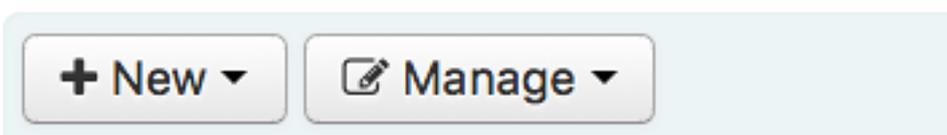
After saving, your layouts will appear on the 'Manage layouts' page.

3.1.6.2. *Templates*

- *Get there:* More > Tools > Patron Card Creator > Manage > Card 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.

3.1.6.2.1. *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.

3
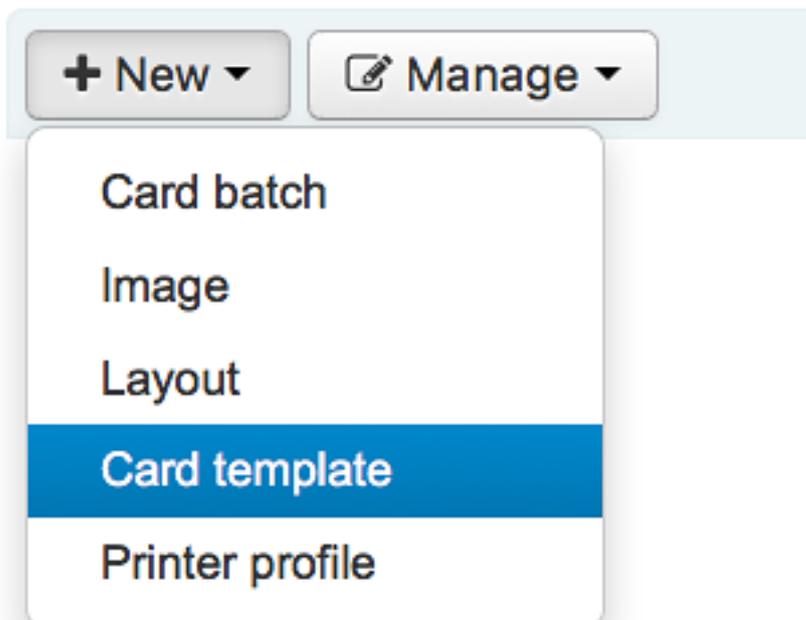
Using the form that appears after pressing either 'Edit' or 'New template'you can define the template for your sheet of labels or cards.

- 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.
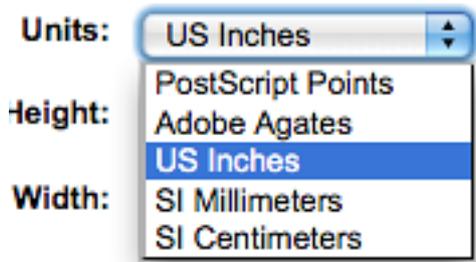
-
> **Note**
>
> A Postscript Point is 1/72" an Adobe Agate is 1/64", an Inch is 25.4 SI Millimeters

- 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.

  -
> **Important**
>
> 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.

3.1.6.3. *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.

3.1.6.3.1. *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'

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: [PostScript Points ▼]

Offset:

Horizontal: [0] pt

Vertical: [0] pt

Creep:

Horizontal: [0] pt

Vertical: [0] pt

[Save] [Cancel]

- 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.

-
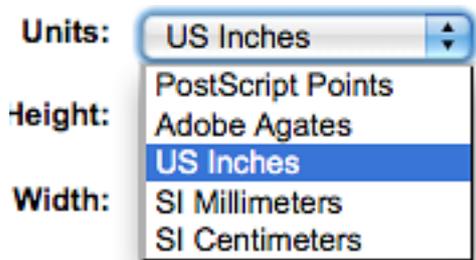
  Note

  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 Printer Profiles' page.

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.

3.1.6.4. *Batches*

- *Get there:* More > Tools > Patron Card Creator > Manage > Card batches

A batch is a collection of patrons for whom you want to generate cards.

3.1.6.4.1. *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.
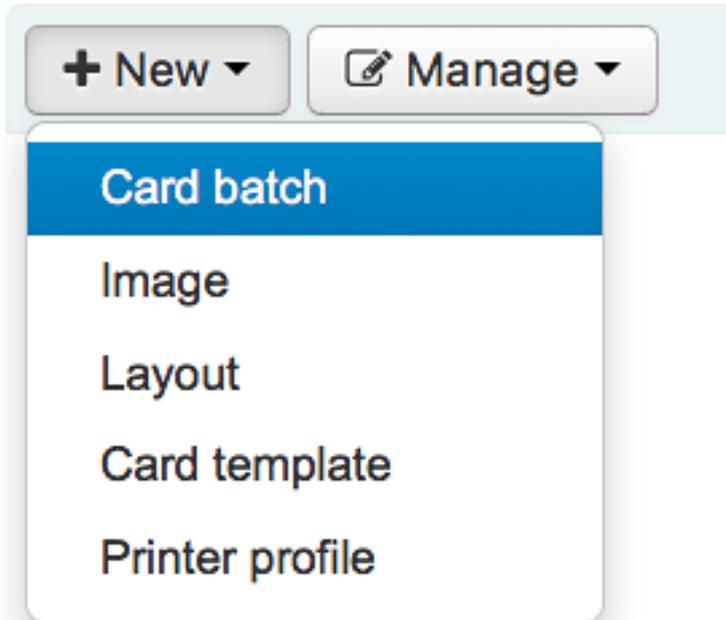
For a new batch a message pops up and directs you to select patrons to be processed in this batch.
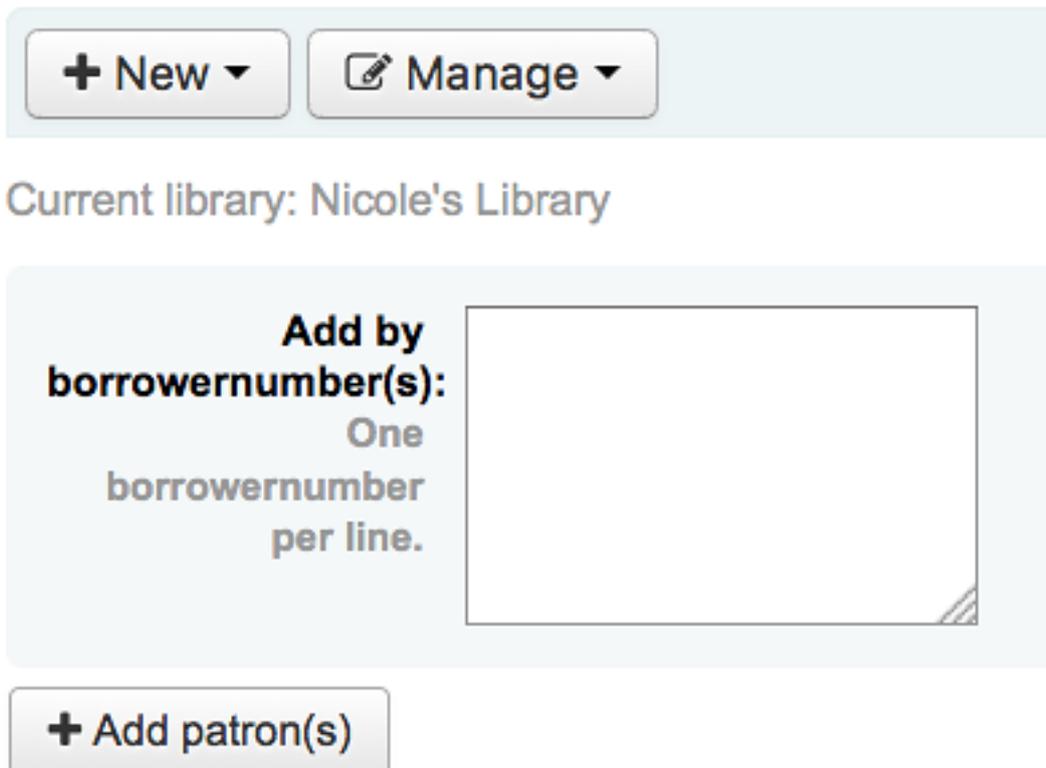
After choosing the 'Add item(s)' button the Patron Search window pops up.

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.

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.

Current library: Nicole's Library

Add by borrowernumber(s): One borrowernumber per line.

[+ Add patron(s)] [🗑 Remove selected patrons] [⊟ Delete batch] [— Remove duplicates] [↗ Export selected card(s)] [↗ Export card batch]

Items in batch number 3

Showing 1 to 4 of 4   Show [20 ▾] entries   «First «Previous Next » Last »   Search: [   ]

Borrower name ▲	Borrower number ⬧	Actions		Select
Daniels, Tanya	3	🗑 Delete	↗ Export	☐
Delgado, Floyd	18	🗑 Delete	↗ Export	☐
Dillon, Eva	4	🗑 Delete	↗ Export	☐
Duffy, Joann	24	🗑 Delete	↗ Export	☐

Showing 1 to 4 of 4   «First «Previous Next » Last »

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 > Card batches' button.

If you would like to export all patron cards you can click 'Export card 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 selected card(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

Select a template to be applied: HB-PC0001

Select a layout to be applied: Test Layout

Enter starting card position: 1

Export   Cancel

Once you click 'Export' you will be presented with a PDF of your labels for printing

Click on the following link(s) to download the exported batch(es).

Card batch number 1

label_batch_1.pdf

Done

When you open the PDF you will see the cards for printing

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.

3.1.6.5. *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 print-able 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:

Browse... No file selected.

Image name:

This will be the name by which you will refer to this image in the patron card layout editor.

Upload

Delete Images

No images are currently available.

Once the file is uploaded you will be presented with a confirmation message.

Image successfully uploaded.
File: logo.jpg
Image name: Koha Logo

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.

Image ID	Name	Delete	Select
1		🗑 Delete	☐

Delete selected

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.

3.1.7. *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: [Any ⌄]
- who are in patron list: [⌄]

Anonymize checkout history

☐ **Verify you want to anonymize patron checkout history**

- Permanently delete checkout history older than [____] 📅 (MM/DD/YYYY)

[Next >>]

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 who
  - have not borrowed since a specific date

  - have accounts that will expire before a specific date

  - are in a specific *patron category*

  - are in a *patron list*

- Click 'Next'

- A confirmation will appear asking if you're sure this is what you want to happen

Warnings

- 0 patrons will be deleted
- 5 checkout history will be anonymized

Checkout history for 5 patrons will be anonymized

[Finish]   Cancel

- 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

3.1.8. *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: [Browse...] 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

[Continue] Cancel

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

To the left of each text box there is a checkbox. Clicking that checkbox will clear our the field values.

Important

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.

Once you have made the changes you want, you can click 'Save' and Koha will present you with the changed patron records.

3.1.9. *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:

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

- To see all of the titles this tag was added to simply click on the term

- 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

		Status	Term	Weight	Actions	Reviewer	Date
1	☐	✓	wizards	11	Approved / Reject	Engard, Nicole	02/26/2011
2	☐	✓	magic	10	Approved / Reject	Engard, Nicole	02/26/2011
3	☐	✓	open	7	Approved / Reject	Engard, Nicole	12/05/2011
4	☐	✓	web development	7	Approved / Reject	Engard, Nicole	02/19/2011
5	☐	✓	wizard	6	Approved / Reject	Engard, Nicole	09/06/2011
6	☐	✓	dictionary	5	Approved / Reject	Engard, Nicole	02/20/2011

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

Finally you can find tags by using the filters on the left.

3.1.10. *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
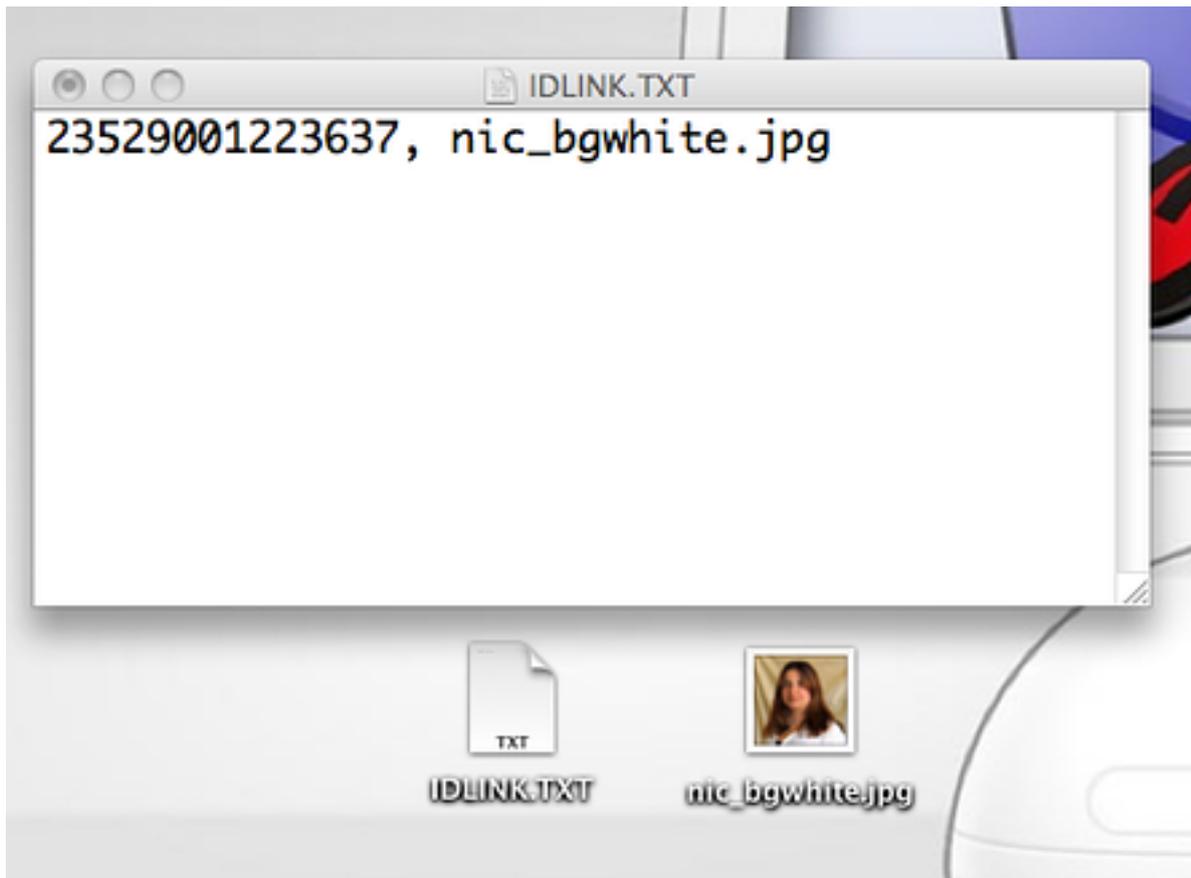
- Make sure that your TXT file is a plain text document, not RTF.

- Zip up the text file and the image files

- Go to the Upload Patron Images Tool

- 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.

> **⭐ Important**
>
> There is a limit of 100K on the size of the picture uploaded and it is recommended that the image be 200x300 pixels, but smaller images will work as well.

3.1.11. *Rotating Collections*

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Edited by Nicole C. Engard
2014

- *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.

> **⭐ Important**
>
> 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.

3.1.11.1. *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".

> **Important**
>
> 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.

3.2. *Catalog*

3.2.1. *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.

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.'

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 thar 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.

Once you have made you changes you will be presented with the resulting items.

Batch item modification results

Done

> **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
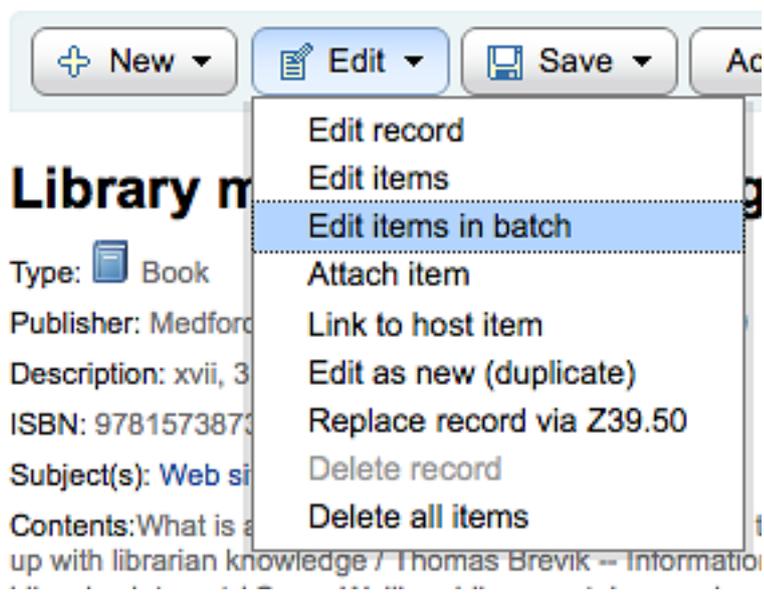
3.2.2. *Batch item deletion*

* *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.

Batch item deletion

Use a file

Barcode file: ⦿

Item number file: ◯

File: [Browse...] No file selected.

Or scan items one by one

Barcode list (one barcode per line):
```
2345043243
47627257
```

Use default values

☐ Populate fields with default values from default framework

[Continue]   Cancel

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 bibliogrphic record if you're deleting the last item by clicking the checkbox next to 'Delete records if no items remain'.
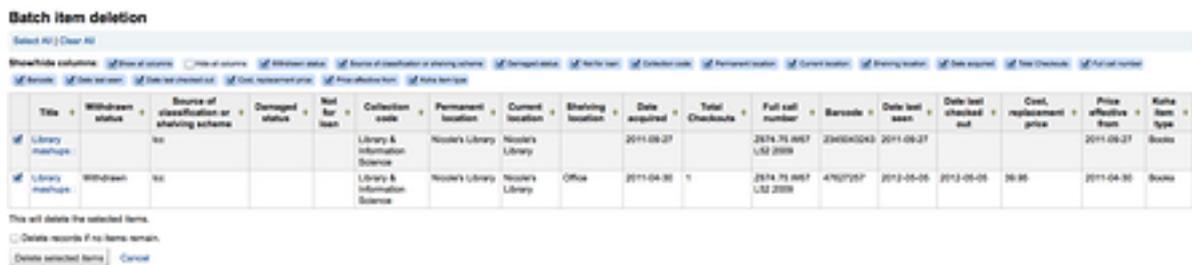
If your file (or list of scanned barcodes) has more than 1000 barcodes, Koha will be unable to present you with a list of the items. You will still be able to delete them, but not able to choose which items specifically to delete or delete the biblio records.

If the items are checked out you will be presented with an error after clicking 'Delete selected items' and the items will not be deleted.

If the items can be deleted they will be and you will be presented with a confirmation of your deletion.
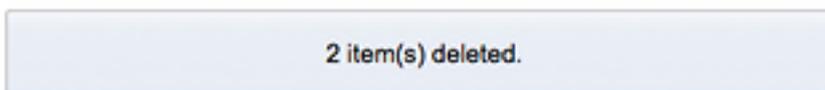
3.2.3. *Batch record deletion*

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: [Browse…] No file selected.

Or enter a list of record numbers

Record number
list (one per line):

[Continue] Cancel

First you need to tell the tool if you're deleting bibliographic or authority records. Next you can load a file with biblionumbers or authids or enter a list of those numbers in the box provided. Once you submit the form you will be presented with a summary of the records you are trying to delete.

Batch record deletion

Select all | Clear all | Select without items | Select without holds

	Biblionumber ⬦	Title ⬦	Items ⬦	Holds ⬦	Checkouts ⬦
☑	4	Kritik der reinen Vernunft	2	0	0
☑	9	Leaves of Grass	3	0	0
☑	143	The Tale of Peter Rabbit	1	0	0
☑	333	Encyclopedia of Needlework	1	0	0
☐	476	House M.D. Season one	1	0	1
☑	477	House, M.D. Season five	1	0	0
☑	478	House M.D. season four /	1	0	0
☑	480	House, M.D. Season three	4	0	0
☑	485	Scrubs. The complete first season	1	0	0
☑	486	Scrubs. The complete fourth season	1	0	0

⚠ Reminder: this action will delete all selected bibliographic records, attached subscriptions, existing holds, and attached items!

[Delete selected records]   Cancel

If a record you want to delete can't be deleted it will be highlighted.

Check the records you want to delete and click the 'Delete selected records' button to finish the process.

3.2.4. *Batch Record Modification*

- *Get there:* More > Tools > Catalog > Batch record modification

This tool will allow you to edit batches of bibliographic and/or authority records using *MARC Modification Templates*. Before visiting this tool you will want to set up at least one MARC modification template.

Batch record modification

Record type

Biblios: ●

Authorities: ○

Use a file

File: [Browse...] No file selected.

Or enter a list of record numbers

Record number list (one per line):

Use MARC Modification Template:

Modify record using the following template: [Select a template ▾]

[Continue]   Cancel

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 critera click 'Continue'

Batch record modification

Modify record using the following template: Ebook

Select all | Clear all

	Biblionumber ⇕	Title ⇕	Preview
✓	1	Wuthering heights /	Preview MARC
✓	2	Moll flanders /	Preview MARC
✓	3	Shirley /	Preview MARC
✓	4	Night navigation /	Preview MARC
✓	5	Book lust to go :	Preview MARC
✓	6	Light on snow :	Preview MARC
✓	7	The diary /	Preview MARC

! Reminder: this action will modify all selected biblios!

Modify selected records   Cancel

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.

Once you're sure everything is the way you want you can click the 'Modify selected records' button and your records will be modified.

3.2.5. *Automatic item modifications by age*

- *Get there:* More > Tools > Catalog > Automatic item modifications by age

This tool allows librarians to update item specific fields when an item reaches a certain age.

Note

Staff need the items_batchmod permission to access this tool

Important

The settings in this tool will be acted upon by the *corresponding cron job*

If you haven't created any rules you will see the option to 'Add rules' on the Tool page. Click this button to create rules.

Automatic item modifications by age

+ Add rules

There are no rules defined.

If you have rules already there will be a button that reads 'Edit rules'. To create a new rule click the 'Edit rules' button at the top of the page

Automatic item modifications by age

✏ Edit rules

List of rules

Age	Conditions	Substitutions
3 days	items.itype = NEW	items.itype = BK

You will be brought to a page where you can edit exisitng rules or create a new rule

Rules for automatic item modifications by age

+ Add rule   **💾 Save**   **✖ Cancel**

There are no rules defined.
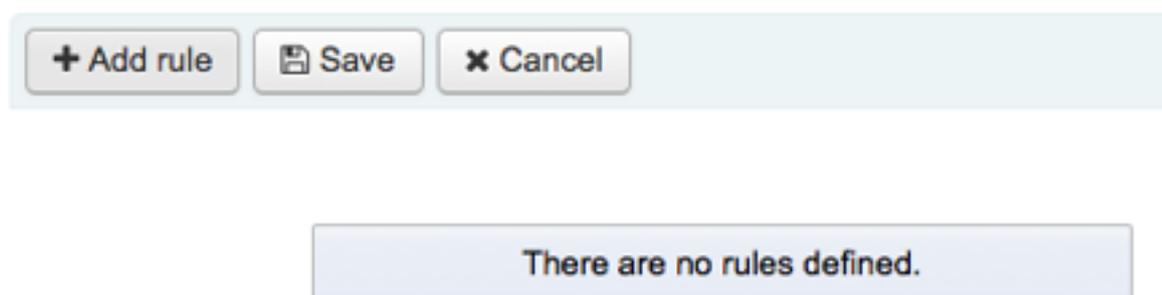
In the form that appears you can set :

- the age in days at which the item will update (Age)

- what criteria is needed to trigger the update (Conditions)

- what changes are made when the script runs (Substitutions)

Rules for automatic item modifications by age

+ Add rule **Save** **✖ Cancel**

Rule 1 🗑 Remove this rule

Age in days

[   ] ⇕ *Required*

Conditions

[Choose a field name ⇕] = [   ] **+ Add a condition**

Substitutions

[Choose a field name ⇕] = [   ] **+ Add a substitution**

Required

Once you're done you can click the 'Add this rule' link and then add additional rules or you can click the 'Submit these rules' button to save your changes.

Automatic item modifications by age

✏ Edit rules

List of rules

Age	Conditions	Substitutions
3 days	items.itype = NEW	items.itype = BK

3.2.6. *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.

3.2.6.1. *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)

- 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

-

> **Important**
>
> 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

- Next choose what to skip when exporting

- 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

- Choose to export your data in marc or marcxml format

- Choose the name you want your file to save as

- Click 'Export bibliographic records'

3.2.6.2. *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

- Choose to export your data in marc or marcxml format

- Choose the name you want your file to save as

- Click 'Export authority records'

3.2.7. *Inventory/Stocktaking*

- *Get there:* More > Tools > Catalog > Inventory/Stocktaking

Koha's Inventory Tool can be used in one of two ways, the first is by printing out a shelf list that you can then mark items off on, or by uploading a text files of barcodes gathered by a portable scanner.

If you do not have the ability to use your barcode scanner on the floor of the library, the first option available to you is to generate a shelf list based on criteria you enter.

Select items you want to check

Library: ⚪ Home library ⚪ Current library

Library: [All libraries ⇕]

Shelving location (items.location) is: [Filter location ⇕]

Item callnumber between: [_____] 🔼 (items.itemcallnumber)

...and: [_____]

Item statuses

items.notforloan

Not For Loan ☐
Ordered ☐
Staff Collection ☐

items.itemlost

Claims Returned ☐
Long Overdue (Lost) ☐
Lost ☐
Lost and Paid For ☐
Missing ☐

items.withdrawn

Weeding ☐
Withdrawn ☐

items.damaged

Damaged ☐

Inventory date: [_____] 📅

Skip copies on loan: ☐

Export to CSV file: ☐

Compare barcodes list to results: ☐

[Submit]

Choose which library, shelving location, call number range, item status and when the item was last seen to generate a shelf list that you can then print to use while walking around the library checking your collection

Inventory/Stocktaking

[Select all] [Clear all]

Showing 1 to 10 of 10,851   Show 10 : entries   (H) First (H) Previous **1** 2 3 4 5 Next (H) Last (H)   Search: [   ]

Seen	Barcode ⬧	Library ⬧	Title ⬧	Status ⬧	Lost ⬧	Damaged ⬧	Unseen since ⬧	Problems ⬧
☐		NIC [AC]	A Budget of Paradoxes, Volume I De Morgan, Augustus, 1806-1871				08/02/2012	
☐		NIC [AC]	A Budget of Paradoxes, Volume II De Morgan, Augustus, 1806-1871				08/02/2012	
☐		NIC [AC]	An Account of Egypt Herodotus, 480? BC-420? BC				08/02/2012	
☐		NIC [AC]	Atlantic Classics				08/02/2012	
☐		[AC]	Complete Project Gutenberg John Galsworthy Works Galsworthy, John, 1867-1933				08/02/2012	
☐		[AC]	Complete Project Gutenberg Oliver Wendell Holmes, Sr. Works Holmes, Oliver Wendell, 1809-1894				08/02/2012	
☐		NIC [AC]	Critical Miscellanies (Vol. 3 of 3) Essay 1: On Popular Culture Morley, John, 1838-1923				08/02/2012	
☐		NIC [AC]	Essays on Education and Kindred Subjects Everyman's Library Spencer, Herbert, 1820-1903				08/02/2012	
☐		NIC [AC]	Health and Education Kingsley, Charles, 1819-1875				08/02/2012	

Alternatively you can export the list to a CSV file for altering in an application on your desktop. Simply check the box next to 'Export to csv file' to generate this file.

Once you have found the items on your shelves you can return to this list and check off the items you found to have the system update the last seen date to today.

If you have a portable scanner (or a laptop and USB scanner) you can walk through the library with the scanner in hand and scan barcodes as you come across them. Once finished you can then upload the text file generated by the scanner to Koha

Use a barcode file

Barcode file: [   ] Browse...

Set inventory date to: 07/15/2012 📅
(MM/DD/YYYY)

Choose the text file and the date you want to mark all items as seen and then scroll to the very bottom and click 'Submit.'

3.2.8. *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

3.2.8.1. *Templates*

- *Get there:* More > Tools > Label Creator > Manage > Label templates

A template is based on the label/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. These labels will include all of the information you will need for setting up a Koha, this information may be on the packaging, and if not it can usually be found on the vendor's website.

3.2.8.1.1. *Add a Template*

To add a new template, you want to click on the 'New' button at the top of the Label Creator and choosing 'Label template'.
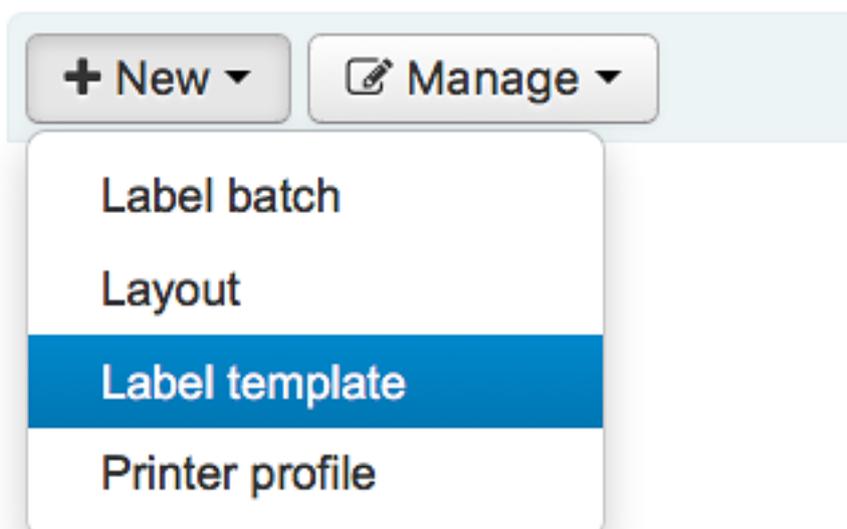
Using the form that appears you can define the template for your sheet of labels or cards.

Edit label template

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.
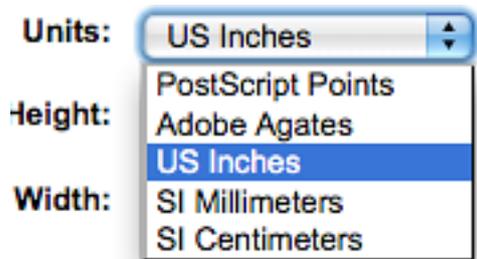
- The measurements, number of columns and number of rows can be found on the vendor product packaging or website.

-

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' area under 'Label templates'.

3.2.8.2. *Profiles*

- *Get there:* More > Tools > Label Creator > Manage > Printer 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.

3.2.8.2.1. *Add a Profile*

To add a new profile, you want to click on the 'New' button at the top of the Label Creator tool and choose 'Printer profile'.
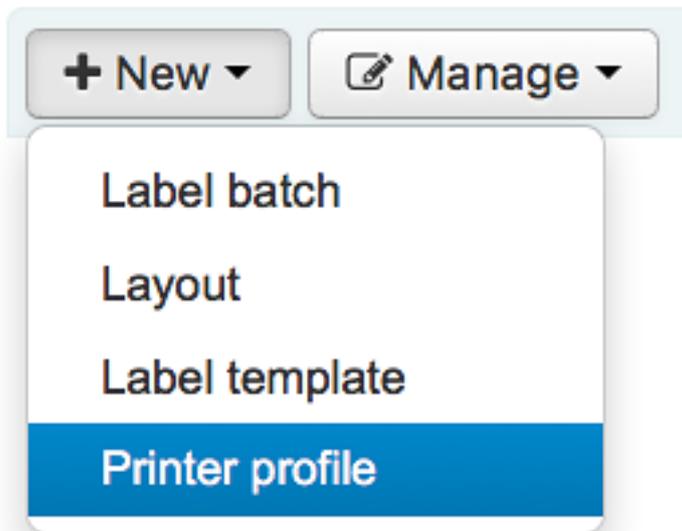
Using the form that appears you can create a profile to fix any problems with your template.

Edit printer profile

Profile settings

Printer name: [   ]

Paper bin: [   ]

Template name: Profile unassigned

Units: [PostScript Points ⬍]

Offset:

Horizontal: [0] pt

Vertical: [0] pt

Creep:

Horizontal: [0] pt

Vertical: [0] pt

[Save] Cancel

- 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.
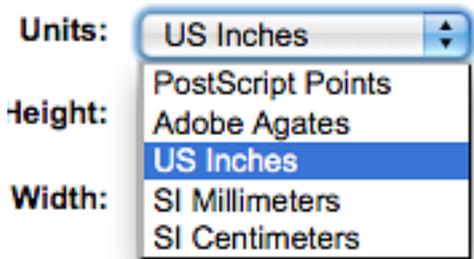
- Offset describes what happens when the entire image is off center either vertically or horizontally and creep describes a condition where the distance between the labels changes across the page or up and down the page

  - 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' area under 'Printer profiles'.
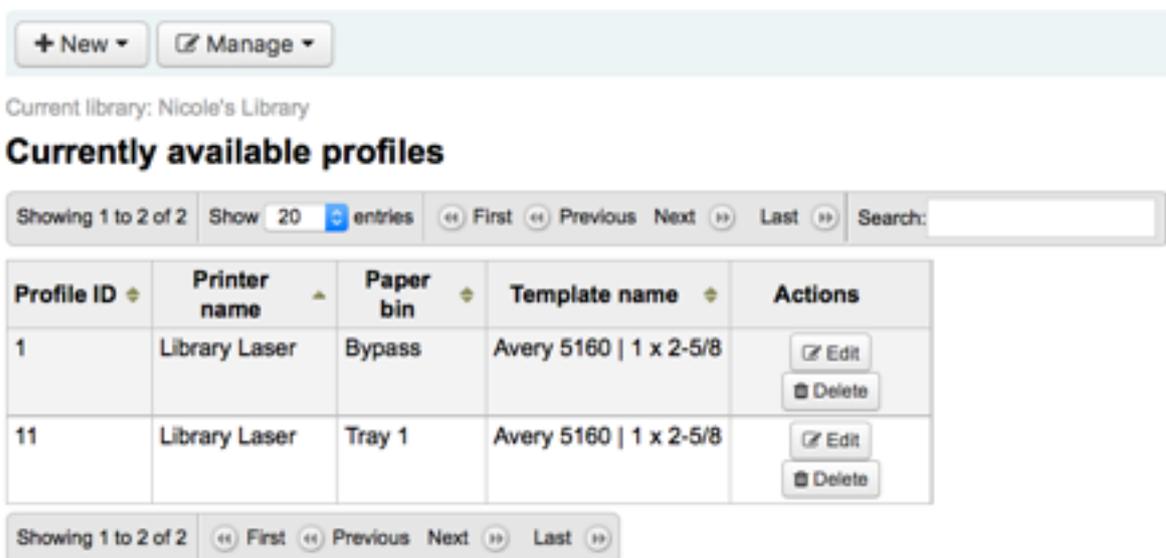
Once you have saved your new profile, you can return to the list of templates and choose to edit the template that this profile is for.

3.2.8.3. *Layouts*

- *Get there:* More > Tools > Label Creator > Manage > Layouts

A layout is used to define the fields you want to appear on your labels.

3.2.8.3.1. *Add a Layout*

To add a new layout, you want to click on the 'New' button at the top of the Label Creator tool and choose 'Layout'.
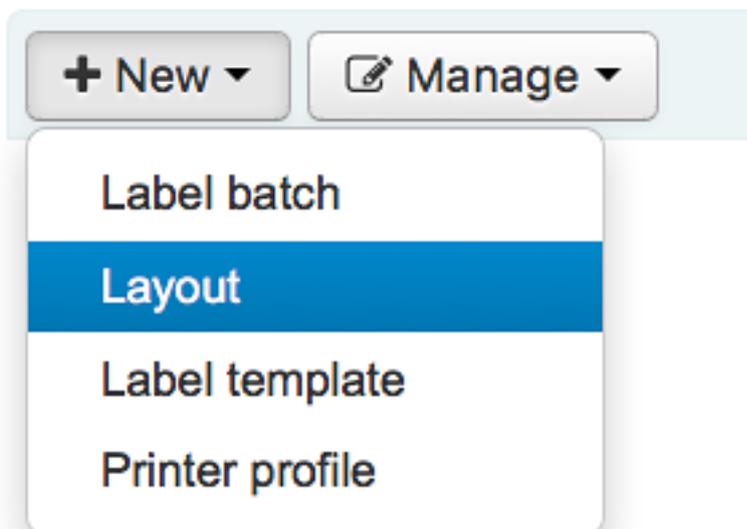
Using the form that appears you can create a profile to fix any problems with your template.

- 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.

3.2.8.4. *Batches*

- *Get there:* More > Tools > Label Creator > Manage > Label 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.

3.2.8.4.1. *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
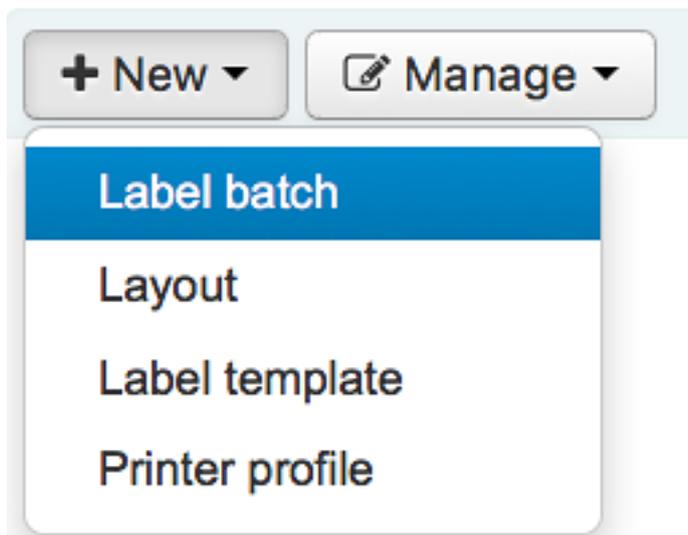
You will be brought to an empty batch with a box to scan barcodes or itemnumbers in to and an 'Add item(s)' button at the bottom of the page.

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 bar-codes box will open a search window for you to find the items you want to add to the batch.

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 | Add checked | Done

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	☐

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	☐
Add	NA	2009-12-27	2566543245679	☐
Add	NA	2009-12-27	2566543245680	☐

Once you have added all of the items click the 'Done' button. The resulting page will list the items you have selected.

To print your labels, click the 'Export full batch' button. To print only some of the labels, click the 'Export selected item(s)' button. Either way you will be presented with a confirmation screen where you can choose your template and layout.

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.

3.2.9. *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.

3.2.10. *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 venders/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.

- 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 existance of another field. For example you might want to add the call number to the item record if it's not already there.

- Choose 'Copy'

- Decide if you want to copy the first occurance or all occurances 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.

- Choose 'Copy and replace'

- Decide if you want to copy the first occurance or all occurances 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.

- Choose 'Copy and replace'

- Decide if you want to copy the first occurance or all occurances 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'

When choosing between 'Copy' and 'Copy and replace' keep the following example in mind:

```
245 _aThe art of computer programming _cDonald E. Knuth.
300 _aA_exists _bB_exists
```

If we apply action (a) Copy the whole field 245 to 300, we get:

```
245 _aThe art of computer programming _cDonald E. Knuth.
300 _aA_exists _bB_exists
300 _aThe art of computer programming _cDonald E. Knuth.
```

If we apply action (b) Copy the subfield 245$a to 300$a, we get:

```
245 _aThe art of computer programming _cDonald E. Knuth.
```

```
300 _aThe art of computer programming _bB_exists
```

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.

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.

Once your template is saved you will be able to pick it when using the *Stage MARC Records for Import* tool.

3.2.11. *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
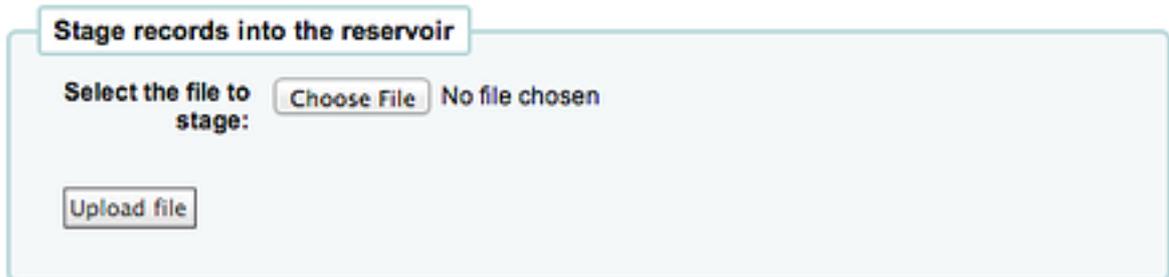
- Next you will be presented with options for record matching and item imports

- Enter 'Comments about this file' to identify your upload when going to the '*Manage Staged MARC Records*' tool

- Tell Koha which type of file this is, bibliographic or authority

- Choose the character encoding

- Choose if you would like to use a *MARC Modification Template* to alter the data you're about to import

- Choose whether or not you want to look for matching records

- You can set up *record matching rules* through the administration area

- 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)

- 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 precendence over barcodes), or Ignore items and not add them.

- Click 'Stage for import'

- You will be presented with a confirmation of your MARC import

- To complete the process continue to the *Manage Staged MARC Records Tool*

3.2.12. *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)	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)	

- 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: Do not look for matching records

Action if matching record found: Add incoming record

Action if no match found: Add incoming record

Item processing: Always add items

Apply different matching rules

- Below the summary is the option to import the batch of bib records using a specific framework
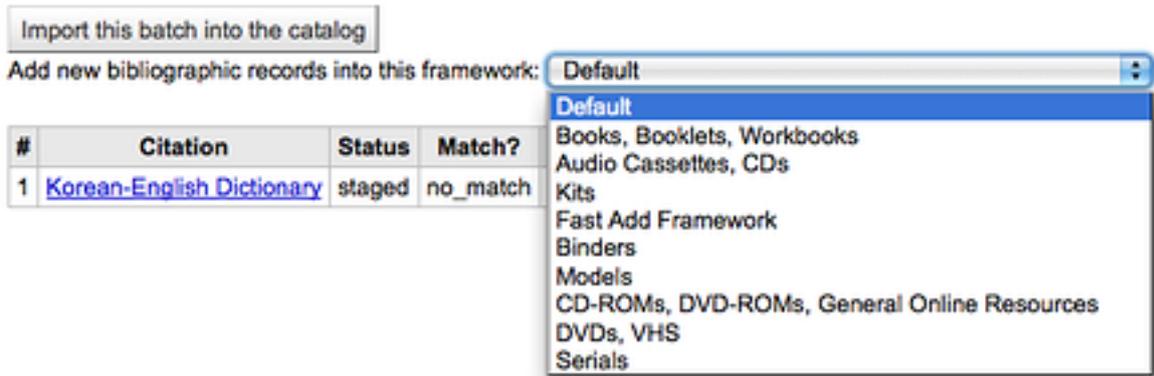
- Choosing a framework other than 'Default' isn't necessary, but it's helpful for running reports and having the right bib level item type selected on import.

- Below the framework selection there will be a list of the records that will be imported

- 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'

and when clicking the 'View' link under 'Diff' you can see the difference between versions.

- Click 'Import into catalog' to complete the import

- 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:

To clean items out of the 'reservoir':

- Visit the main screen of the Manage Staged MARC Records tool

- To clean a batch, click the 'Clean' button to the right

- You will be presented with a confirmation message
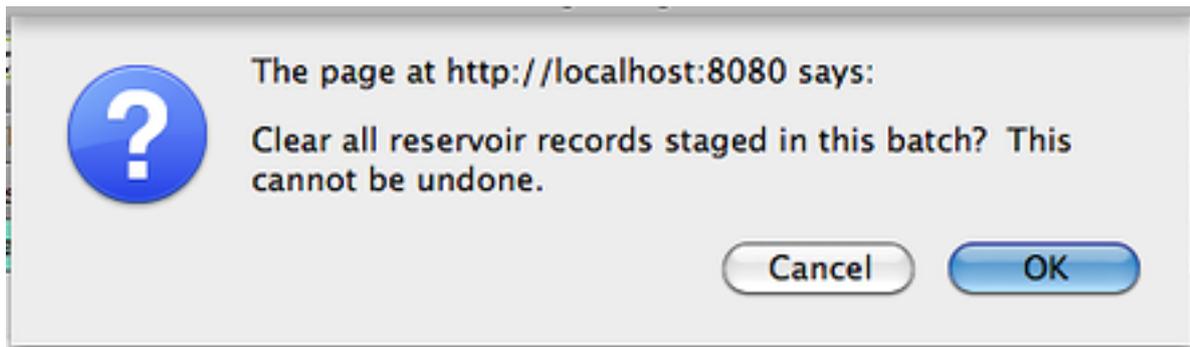
- Accept the deletion and the records will be removed from the reservoir and the status will be changed to 'cleaned'

3.2.13. *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.
>
>

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: /Users/nengard/Desktop/7 [Browse...]

[Upload file]

Upload progress:

▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
100%

File type

○ ZIP file

⦿ Image file

Enter cover biblionumber: [   ]

Options

Replace existing covers ☐

[Process images]

- 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

    Koha › Catalog ›

    𝑘 kohavm:8080/cgi-bin/koha/catalogue/MARCdetail.pl?biblionumber=4091
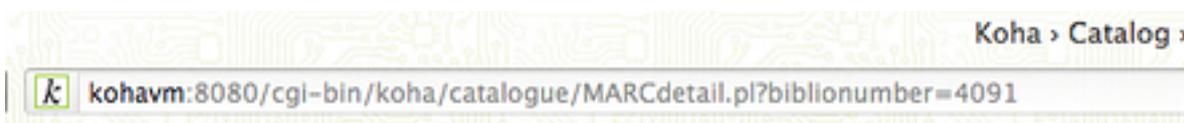
  - or by clicking on the MARC tab on the detail page in the staff client

    ⊕ New ▾ | 📝 Edit ▾ | 💾 Save ▾ | Add to ▾ | 🖨 Print

    ## MARC biblio : 4091 (Library mashups :)

    Normal

    MARC

    Labeled MARC

    With Framework : Default ⬍

    0 2 3 5 6 7 8 9

- 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 to 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
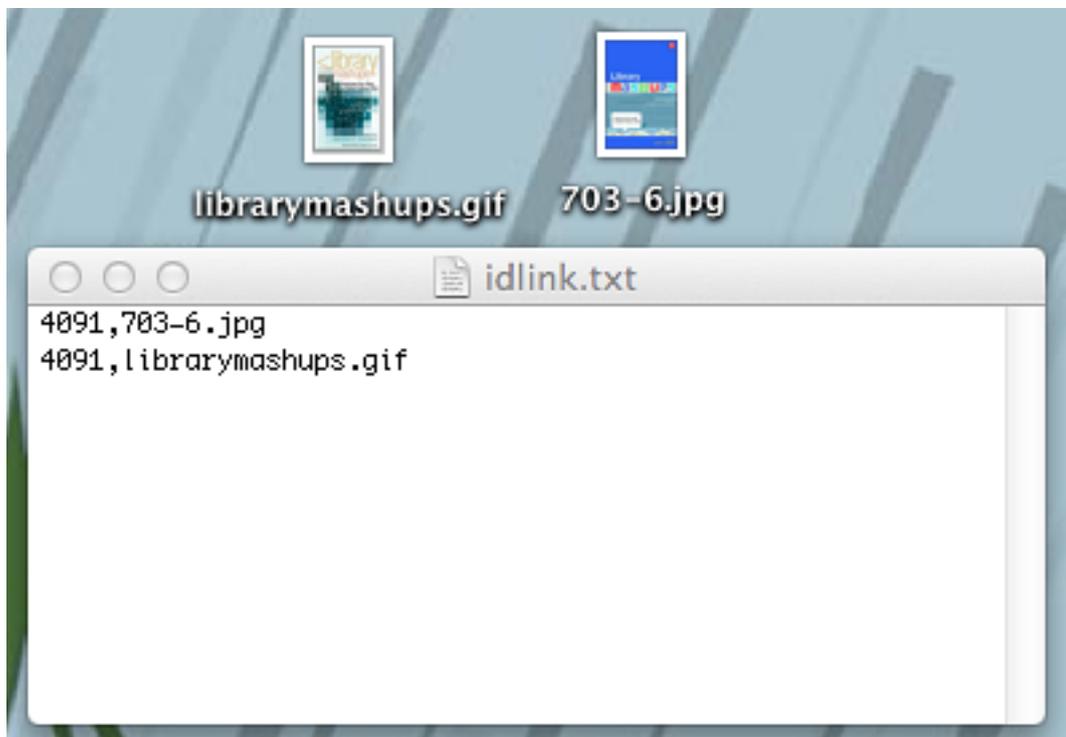
- Browse your local computer to the ZIP file

- 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
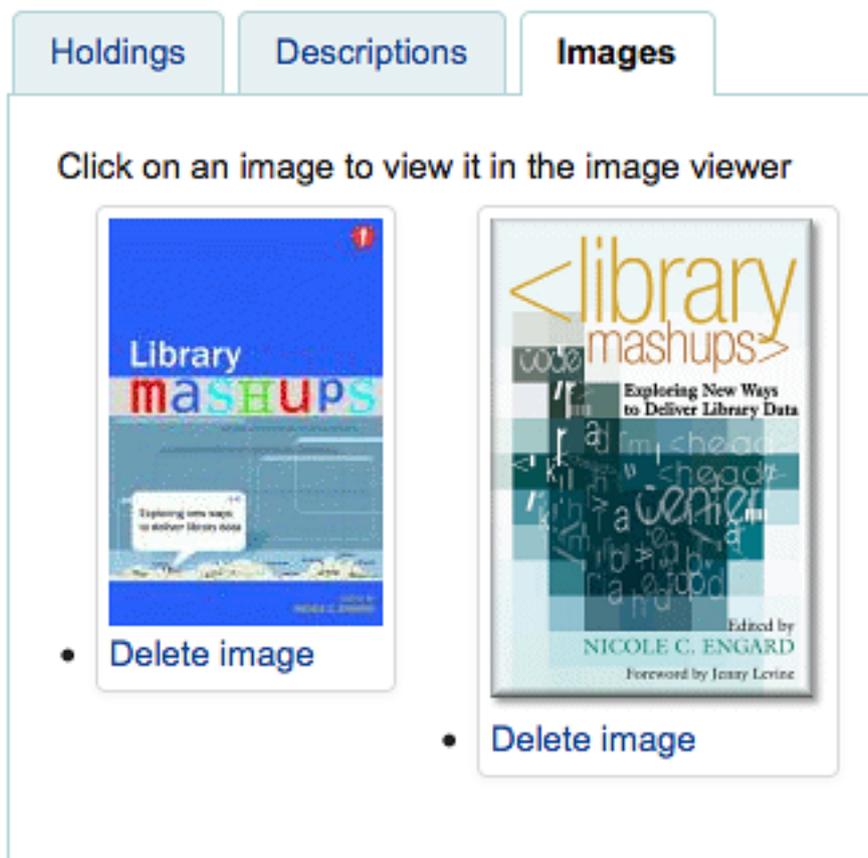
In the OPAC the cover images will also appear in the images tab, as well as next to the title and on the search results.

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_.

3.3. *Additional Tools*

3.3.1. *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

Nicole's Library Calendar

Define the holidays for: [Nicole's Library   ⇕]

Calendar information

◀	Nov ⇕	2012 ⇕	▶

Su	Mo	Tu	We	Th	Fr	Sa
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]

Copy holidays to: [⇕] [Copy]

3.3.1.1. *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

Add new holiday

Library: Nicole's Library

From date: Thursdays, 11/8/2012

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

- 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

3.3.1.2. *Editing Events*

To edit events

- Click on the event on the calendar that you want to change (do this by clicking on the date on the calendar, not the event listed in the summary)

Edit this holiday

Unique holiday

Library: Nicole's Library

From Date: Thursdays, 11/22/2012

To Date : [_____] 🗓

Title:

Thanksgiving

Description:

[   ]

○ **Generate exceptions on a range of dates.** [?]
○ **Delete this holiday.** [?]
○ **Delete the single holidays on a range.** [?]
○ **Delete the repeated holidays on a range.** [?]
○ **Delete the exceptions on a range.** [?]
⦿ **Edit this holiday** [?]

[Save]   Cancel

- From this form you can make edits to the holiday or delete the holiday completely.
  - All actions require that you click 'Save' before the change will be made.

- Clicking on repeatable events will offer slightly different options

Edit this holiday

Holiday repeating weekly

Library: Nicole's Library

From Date: Sundays, 11/4/2012

To Date :

Title:

Sunday Closed

Description:

○ **Generate an exception for this repeated holiday.** [?]
○ **Generate exceptions on a range of dates.** [?]
○ **Delete this holiday.** [?]
○ **Delete the single holidays on a range.** [?]
○ **Delete the repeated holidays on a range.** [?]
○ **Delete the exceptions on a range.** [?]
⦿ **Edit this holiday** [?]

Save   Cancel

- In the form above you will note that there is now an option to 'Generate an exception for this re-peated holiday,' choosing this option will allow you to make it so that this date is not closed even though the library is usually closed on this date.
  - All actions require that you click 'Save' before the change will be made.

3.3.1.3. *Additional Help*

When adding or editing events you can get additional help by clicking on the question mark next to various different options on the form

3.3.2. *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.

3.3.2.1. *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

- If you choose SQL then you will need to enter SQL database fields

- The 'Profile name' will appear on the export pull down list when choosing 'Download' from your cart or list
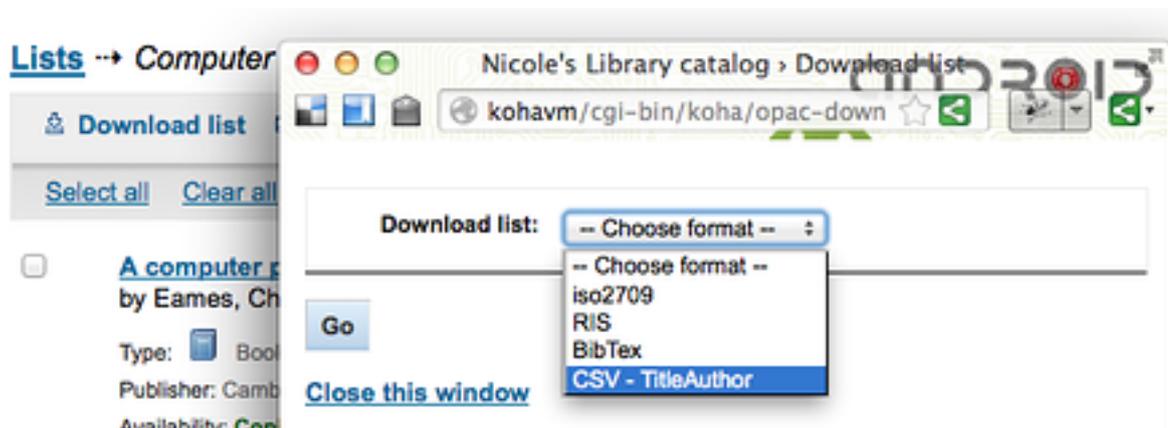
- The 'Profile description' is for your own benefit, but will also appear in the OPAC when patrons download content, so make sure it's clear to your patrons as well

- 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.

3.3.2.2. *Modify CSV Profiles*

Once you have created at least one CSV Profile an 'Edit profile' tab will appear next to the 'New profile' button.

- 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

- To delete a profile, check the 'Delete selected profile' option before clicking 'Submit Query'

3.3.2.3. *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
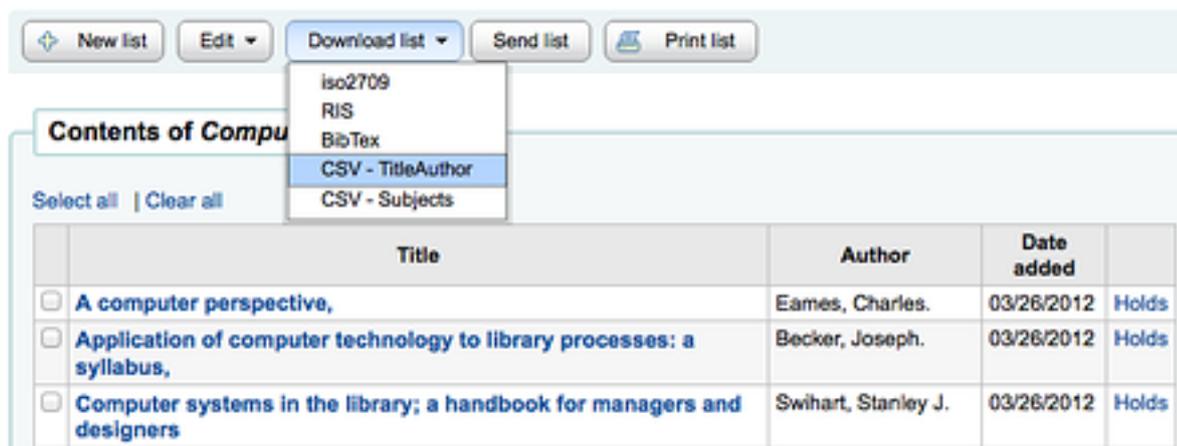
3.3.3. *Log Viewer*

- *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:
```
All
Catalog
Authorities
Patrons
```

Action: [All   ▲▼]

Object: [   ]

Info: [   ]

Display from: [   ] 🗓
(MM/DD/YYYY)

Display to: [   ] 🗓
(MM/DD/YYYY)

Output

To screen in the browser: ⦿

To a file: ◯   Named: [Export   ]

[Submit]

Choosing different combinations of menu options will produce the log file for that query.

24 lines found.

Date	Librarian	Module	Action	Object	Info
2015-03-02 07:59:24	Nicole Engard (51)	Circulation	Checkout	Jordan Alford (45)	Item 0674012925
2015-03-02 08:00:40	Nicole Engard (51)	Circulation	Checkout	Johnny Bryan (23)	Item 1880418592
2015-03-04 06:45:26	Nicole Engard (51)	Circulation	Checkout	Nicole Engard (51)	Item 1000006
2015-03-04 06:46:35	Nicole Engard (51)	Circulation	Checkout	Coda Engard (52)	Item 1000003
2015-03-06 04:14:39	Nicole Engard (51)	Circulation	Checkout	Nicole Engard (51)	Item 1000007
2015-03-06 04:15:02	Nicole Engard (51)	Circulation	Return	Nicole Engard (51)	Item 1000007
2015-03-06 04:15:47	Nicole Engard (51)	Circulation	Checkout	Nicole Engard (51)	Item 1000007
2015-03-06 05:25:45	Nicole Engard (51)	Circulation	Return	Nicole Engard (51)	Item 1000007
2015-03-06 05:26:05	Nicole Engard (51)	Circulation	Checkout	Nicole Engard (51)	Item 1000007
2015-03-06 05:26:22	Nicole Engard (51)	Circulation	Return	Nicole Engard (51)	Item 1000007
2015-03-30 10:45:50	Sonia Frazier (20)	Circulation	Checkout	Jordan Alford (45)	Item something
2015-04-24 09:39:55	Nicole Engard (51)	Circulation	Return		Item 1000007

3.3.4. *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.

To add news to either the OPAC, the Staff Client or a Circulation receipt:

- Click 'New Entry'

- Under 'Display Location' choose whether to put the news on the OPAC, Slip (circulation receipt) or the Librarian (Staff) Interface.

- 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*
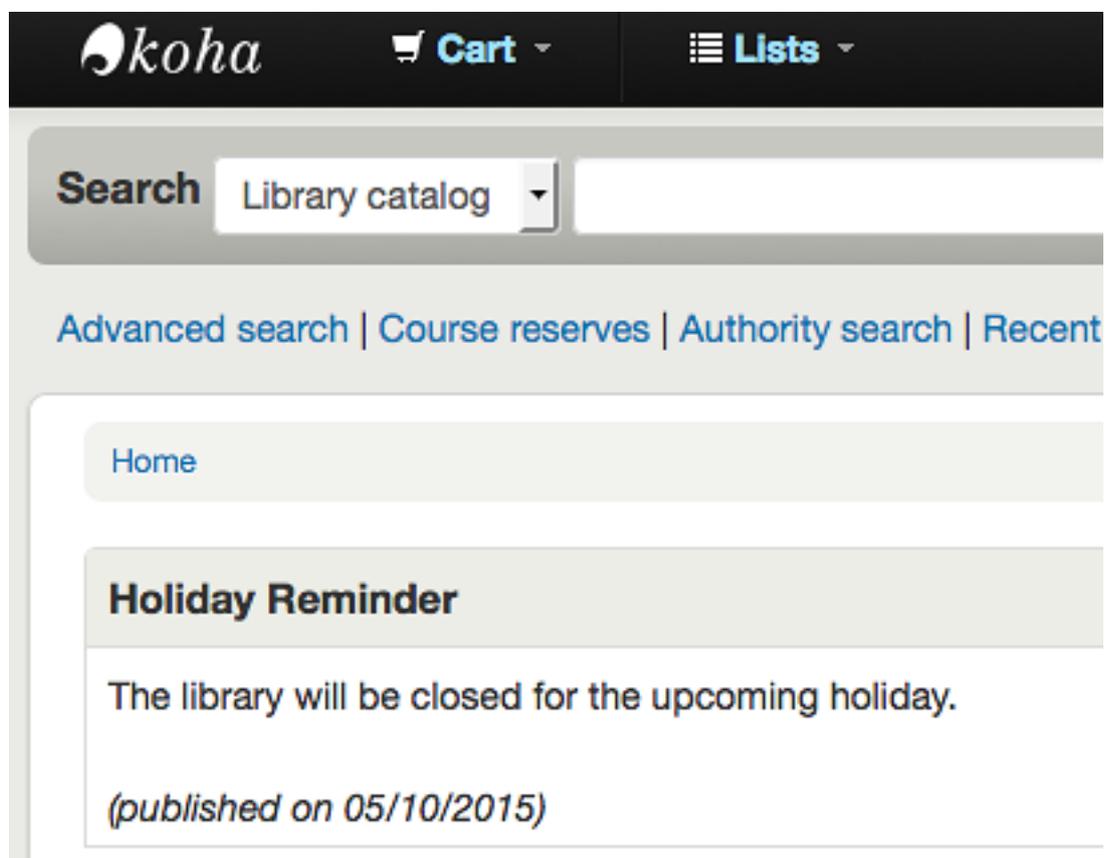
- Below the news in the OPAC there will be an RSS icon allowing you to subscribe to library news
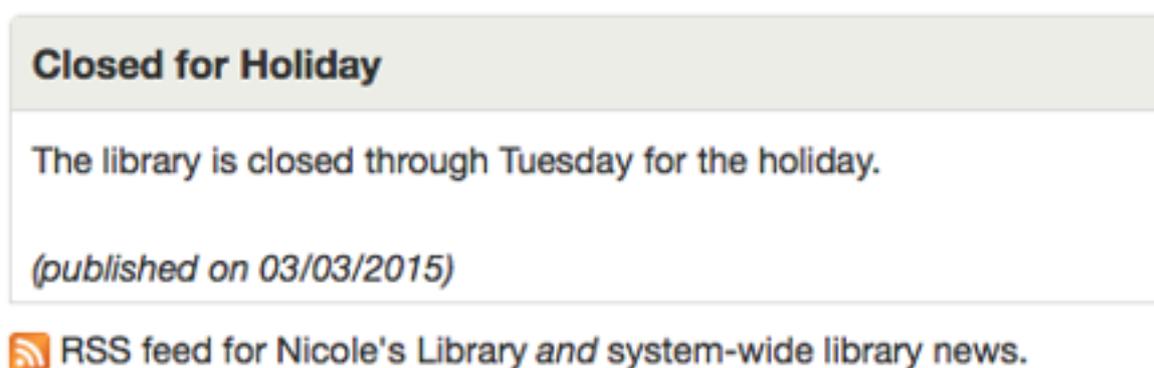
- News in the Staff Client will appear on the far left of the screen

- 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*

- Depending on your choice for the *NewsAuthorDisplay* preference you will also see the person who
  created the news item (this uses the logged in person)

3.3.5. *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

- 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

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
non grouped zips	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
previous month items created	1		Engard, Nicole (51)	12/07/2009		Show SQL	Edit SQL	Run	Schedule	Delete
barcodes			Engard, Nicole (51)	12/14/2009		Show SQL	Edit SQL	Run	Schedule	Delete

3.3.5.1. *Troubleshooting*

Task scheduler will not work if the user the web server runs as doesn't have the permission to use it. To find out if the right user has the permissions necessary, check /etc/at.allow to see what users are in it. If you don't have that file, check etc/at.deny. If at.deny exists but is blank, then every user can use it. Talk to your system admin about adding the user to the right place to make the task scheduler work.

3.3.6. *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 the *Opac-MainUserBlock* in the OPAC:
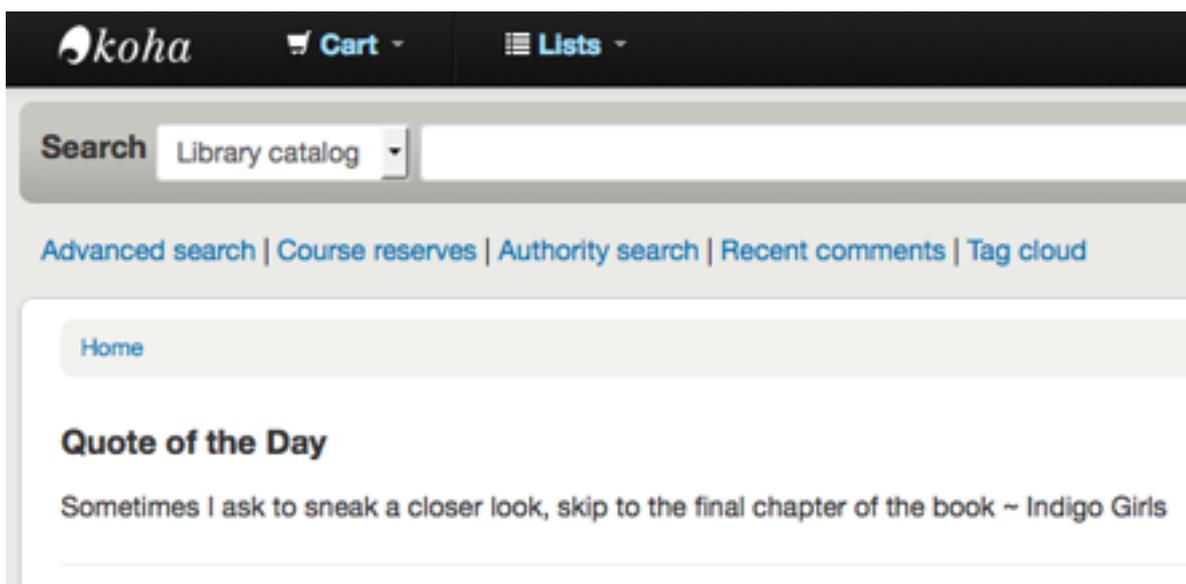
3.3.6.1. *Add a Quote*

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.

-
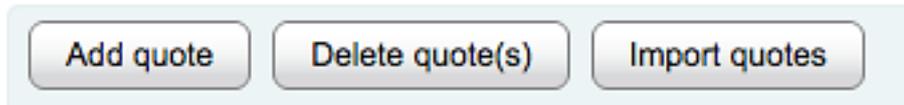
> **Important**
>
> Both the 'Source' and the 'Text' fields must be filled in in order to save the new quote.

- 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.

3.3.6.2. *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.

- 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.

3.3.6.3. *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
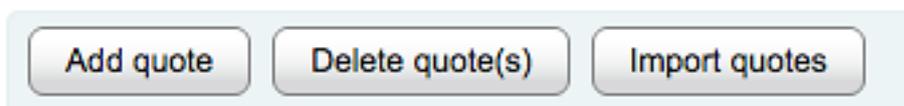
- Once on the import quotes screen you can browse your computer for the file you would like to import

- After selecting the CSV file, click the 'Open' button and the file will be uploaded into a temporary editing table.

- 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.

- 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.

- Once quote selection is finished, simply click the 'Delete quote(s)' key.

- You will be prompted to confirm the deletion.
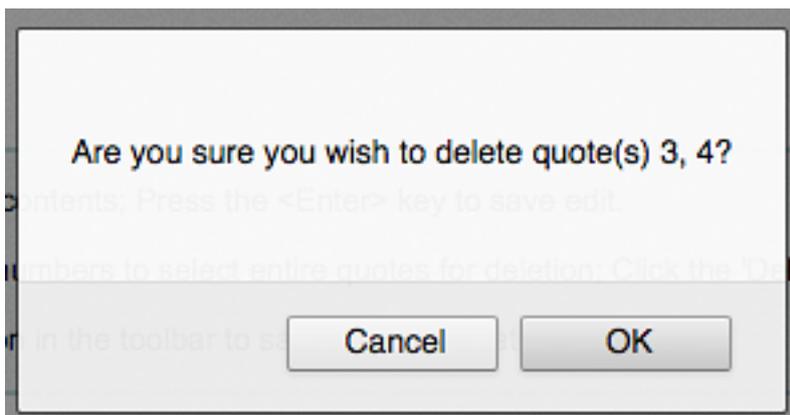
- After confirming the deletion, the list will update and the quote(s) will no longer appear.

- Once you are satisfied with the quotes, click the 'Save quotes' button in the toolbar at the top and the quotes will be saved.

3.3.7. *Upload*

- *Get there:* More > Tools > Additional Tools > Upload

This tool will allow you to upload files to your Koha system for selection from the *Cataloging form*.

3.3.7.1. *Upload Files*

When you first visit the Upload tool you might see a warning about missing a category.
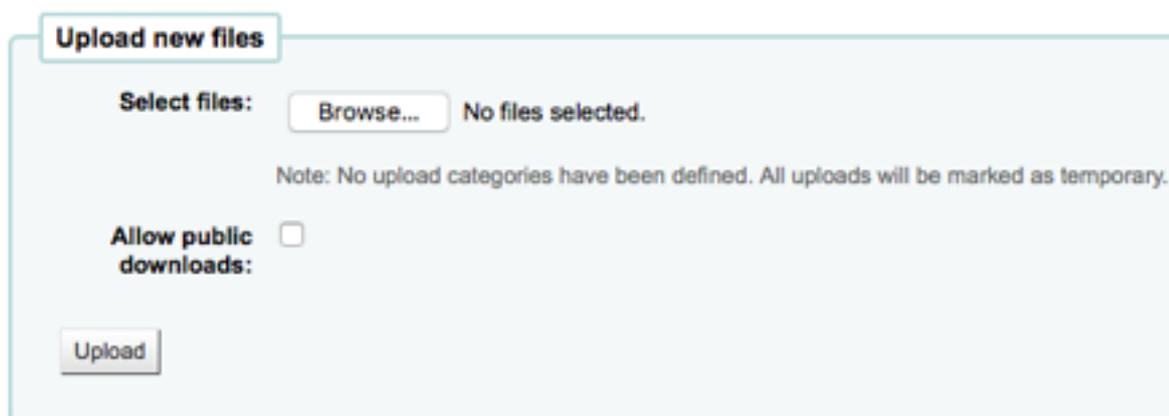
Categories are defined in the *authorized value* in the UPLOAD category. If you do not have upload categories then your files will be temporary and will be deleted the next time the server is rebooted. Once you have a value in the UPLOAD authorized value category you will see a Category pull down below the 'Browse' button.

Browse your computer a file, choose a category and decide if the public will be able to download this file via the OPAC. Once your file is uploaded you will be presented with a confirmation.

3.3.7.2. *Search Files*

All uploaded files are searchable from below the upload form. Using the form you can search any part of the filename and/or the Hashvalue.

You will be presened with the results of your search.

Your request gave the following results:

Filename	Size	Hashvalue	Category	Public	Temporary	Actions	
fashion89.mrc	151244	57b13d16ecd41ed1c5dca54d4bae3f22	koha_kohadev_upload	No	Yes	⬇ Download	🗑 Delete
importdvd.mrc	293442	c7a10cfa3c57f98dbee13a1cc10d48a7	koha_kohadev_upload	Yes	Yes	⬇ Download	🗑 Delete
mashups.mrc	5742	ccf64458098056241763d8b0ba45f49f	Cat	Yes	No	⬇ Download	🗑 Delete

Back

Patrons

Before importing and/or adding patrons be sure to set up your *patron categories*.

4.1. *Add a new patron*

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

- *Get there:* Patrons

Once there you can add a new patron.

- Click 'New patron'
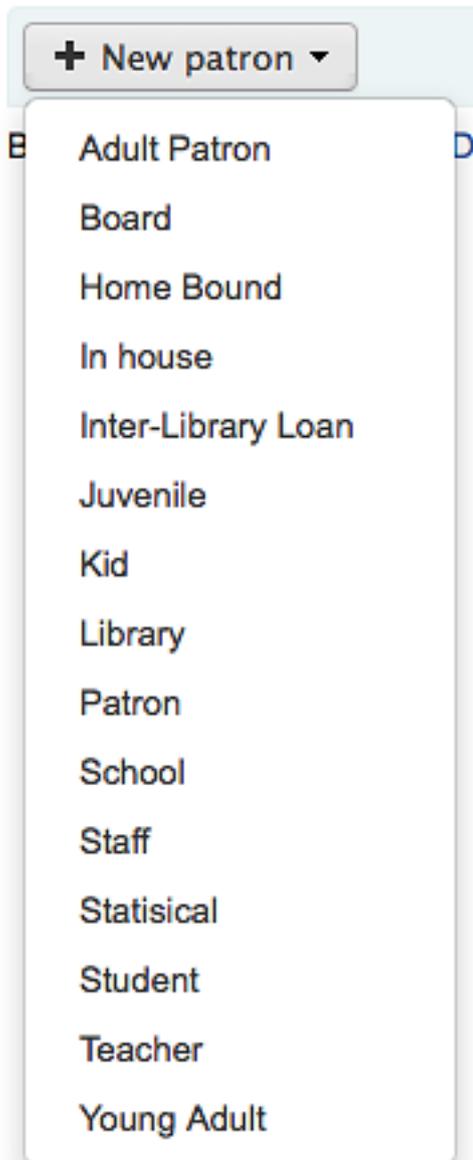
- The fields that appear on the patron add form can be controlled by editing the *BorrowerUnwanted-Field* system preference.

- First enter the identifying information regarding your patron

Add Patron patron

- Required fields are defined in the *BorrowerMandatoryField* system preference

- Salutation is populated by the *BorrowersTitles* system preference

-

> **Note**
>
> If you'd like to prevent full names from printing on *slips* and you're not using the Initials or Other name fields for anything else, you can use them for shortened versions of the name to then be printed on the slip.
>
> For example:
>
> ```
> Firstname: Nicole C.
> Surname: Engard
> Initials: NCE
> ```
>
> Then on the slip you can have it print the <<borrowers.initials>> instead of the full name (NCE).
>
> Or you could do something like this:
>
> ```
> Firstname: Nicole
> Surname: Engard
> Initials: E
> ```
>
> Then on the slip you can have it print the <<borrowers.initials>>, <<borrowers.firstname>> instead of the full name (E, Nicole).

- Next enter the contact information

- 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

- 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 *borrowerRelationship* system preference

- If this patron is a professional, you will be asked to attach the patron to an organizational patron

- 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: 24535000001954   *Required*

Library: South Branch

Category: Patron

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

- 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

- 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

- Finally, if you have *EnhancedMessagingPreferences* set to 'allow,' you can choose the messaging preferences for this patron.

- These notices are:

  - Advanced notice : A notice in advance of the patron's items being due (The patron can choose the number of days in advance)

  - Item checkout : A notice that lists all the of the items the patron has just checked out and/or renewed, this is an electronic form of the checkout receipt

  - Hold filled : A notice when you have confirmed the hold is waiting for the patron

  - Item due : A notice on the day and item is due back at the library

  - Item check-in : A notice that lists all the of the items the patron has just checked in

- Patrons can choose to receive their notices as a digest by checking the 'Digest only?' box along with the delivery method. A digest is a combination of all the messages of that type (so all items due in 3 days in one email) in to one email instead of multiple emails for each alert.

-
  > **Important**
  >
  > These preferences will override any you set via the *patron categories*

-
  > **Important**
  >
  > 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 🗆

> **Note**
>
> A duplicate patron is detected if first and last names match and there is no date of birth populated or if first name, last name and date of birth fields are all populated. If two patrons have matching names, but one has a date of birth and the other does not they will not match as duplicates.

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.

4.2. *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*

> **Important**
>
> Remember to assign your staff secure usernames and passwords since these will be used to log into the staff client.

4.3. *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
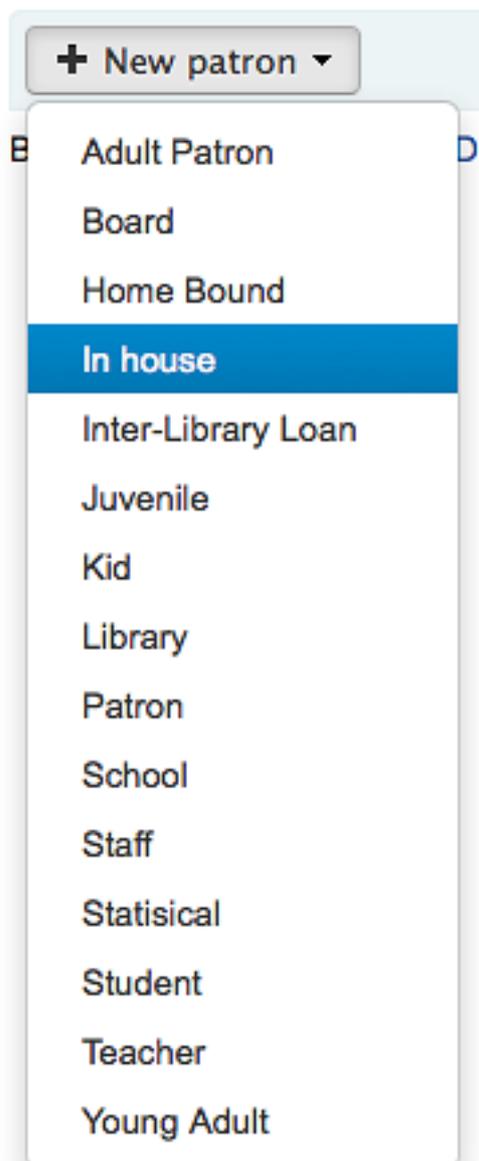
Next, follow the steps put forth in the '*Add a new Patron*' section of this manual. Since this patron is not a real person, simply fill in the required fields, the correct library and nothing else.

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

4.4. *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

Nicole Engard (9876543457)

- 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'

-

> **Note**
>
> Clicking in a field that is already populated with data will clear that field of all information (making it easier for you to type in something different)

- You will be brought to your new patron

Brian Engard (9876543453)

123 My Street
Philadelphia PA 19101

4.5. *Add Patron Images*

If you would like you can add patron images to help identify patrons. To enable this feature you must first set the *patronimages* preference to 'Allow'.

If the preference is set to 'Allow' you will see a placeholder image under the patron's name and box to upload a patron image below the basic contact information.

In the 'Upload Patron Image' box click 'Browse' to find the image on your computer and 'Upload' to load the image on to the patron record.
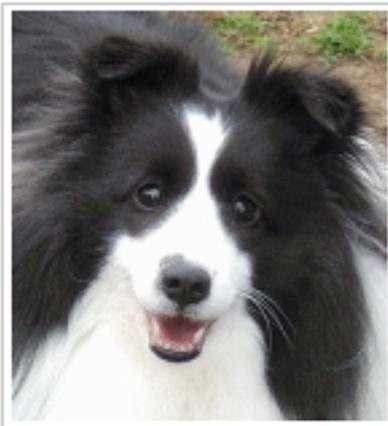
> **⭐ Important**
>
> There is a limit of 100K on the size of the picture uploaded and it is recommended that the image be 200x300 pixels, but smaller images will work as well.

4.6. *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.

- 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

- 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:	9876543456
Borrowernumber:	53
Category:	Juvenile (J)
Registration date:	02/18/2011
Expiration date:	05/18/2019
Library:	Fairfield
Privacy Pref:	Never
Username:	beau
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:

[   ] Browse...

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

- 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

- 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

- If you would like to bar a patron from the library you can add a manual restriction

-

> **Note**
>
> This flag can automatically be set with the *Overdue/Notice Status Triggers*

- If you enter in a date and/or note related to the restriction you will see that in the restricted message as well
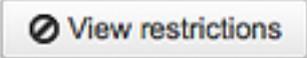
- Children patrons do not become adults automatically in Koha unless you have *Juvenile to Adult cron job* running. To upgrade a child patron to and adult patron category manually go to the 'More' menu and choose 'Update Child to Adult Patron'
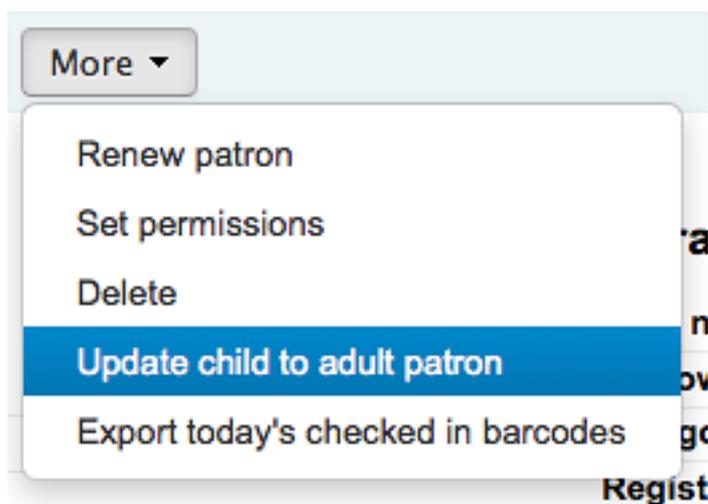
- You will then be presented with a pop up window asking which one of your adult patron categories this Child should be updated to

Choose Adult category

	Code ⇕	Description ▾
○	ADPT	**Adult Patron**
○	HB	**Home Bound**
○	PT	**Patron**
○	ST	**Student**

Submit   Cancel

4.7. *Managing Patron Self Edits*

If you are allowing patrons to edit their accounts via the OPAC with the *OPACPatronDetails* preference then you will need to approve all changes via the staff client before they're applied. If there are patron edits awaiting action they will appear on the staff client dashboard below the modules list (along with other items awaiting action).

Suggestions pending approval: **1**

Comments pending approval: **1**

Tags pending approval: **1**

Patrons requesting modifications: **1**

> **Note**
>
> Superlibrarians will see modifications for any branch, other staff will only see modifications for patrons who belong to their logged in branch.

When you click the 'Patrons requesting modifications' link you will be brought to a list of patrons with requested changes.

Update patron records

▼ **Engard, Nicole (Nicole's Library) (12345674223)**

View record

○ Approve ○ Deny ● Ignore | Patron details

Field	From	To
Country		USA
First name	Nicole	Nicole C.
Primary phone	555.555.5555	555.555.5556
Sex		F

Submit

From here you can 'Approve' and apply the changes to the patron record, 'Delete' and remove the changes or 'Ignore' and keep the changes pending to review later.

If you would like to see the entire patron record you can click the 'Patron details' links to the right of the buttons. This will open in a new tab.

4.8. *Patron Permissions*

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

> **Important**
>
> In order for a staff member to log into the staff interface they must have (at the very least) 'catalogue' permissions which allow them to view the staff interface.

4.8.1. *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
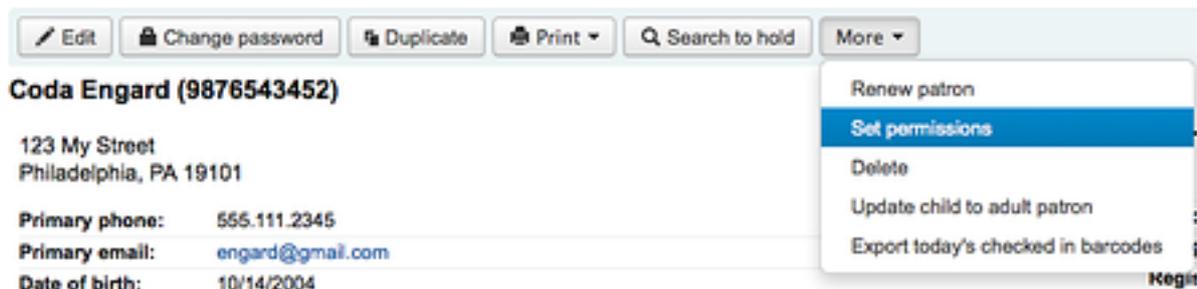
- You will be presented with a list of preferences, some of which can be expanded by clicking the plus sign to the left of the section title.

4.8.2. *Patron Permissions Defined*

- superlibrarian

  - Access to all librarian functions

-

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

- circulate

  - Check out and check in items

  - This section can be expanded (*Learn more*)

- catalogue

  - **Required for staff login.** Staff access, allows viewing the catalogue in staff client

    -

      > **Important**
      >
      > Must be given to all staff members to allow them to login to the staff client

- parameters

  - Manage Koha system systems (Administration panel)

  - This section can be expanded (*Learn more*)

- borrowers

  - Add or modify patrons

- permissions

  - Set user permissions

- reserveforothers

  - Place and modify holds for patrons

  - This section can be expanded (*Learn more*)

- editcatalogue

  - Edit Catalog (Modify bibliographic/holdings data)

  - This section can be expanded (*Learn more*)

- updatecharges

  - Manage patrons fines and fees

- This section can be expanded (*Learn more*)

- acquisition

  - Acquisition and/or suggestion management

  - This section can be expanded (*Learn more*)

- management

  - Set library management params (deprecated)
  -
    > **Important**
    >
    > This permission level no longer controls anything.

- tools

  - Use all tools

  - This section can be expanded (*Learn more*)

- editauthorities

  - Edit Authorities

- serials

  - Manage serial subscriptions

  - This section can be expanded (*Learn more*)

- reports

  - Allow access to the reports module

  - Reports found on the Circulation page are not controlled by this permission

  - This section can be expanded (*Learn more*)

- staffaccess

  - Allow staff members to modify permissions for other staff members

  -
    > **Important**
    >
    > Requires the borrowers permission above

- plugins
  - Koha plugins

  - This section can be expanded (*Learn more*)

- lists
  - Koha Lists

  -
    > **Important**
    >
    > All staff have permission to create and modify their own lists, this permission is only necessary if you'd like to give a staff member permission to delete public lists that they have not created.

  - This section can be expanded (*Learn more*)

4.8.2.1. *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

  - Remaining circulation permissions

  - All circulation rights except those covered by permissions listed below

- force_checkout
  - Force checkout if a limitation exists

  - With this permission a librarian will be allowed to override a check out restriction in the following cases:
    - age restriction

    - the item is issued to another patron

    - the item is not for loan

    - the patron has overdue items

    - the item is lost

    - the item is a high demand item

    - the item is on hold

- manage_restrictions
  - Manage restrictions for accounts

  - Grants permission to the staff member to lift a restriction that might be on the patron's record

- overdues_report

- Execute overdue items report

- The permission to run the overdues reports found under Circulation

- override_renewals

  - Override blocked renewals

  - Requires that the staff member also has circulate_remaining_permissions

4.8.2.2. *Granular Parameters Permissions*

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

- manage_circ_rules

  - Manage circulation rules

  - The ability to access the *Circulation and fines rules* in the administration area

- parameters_remaining_permissions

  - Remaining system parameters permissions

  - The ability to access all areas in Administration (other than the Circulation and fine rules)

4.8.2.3. *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

  - Modify holds priority

  - Allow staff members to alter the holds priority (moving patrons up and down the queue)

- place_holds

  - Place holds for patrons

4.8.2.4. *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:

- delete_all_items
  - Delete all items at once

  - Ability to use the 'Delete all items' option found under the 'Edit' menu in cataloging

- edit_catalogue

  - Edit catalog (Modify bibliographic/holdings data)

  - Ability to access all cataloging functions via the *Cataloging* page

- edit_items

  - Edit items

  - Ability to make *edits to item/holdings records*, but not bibliographic records

- edit_items_restricted
  - Limit item modification to subfields defined in the *SubfieldsToAllowForRestrictedEditing* preference

  - > **Note**
    >
    > Please note that edit_items permission is still required

- fast_cataloging

  - Fast cataloging

  - The ability to catalog using only the *Fast Add Framework* found on the *Circulation* page

4.8.2.5. *Granular Fines and Charges Permissions*

If a staff member has 'updatecharges' permission they have the ability to perform all of these actions. If you would like to control fines and charges permissions on a more granular level choose from these options:
- remaining_permissions
  - Remaining permissions for managing fines and fees other than the ability to write off charges

- writeoff
  - Write off fines and fees

4.8.2.6. *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

  - Add and delete budgets (but can't modify budgets)

- budget_manage

  - Manage budgets

- budget_manage_all
  - Manage all budgets

  budget_modify

  - Modify budget (can't create lines, but can modify existing ones)

- contracts_manage

- Manage contracts

- group_manage

  - Manage orders and basket groups

- order_manage

  - Manage orders and baskets

- order_manage_all
  - Manage all orders and baskets, regardless of restrictions on them

- order_receive

  - Manage orders and baskets

- period_manage

  - Manage periods

- planning_manage

  - Manage budget planning

- vendors_manage

  - Manage vendors

4.8.2.7. *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 via the *Claims section*

- create_subscription

  - Create *a new subscription*

- delete_subscription

  - Delete an existing subscription

- edit_subscription

  - Edit an existing subscription

  - This permission does not include the ability to delete or create a subscription

- receive_serials

  - Serials receiving

- Receive serials on existing subscriptions

- renew_subscription

  - Renew a subscription

- routing

  - Routing

  - Manage *routing lists*

- superserials
  - Manage subscriptions from any branch (only applies when *IndependantBranches* is used)

4.8.2.8. *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 (deletes borrower 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, authorities and holdings data

- Access to the *Export 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 *Batch Item Deletion Tool*

- items_batchmod

  - Perform batch modification of items

  - Access to the *Batch Item Modification Tool*

- items_batchmod_restricted
  - Limit *batch item modification* to subfields defined in the *SubfieldsToAllowForRestrictedBatchmod* preference

  -

    > **Note**
    >
    > Please note that items_batchmod permission is still required

- 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

  - Manage CSV export profiles

  - Access to the *CSV Profiles Tool*

- manage_staged_marc

  - Manage 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 Tool*

- moderate_tags
  - Moderate patron tags

  - Access to the *Tags Tool*

- records_batchdel
  - Perform batch deletion of records (bibliographic or authority)

  - Access to the *Batch Record Deletion Tool*

- rotating_collections
  - Manage rotating collections

  - Access to the *Rotating Collections Tool*

- 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_general_files
  - Upload any file

  - Access to upload files via the *Upload Tool*

- upload_local_cover_images

  - Upload local cover images

  - Access to the *Upload Local Cover Image Tool* as well as permission to add and delete local cover images from the bib detail page

- upload_manage
  - Manage uploaded files

  - Access to uploaded files via the *Upload Tool*

    > **Note**
    >
    > upload_general_files permission is required for this permission

- view_system_logs

  - Browse the system logs

  - Access to the *Log Viewer Tool*

4.8.2.9. *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

  - Create SQL Reports

  - The ability to create and edit but not run SQL reports

- execute_reports

  - Execute SQL Reports

  - The ability to run but not create or edit SQL reports

4.8.2.10. *Granular Plugins Permissions*

If the staff member has 'plugins' 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:
- configure
  - Configure plugins

  - The ability to run the 'configure' section of a plugin if it has one

- manage
  - Manage plugins

  - The ability to install or uninstall plugins

- report
  - Use report plugins

  - The ability to use report plugins

- tool
  - Use tool plugins

  - The ability to use tool plugins

4.8.2.11. *Granular Lists Permissions*

All staff members have permission to access lists. This section only needs to be checked off if you want to give permission to a staff member to delete public lists that they have no created themselves.
- delete_public_lists
  - Delete public lists

4.9. *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.

- *Get there:* Patrons > Browse or search for patron > Click patron name

4.9.1. *Check Out*

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

Staff members can access their own check out screen by clicking their username in the top right of the staff client and choosing 'My checkouts'

4.9.2. *Details*

Staff members can access their own account details by clicking their username in the top right of the staff client and choosing 'My account'

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

Coda Engard (23529001223638)

123 My Street
Austin TX 78741

Primary phone:	555.512.5555
Primary email:	coda@email.com
Guarantor:	Engard, Nicole

Edit

- On the Guarantor's record, all children and/or professionals will be listed

Nicole Engard (23529001223637)

123 My Street
Austin TX 78741

Primary phone:	555.512.5555
Primary email:	nicole@gmail.com
Guarantees:	
Coda Engard	

Edit

4.9.2.1. *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.

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

The Restrictions tab will show for all patrons. If the patron has no restrictions you will see that on the tab.

If the patron has restrictions on their account the tab will show the number and the description.

Using the 'Add manual restriction' button you can add a restriction to the patron record from here.

4.9.3. *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.

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
  - If you're allowing patrons to pay fines via the OPAC with PayPal (*EnablePayPalOpacPayments*) you will see a Note that says 'PayPal' for items paid this way

- Amount: the total amount of the payment or charge

- Outstanding: the amount still due on charge

- The ability to reverse a payment

- A link to print a receipt for that line item

At the top of the table you can click the 'Filter paid transaction' to hide all completed transaction and above that you can use the search box to find a specific charge or payment.

4.9.3.1. *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

4.9.3.2. *Pay/Reverse Fines*

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

- Each line item can be paid in full, partially paid, or written off.

- Pay a fine in full

    - If you have a note about the payment please type that first then move on

    - 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

- 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

- 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"

- 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"

- Enter an amount to pay towards the fines.

- 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

| 06/24/2016 | Payment, thanks Going Postal (Discworld). | | -5.00 | 0.00 | 🖶 Print | ↻ Reverse |

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

| 06/24/2016 | Payment, thanks , Reversed - Going Postal (Discworld). | | -5.00 | 5.00 | 🖶 Print | ↻ Reverse |

4.9.3.3. *Creating Manual Invoices*

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

- 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

4.9.3.4. *Creating Manual Credits*

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

- 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

4.9.3.5. *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.

INVOICE		
Fairview		
Bill To: Nicole Engard **Card Number: 23529001223637**		
Date	**Description of charges**	**Amount**
09/27/2010	Lost Item Voyages of discovery : 33203000745779	15.00
Total outstanding dues as on date:		2.65

4.9.4. *Routing Lists*

A list of all of the serial routing lists the patron belongs to will be accessible via the 'Routing Lists' tab on the patron record.

Check out

Details

Fines

Routing Lists

Circulation history

Modification log

Notices

Statistics

Files
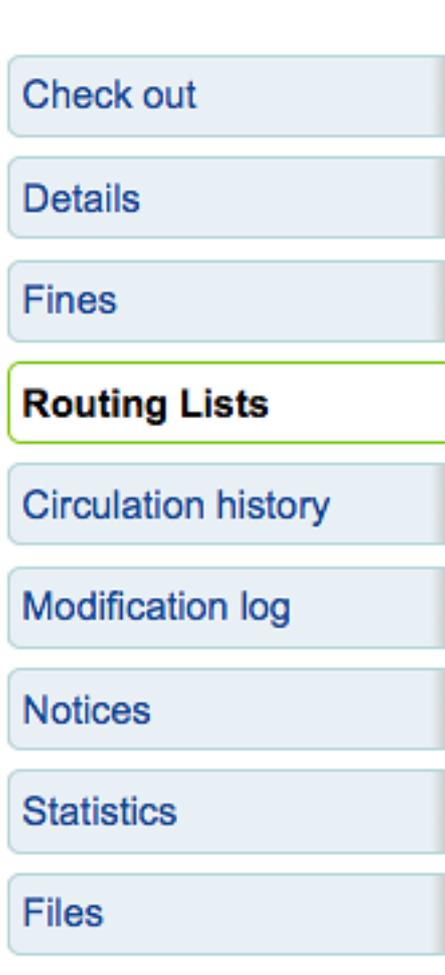
On this tab you will be able to see and edit all of the routing lists that this patron is on.

Search subscriptions:

ISSN: [   ]   Title: [   ]   Search

3 Subscription routing list(s)

Subscription title	Routing list
Computers in libraries.	Edit routing list
Computers in libraries.	Edit routing list
Library journal	Edit routing list

4.9.5. *Circulation History*

The circulation history tab will appear if you have set the *intranetreadinghistory* preference to allow it to appear. If you have the *OPACPrivacy* system preference set to 'Allow' and the patron has decided that the library cannot keep this information this tab will only show currently checked out items.

Circulation History

Page(s): (H) (H)   (H) (H) Entries/page: 20 ‡

Showing 1 to 4 of 4   Show 10 ‡ entries   Search: [   ]

Date ▲	Title ⬍	Author ⬍	Call No. ⬍	Barcode ⬍	Number of Renewals	Checked out on ⬍	Checked out from ⬍	Date Due ⬍	Return Date ⬍
11/30/2011	Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5).	Butcher, Jim.		60479696	1	11/18/2011	Nicole's Library	12/01/2011	Checked Out
12/24/2011	Blood Rites (The Dresden Files, Book 6).	Butcher, Jim.		67022150	1	11/18/2011	Nicole's Library	12/25/2011	Checked Out
03/14/2012	Harry Potter and the goblet of fire	Rowling, J. K.	PZ7.R79835 Hal 2000b	19936024	4	07/21/2011	Nicole's Library	11/26/2011	03/14/2012
03/14/2012	Harry Potter and the prisoner of Azkaban	Rowling, J. K.	PZ7.R79835 Ham 2000	100019	4	09/27/2011	Nicole's Library	11/26/2011	03/14/2012

Showing 1 to 4 of 4

If you would like to export a list of barcodes for the items checked in today you can find that option under the More menu on the top right of the page.

This will generate a text file with one barcode per line.

4.9.6. *Modification Log*

If you have set your *BorrowersLog* to track changes to patron records, then this tab will appear. The Modification Log will show when changes were made to the patron record. If you also have turned on the *IssueLog* and *ReturnLog* you will see checkins and outs on this screen as well.

- The Librarian field shows the patron number for the librarian who made the changes

- The module lists 'MEMBERS' for the patron module

- The action will tell you what action was being logged

- The Object field lists the borrowernumber that is being modified (in the example above, it was my changing my own record)

4.9.7. *Notices*

The *patron's messaging preferences [442]* are set when *adding* or *editing* the patron. This tab will show the messages that have been sent and those that are queued to be sent:

Sent notices for Nicole Engard

Notice	Type	Status	Time
Purchase suggestion declined	email	pending	2011-04-01 12:44:21
Purchase suggestion declined	email	pending	2011-04-01 12:44:21
Purchase suggestion accepted	email	pending	2011-04-01 12:47:54
Purchase suggestion declined	email	pending	2011-04-30 07:00:40
Purchase suggestion accepted	email	pending	2011-04-30 07:19:38
Purchase suggestion accepted	email	pending	2011-05-23 15:31:22
Purchase suggestion accepted	email	pending	2011-05-23 15:37:20
Check-ins	email	pending	2011-07-06 00:20:09
Checkouts	email	pending	2011-07-06 22:47:11
Hold Available for Pickup at Nicole's Library	email	pending	2011-08-08 13:13:29
Hold Available for Pickup at Nicole's Library	email	pending	2011-09-06 09:57:29
Hold Available for Pickup at Nicole's Library	email	pending	2011-09-06 11:42:03
Purchase suggestion declined	email	pending	2011-09-07 20:19:11
Purchase suggestion accepted	email	pending	2011-09-07 20:24:44
Purchase suggestion accepted	email	pending	2011-09-07 20:30:27

Clicking on the message title will expand the view to show you the full text of the message that was sent.

Notice	Type	Status	Time
Purchase suggestion declined Dear Nicole Engard, You have suggested that the library acquire Book by Book. The library has reviewed your request today, and has decided not to accept the suggestion at this time. The reason given is: If you have any questions, please email us at nengard@bywatersolutions.com. Thank you, Nicole's Library	email	pending	2011-04-01 12:44:21

If the message has a status of sent or failed you will have the option to 'resend' the message to the patron by clicking the 'resentd button found under the status.

Sent notices for Johnny Bryan (23529000120056)

Showing 1 to 1 of 1   Show 20 entries   ⟨⟨ First ⟨ Previous   Next ⟩⟩   Last ⟩⟩

Search:

Notice	Type	Status	Time
Item Overdue Dear Johnny Bryan, According to our current records, you have items that are overdue.Your library does not charge late fines, but please return or renew them at the branch below as soon as possible.	print	sent Resend	07/12/2016 15:08

4.9.8. *Statistics*

Depending on what you set for the values of your *StatisticsFields* system preference, you can see statistics for one patron's circulation actions.

4.9.9. *Files*

If you set the *EnableBorrowerFiles* preference to 'Do' the Files tab will be visible on the patron information page.

From here you can upload files to attach to the patron record.

All files that are uploaded will appear above a form where additional files can be uploaded from.

Files

Name	Type	Description	Uploaded	
wordpress-tblc-2012.pdf	application/pdf	Presentation	08/08/2012	Delete

Upload New File

Description: [   ]

File: [   ] Browse...

[Upload File]

4.9.10. *Purchase Suggestions*

If the patron has made any purchase suggestions you will see a purchase suggestions tab on the patron record.

From here you can see all suggestions made by the patron and their status, you can also create a purchase suggestion on the patron's behalf by clicking the 'New purchase suggestion' button at the top.

Learn more about *Purchase suggestions* in the *Acquisitions* chapter of this manual.

4.9.11. *Patron discharges*

A discharge is a certificate that says the patron has no current checkouts, no holds and owe no money. To enable this option on the patron record you need to set the *useDischarge* system preference to 'Allow'.

> **Note**
>
> In France a "quitus" ("discharge") is needed if you want to register for an account in a library or a university).

> **Note**
>
> Academic libraries often require that you have a clear record at the library before you can graduate.

Patrons can *request discharges via the OPAC*. Any pending discharges will be listed below the menu buttons on the main staff client page

Discharge requests pending: **1**

Clicking the pending requests will open a screen where you can allow those discharges

Pending discharge requests

Patron	Allow
Middleton, Bobbie	Allow

To generate a discharge for a specific patron click the 'Discharge' tab on the left of the patron record

If the patron can have a discharge generated then it will have a button that says 'Generate discharge'

If not then you'll see an error explaining why you can't discharge the patron.

Once the letter is generated you will have a PDF to download

> **Note**
>
> You can style the PDF using the *NoticeCSS* preference.

The patron will have a restriction added to their account

And a history of discharges will be added to the 'Discharge' tab

4.10. *Patron Search*

Clicking on the link to the Patron module will bring you to a search/browse screen for patrons. From here you can search for a patron by any part of their name or their card number.

Clicking the small plus sign [+] to the right of the search box will open up an advanced patron search with more filters including the ability to limit to a specific category and/or library.

You can also filter your patron results using the search options on the left hand side of the page.

Depending on what you have chosen for the 'Search fields' you can search for patrons in various different ways.

- Standard:

  - Enter any part of their name, username, email address or barcode

- Email:

  - Enter any part of their email address and choose 'Contains' instead of 'Starts with'

- Borrower number:

  - Enter the Koha borrower number

- Phone number:

  - Enter the phone number exactly as it is in the system or by using spaces between each batch of numbers.

  - Example: To find (212) 555-1212 you can search for it exactly as it was entered or by searching for 212 555 1212

- Street address:

  - Enter any part of the patron's address (includes all address fields) and choose 'Contains' instead of 'Starts with' to find the string anywhere in the address

- Date of birth
  - Birth dates should be entered using the format set forth in the *dateformat* preference.

- Sort field 1
  - This is a custom field that libraries can use for any type of data about the patron.

- Sort field 2
  - This is a custom field that libraries can use for any type of data about the patron.

You can also choose to either search for fields that start with the string you entered or contain the string. Choosing 'Contains' will work like a wildcard search.
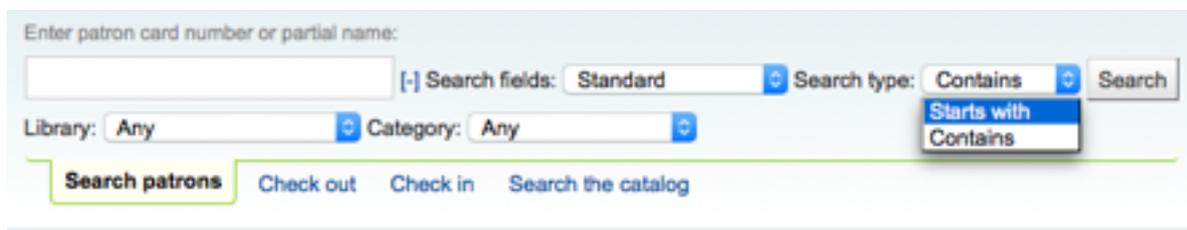
You can also browse through the patron records by clicking on the linked letters across the top.

Circulation

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 users

- jump to the checkin with Alt+R

> **Note**
>
> Mac users use the OPTION button in place of ALT

5.1. *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 the top of the main staff client

- Check out option on the patron record

- If you have enabled *batch checkouts* then click the batch check out option on the patron record

- Check out option on the quick search bar on the circulation page
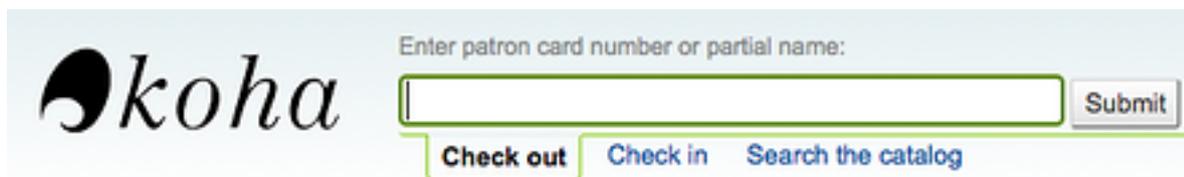
5.1.1. *Checking Items Out*

To check an item out to a patron, first search for that patron using one of the many options listed above. You will then be presented with the checkout screen.

If you have chosen to 'Always show checkouts immediately' then you will see the list of checkouts below the check out box.

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

- If the barcode is not found you will be prompted to use fast cataloging to add the item. Learn more about *fast cataloging* later in this manual.

- If you have *itemBarcodeFallbackSearch* set to 'Enable' then you can enter a keyword search in this box instead of just a barcode (this will make it possible to check out using title and/or call number).

To see more checkout options click the 'Checkout settings' link to expand the checkout area.

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

Below the box for the barcode you will see a checkbox for 'Automatic renewal'. This will allow this item to automatically renew if the *appropriate cron job* is running and there are no holds on the item.

Next is an option to no decrease the loan length based on holds. This overrides the *decreaseLoan-HighHolds* preference.

If you're allowing the *checkout of items on site* to patrons (these are usually items that are not for loan that you would like to check for in library use) then you will see the 'On-site checkout' checkbox after clicking the 'Checkout settings' link to expand your circulation options.

At the bottom of the page there is a summary of the patron's current checked out items along with the due date (and time if the item is an hourly loan), items checked out today will appear at the top.

> **Note**
>
> Items that are hourly loan items will include the time with the due date.

If you checked out an item for on site use you will see that highlighted in red in the checkout summary.

If you have set your *ExportWithCsvProfile* preference, you will also see the option to export the patron's current checkout information using a CSV Profile or ISO2709 (MARC21) format.

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

From the holds list you can suspend or resume patrons holds using the options at the bottom of the list if you have the *SuspendHoldsIntranet* preference set to 'allow.'

> **Note**
>
> If you have your *AutoResumeSuspendedHolds* preference set to "Don't allow" then you will not have the option to put an end date on the hold suspension

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

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

The details of the checkouts will appear on the bib detail page in the staff client as well.

5.1.1.1. *Printing Receipts*

Once you have checked out all of the items for the patron you can print them a receipt by choosing one of two methods.

If you have the *CircAutoPrintQuickSlip* preference set to 'open a print quick slip window' you can simply hit enter on your keyboard or scan a blank piece of paper with your barcode scanner. The idea being that you're "checking out" a blank barcode which triggers Koha to print the 'Quick slip.'

You can also click the Print button at the top of the screen and choose 'Print slip' or 'Print quick slip'.
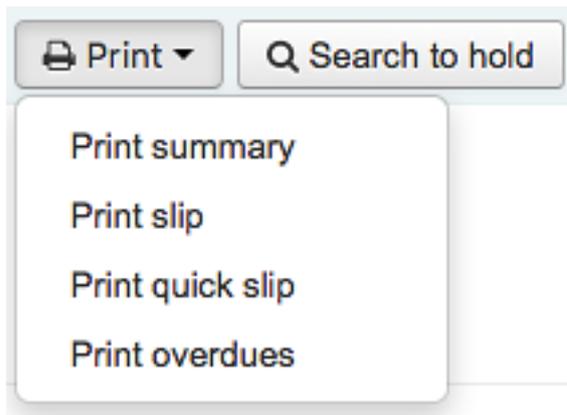
If you choose 'Print slip' it will print all of the items the patron has checked out, including those they checked out at an earlier date. Choosing 'Print quick slip' will print only the items that were checked out today.

'Print summary' will generate a full page summary for the patron's circulation information and 'Print overdues' will print out a slip that lists all items that are overdue.

What prints on the slips can be customized by altering the slip templates under the *Notices & Slips* tool.

5.1.1.2. *Clear Patron Information*

When you're done checking an item out if you have the *DisplayClearScreenButton* preference set to 'Show' you can clear the current patron by clicking the X in the top right of the patron's info to remove the current patron from the screen and start over.

If you have the *CircAutoPrintQuickSlip* preference set to 'clear the screen' then you simply need to hit enter or scan a blank barcode and the screen will be cleared of the current patron.

5.1.2. *Batch Checkouts*

If you would like to perform a batch check out you can do so by turning on the *BatchCheckouts* system preference and assigning the proper patron categories via the *BatchCheckoutsValidCategories* preference. This will allow you to use an RFID pad that reads multiple barcodes or perform a batch check out for training internal use.

From this screen you can scan several barcodes or load a file of barcodes. If those items cannot be checked out they will provide a warning on the following screen

Please confirm checkout

Checkout or renew

If you are using a statistical patron type then you'll see that local use was recorded for each item you scanned.

Barcode	Title	Information
0002259613	Daughter of fortune :, by Allende, Isabel. 0002259613	Local use recorded
0006541593	The Lover., by Duras, Margarite. 0006541593	Local use recorded
0006545793	Brave New World., by Huxley, Aldous. 0006545793	Local use recorded
0028622456	Frommer's 99 Europe from $50 a Day (Serial)., by Frommer, Arthur. 0028622456	Local use recorded
002862307X	Frommer's 99 England (Frommer's England)., by Frommer, Arthur. 002862307X	Local use recorded

5.1.3. *Check Out Messages*

If you check out an item that has multiple pieces and you have cataloged that information in subfield 3 of the item record (in MARC21) a message will pop up when you check out that item telling you how many pieces should be there.

Note about the accompanying materials:
17 Disks

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 Beau ENGARD (23529001223644)

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 On Hold	☐
				Totals:	22.50	25.00	Renewal due date: ▭ Forgive fines on return: ☐	

Override Renewal Limit: ☐ | Renew or Return checked items | Renew all

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

- Patron has a restriction on their account

- This can be set by the librarian editing a patron record and adding a *restriction [449]* or by the *Overdue/Notice Status Triggers*

- If the staff member has the right permission they can override the restriction temporarily

- Patron needs to confirm their address

- This can be set by the librarian editing a patron record and adding a *flag [449]*

- Patrons has lost their library card

- This can be set by the librarian editing a patron record and adding a *flag [449]*

5.1.4. *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

- Item on hold for someone else

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

- Item already checked out to this patron

- Item checked out to another patron

- This warning will allow you to place a hold on the item for the patron you're trying to check it out to.

- Item not for loan

- Patron has too many things checked out and *AllowTooManyOverride* is set to 'Allow'

- Patron has too many things checked out and *AllowTooManyOverride* is set to "Don't allow"

- Item cannot be renewed

- This can be overridden with the *AllowRenewalLimitOverride* system preference

- Barcode not found

> - The barcode was not found 2345678765343234
>   Fast cataloging

- Learn more about *fast cataloging* later in this manual.

- Item being checked out is marked as 'lost'

  - Depending on the value in your *IssueLostItem* preference, you may just see a warning

> This item has been lost with a status of "Lost".

  or a confirmation box

> **Please confirm checkout**
> - This item has been lost with a status of "Lost". Check out anyway?
>   ✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Item being checked out is not recommended for a patron of this age

> **Please confirm checkout**
> - Age restriction PG 13. Check out anyway?
>   - The patron has a debt of 32.45
>   ✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Item being checked out meets the *decreaseLoanHighHolds* system preference criteria

> **Please confirm checkout**
> - High demand item. Loan period shortened to 2 days (due 10/13/2012 00:00). Check out anyway?
>   ✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

5.2. *Renewing*

Checked out items can be renewed (checked out for another period of time) based on your *circulation rules* and *renewal preferences*.

If *you allow it*, patrons can renew their own items via the OPAC, but sometimes you'll need to help them by renewing their items via the staff client.

To renew items checked out to a patron, you can do one of two things.

The first is to visit their details page or checkout page and review their checkout summary at the bottom.

In the Renew column you will see how many times each item has been renewed and a checkbox to renew the item for the patron. Check the boxed of the items you would like to renew and click the 'Renew or Return checked items' button, or to renew all items checked out to the patron simply click the 'Renew all' button.

Sometimes renewals will be blocked based on your circulation rules, to override this block you must have your *AllowRenewalLimitOverride* preference set to 'Allow'. If you allow renewal limit overrides, you will see a checkbox at the bottom left of the circulation summary. Check that box and then choose the items you would like to renew.

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

The second option is to visit the 'Renew' page found under the Circulation menu.

Circulation

- Check out
- Check in
- Renew
- Transfer
- Fast cataloging

Offline circulation

- Built-in offline circulation interface
- Upload offline circulation file (.koc)
- Pending offline circulation actions
  - Get desktop application
  - Get Firefox add-on

And scan the barcodes of the items you would like to renew.

Renew

Enter item barcode: [＿＿＿＿＿＿＿＿] Submit

If the item is renewed you will receive a confirmation message.

Item renewed:

Audiovisual librarianship; (31619000163907) renewed for Beau
Engard (9876543456) now due on 12/27/2013

If the barcode is not found you will be presented with an error.

Cannot renew:

No item matches this barcode

✕ Ignore and continue

If the item is not actually checked out you will also receive an error.

5.3. *Check In (Returning)*

Checking in items can be performed from various different locations

- The check in box on the top of the main staff client
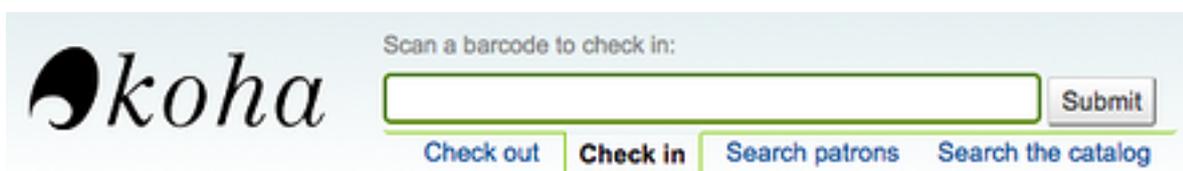
- The check in option on the quick search bar on the Circulation page
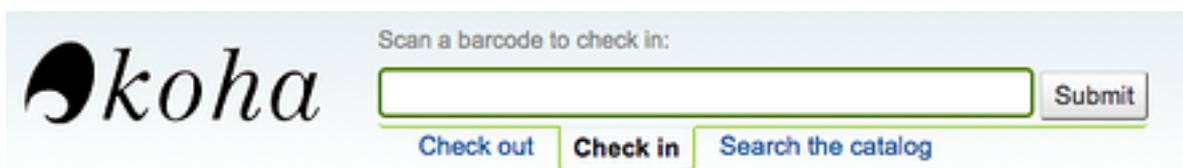
- The check in link on the patron's checkout summary (and on the checkout summary page)

- The Check in page under the Circulation menu

5.3.1. *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

If you are checking items in that were put in the book drop while the library was closed you can check the 'Book drop 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.

If you have the *SpecifyReturnDate* preference set to 'Allow' you will be able to arbitrarily set the return date from below the check in box.

5.3.2. *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

- After this item is checked in the status of the item will be changed in the catalog to 'in transit'

- To mark an item as back at the home branch, check the item in at the home branch

- A message will appear tell you that the item is not checked out, but the status will now say available in the catalog. This step is necessary to mark items as received by the home branch.

- If you are checking in an item that should have multiple parts or pieces a message will appear warning you about the number of pieces you should have in your hand

- If you're checking an item in that has a hold on it, you will be prompted to confirm the hold

- Clicking the Confirm hold button will mark the item as waiting for pickup from the library

Item type	Location	Call Number	Status	Last seen	Barcode
📙	Fairview General Stacks	975.26B	Waiting for Edna Acosta at Fairview since 12/01/2009	12/01/2009	10101000000414

- Clicking the Print Slip and Confirm button will mark the item as waiting for pickup at the library and present the library with a receipt to print and place on the book with the patron's information

- Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

- If you're checking in an item that has a hold on it at another branch you will be prompted to confirm and transfer the item

- Clicking the Confirm hold and Transfer button will mark the item as in transit to the library where the hold was placed

Item type	Location	Call Number	Status	Last seen	Barcode
	Fairview General Stacks	975.26B	In transit from Midway, to Fairview, since 12/01/2009 On hold for Edna Acosta expected at Fairview since 10/31/2009	12/01/2009	10101000000414

- Clicking the Print Slip, Transfer and Confirm button will mark the item as in transit to the library where the hold was placed and present the library with a receipt to print and place on the book with the patron's information

- Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

- If you have the system showing you fines at the time of checkin (*FineNotifyAtCheckin*) you will see a message telling you about the fine and providing you a link to the payment page for that patron

Patron has outstanding fines of 0.45.

Make payment.

5.4. *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.

5.4.1. *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 though a list of authorized values

Show Category: BOR_NOTES ▾

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

The 'Description' field can hold a canned message that you would like to appear on the patron's record.

> **Important**
>
> The 'Description' field is limited to 80 characters, but the patron message field can hold more than that. Enter 80 characters in the 'Description' field and then type the rest on the patron record.

5.4.2. *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 and a button at the top to 'Add message'.

When you click either of these options you will be asked to choose if the message is for the librarians or the patron and the message you would like to leave.

> **Note**
>
> A message for the patron will also show to the library staff.

5.4.3. *Viewing Messages*

Circulation messages meant for the staff and/or the patron will appear on the patron's checkout screen to the right of the checkout box. Messages in bold and red are meant for the library staff only, whereas messages in regular italics font are meant for the patron and the librarian.

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

5.5. *Holds*

Koha allows patrons to put things on hold. A 'Hold' is a way to reserve an item. Depending on your *circulation and fine rules* and *hold preference* settings patrons will be able to place items on hold for pickup at the library at a later date/time.

5.5.1. *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.

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.

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

If you'd like to search for the patron first and then the bib record for the hold, you can open the patron record and click on the 'Search to Hold' button at the top of the patron record.
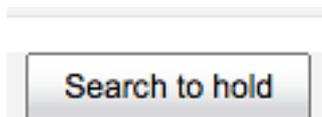
After clicking the button you will be brought to the catalog search page where you can find the book(s) you want to place a hold on. Under each title on the results you'll see an option to 'Hold for Patron Name.'

If you want to place a hold on multiple items, simply check the boxes to the left of them and click the arrow to the right of the 'Place Hold' button.

Depending on how many items you choose to place a hold on at once you will 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.

- Enter any notes that might apply to this hold

- Choose the library where the patron will pick up the item

- If you have the *AllowHoldItemTypeSelection* preference set to 'Allow' and the record had more than one item type attached you will see an option to choose to limit the hold to a specific item type

- 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.

Confirm Holds

Once your hold is placed, if you'd like to have Koha forget that you used the 'Search to Hold' function, you can choose to have Koha 'forget' the patron's name by clicking the arrow to the right of the 'Place Hold' button on the search results and choosing the 'Forget' option.
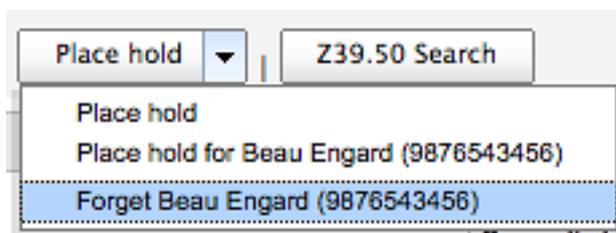
5.5.2. *Managing Holds*

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

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

> **Note**
>
> If you have your *AutoResumeSuspendedHolds* preference set to "Don't allow" then you will not have the option to put an end date on the hold suspension

Note

Depending on how you have your *HidePatronName* system preference set the list may show card numbers instead of names 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.

If you use the priority pull down to rearrange or delete holds you will need to click the 'Update hold(s)' button to save your changes.

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.

If a patron asks to have their hold suspended and you have the *SuspendHoldsIntranet* system preference set to 'allow' you can do so by clicking the Suspend button to far right. If the patron gives you a date for the items to become unsuspended you can enter that in the date box and click the 'Update hold(s)' button to save your changes.

To delete or cancel a hold click the red 'X' to the right of the hold line. To delete/cancel a bunch of holds you can choose 'del' from pull down to the left of each line and then click 'Update hold(s)' at the bottom of the list.

5.5.3. *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

or just confirm the hold

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.

Hold date	Title	Call number	Barcode	Pickup at	Expiration	Priority	Delete?	Suspend?
03/03/2015	The family tree / by Tepper, Sheri S.			Nicole's Library		1	No	Ⅱ Suspend
01/29/2016	The cathedral and the bazaar : by Raymond, Eric S.	QA76.76.O63	Item is waiting here 0596001312	Nicole's Library	02/05/2016		No	

From here if the patron would like you suspend their holds you can do so one by one or in bulk.

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

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.

From here you can check the item out to the patron at the desk and cancel the hold for the patron.

5.6. *Transfers*

If you work in a multi-branch system you can transfer items from one library to another by using the Transfer tool.

• *Get there*: Circulation > Transfer

To transfer an item

• Click 'Transfer' on the Circulation page

• 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'

- The item will now say that it is in transit

- 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

- The item shows the same 'Home Library' but has updated the 'Current Location' to note where it resides at this time

5.7. *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.

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.

Once you have saved your changes you new library will appear in the top right.

5.8. *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 [459]* permissions. There are two ways to add titles via fast add. If you know that you're about to check out an item that isn't in you catalog you can go to the Circulation module and click 'Fast cataloging.'

The cataloging interface will open up with the short cataloging record:

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.

The other way to fast catalog is from the checkout screen. When you enter a barcode at checkout that Koha can't find, it will prompt you to use fast cataloging to add the item to Koha and check it out.

Clicking 'Fast cataloging' will bring you to the fast cataloging form where you can enter the title information

After clicking 'Save' you will be brought to the item record where the barcode will already be filled in with the barcode you're trying to check out.

Items for Fool Moon by Butcher, Jim (Record #5901)

Add Item

0 - Withdrawn status	[▲▼]
1 - Lost status	[▲▼]
2 - Source of classification or shelving scheme	[Library of Congress Classification ▲▼]
3 - Materials specified (bound volume or other part)	[ ]
4 - Damaged status	[▲▼]
5 - Use restrictions	[▲▼]
6 - Koha normalized classification for sorting	[ ]
7 - Not for loan	[▲▼]
8 - Koha collection	[▲▼]
a - Location (home branch)	[Nicole's Library ▲▼]
b - Sublocation or collection (holding branch)	[Nicole's Library ▲▼]
c - Shelving location	[▲▼]
d - Date acquired	[ ] ...
e - Source of acquisition	[ ]
f - Coded location qualifier	[ ]
g - Cost, normal purchase price	[ ]
h - Serial Enumeration / chronology	[ ]
j - Shelving control number	[▲▼]
l - Koha issues (times borrowed)	[ ]
m - Koha renewals	[ ]
n - Koha reserves (requests)	[ ]
o - Koha full call number	[ ]
p - Piece designation (barcode)	[2345678765343234] ...

After clicking the 'Add item' button the item will automatically be checked out the patron you were trying to check the book out to originally.

09/22/2011	Fool Moon, by Butcher, Jim 2345678765343234		09/08/2011		0.00	0 ☐	☐

5.9. *Circulation Reports*

Most reports can be found via the Reports module, but some of the more common circulation reports are available right from the Circulation module.

- *Get there*: Circulation > Circulation reports

5.9.1. *Holds Queue*

This report will show you all of the holds at your library.

Holds Queue

10 items found for NIC

Title	Collection	Item type	Call number	Copy number	Enumeration	Barcode	Patron	Send to	Date	Notes
Harry Potter and the goblet of fire **Rowling, J. K.** Listening Library, , 2000 : 17 sound discs (ca. 20 hr.) : 4 3/4 in. ISBN: 0807282596	Audio Book	Book on CD	FAM PZ7.R79835 Hal 2000b			19936024 or any available	Engard, Coda (9876543452) 555.111.2345	NIC	08/15/2011	
Learning Perl / **Schwartz, Randal L.** O'Reilly, , 2008 : xviii, 328 p. : 24 cm. ISBN: 9780596520106	Computer Programming	Books	LIV QA76.73.P22 S37 2008			3160778947 or any available	Engard, Coda (9876543452) 555.111.2345	NIC	03/23/2013	

To generate this report, you must have the *Build Holds Queue cron job* running. This cron job is a script that should be run periodically if your library system allows borrowers to place on-shelf holds. This script decides which library should be responsible for fulfilling a given hold request.

It's behavior is controlled by the system preferences *StaticHoldsQueueWeight* and *RandomizeHoldsQueueWeight*.

If you do not want all of your libraries to participate in the on-shelf holds fulfillment process, you should list the libraries that *do* participate in the process here by inputting all the participating library's branchcodes, separated by commas (e.g. "MPL,CPL,SPL,BML" etc.).

By default, the holds queue will be generated such that the system will first attempt to hold fulfillment using items already at the pickup library if possible. If there are no items available at the pickup library to fill a hold, build_holds_queue.pl will then use the list of libraries defined in StaticHoldsQueueWeight. If RandomizeHoldsQueueWeight is disabled (which it is by default), the script will assign fulfillment requests in the order the branches are placed in the StaticHoldsQueueWeight system preference.

For example, if your system has three libraries, of varying sizes (small, medium and large) and you want the burden of holds fulfillment to be on larger libraries before smaller libraries, you would want StaticHoldsQueueWeight to look something like "LRG,MED,SML".

If you want the burden of holds fulfillment to be spread out equally throughout your library system, simply enable RandomizeHoldsQueueWeight. When this system preference is enabled, the order in which libraries will be requested to fulfill an on-shelf hold will be randomized each time the list is regenerated.

Leaving StaticHoldsQueueWeight empty is contraindicated at this time. Doing so will cause the build_holds_queue script to ignore RandomizeHoldsQueueWeight, causing the script to request hold fulfillment not randomly, but by alphabetical order.

5.9.2. *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. If the items are available at multiple branches then all branches with that item available will see the hold to pull until one library triggers the hold.

Holds to pull placed between 01/01/2013 and 08/16/2013

Reported on 08/16/2013

The following holds have not been filled. Please retrieve them and check them in.

Showing 1 to 2 of 2 entries   Show 10 ⇕ entries   ⊕ Previous Next ⊕   Search:

Pull this many items	Items available	Patrons with holds	Title	Libraries	Available call numbers	Available copy No	Available enumeration	Available itypes	Available locations	Earliest hold date
1	1	1	Learning Perl / by Schwartz, Randal L.	NIC	QA76.73.P22 S37 2008			BK	LIV	03/23/2013 in NIC
1	1	1	The cathedral and the bazaar :	NIC	QA76.76.O63 R397 2001			BK	LIV	06/17/2013 in NIC
Pull this	Items avail	Patron ho	Title	None ⇕	Call number	Available c	Available enur	None ⇕	None ⇕	

Showing 1 to 2 of 2 entries   ⊕ Previous Next ⊕

You can limit the results you see by using the Refine box on the left side of the page:

Refine Results

Start date:

12/14/2009

End date:

12/16/2009

(Inclusive, default is two days ago to today, set other date ranges as needed.)

Submit

5.9.3. *Holds awaiting pickup*

This report will show all of the holds that are waiting for patrons to pick them up.

Items that have been on the hold shelf longer than you normally allow (based on the *ReservesMax-PickUpDelay* preference value) will appear on the 'Holds Over' tab, they will not automatically be cancelled unless you have set the *cron job* to do that for you, but you can cancel all holds using the button at the top of the list.

5.9.4. *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 Numbers	Items Needed
3	1	3.00	A gate at the stairs :	SFL	FIC	BOOK	FIC MOORE	1 to order
4	1	4.00	Alex Cross's trial /	SFL	FIC	BOOK	FIC PATTERSON	1 to order
4	1	4.00	The defector /	SFL	FIC	BOOK	FIC SILVA	1 to order
5	1	5.00	The elegance of the hedgehog / "French Voices"--P. 4 of cover.	SFL	FIC	BOOK	FIC BARBERY	1 to order
6	2	3.00	Catching fire /	SFL	TEEN	BOOK	TEE COL	1 to order
6	1	6.00	True compass :	SFL		BOOK	B KENNEDY | B KENNEDY	2 to order

5.9.5. *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 G73

> ⭐ **Important**
>
> An item is considered late based on the number of days you have entered in the *TransfersMax-DaysWarning* system preference.

5.9.6. *Overdues*

> ⭐ **Important**
>
> For libraries with a large patron base, this report may take a significant amount of time to run.

> 💬 **Note**
>
> 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.

The report can be filtered using the menu options found on the left of the report.

> **Note**
>
> The 'Show any items currently checked out' checkbox basically switches this from a report of overdues to a report of checkouts. It will show all titles checked out regardless of due date.

5.9.7. *Overdues with fines*

This report will show you any overdues at your library that have accrued fines on them.

If you would like to limit the report you can use the pull down menu at the top to limit to a specific shelving location at your branch. To see overdues with fines at other branches you will have to *change your branch* or log in at that branch.

> **Important**
>
> If you do not charge fines and/or don't have the *fines cron job* running you will see no data on this report.

5.9.8. *Pending on-site checkouts*

If you are using the on site checkouts functionality (*OnSiteCheckouts*) then you'll have a report to view all items that are currently checked out on site.

This will list the due date (overdues in red), who has the item, item information and what library the item is at.

5.10. *Tracking In house Use*

Many libraries track the use of items within the library.

> **Note**
>
> This is different from tracking on site usage. In house use is the use of items in the library by patrons without them having to check them out. On site use is the use of items on site that must first be checked out. To learn more about on site usage please review the *OnSiteCheckouts* preference.

Tracking the use of items in the library without checking them out can be done in Koha one of two ways. The first is to create 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:

Instead of marking the item as 'checked out' the system will record that the item was used in house:

Repeat these steps for all items that have been used within the library to keep accurate statistics for item use.

The other way to record local use of items is to set your *RecordLocalUseOnReturn* preference to 'Record.' Then whenever you check an item in that is not checked out and not on hold a local use will be recorded.

Not checked out.
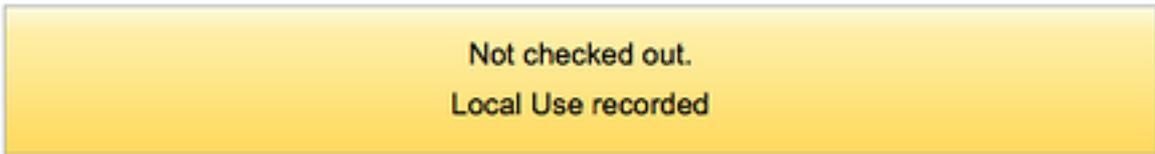
Local Use recorded

> **Note**
>
> If you have *RecordLocalUseOnReturn* set to 'Record' you can still use your statistical patrons to record local use as well.

5.11. *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 *LOC* category for PROC (Processing Center) and CART (Book Cart).

Authorized values for category LOC:

Showing 1 to 10 of 10 Show 20 entries   First Previous Next Last   Search:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
AV	Audio Visual			No limitation	Edit	Delete
CART	Book Cart			No limitation	Edit	Delete
CHILD	Children's Area			No limitation	Edit	Delete
FIC	Fiction			No limitation	Edit	Delete
GEN	General Stacks			No limitation	Edit	Delete
NEW	New Materials Shelf			No limitation	Edit	Delete
DISPLAY	On Display			No limitation	Edit	Delete
PROC	Processing Center			No limitation	Edit	Delete
REF	Reference			No limitation	Edit	Delete
STAFF	Staff Office			No limitation	Edit	Delete

Showing 1 to 10 of 10   First Previous Next Last

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.

When creating items you enter in their desired final shelving location and Koha will temporarily change that to PROC. If *InProcessingToShelvingCart* is set to "Don't move" then when an item with a location of PROC is checked in it will either automatically update the item to use the permanent location. If *InProcessingToShelvingCart* is set to "Move" then when an item is checked in the location is changed from PROC to CART.

A *cron job* is then set to run 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.)

- > **Note**
  >
  > If the *ReturnToShelvingCart* system preference is set to "Move", 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.

5.12. *Self Checkout*

Koha comes with a very basic self checkout module. To enable this module you need to set the *Web-BasedSelfCheck* preference to 'Enable.' To use this module you have to log in as a *staff member* with *circulation permissions*.

> **Note**
>
> 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>"); });
```

> **Important**
>
> The code above has line breaks added to make it more readable, please be sure to enter the above as one line in when putting it in the system preference.

The link will then appear at the bottom of the log in page:

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 depending on your value in the *SelfCheckoutByLogin* preference you will be asked to enter you cardnumber

or your username and password:

Log in to your account

Login:

Password:

Log in

Once you're logged in to the self check module you will be asked to scan the items you are checking out

You are logged in as Nicole Engard.

Check out or renew an item:

Scan a new item or enter its barcode: | | Submit

🔴 Finish

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	Return Item

When you are finished scanning items it is important to click the 'Finish' button. This will prompt you to print a receipt and log you out of the self check module.
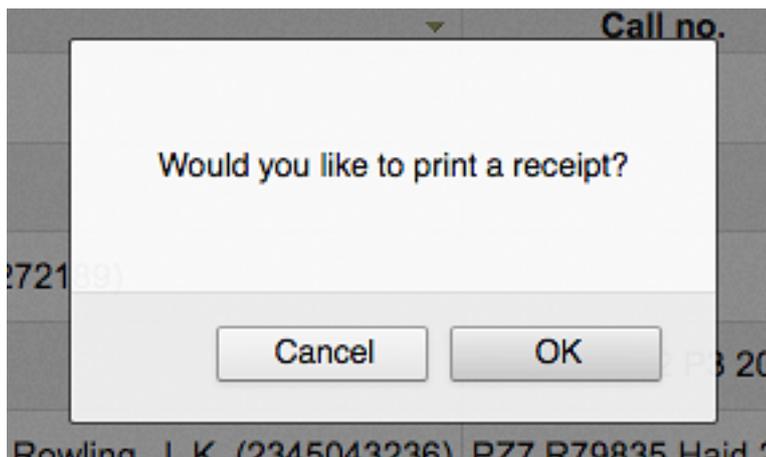
When attempting to check items out there are some instances where error messages will appear and the patron will be directed to the librarian. This will happen even if you are allowing overrides on circulation functions. Only a librarian can override a circulation block and so patrons must go to the librarian for help in these situations.
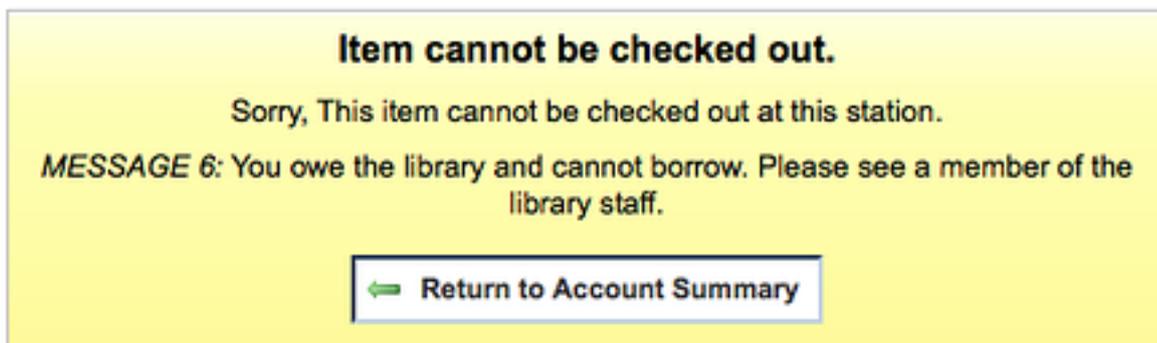
5.13. *Offline Circulation Utilities*

Koha allows for you to continue circulation actions while offline by using any one of three utilities.

5.13.1. *Offline Circulation in Koha*

If the *AllowOfflineCirculation* preference is set to 'Enable' the library staff can continue to perform circulation actions within Koha when the system is offline. You will want to visit http://your-koha-staff-client-url/cgi-bin/koha/circ/offline.pl at least once while online and bookmark that page. That is the page you will go to when you are offline.

> **Important**
>
> The offline interface uses HTML LocalStorage, which depending on the browser and user setting, is limited to 2.5MB or 5MB per domain. This means that larger systems will not be able to synchronize their data and are recommended to use either the *Firefox* or *Windows* application for offline circulation.

5.13.1.1. *Setup*

Before the first time the system goes offline go to Circulation and choose 'Built-in offline circulation interface'

And synchronize your data on every circulation computer by clicking the 'Synchronize' link on the right of the screen.

> **Important**
>
> The offline interface uses HTML LocalStorage, which depending on the browser and user setting, is limited to 2.5MB or 5MB per domain. This means that larger systems will not be able to synchronize their data and are recommended to use either the *Firefox* or *Windows* application for offline circulation.

This will allow you download a local copy of your patrons and circulation data. Click the 'Download records' link at the top of the page to synchronize your data.

Once your data is downloaded you will see the dates your data was last synced to the right of each data set.

This should be done regularly in preparation for any unexpected connection losses.

5.13.1.2. *Circulating*

When your system goes offline visit the Offline Circulation page (http://your-koha-staff-client-url/cgi-bin/koha/circ/offline.pl) in Koha and click 'Check out' or 'Check in' to perform offline actions.

Checking out is done by searching for the patron by barcode or name at the top of the 'Check out' screen. After selecting a patron you will be presented with the synced patron info, including fines and check outs.

Scan the barcode of the item you would like to check out and enter a due date. If you don't enter a due date Koha will prompt you for one.
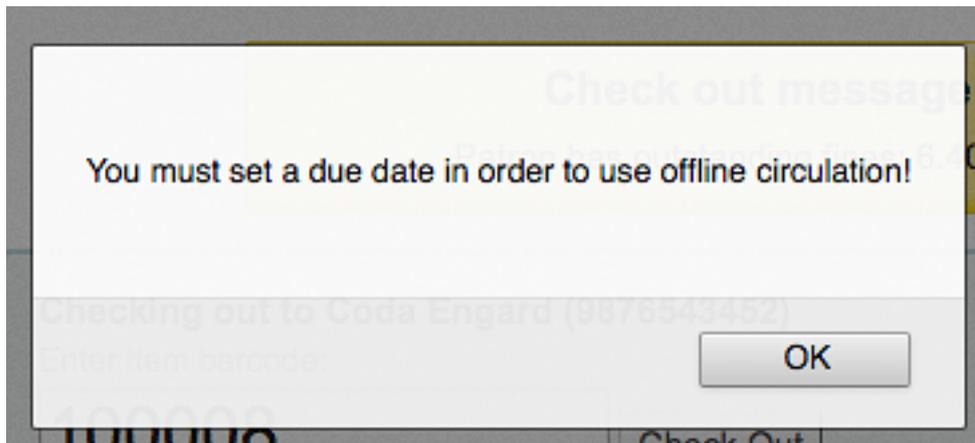
Once the item is checked out it will appear below the patron's info.

5.13.1.3. *Koha Offline Uploading*

Once the system is back online visit the Synchronize page on the Offline Circulation module and click 'Upload transactions'

After the files are uploaded you can click 'View pending offline circulation actions' on the right.

Offline circulation

In order for offline circulation to work on this computer, your library's records must be up-to-date on this computer:

- Patron records were last synced on: 2013-10-24 10:00:34 GMT-0500 (CDT)
- Item records were last synced on: 2013-10-24 10:00:34 GMT-0500 (CDT)
- Circulation records were last synced on: 2013-10-24 10:00:34 GMT-0500 (CDT)

You do not have any pending transactions in the offline circulation database on this computer. View pending offline circulation actions

After clicking 'View pending offline circulation actions' you will be brought to a summary of all of the actions you loaded in to Koha in your *.koc file.

- Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.

- Click on the Process button and Koha will record every stored transaction one by one. For each transaction, the status will change to:
  - "Success." if the transaction was processed correctly

  - "Borrower not found." if the borrower card number is incorrect

  - "Item not found." if the item barcode is wrong

  - "Item not issued." if you checked in an available item

Once finished you will have a summary of all of your transactions

Offline circulation

Check all | Uncheck all

	Date	Action	Barcode	Card number
Success.	2012-05-15 13:13:26	issue	100021	23529000050113
Success.	2012-05-15 13:13:34	issue	100023	23529000050113
Success.	2012-05-15 13:13:38	return	100027	

5.13.2. *Firefox Plugin*

Franois Charbonnier
Edited by Nicole C. Engard
2012

There is an offline circulation tool that you can add to your Firefox browser as an addon. To do so, just go to *https://addons.mozilla.org/en/firefox/addon/koct/* page and click on the "install now" button. You may have to confirm the installation, just click on "install now" and then restart Firefox to complete the installation.

Once you have installed the plugins and restarted Firefox, you will see the Koha logo in the download bar at the bottom right of Firefox.

A click on the logo will open the tool in its own window.
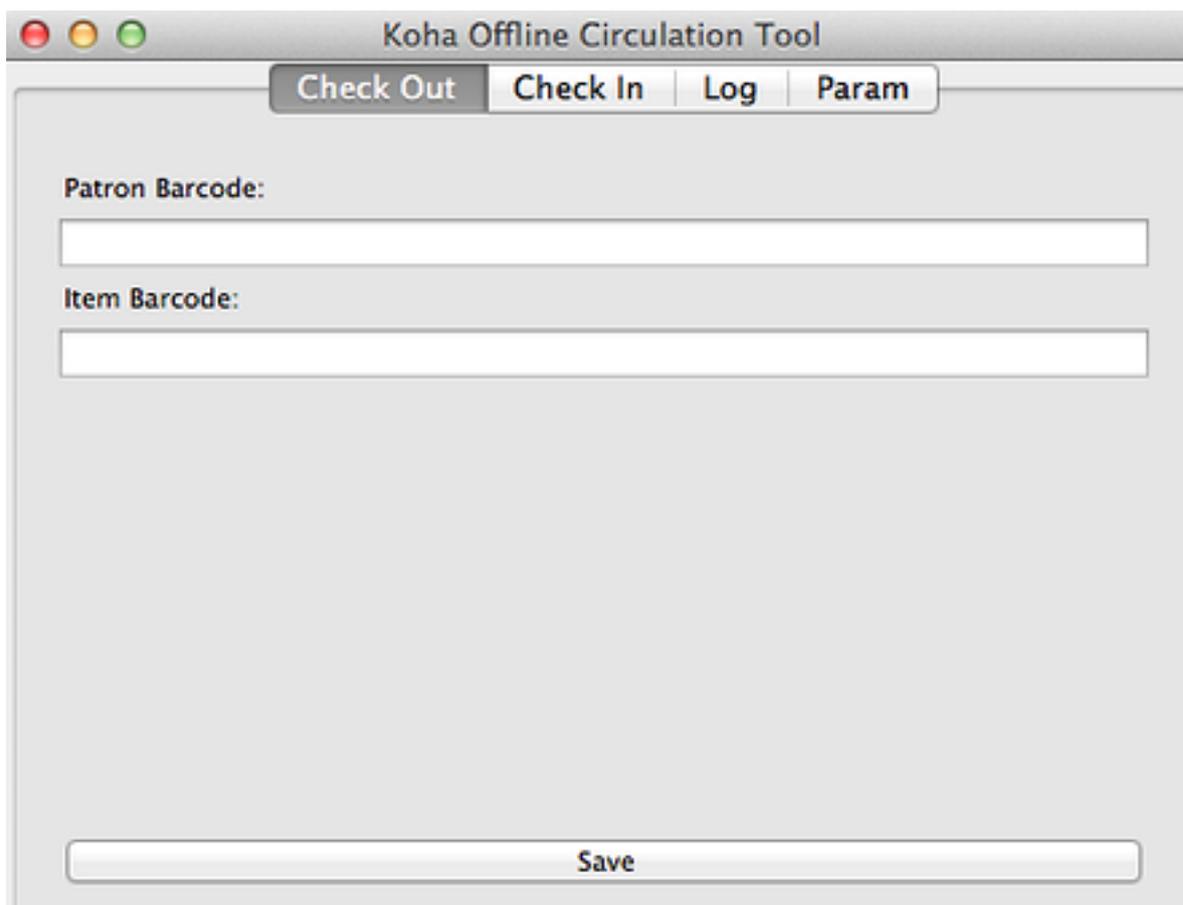
The plugin consists of four tabs:

- The Check Out tab is where you check out items

- The Check In tab is where you check in items

- The Log tab keeps track of every transaction done while in offline mode

  - The log will keep information until you empty it. Each time you open the plugin and it contains data in the log it will warn you
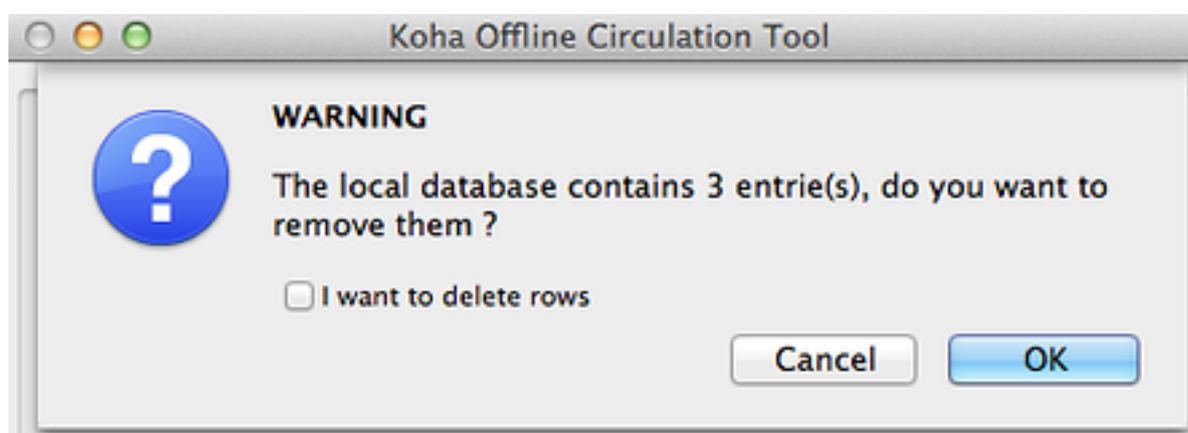
  If you'd like to clear the log, check the 'I want to delete rows' box before hitting the 'OK' button. Otherwise clicking 'OK' will keep the items in the log and let you continue working with the tool.

- The Param tab is to set up the plugin

The first thing you want to do then is to set up the plugin. Go to the Param tab to set up the plugin
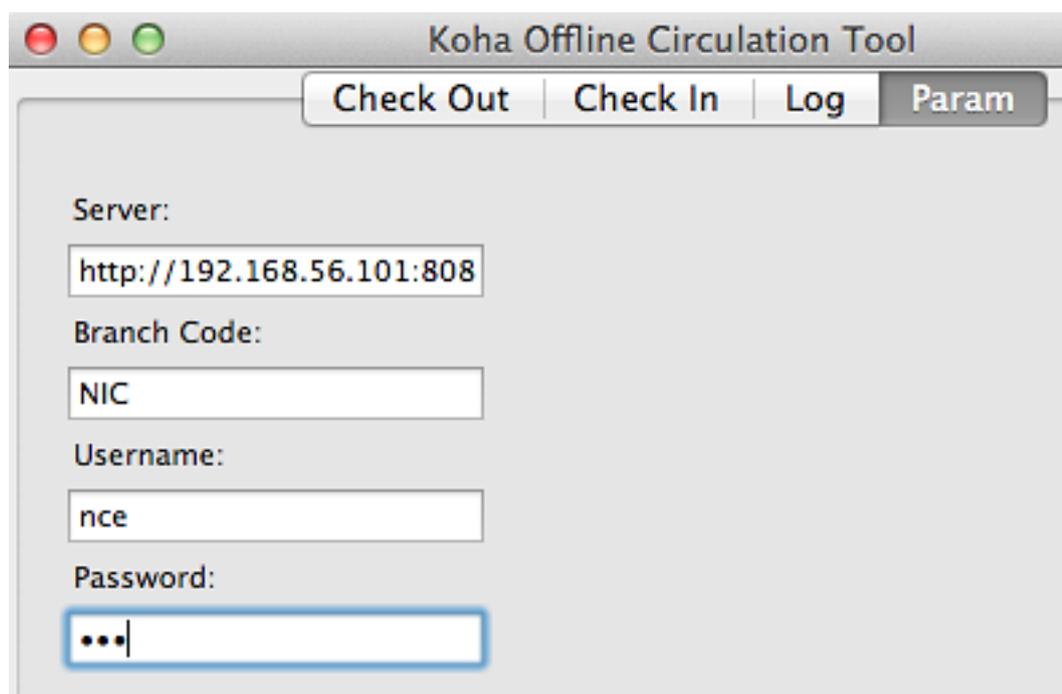
Answer the 4 questions presented:

- Server = the URL of the librarian interface

- Branch Code = the code for the branch where you are located

- Username = your staff account login

- Password = your staff account password

> ⭐ **Important**
>
> To save the settings, you will have to close the plugin window and re-open it by clicking again on the Koha logo in the add-on bar.

> 💬 **Note**
>
> You can create a staff account dedicated to the offline circulation. So that, no matter who is at the circulation desk, they can all use the same login. Along those lines, you can use a group login that you already have in place for circulation as well.

Once you have everything set up you can start checking items in and out.

Checking out:
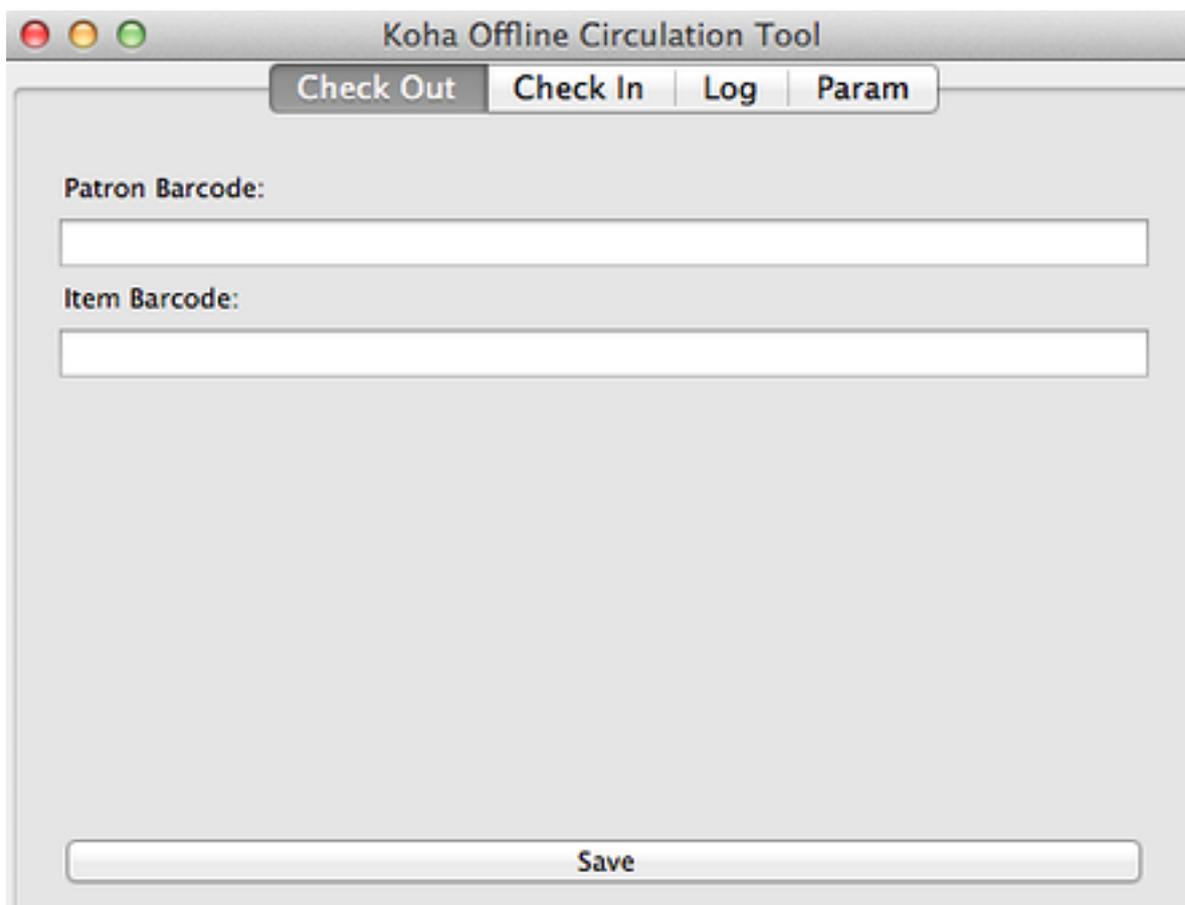
- Go to the Check Out tab

- Scan the patron barcode

- Scan the item barcode

- Click 'Save'

Checking in:
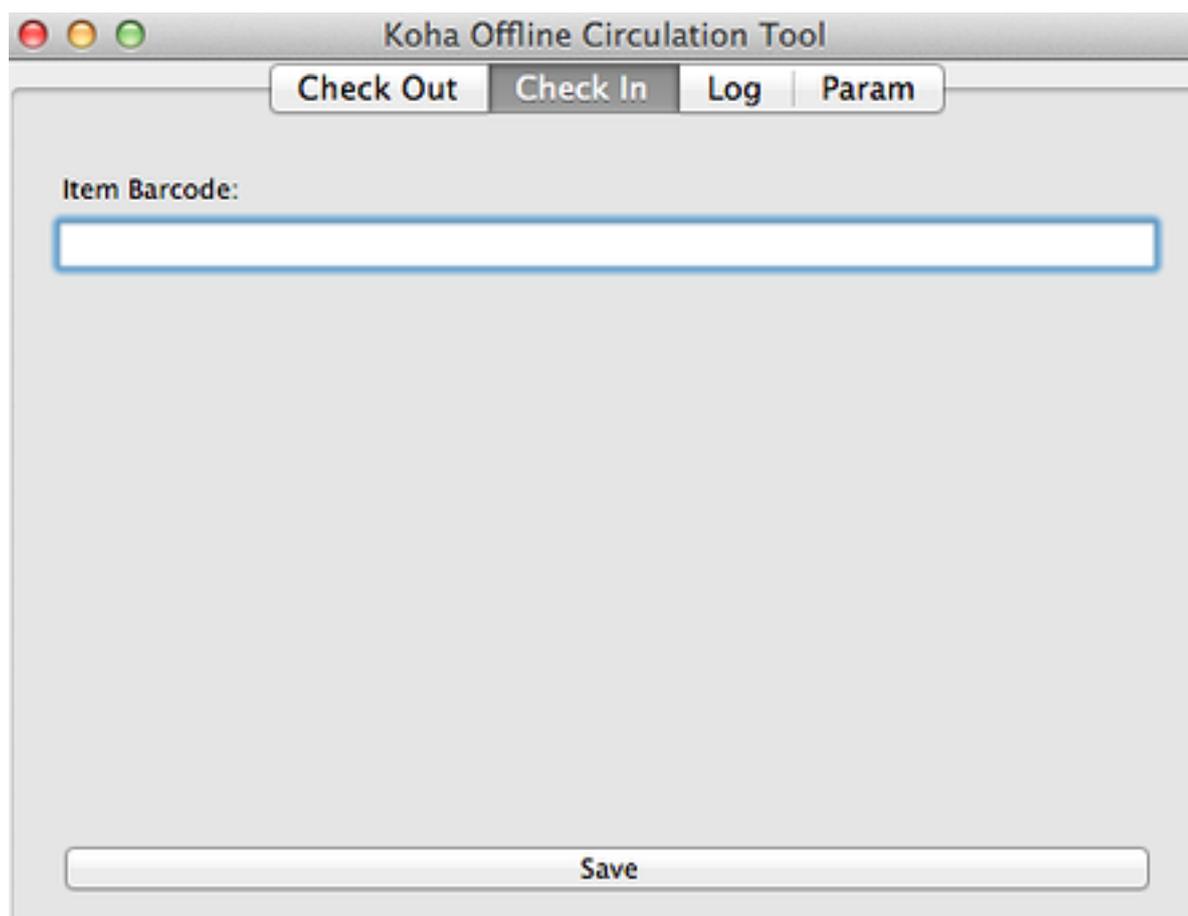
- Go to the Check In tab

- Scan the item barcode

- Click Save

Each time, you check out or check in an item, a new transaction is recorded in the local plugin database and you will see, at the bottom of the plugin how many transactions has been made during the offline circulation. For example, "10 Row(s) Added" means you did 10 transactions.
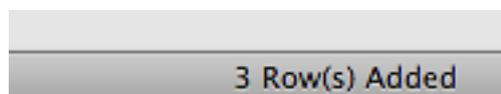
Then, if you want an overview of every transaction, go to the Log tab. This tab will show you the transactions in the plugin database

When your Internet connection comes back up you will want to get these transactions in to Koha. Before processing these transactions you should be aware of a few issues.

Because you are not connected to your Koha database when using this plugin holds will need additional processing. If an item you check in while offline has a hold, the hold is kept on the item. Since, you can't confirm holds found during the processing of every check in, the holds stay on the item and will need to be managed later. If you only checked in a few items you can just keep a record of them all. If you checked in a lot of items you can use the Holds Queue once it rebuilds to see what holds made it to the shelf erroneously.

Similarly, if an patron card was expired, the offline circulation tool won't know about it, so the checkout will be recorded regardless of the patron's account being blocked normally.

You have two options for adding this data to Koha

- Commit to Koha

  - If you checked in/out on more than one computer at the same time, what you want is to process every transaction consistently. Let's say for instance that one patron checked a book out on one computer and then checked the same book in on another computer. To be consistent, you need to record the check out first and then the check in. Not the opposite! To do so, you need to group

every transaction in one place, sort them all and then, process everything. So, you need to use the "Commit to Koha" option from every plugin/computer you worked with. This way, the log will go to Koha and be accessible from the Offline Circulation page.

Circulation

- Check out
- Check in
- Transfer
- Set library
- Fast cataloging

Offline circulation

- Upload offline circulation file (.koc)
- Pending offline circulation actions
  - Get desktop application
  - Get Firefox add-on

- *Get there:* Circulation > Pending offline circulation actions

Offline circulation

Check all | Uncheck all

	Date	Action	Barcode	Card number
☐	2012-05-15 13:13:26	issue	100021	23529000050113
☐	2012-05-15 13:13:34	issue	100023	23529000050113
☐	2012-05-15 13:13:38	return	100027	

For the selected operations: Process Delete

- Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.

- Click on the Process button and Koha will record every stored transaction one by one. For each transaction, the status will change to:

  - "Success." if the transaction was processed correctly

  - "Borrower not found." if the borrower card number is incorrect

  - "Item not found." if the item barcode is wrong

  - "Item not issued." if you checked in an available item

- Once finished you will have a summary of all of your transactions

Offline circulation

Check all | Uncheck all

	Date	Action	Barcode	Card number
Success.	2012-05-15 13:13:26	issue	100021	23529000050113
Success.	2012-05-15 13:13:34	issue	100023	23529000050113
Success.	2012-05-15 13:13:38	return	100027	

- Apply directly

  - If you performed all of the circulation actions on one computer then everything is sorted already so you can choose to "Apply directly"

  - The status column will be updated to let you know if the transactions were applied

    - "Success." if the transaction was processed correctly

    - "Borrower not found." if the borrower card number is incorrect

    - "Item not found." if the item barcode is wrong

    - "Item not issued." if you checked in an available item

  - Once you're finished you can review all of the items right in the Log tab
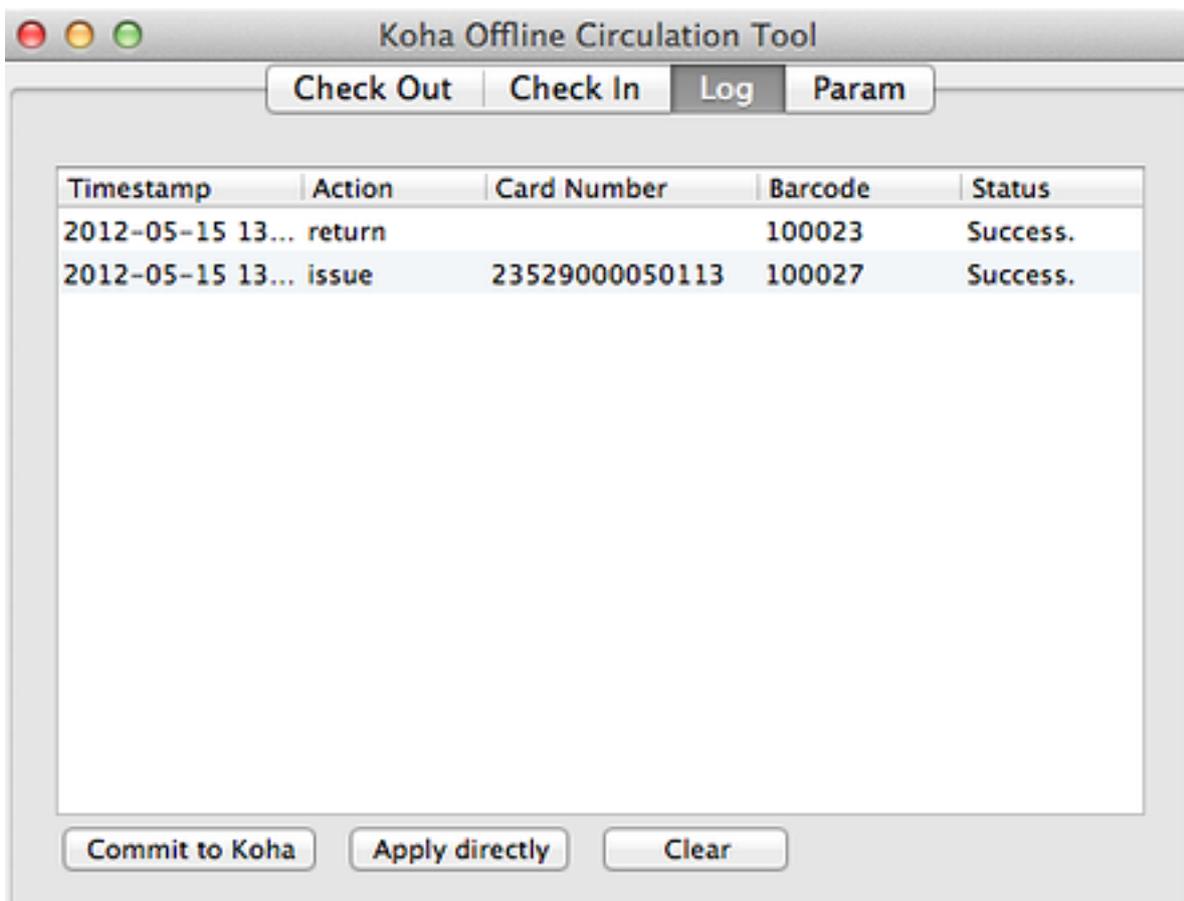
Once you are done you can clear the log by clicking Clear. If you don't you will be warned the next time you open the Offline Circulation tool.
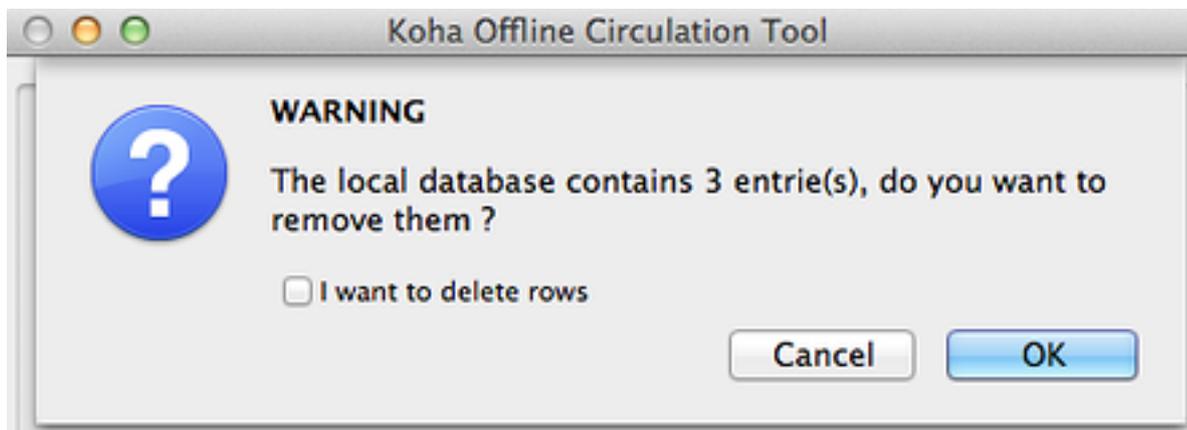
5.13.3. *Offline Circ Tool for Windows*

The Offline Circulation Utility can be downloaded at: *https://github.com/bywatersolutions/koha-offline-circulation/releases*

To generate a borrowers.db file for loading in to the Windows tool you will need to run the *file generator via a cron job*.

5.13.3.1. *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 'Upload offline circulation file (.koc)'

Circulation

- Check out
- Check in
- Transfer
- Set library
- Fast cataloging

Offline circulation

- Upload offline circulation file (.koc)
- Pending offline circulation actions
  - Get desktop application
  - Get Firefox add-on

Browse your computer for the *.koc file

Upload offline circulation data

Choose .koc file:

[Browse...]

[Upload file]
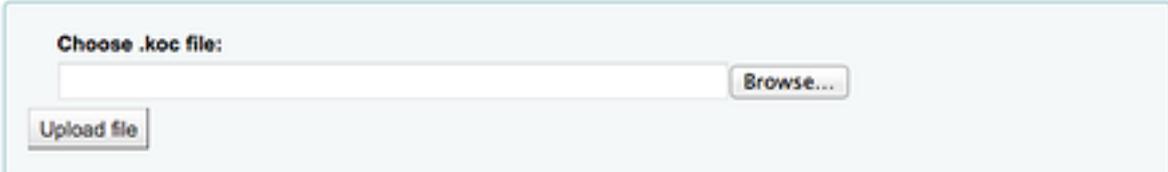
Once the file is uploaded, click the process the file

Upload progress:

████████████████████████████████

100%

[Add to offline circulation queue]
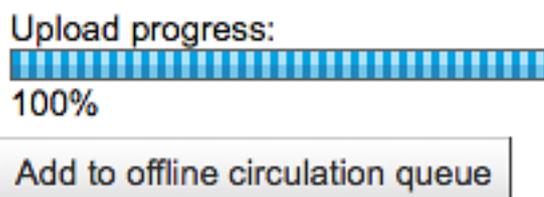
When this is complete you'll be able to upload another file or tend to pending offline circulation actions.

Koha offline circulation

Your file was processed.

Upload another KOC file

View pending offline circulation actions

After clicking 'View pending offline circulation actions' you will be brought to a summary of all of the actions you loaded in to Koha in your *.koc file.

Offline circulation

Check all | Uncheck all

	Date	Action	Barcode	Card number
☐	2012-05-15 13:13:26	issue	100021	23529000050113
☐	2012-05-15 13:13:34	issue	100023	23529000050113
☐	2012-05-15 13:13:38	return	100027	

For the selected operations: Process | Delete

- Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.

- Click on the Process button and Koha will record every stored transaction one by one. For each transaction, the status will change to:
  - "Success." if the transaction was processed correctly

  - "Borrower not found." if the borrower card number is incorrect

  - "Item not found." if the item barcode is wrong

  - "Item not issued." if you checked in an available item

Once finished you will have a summary of all of your transactions

Offline circulation

Check all | Uncheck all

	Date	Action	Barcode	Card number
Success.	2012-05-15 13:13:26	issue	100021	23529000050113
Success.	2012-05-15 13:13:34	issue	100023	23529000050113
Success.	2012-05-15 13:13:38	return	100027	

Cataloging

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.

You can also use OCLC Connexion to send records directly in to Koha. For more information on that please review the *OCLC Connexion Setup appendix*.

- *Get there:* More > Cataloging

6.1. *Bibliographic Records*

In Koha the bibliographic record contains the main information related to the material. This includes things like the title, author, ISBN, etc. This information is stored in Koha in Marc (different flavors of Marc are supported in Koha). Once this information is saved, *items or holdings* can be attached.

6.1.1. *Adding Records*

Records can be added to Koha via original or copy cataloging. You can also choose to use the basic or advanced cataloging interface for all of your work.

If you would like to catalog a record using a blank template in the basic editor

- Click 'New Record'
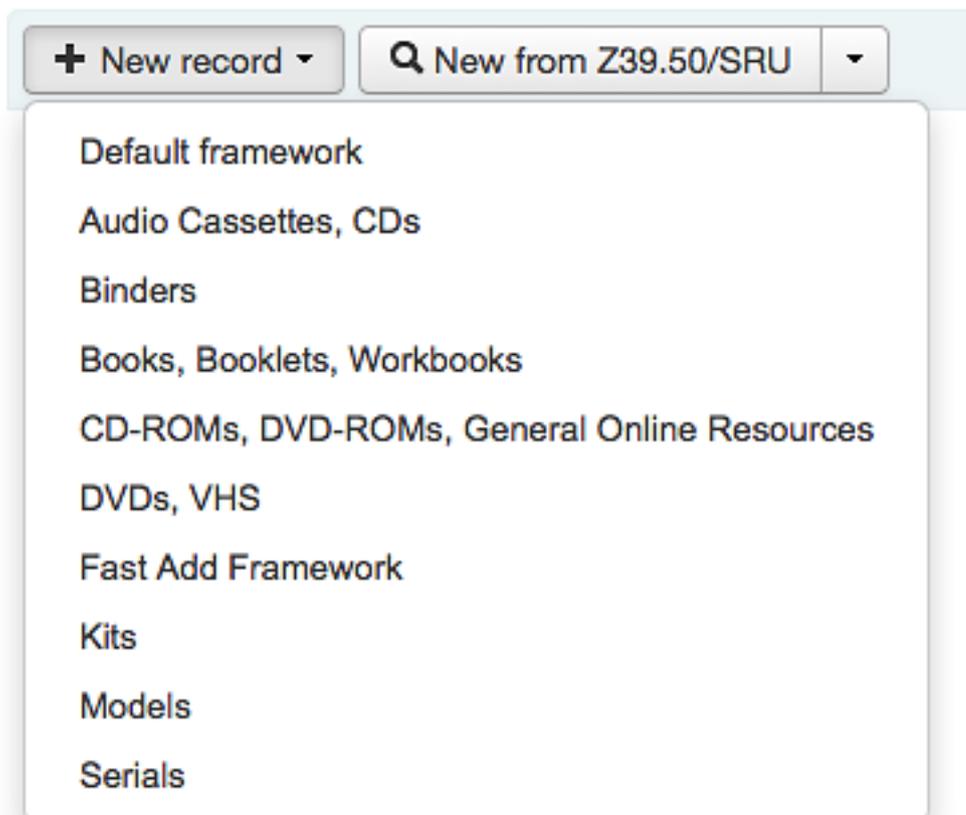
- Choose the framework you would like to base your record off of

If you would like to catalog a record using a blank template in the advanced editor

- Enable the *EnableAdvancedCatalogingEditor* preference

- Click the 'Advanced editor' button

If you want to catalog a record based on an existing record at another library in the editor you last used (basic or advanced)

- Click 'New from Z39.50/SRU'

- Search for the item you would like to catalog

-

  > **Note**
  >
  > 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

You searched for: *Title:* library science

Server	Title	Author	Date	Edition	ISBN	LCCN	MARC	Card	
LIBRARY OF CONGRESS	25 years of the Department of Library Science (1956-81), University of Karachi.		1981.			82930098	MARC	Card	Import
COLUMBIA UNIVERSITY	A bibliography of works in Spanish and Portuguese on library science,		1945.				MARC	Card	Import
COLUMBIA UNIVERSITY	ARBA guide to library science literature, 1970-1983 /		1987.		0872875857:	86027712	MARC	Card	Import
LIBRARY OF CONGRESS	ARBA guide to library science literature, 1970-1983 /		1987.		0872875857:	86027712	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

LIBRARY OF CONGRESS	ARBA guide to library science literature, 1970-1983 /		1987.		Preview MARC Preview card Import X	ARC	Card	Import

- If you don't find the title you need in your Z39.50 search results you can click the 'Try Another Search' button at the bottom left of your results

COLUMBIA UNIVERSITY	The changing environment for library services in the metropolitan area :	

Previous Page | Page 2 / 46 | Next Page

Go to page : 2 | Go

Try another search

6.1.1.1. *Basic Editor Cataloging*

In the basic editor once you've opened a blank framework or imported a record via Z39.50 you will be presented with the form to continue cataloging
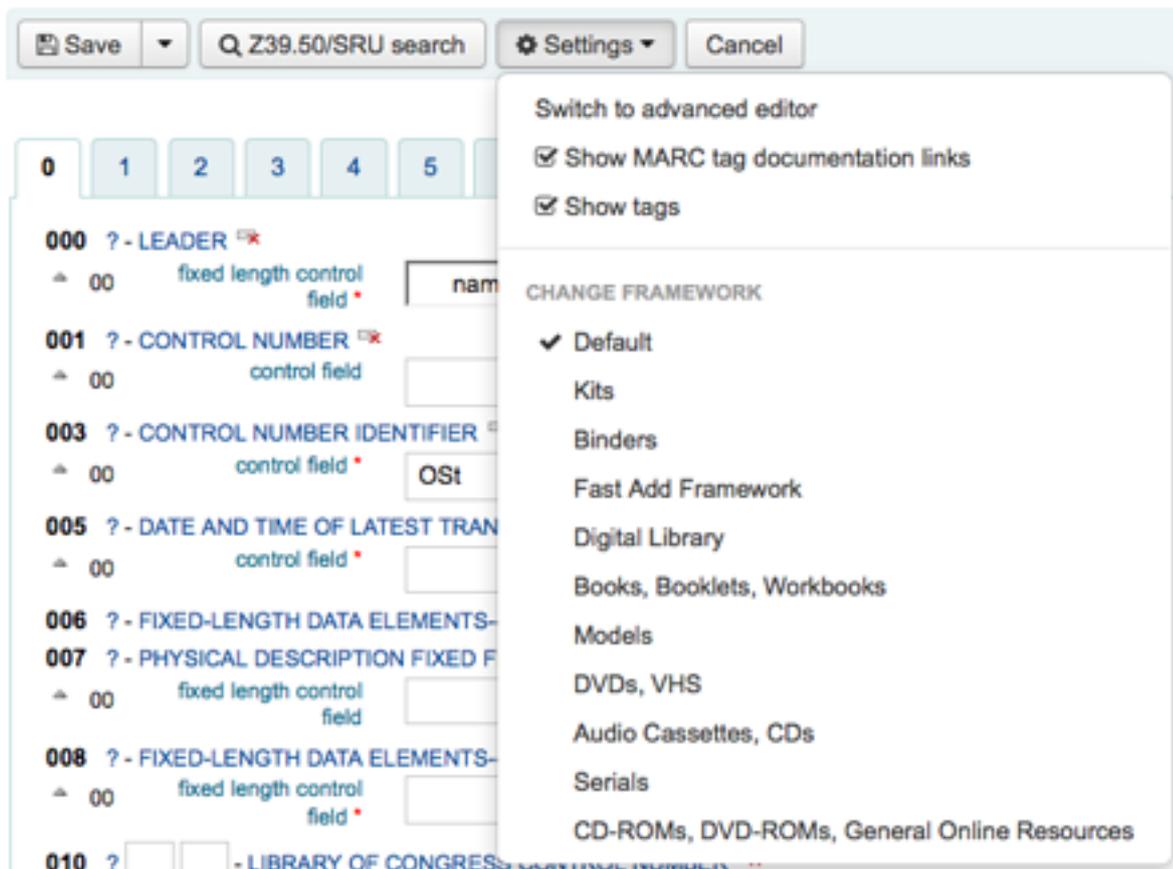
- If you would rather not see the MARC tag numbers you can change the value in your *hide_marc* system preference or each user can check the box next to 'Show tags' found under 'Settings'.

- To expand a collapsed tag click on the tag description

- To get help from the Library of Congress on a Marc tag click the question mark (?) to the right of each field number

  - If you feel that this clutters the screen you can hide the question marks by unchecking the box next to the 'Show MARC tag documentation links' note found under 'Settings'

- 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.

- If this icon appears you must click the icon to the right of the field to search for an existing authority.

Authority search results

Search options

Authority type	PERSO_NAME	
Main entry ($a only)	contains ⬍	
Main entry	contains ⬍	
Anywhere	contains ⬍	
Heading match	contains ⬍	
Sort by	Heading ascendant ⬍	

[Start search] [Cancel]   [Clear field] [Create new]

- From the results list click 'Choose authority' to bring that into your catalog record

Results 1 to 6 of 6

Summary	Used	Get it!	Other action
Personal Names: Butcher, Jim	1 times	choose	Edit authority

- To duplicate a field click on the 'repeat this tag' icon to the right of the tag

650 ? [ ] [0] - SUBJECT ADDED ENTRY--TOPICAL TERM

▲ a	Topical term or geographic name as entry element	🔒 Web sites	
▲ x	General subdivision	Design	
▲ x	General subdivision	Computer programs.	

- To move subfields in to the right order, click the up arrow to the left of the field

- To duplicate a subfield click on the clone icon (to remove a copied field, click the delete clone icon) to the right of the field

▲ d	Active dates	
▲ e	Relator term	
▲ v	Form subdivision	
▲ x	General subdivision	
▲ y	Chronological subdivision	
▲ z	Geographic subdivision	

651 ? [ ] [ ] - SUBJECT--GEOGRAPHIC NAME + –
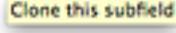
653 ? [ ] [ ] - SUBJECT--UNCONTROLLED + –

655 ? [ ] [ ] - SUBJECT--GENRE/FORM + –

[Clone this subfield]

- To remove a subfield (if there is more than one of the same type), click the - (minus sign) to the right of the field

- To use a plugin click on the icon to the right of the filed

- Some fixed fields have editors that will change based on the material type you're cataloging (for example the 006 and the 008 fields)

- Once you've finished, click the 'Save' button at the top and choose whether you want to save and view the bib record you have created or continue on to add/edit items attached to the record
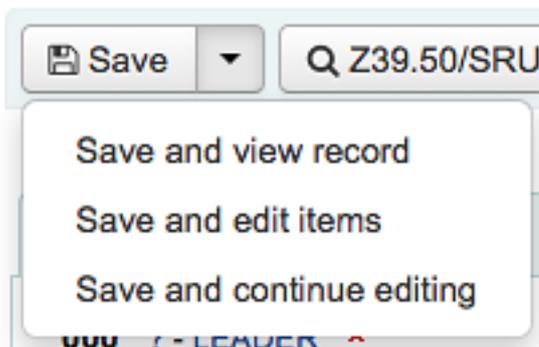
- Choosing 'Save and view record' will bring you right to the record you just cataloged

- Choosing 'Save and edit items' will bring you to the add/edit item form after saving the bib record so that you can attach holdings

- Choosing 'Save and continute editing' will allow you to save your work so far and keep you in the editor to continue working

- If you are about to add a duplicate record to the system you will be warned before saving
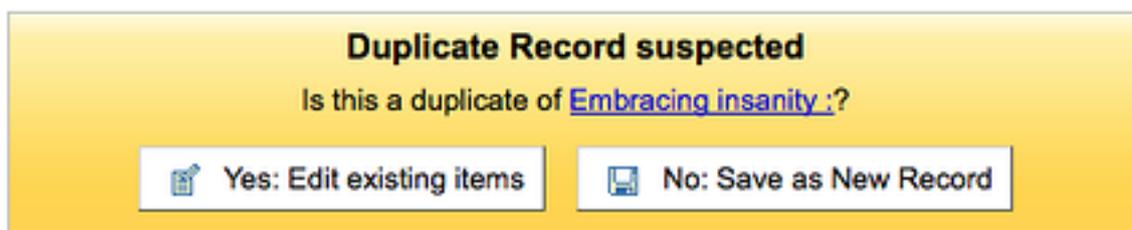
6.1.1.2. *Advanced Editor Cataloging*

In order to use the Advanced cataloging editor you need to enable the *EnableAdvancedCatalogingEditor* preference.

> **Important**
>
> This feature is currently experimental, and may have bugs that cause corruption of records. It also does not include any support for UNIMARC or NORMARC fixed fields. Please help us test it and report any bugs, but do so at your own risk.

In the advanced editor once you've opened a blank framework or imported a record via Z39.50 you will be presented with the form to continue cataloging

Using the search box on the left you can perform Z39.50 searches

And from those Z39.50 results you can view the marc record by clicking the link to the right

Clicking 'Import' will bring the record in to the editor where you can perform your edits

> **Note**
>
> When adding a new field in the Advanced Editor, you need to key underscores for a blank indicator, and surround the indicators with spaces.

> **Note**
>
> You need to key a space before the first subfield delimiter, but not before or after other subfield delimiters in the field.

At the bottom of the editor you will see help from the Library of Congress for the field you are on. In cases where your MARC is invalid you will see red highlighting. To edit the record using only keyboard functions the Keyboard shortcuts button will inform you of the necessary commands

6.1.1.2.1. *Advanced Cataloging Keyboard Shortcuts*

The following keyboard shortcuts can be used in the advanced cataloging module to save time and clicking.
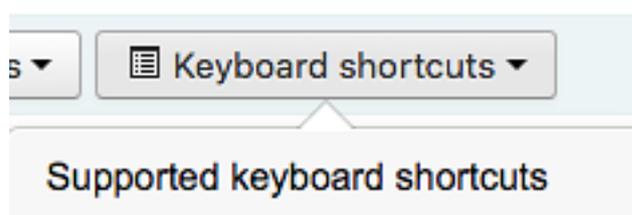
Shortcut	Behavior
Ctrl-D	Insert delimiter (‡)
Ctrl-H	Get help on current subfield
Ctrl-S	Save record
Ctrl-X	Delete current field
Ctrl-Shift-X	Delete current subfield
Enter	New field on next line
Shift-Enter	Insert line break
Tab	Move to next position
Shift-Tab	Move to previous position

6.1.1.2.2. *Macros in Advanced Cataloging*

To record a new macro:

- Select the "> Macros..." button

- A window will pop up. In this window, select "New macro...," key the new macro's name in the pop-up box and select OK.

- Now click to the right of the little number 1, and key the first line of your macro. For a multi-line, i.e., multi-field macro, hit the return key so that a little number 2 appears, and key the second line/field, etc.

- Your macros will be automatically saved. When finished you can select the "x" to close the window, or select a macro to run on the record that you're editing, or select another macro to run.

To edit an existing macro:

- Select the "> Macros..." button

- A window will pop up. In this window, select the macro that you wish to edit & make your changes.

- Your work will automatically be saved, and when finished you can select the "x" to close the window, or select a macro to run on the record that you're editing, or select another macro to run.

The basic syntax of the macro language:

- new 500=‡aEdited with Rancor
  - Creates a new 500 with a ‡a subfield and sets it to "Edited with Rancor".

- 245c= by J.K. Rowling.
  - Sets the first ‡c subfield of the first 245 tag in the record to " by J.K. Rowling", creating it if necessary.

- 082a={084a}
  - Sets the ‡a subfield of the first 082 tag (creating the subfield if necessary) to the contents of the first 084‡a.

- indicators=_1
  - Sets the indicators of the last mentioned tag (in this case, 082) to "_" and "1".

- new 090a=Z674.75.W67
  - Creates a new ‡a subfield on the first 090 (but only if that field already exists) and sets it to Z674.75.W67.

- new 090a at end=Z674.75.W67
  - Same as above.

- new 245b after a= a tale of might and magic /
  - Creates a new ‡b after the first a subfield and sets it to " a tale of might and magic /".

- delete 245b
  - Deletes the first ‡b subfield on the first 245 to ‡b

6.1.2. *Adding Analytic Records*

Libraries sometimes make journal articles and articles within monographs and serials accessible to library patrons through analytics cataloging. Analytics cataloging creates separate bibliographic records for these articles, chapters, sections, etc. found within a larger resource such as a book, an article within a journal, newspaper or serial. In analytics cataloging, although a separate bib record is created for the title, it is not physically separated from the host item. Learn more about Analytics in Chapter 13 of AACR2.

If you would like to catalog analytic records there are two options. One is to use the *Easy Analytics* funtion; the other is the *Analytics Enhanced Workflow*.

6.1.2.1. *Easy Analytics*

The Easy Analytics feature makes linking analytic records together easier. The first thing you need to do is set the *EasyAnalyticalRecords* preference to 'Display' and the *UseControlNumber* preference to 'Don't use.'

After cataloging your analytic record (see *Adding Records* for more on creating records) click 'Edit' from the normal view and choose to 'Link to Host Item'
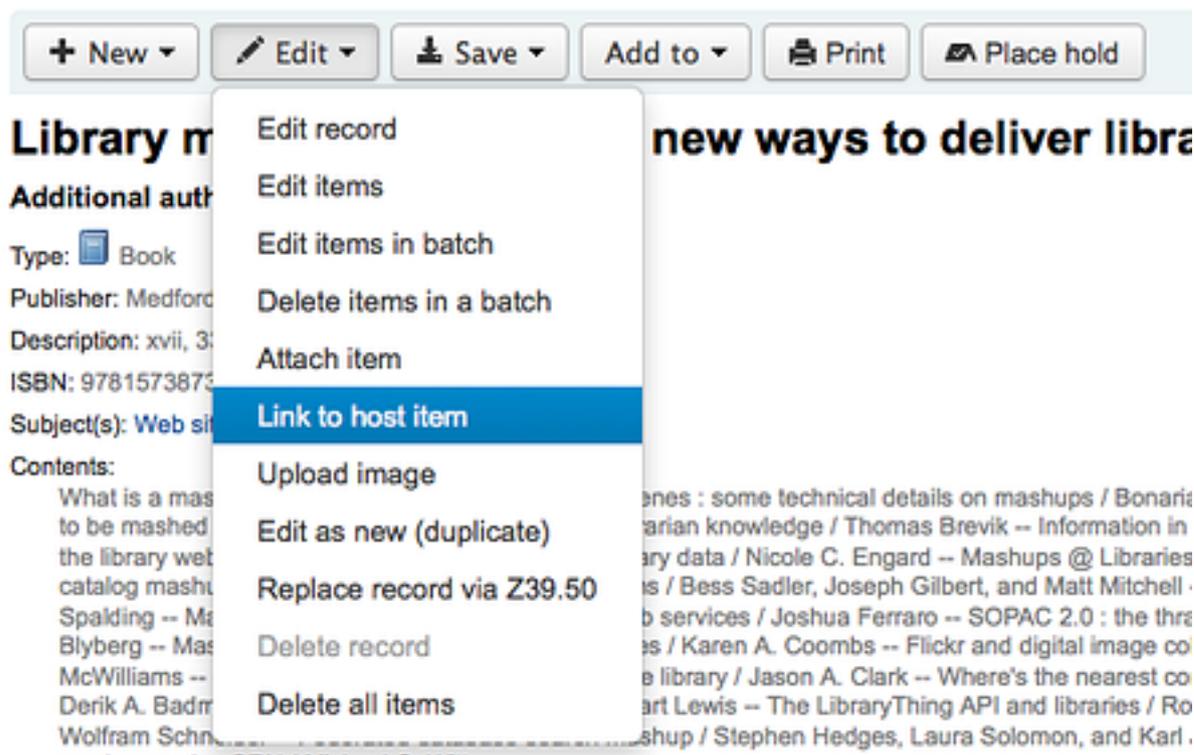
This will prompt you to enter the barcode for the item this record should be linked to.

Select the host item to link to *Following the Yellow Brick Road to Simplified Link Management*
Enter item barcode:

Select

After entering the item's barcode and clicking 'Select' you will receive a confirmation message.

The item has successfully been linked to *Following the Yellow Brick Road to Simplified Link Management*.

The record will now have the 773 field filled in properly to complete the link.

To view all of the items tied to the host record, do a search for the record, click the Analytics tab on the left and the analytics tied to each barcode will be shown under the "Used in" column.

Note

It is also possible to create analytic records from this screen by clicking on "Create Analytics"

You can also see the analytics attached to this record by clicking the 'Show Analytic' link towards the top of the record in the normal view.

Computers in libraries.

Type: ✎ Continuing Resource

Analytics: Show analytics

Publisher: Meckler, Westport, CT : c1988- .

When looking at the anaytic record you will also see a link to the host item under the 'Host records' column in the holdings table when viewing the 'Analtyics' tab.

6.1.2.2. *Analytics Enhanced Workflow*

To use the Enhanced Workflow method of adding analytics, the first thing you need to do is set the *EasyAnalyticalRecords* preference to 'Don't display' and the *UseControlNumber* preference to 'Use.'

After cataloging your original record (see *Adding Records* for more on creating records) click 'New' from the normal view and choose to 'New child record.'

This will open a new blank record for cataloging. The blank record will only have the 773 field filled in properly to complete the link once the record is saved.

To view all of the items tied to the host record, do a search for the record, click the Analytics tab on the left and the analytics tied to each barcode will be shown under the "Used in" column.

You can also see the analytics attached to this record by clicking the 'Show Analytic' link towards the top of the record in the normal view.

When looking at the anaytic record you will also see a link to the host item under the 'Host records' column in the holdings table when viewing the 'Analtyics' tab.

6.1.2.3. *Editing Analytics*

If you have linked an analytic record incorrectly you can remove that link by editing the item on the analytic record (not the host record). To do this, go to the analytic record and click the 'Edit' button and choose to 'Edit items'. To the left of each item you will see two options.

- Clicking 'Edit in Host' will allow you to edit the item on the host record.

- Clicking 'Delink' will remove the 773 field and the link between the analytic and the host.

6.1.3. *Editing Records*

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

or by clicking the Edit button on the Bibliographic Record and choosing 'Edit Record'

The record will open in the MARC editor

The alternative is to search via Z39.50 to overlay your record with a fuller record found at another library. You can do this by choosing 'Replace Record via Z39.50' from the Edit menu.
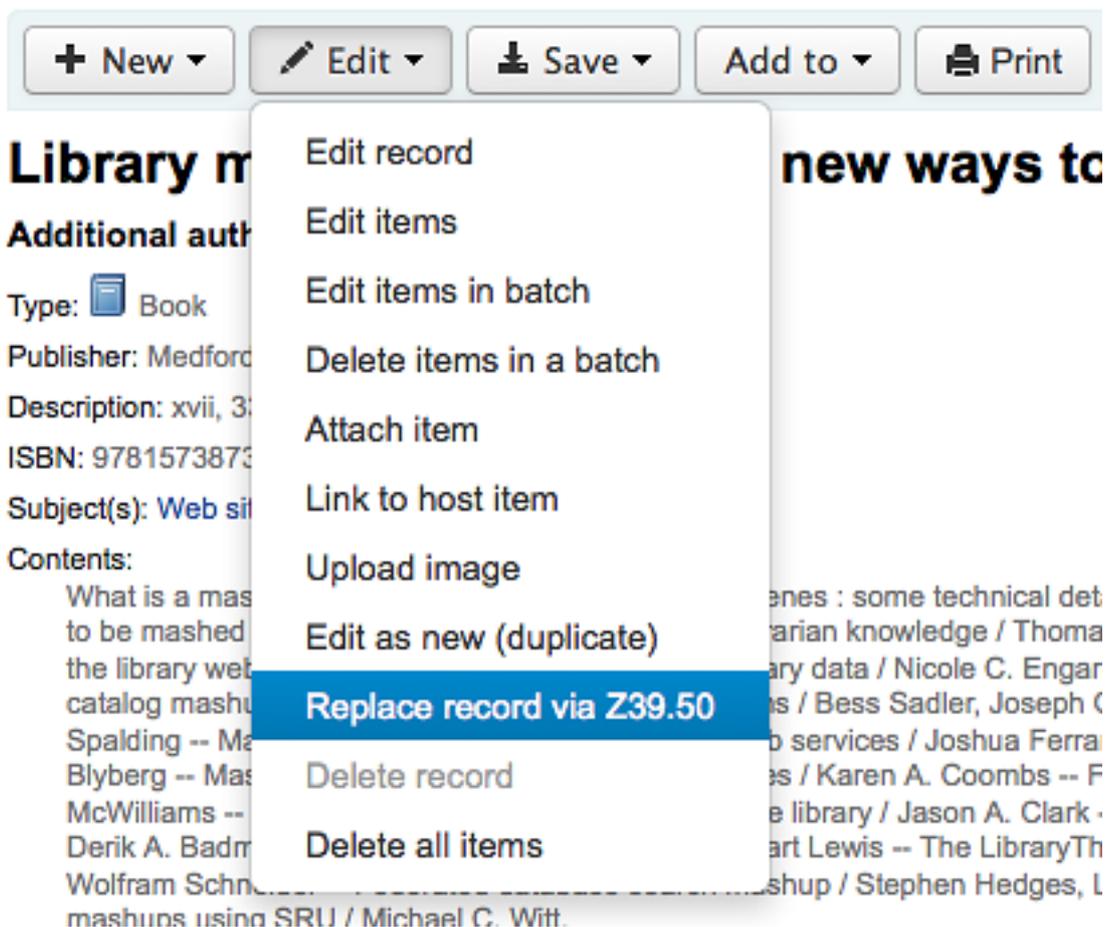
Once you choose that you will be brought to a Z39.50 search window to search other libraries for the record in question.

Once you have made your edits (via either method) you can click 'Save' at the top left of the editor.

You can also use the edit menu to add your own custom cover image if you have either *OPACLocalCoverImages* and/or *LocalCoverImages* set to 'Display' by choosing 'Upload Image' from the menu.
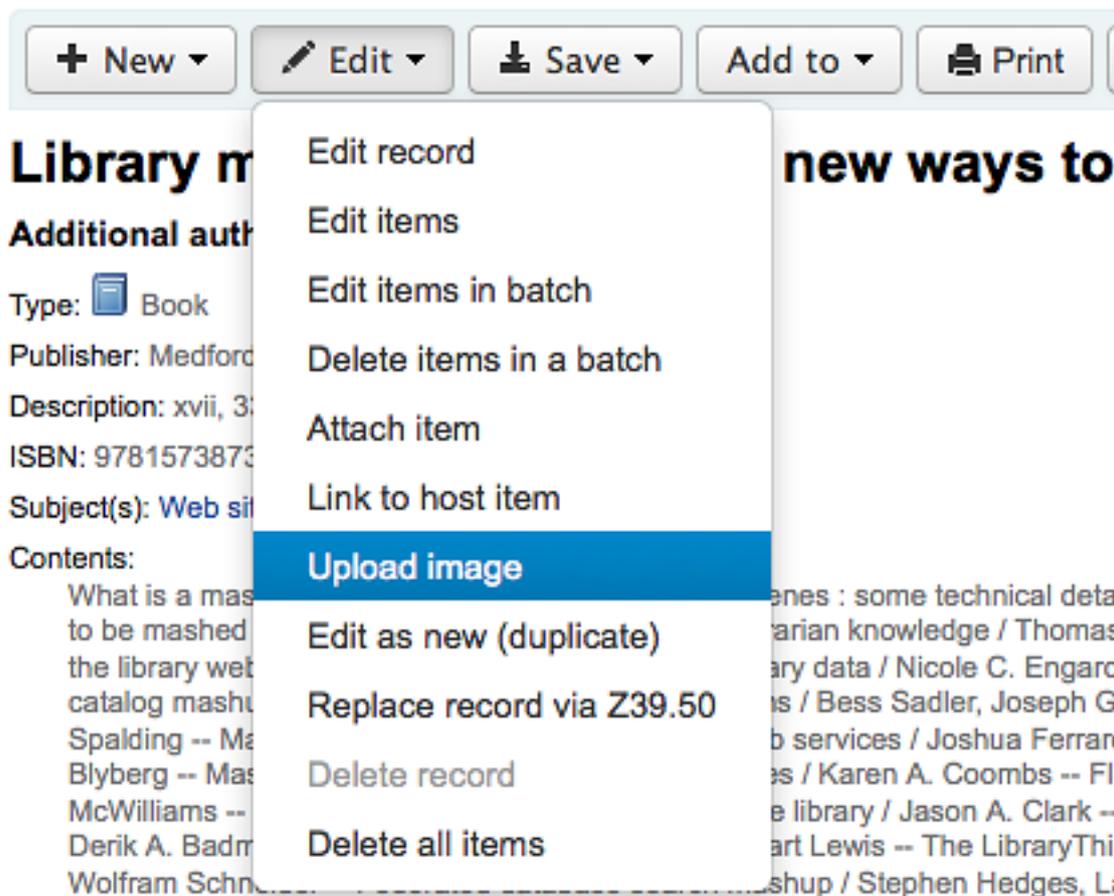
Choosing to 'Upload Image' will take you to the *Upload Local Cover Image Tool*.

6.1.4. *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
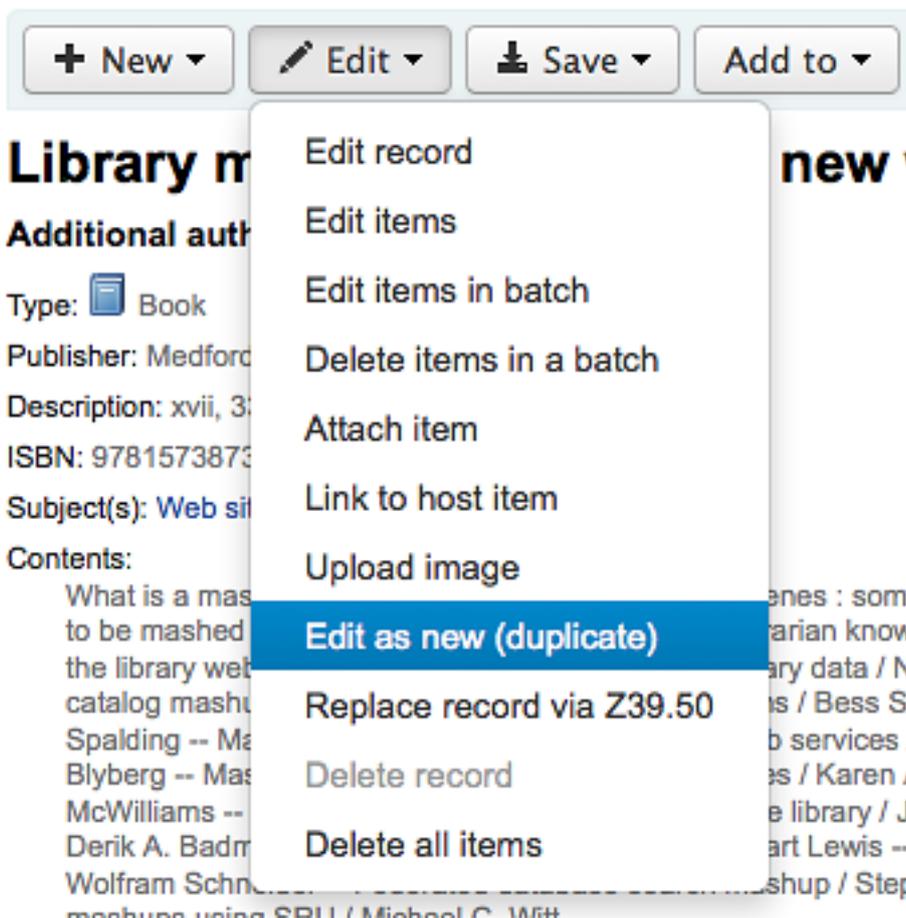
This will open a new MARC record with the fields filled in with the values from the original Bibliographic Record.

6.1.5. *Attaching files to Records*

If you would like to upload files to Koha you can do so with a few settings.

- You will need to ask your system administrator to set the 'upload_path' config variable to point to where the files will be stored
  - You can see if your upload path is set correctly by visiting About Koha > System Information. If there is an error you will see it there.

- You will want to be sure that your *OPACBaseURL* system preference is set appropriately

- You will want to add the upload.pl plugin to the 856$u subfield in one (or multiple) of your *frameworks*

Once you are all set up you can continue with cataloging as regular. You will see a plugin icon next to the 856$u that will open up the upload and/or search window
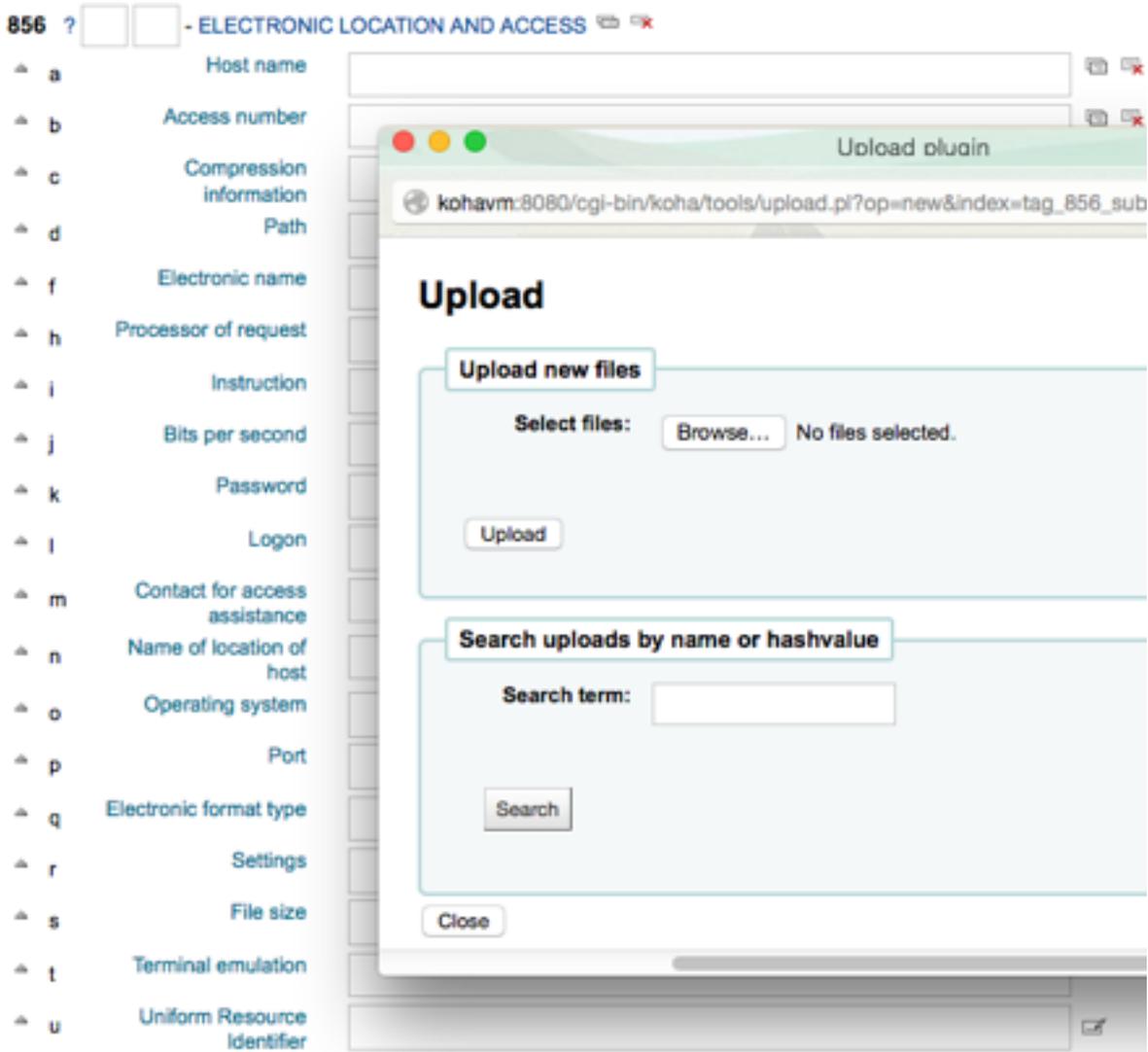
From this menu you can click browse to find a file and attach it, or you can search files you have uploaded previously using the search box. From the search results you can choose which file to attach.

Once the file is chosen it will appear as a link in the MARC record and on the detail display.

6.1.6. *Merging Records*

To merge bibliographic records together you will want to go to the Cataloging module and perform a search.

If you see duplicates on that search results screen you can check the boxes next to the duplicates and click the 'Merge selected' button at the top of the results.

Once you have selected the records you want to merge, click the 'Merge selected' button at the top of the list. You will be asked which of the records you would like to keep as your primary record and which will be deleted after the merge. If the records were created using different frameworks, Koha will also ask you what Framework you would like the newly merged record to use.

You will be presented with the MARC for all of the records (each accessible by tabs labeled with the bib numbers for those records). By default the entire first record will be selected, uncheck the fields you don't want in the final (destination) record and then move on to the second tab to choose which fields should be in the final (destination) record.

Should you try to add a field that is not repeatable two times (like choosing the 245 field from both record #1 and #2) you will be presented with an error
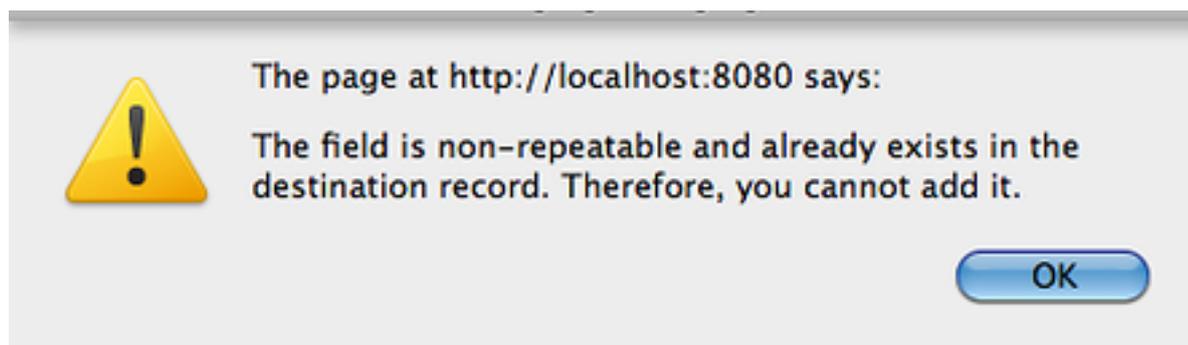
Below the records you are merging is an option to enter fields to report on. This will allow you to control what fields you see on the merge confirmation page:

If you enter nothing you will be presented with a confirmation of biblionumbers only

If you enter fields you will see those on the confirmation page (you can set defaults with the *MergeReportFields* preference)

Merging records

The merge was successful. Click here to see the merged record.

Report

Biblionumber	001	245$a	245$b	650$2	650$a	650$v	650$x	650$z
6237 (record kept)	livesonboundarym00rose	Lives on the boundary :	a moving account of the struggles and achievements of America's educationally unprepared /	eriod gtt gtt gtt	People with social disabilities Remedial teaching Literacy College teachers Educationally Disadvantaged. Kansarmen. Onderwijs. Remedial teaching. Handicapés sociaux Enseignement correctif Alphabétisation Professeurs (Enseignement supérieur)	Biographies.	Education Biography. Éducation	United States. United States. United States. United States Ètats-Unis. États-Unis. États-Unis. États-Unis
6238	livesonboundarys00rose	Lives on the boundary :	the struggles and achievements of America's educational underclass.		People with social disabilities Remedial teaching. Literacy. College teachers People with disabilities.	Biography.	Education.	
6239	livesonboundarys1989rose	Lives on the boundary :	the struggles and achievements of America's educational underclass.		People with social disabilities Remedial teaching. Literacy. College teachers People with disabilities.	Biography.	Education.	

Once you have completed your selections click the 'merge' button. The primary record will now CON-TAIN the data you chose for it as well as all of the items/holdings from both bib records, and the second record will be deleted.

Important

It is important to rebuild your zebra index immediately after merging records. If a search is performed for a record which has been deleted Koha will present the patrons with an error in the OPAC.

> **Note**
>
> If you would like you can also use the *Lists* tool for merging records together. *Learn more here*.

6.1.7. *Deleting Records*

To delete a bibliographic record simply choose the 'Edit' button and select 'Delete record'
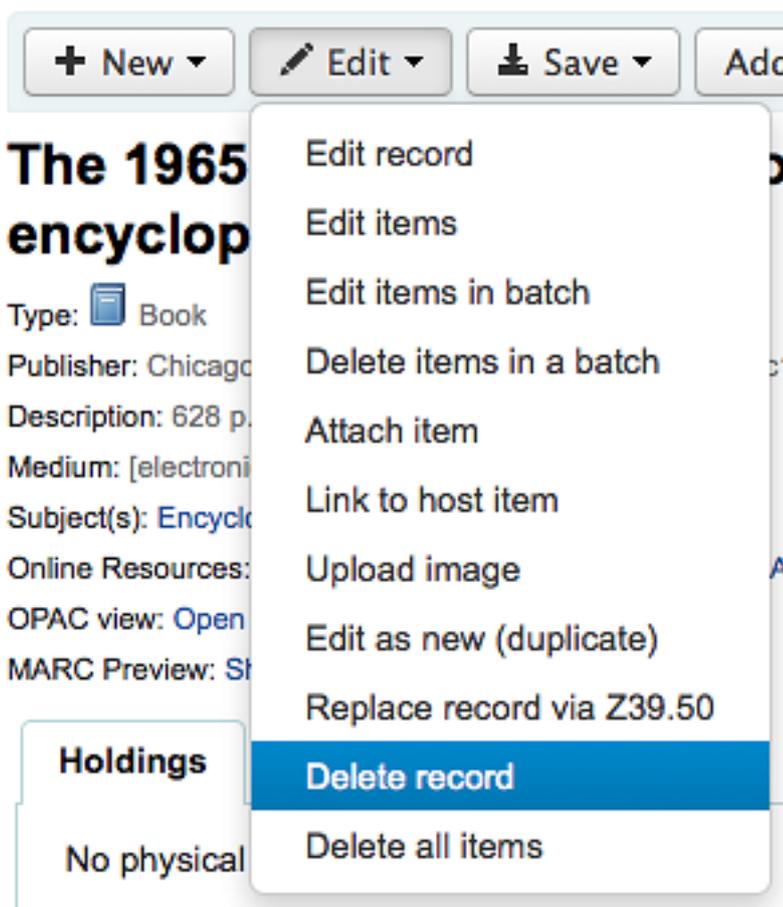
Bibliographic records can only be deleted one all items have been deleted. If you try to delete a bibliographic record with items still attached you will see that the delete option is grayed out.

6.2. *Item Records*

In Koha each bibliographic record can have one or more items attached. These items are sometimes referred to as holdings. Each item includes information to the physical copy the library has.

6.2.1. *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/Edit Items' from the cataloging search results

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:

At the very least, if you plan on circulating the item, the following fields should be entered for new items:

- 2 - Source of classification

- a - Permanent location

- b - Current location

- o - Full call number
  - If you'd like you can use the *call number browser plugin* for this field. If it's enabled you'll see a ... to the right of the field. When clicked that will open a call number browser window if the row is highlighted in Red then the call number is in use, if there is a thin Green line instead then the call number can be used.

- 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

To make sure that these values are filled in you can mark them as mandatory in the *framework* you're using and then they will appear in red with a 'required' label. The item will not save until the required fields are filled in.

-

> **Note**
>
> To make item subfields required in a framework you'll want to edit the 952 field in the *framework editor*.

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 your to alter

- Add Multiple items will ask how many items and will then add that number of items adding +1 to the barcode so each barcode is unique

Your added items will appear above the add form once submitted

Items for Library mashups : (Record #110)

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

	Item type	Current location	Home library	Call number	Status	Last seen	Barcode	Edit
☐	Books	Centerville	Centerville	Z678.9.O65 E54 2010	Available	08/02/2012	503046642	Edit
☐	Books	Fairfield	Fairfield	Z678.9 .E54 2010	Available	07/19/2011	3160778988	Edit
☐	Books	Nicole's Library	Nicole's Library	Z678.9 .E54 2010	Available	04/30/2011	65104144	Edit

If you have *SpineLabelShowPrintOnBibDetails* set to 'Display' then there will also be a link to print a quick spine label next to each item.

	Item type	Current location	Home library	Call number	Status	Last seen	Barcode	Spine label	Edit
☐	Books	Centerville	Centerville	Z678.9.O65 E54 2010	Available	08/02/2012	503046642	Print label	Edit
☐	Books	Fairfield	Fairfield	Z678.9 .E54 2010	Available	07/19/2011	3160778988	Print label	Edit
☐	Books	Nicole's Library	Nicole's Library	Z678.9 .E54 2010	Available	04/30/2011	65104144	Print label	Edit

You can also filter the contents of your holdings table by clicking the 'Activate filters' links. This will show a row at the top where you can type in any column to filter the results in the table.

6.2.2. *Editing Items*

Items can be edited in several ways.

- Clicking 'Edit' and 'Edit Items' from the bibliographic record
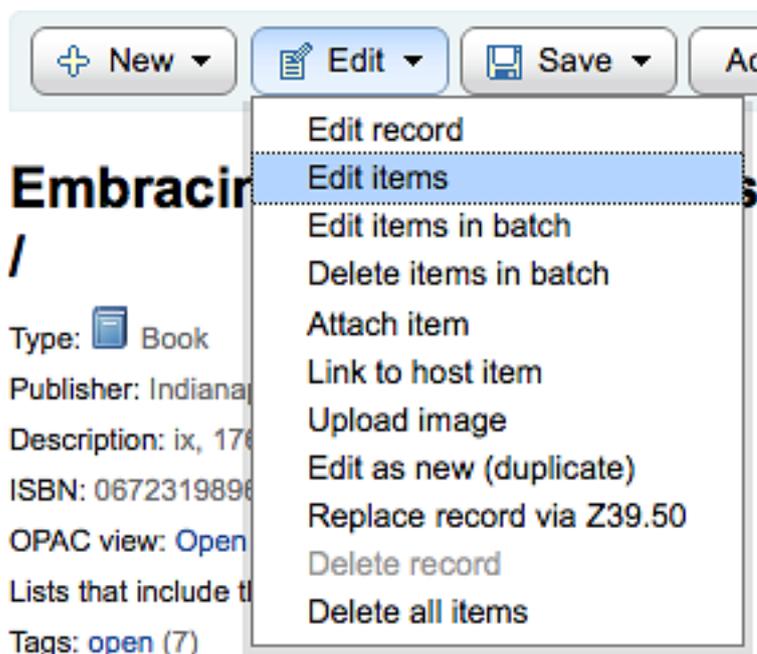
Which will open up a list of items where you can click the 'Actions' button to the left of the specific item you would like to edit and choose 'Edit'.
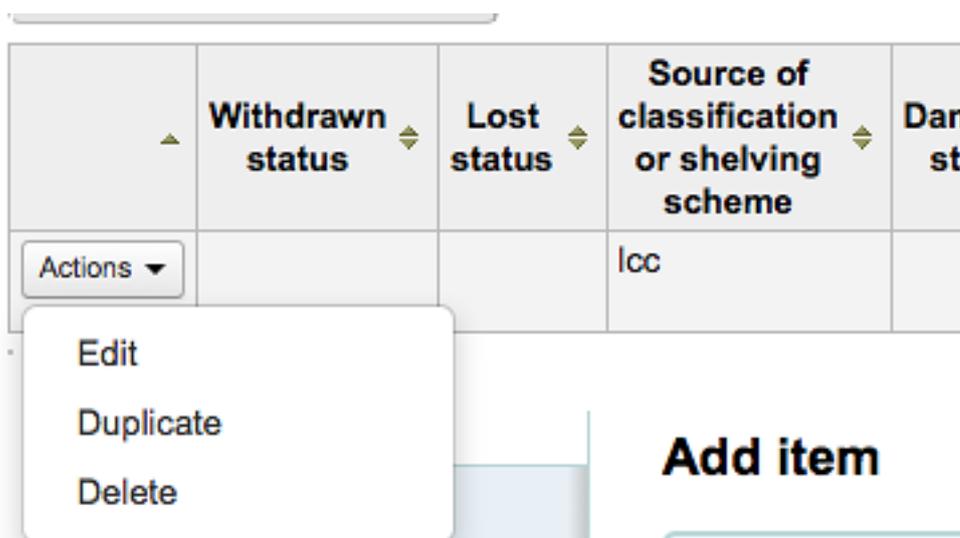
* Clicking 'Edit Items' beside the item on the 'Items' tab

Normal

MARC

Labeled MARC

ISBD

Items

Holds

Analytics

Checkout history

Modification log

+ New ▾ | ✎ Edit ▾ | 💾 S

Library mashups :

exploring new ways to delive

Biblionumber:	4
Rental charge:	0
ISBN:	9
Publisher:	N
Physical details:	x
No. of items:	2

Barcode

Item information *[Edit Item]*

Home library:	
Item type:	E
Collection:	L
Item callnumber:	
Replacement price:	0

Which will open up the editor on the item you'd like to edit

Items for Library mashups : (Record #110)

- Clicking 'Edit' and then 'Edit items in batch'

This will open up the *batch item modification tool* where you can edit all of the items on this record as a batch.

- You can also enable *StaffDetailItemSelection* to have checkboxes appear to the left of each item on the detail display. You can then check off the items you would like to edit and click 'Modify selected items' at the top of the list.

- You can click 'Edit' to the right of each item in the Holdings tab

- There is also a link to Edit items from the search results in the staff client

- Finally you can use the *Batch Item Modification* tool

6.2.2.1. *Quick Item Status Updates*

Often circulation staff need to change the status of an item to Lost or Damaged. This doesn't require you to edit the entire item record. Instead clicking on the item barcode on the checkout summary or

checkin history will bring you to an item summary. You can also get to the item summary by clicking on the Items tab to the left of the bib detail page.

From this view you can mark an item lost by choosing a lost status from the pull down and clicking the 'Set Status' button.

You can also mark an item as damaged by choosing a damaged status from the pull down and click-
ing the 'Set Status' button.
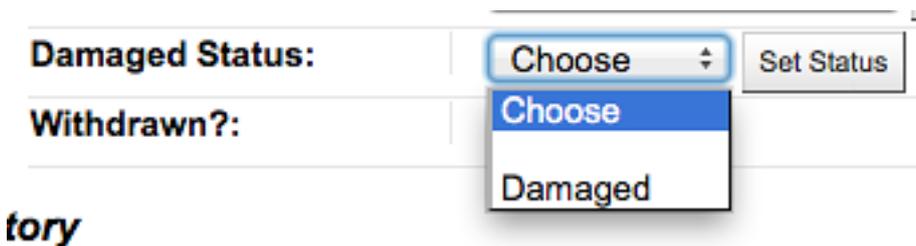
6.2.2.2. *Duplicating Items*

You can easily duplicate each item by clicking the 'Action' button the left of each item on the edit items
screen
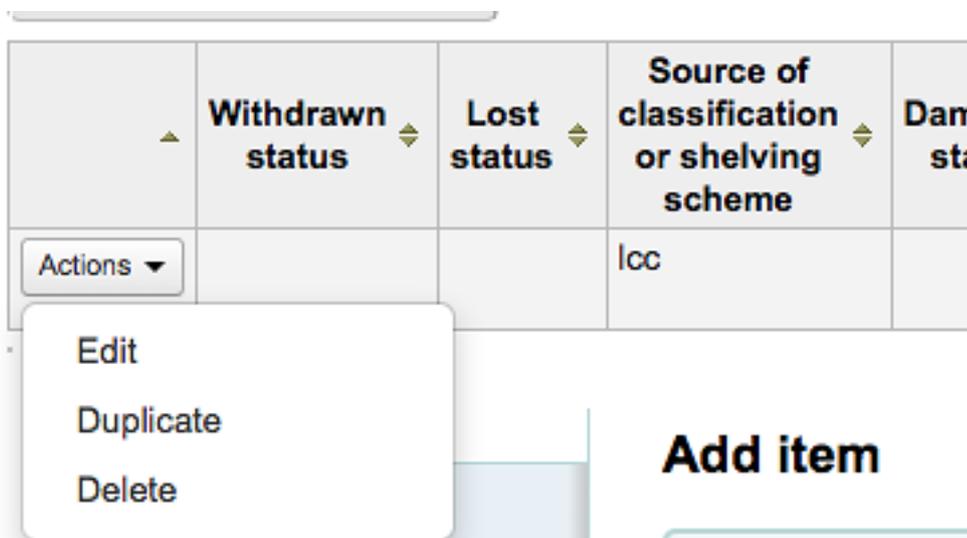
From here you can choose to 'Duplicate' the item and this will populate the form with the values from
the item you chose.

6.2.3. *Item Information*

To the left of every bibliographic record there is a tab to view the items.

Clicking that tab will give you basic information about the items. From here you can see basic information about the item such as the home library, item type, collection code, call number and replacement price. You can also see and edit the status information. If an item is marked lost or withdrawn you will also see the date that status was applied.

In the History section you will see infomration about the check out history of the item and if you ordered the item via the acquisitions module then this section will include information about the order.

If the Order or Accession date is linked, clicking it will bring you to the acquisitions information for that item.

6.2.4. *Moving Items*

Items can be moved from one bibliographic record to another using the Attach Item option
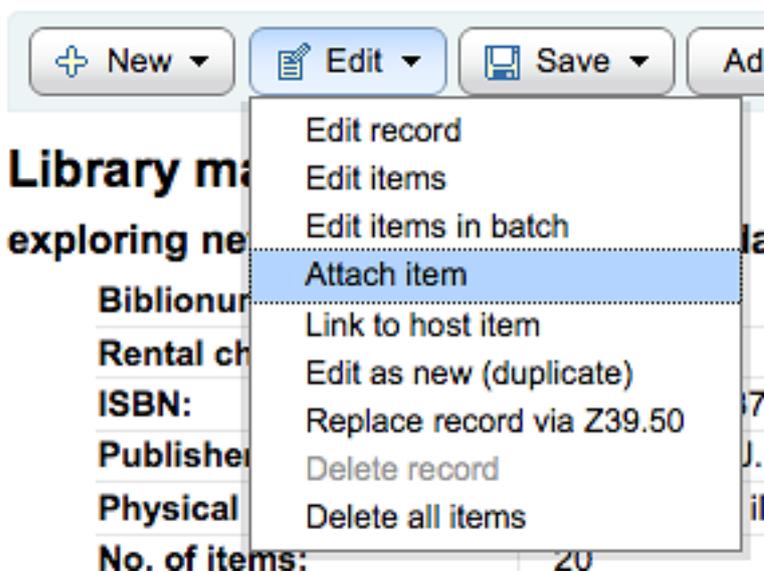
Visit the bibliographic record you want to attach the item to and choose 'Attach Item' from the 'Edit' menu.

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.

6.2.5. *Deleting Items*

There are many ways to delete item records. If you only need to delete one item you can do this by opening up the detail page for the bib record and clicking the 'Edit' button at the top. From there you can choose to 'Edit items'.

You will be presented with a list of items and next to each one will be a link labeled 'Delete'. Click that link and if the item is not checked out it will delete that item.

Items for Library mashups : (Record #4091)

	Withdrawn status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired
Edit Delete				Ordered	Library & Information Science	Centerville	Centerville		2011-11-19

If you know that all of the items attached to your record are not currently checked out you can use the 'Delete all items' option under the 'Edit menu' and it will remove all items from the record.

You can also enable *StaffDetailItemSelection* to have checkboxes appear to the left of each item on the detail display. You can then check off the items you would like to delete and click 'Delete selected items' at the top of the list.

Finally you can use the *batch delete tool* to delete a batch of items.

6.2.6. *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.

Below the 'History' heading is a link to 'View item's checkout history,' clicking that will open up the item's history which will look slightly different from the bibliographic record's history page.

Library mashups :

Barcode 90988672637121

| Home Library	Current Library	Date arrived at current library	Number of issues since last transfer
Fairview	Fairview	12/09/2009	1

Library	No. of times checked out	Last Seen
Centerville	0	Never
Fairfield	0	Never
Fairview	2	01:07 02/05/2010
Franklin	0	Never
Institut Protestant de Théologie	0	Never
Liberty	0	Never
Main	0	Never
Midway	0	Never
Pleasant Valley	0	Never
Riverside	0	Never
Springfield	0	Never
Troy	0	Never
Union	0	Never

6.3. *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.
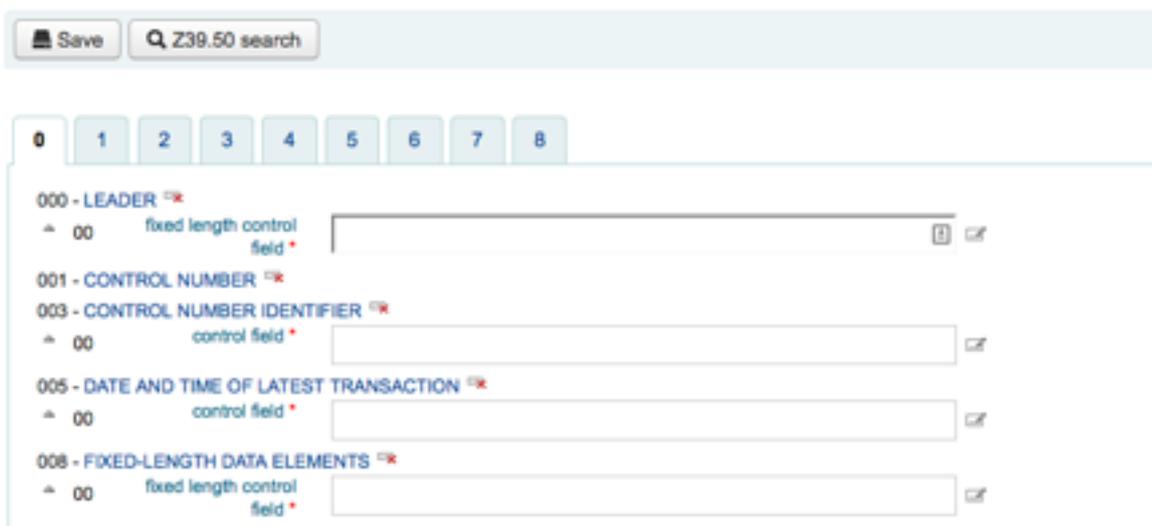
6.3.1. *Adding Authorities*

To add a new authority record you can either choose the authority type from the 'New Authority' button or search another library by clicking the 'New from Z39.50' button.
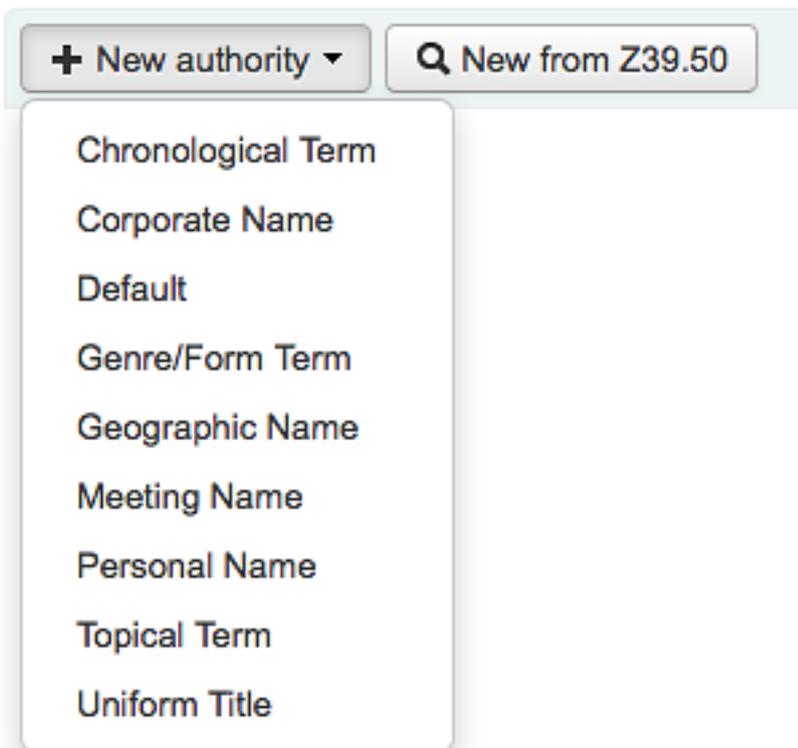
If you choose to enter a new authority from scratch, the form that appears will allow you to enter all of the necessary details regarding your authority record.

To expand collapsed values simply click on the title and the subfields will appear. To duplicate a field or subfield just click the plus sign (+) to the right of the label. To use field helper plugins simply click the ellipsis (...) to the right of the field.

When linking authorities to other headings, you can use the authority finder plugin by clicking the ellipsis (...) to the right of the field.

From there you can search your authority file for the authority to link. If you can't find the authority to link, you can click the 'Create new' button and add the necessary authority for the link. This plugin also allows for you to choose the link relationship between the authorities.

If you choose to search another library for the authority record you will be presented with a search box

Z39.50 Authority search points

From the results you can choose the 'Import' link to the right of the record you would like to add to Koha

Results for Authority Records

Server	⇕	Heading	▲	Authority Type	MARC	
LOC NAME AUTHORITIES		Engard, Nicole C., 1979-		PERSO_NAME	MARC	Import
LOC NAME AUTHORITIES		Engard, Rodney G.		PERSO_NAME	MARC	Import
LOC NAME AUTHORITIES		Engard, Ronald K.		PERSO_NAME	MARC	Import
LOC NAME AUTHORITIES		Engard, Sean		PERSO_NAME	MARC	Import

Page 1 / 1

Go to page : 1 [Go]

[Try Another Search]

You will then be presented with the form to edit the authority before saving it to your system

Adding authority Personal Name

6.3.2. *Searching Authorities*

From the authorities page you can search for existing terms and the bibliographic records they are attached to.

From the results you will see the authority record, how many bibliographic records it is attached to, an 'Actions' menu that includes the ability to *edit*, *merge* and *delete* (if there are no bibliographic records attached).

Authority search results

<< < 1 2 3 ... 29 > >>

Results 1 to 20 of 574

Summary		Used in	
Personal Names: **Abbott, Tony.**	Details	0 records	Actions ▼
Personal Names: **Abbott, Tony. Secrets of Droon.**	Det	✎ Edit	
Personal Names: **Abbott, Tony. Secrets of Droon special edition.**	Det	⚔ Merge	
		🗑 Delete	
Topical Term: **Abused women Fiction.**	Details	0 records	Actions ▼
Topical Term: **Accidents Fiction.**	Details	0 records	Actions ▼
Topical Term: **Accounting.**	Details	0 records	Actions ▼
Personal Names: **Ackerman, Diane.**	Details	0 records	Actions ▼
Genre/Form Term: **Action and adventure films.**	Details	0 records	Actions ▼
Topical Term: **Actors United States Biography.**	Details	0 records	Actions ▼

Clicking on the Details link to the right of the authority record summary will open the full record and the option to edit the record.

If the authority has See Alsos in it you will see those broken out on the search results, clicking the linked headings will run a search for that heading instead.

Authority search results

Results 1 to 4 of 4

Summary		Used in	
Personal Names: **Horlak, E. E.** *see also:* Tepper, Sheri S. (n)	Details	0 records	Actions ▼
Personal Names: **Oliphant, B. J.** *see also:* Tepper, Sheri S. (n)	Details	0 records	Actions ▼
Personal Names: **Orde, A. J.** *see also:* Tepper, Sheri S. (n)	Details	0 records	Actions ▼
Personal Names: **Tepper, Sheri S.** *see also:* Orde, A. J. (n) Oliphant, B. J. (n) Horlak, E. E. (n)	Details	0 records	Actions ▼

6.3.3. *Editing Authorities*

Authorities can be edited by clicking on the authority summary from the search results and then click-ing the 'Edit' button above the record. Or by clicking on the 'Edit' link to the left of the authority on the search results.

Once you've made the necessary edits, simply click 'Save' and *dontmerge* is set to 'Do', Koha will immediately update all of the bib records linked to the authority with the new authority record's data. If dontmerge is set to "Don't" then Koha won't edit bib records when changes are made to authorities, rather, this is done later by the *merge_authority.pl cronjob*.

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.

6.3.4. *Merging Authorities*

If you have duplicate authority records you can merge them together by clicking the 'Merge' link, found in the actions menu, next to two results on an authority search.

After clicking 'Merge' on the first result you will see that authority listed at the top of the results.

Next you need to click 'Merge' next to the second result you'd like to merge.

You will be asked which of the two records you would like to keep as your primary record and which will be deleted after the merge.

You will be presented with the MARC for both of the records (each accessible by tabs labeled with the authority numbers for those records). By default the entire first record will be selected, uncheck the fields you don't want in the final (destination) record and then move on to the second tab to choose which fields should be in the final (destination) record.

Merging records

Source records

Destination record

Once you have completed your selections click the 'Merge' button. The primary record will now contain the data you chose for it and the second record will be deleted.

6.4. *Cataloging Guides*

6.4.1. *Bibliographic Record Cataloging Cheat Sheet*

Jared Camins-Esakov
Edited by Nicole C. Engard
2010

Table 6.1. Cataloging Guide

Tag	Label	Description	Instructions
000	LEADER	Describes the record(i.e. surrogate) -- is it a record for a monograph? A serial?	Click in this field to fill it in. Then set "Bibliographic level" to 'a' for articles or 's' for serials. Otherwise, leave everything as is.
001	CONTROL NUMBER	Accession number.	Enter the accession number written inside the item here. For articles and items which

Tag	Label	Description	Instructions
			do not have accession numbers, leave blank.
003	CONTROL NUMBER IDENTIFIER	Your MARC Organizational Code	Click in this field to fill it in (will auto fill if you have your *MARCOrgCode* preference set).
005	D & T LATEST TRANSACTION	Current date and time.	Click in this field to fill it in.
008	FIXED-LENGTH DATA ELEMENTS	Field containing computer-readable representations of a number of things.	Generally you will only use 's' (single) or 'm' (multiple) options for position 06- use the former when the item was published in a single year, the latter when it was published over the course of several. If there is a single date, only enter a date in the first date field (positions 07-10). Enter the three-digit country code in positions 15-17, being sure to add spaces if the country code is fewer than three characters long. If there is an index, note that fact in position 31. Enter the three-letter language code in positions 35-37.
010	LCCN	A number assigned by the Library of Congress to uniquely identify the work.	Check on the copyright page of the book (if it was published in the US) or the LC catalog for this number. If you can't find it, don't worry about it.
020	ISBN	Unique number used by publishers to identify books.	If this number isn't listed on the book, there probably isn't one.
022	ISSN	Unique number used by publishers to identify serials.	If this number isn't listed on the book, there probably isn't one.
033	DATE/TIME OF EVENT	Used for auction dates. Required for auction catalogs.	For auctions that took place on only one day, enter the date of the

Tag	Label	Description	Instructions
			auction in the format YYYYMMDD in the subfield 'a' and a '0' in the first indicator. For auctions that took place over two consecutive days or any number of non-consecutive days, create a subfield 'a' for each day with the date in the format YYYYMMDD, and put a '1' in the first indicator. For auctions that took place over more than two consecutive days, create a subfield 'a' (in format YYYYMMDD) for the first day and a subfield 'a' (also in format YYYYMMDD) for the last day, and put a '2' in the first indicator.
040	CATALOGING SOURCE	Identifies which libraries created and modified the record.	For imported records, add a subfield 'd' with your OCLC code as the value. For new records, make sure that the subfield 'c' with your OCLC code as the value.
041	LANGUAGE CODE	Identifies all the languages used in an item, when two or more languages are present.	For significant portions of a text in a given language, there should be a subfield 'a' with that language code. If there are only summaries or abstracts in a specific language, create a subfield 'b' with that language code.
100	MAIN ENTRY--PERSONAL	Authorized form of the main author's name	See Authorized headings sheet and AACR2. The first indicator should generally be a '1', to indicate that the entry is surname first. If the name consists only of a forename, how-

Tag	Label	Description	Instructions
			ever, the first indicator should be '0'.
110	MAIN ENTRY--COR-PORATE	Authorized form of the name of the main corporate author. Required for auction catalogs.	Auction catalogs should use a 110 field rather than a 100 field. See Authorized headings sheet and AACR2. Set the first indicator to '2'.
111	MAIN EN-TRY--MEETING	Authorized form of the name of a meeting which acted as a main offer (e.g. conference proceedings)	See Authorized headings sheet and AACR2. Set the first indicator to '2'.
245	TITLE STATEMENT	Transcription of the title statement from the title page (or chief source of information)	Enter the title in subfield 'a', the subtitle in subfield 'b', and the statement of responsibility in subfield 'c'. If you are creating a record for a single volume or part of a multi-part item, you should put the part number in subfield 'n' and the part title in subfield 'p.' For auction catalogs, the date (in 'MM/DD/YYYY' format) should be listed in square brackets in subfield 'f'. See ISBD punctuation sheet. Set the first indicator to '0' if there is no author, otherwise set it to '1'. Set the second indicator to the number of non-filing characters (i.e. characters in an initial articles plus the space... for "The " set the second indicator to '4').
246	VARYING FORM OF TITLE	Alternate form of title for searching and filing purposes	If the patron might look for the work under a different title, enter it here. Do not include initial articles. The first indicator should be '3', unless the title is merely a variant spelling, in

Tag	Label	Description	Instructions
			which case the first indicator should be '1'.
250	EDITION STATEMENT	Transcription of the edition statement from the title page (or chief source of information)	Transcribe the edition statement exactly as it appears on the title-page. You may abbreviate if the edition statement is very long.
260	PUBLICATION (IMPRINT)	Publication information.	Put the location of publication in subfield 'a', the publisher in subfield 'b', and the year (or probable year) in subfield 'c'. See ISBD punctuation sheet.
300	PHYSICAL DESCRIPTION	Physical description	Enter the pagination statement in subfield 'a', a brief description of "special" contents such as illustrations or maps in subfield 'b' (see AACR2), and the size of the item in subfield 'c'. See ISBD punctuation sheet.
490	SERIES STATEMENT	Shows the series statement exactly as it appears on the item.	Transcribe the series statement into subfield 'a' with the volume number in subfield 'v'. See ISBD punctuation sheet. Set the first indicator to '1' if you are using an 830. As a general rule, you should do so.
500	GENERAL NOTE	Notes that don't fit anywhere else.	Enter notes as full sentences, with a separate 500 field for each distinct topic.
501	WITH NOTE	Notes whether the work is bound with the works described by other records.	Put description of relationship in subfield 'a'.
504	BIBLIOGRAPHY, ETC. NOTE	Indicates whether the work includes a bibliography.	If the work includes a bibliography and index, put the text "Includes bibliographical references (p. XXX-XXX) and index." in subfield 'a'. If the work does not

Tag	Label	Description	Instructions
			include an index, remove that part of the sentence. If the references are scattered throughout the work and not gathered into a distinct sentence, remove the parenthetical statement.
505	FORMATTED CONTENTS	List of contents in a standard format. Unformatted contents can be listed in a 500 (General Note) field.	See ISBD punctuation sheet. Set the first indicator to '0'. If you are separately coding authors and titles, set the second indicator to '0'. Otherwise, leave the second indicator blank.
518	DATE/TIME OF EVENT NOTE	Used for auction dates.	For auction catalogs, enter the date of the auction in the format 'January 2, 1984' in the subfield 'a'
520	SUMMARY, ETC.	A brief summary or abstract of the book or article.	In general you do not need to write a summary. A summary might be called for, however, with items that cannot be easily reviewed by a patron, such as books with highly acidic paper or CD-ROMs.
546	LANGUAGE NOTE	Note describing the languages used in the work	Only needed for works in multiple languages. See ISBD punctuation sheet.
561	PROVENANCE INFORMATION	Describes the previous ownership of the item.	Used only for rare books.
563	BINDING INFORMATION	Describes the binding of the item.	Used only for rare books.
590	LOCAL NOTE	Local notes. Required for auction catalogs.	Used for auction catalogs to indicate what types of coins are sold in the auction- Roman, Greek, etc.
600	SUBJECT ADDED--PERSONAL	Authorized form of personal names for people discussed in the work	See Authorized headings sheet and AACR2. The first indicator should generally be a '1', to indicate that the

Tag	Label	Description	Instructions
			entry is surname first. If the name consists only of a forename, however, the first indicator should be '0'. If you found the name in the LC authority file, set the second indicator to '0'. Otherwise set the second indicator to '4'.
610	SUBJECT ADDED--CORPORATE	Authorized form of corporate names for organizations discussed in the work	See Authorized headings sheet and AACR2. Set the first indicator to '2'. If you found the name in the LC authority file, set the second indicator to '0'. Otherwise set the second indicator to '4'.
611	SUBJECT ADDED--MEETING	Authorized form of meeting names for meetings discussed in the work	See Authorized headings sheet and AACR2. Set the first indicator to '2'. If you found the name in the LC authority file, set the second indicator to '0'. Otherwise set the second indicator to '4'.
630	SUBJECT ADDED--UNIFORM TITLE	Authorized form of titles for other works discussed in the work	See Authorized headings sheet and AACR2. Set the first indicator to the number of non-filing characters (i.e. characters in an initial articles plus the space... for "The " set the first indicator to '4'). If you found the name in the LC authority file, set the second indicator to '0'. Otherwise set the second indicator to '4'.
650	SUBJECT ADDED--TOPICAL	Library of Congress Subject Heading terms describing the subject of the work	See Authorized headings sheet and AACR2. If you found the name in the LC authority file, set the second indicator to '0'. Otherwise set the second indicator to '4'.

Tag	Label	Description	Instructions
651	SUBJECT ADDED--GEOGRAPHICAL	Library of Congress Subject Heading geographical terms describing the subject of the work	See Authorized headings sheet and AACR2. If you found the name in the LC authority file, set the second indicator to '0'. Otherwise set the second indicator to '4'.
655	INDEX TERM--GENRE/FORM	Describes what an item is as opposed to what the item is about.	Generally used only for auction catalogs, which should have the genre heading "Auction catalogs." (make sure to find the authorized heading!) If you found the name in the LC authority file, set the second indicator to '0'. If you are using a term from a specific thesaurus, set the second indicator to '7' and put the code for the thesaurus in subfield '2'. Otherwise set the second indicator to '4'.
690	LOCAL SUBJECT ADDED--TOPICAL	Used for headings from any custom subject authority file.	If there is no appropriate LCSH term, you can use a 690 with subject headings you find on other items in the catalog.
691	LOCAL SUBJECT ADDED--GEOGRAPHICAL	Used for headings from any custom subject authority file.	If there is no appropriate LCSH term, you can use a 691 with subject headings you find on other items in the catalog.
700	ADDED ENTRY--PERSONAL	Used for second authors and other persons related to the production of the work.	See Authorized headings sheet and AACR2. The first indicator should generally be a '1', to indicate that the entry is surname first. If the name consists only of a forename, however, the first indicator should be '0'.

Tag	Label	Description	Instructions
710	ADDED ENTRY--COR-PORATE	Used for corporate bodies related to the production of the work (e.g. publishers).	See Authorized headings sheet and AACR2. Set the first indicator to '2'.
711	ADDED EN-TRY--MEETING	Used for meetings related to the production of the work (e.g. symposia that contributed to the work).	See Authorized headings sheet and AACR2. Set the first indicator to '2'.
730	ADDED ENTRY--UNI-FORM TITLE	Used for uniform titles related to the production of the work (e.g. a work that inspired the present work)	See Authorized headings sheet and AACR2. Set the first indicator to the number of non-filing characters (i.e. characters in an initial articles plus the space... for "The " set the first indicator to '4').
773	HOST ITEM ENTRY	Describes the larger bibliographic unit that contains the work (e.g. book or journal containing the article being described in the current record)	If the host publication is author main entry, enter the authorized form of the author's name in subfield 'a'. Put the title in subfield 't'. If the host publication is an independent work, put publication information in subfield 'd'. When available, ISSN and ISBN should always be used in, in subfields 'x' and 'z' respectively. Relationship information (e.g. volume number, page number, etc.) goes in subfield 'g'. Subfield 'q' contains an encoded representation of the location of the item: volume, issue, and section numbers are separated by colons, and the first page is entered following a '<' at the end of the subfield. See ISBD punctuation sheet. Set the first indicator to '0'. If you want the label "In:" to be generated, leave the second indi-

Tag	Label	Description	Instructions
			cator blank. If you want something else displayed before the 773 text, set the second indicator to '8' and add a subfield 'i' with the label you want at the beginning of the field (e.g. "$iOffprint from:").
830	SERIES ENTRY--UNIFORM TITLE	Authorized form of the series name transcribed in the 490 field. Often this will just be the same as the 490.	See Authorized headings sheet and AACR2. Set the second indicator to the number of non-filing characters (i.e. characters in an initial articles plus the space... for "The " set the second indicator to '4').
852	LOCATION/CALL NUMBER	Provides the section name for pre-barcode books, pamphlets, and some articles and serials.	Do not put anything in this field if you are cataloging a volume which gets only one record and a barcode. If the item does not get a barcode, or you are currently creating a record for an article in a volume, put the section in subfield 'a' (see ANS cataloging documentation), and the call number in subfield 'i'. Set the first indicator to '8'.
856	ELECTRONIC ACCESS	Links to material available online.	Put the URL of any electronic copies or summaries, etc. in subfield 'u' and a link title in subfield 'y'. Set the first indicator to '4'.
942	ADDED ENTRY ELEMENTS (KOHA)	Used for Koha-specific data.	Set the subfield 'c' to the appropriate item type.

6.4.2. *Item/Holdings Record Cataloging Guide*

This table represents the default embedded holdings data in Koha. This information can be used for migration or importing data purposes

Table 6.2. Koha Embedded Holdings Data

MARC21 Tag/subfield	Data Element	Description	Notes
952$0	Withdrawn status	Default values: • 0 = Not withdrawn • 1 = Withdrawn	Coded value, matching *Authorized Value* category ('WITHDRAWN' in default installation)
952$1	Lost status	Default values: • 0 = Available • 1 = Lost • 2 = Long Overdue (Lost) • 3 = Lost and Paid For • 4 = Missing in Inventory • 5 = Missing in Hold Queue	It's possible to configure OPAC so that lost items don't display with the *hidelostitems* system preference. Coded value, matching *Authorized Value* category ('LOST' in default installation)
952$2	Classification	Classification scheme that defines filing rules used for sorting call numbers.	A choice of *classification sources* as they are defined in administration. If no classification scheme is entered, the system will use the value entered in the *DefaultClassificationSource* preference.
952$3	Materials specified	Specific issues of serials or multi-part items.	Displayed when items are checked out and in to tell the staff how many pieces the item has. Copy/volume data is stored in 952$h and $t for display in Normal views.
952$4	Damaged status	Default values: • 0 = Not damaged • 1 = Damaged	Coded value, matching *Authorized Value* category ('DAMAGE' in default installation)
952$5	Use restrictions	Default values: • 0 = No use restrictions • 1 = Restricted Access	Coded value, matching *Authorized Value* category ('RESTRICT' in default installation). This value has no effect on circulation.

MARC21 Tag/subfield	Data Element	Description	Notes
952$7	Not for loan	Default values: • -1 = Ordered • 0 = Available for loans • 1 = Not for Loan • 2 = Staff Collection	Coded value, matching *Authorized Value* category ('NOT_LOAN' in default installation). Negative number values can still be placed on hold.
952$8	Collection code	Coded value	Coded value, matching *Authorized Value* category ('CCODE' in default installation)
952$9	Item number	System-generated item number.	Does not display in the item record.
952$a	Owning Library **	Branch code	**Required**. Code must be defined in *Libraries, Branches and Groups*
952$b	Holding library ** (usually the same as 952$a)	Branch code	**Required**. Code must be defined in *Libraries, Branches and Groups*
952$c	Shelving location code		Coded value, matching *Authorized Value* category ('LOC' in default installation)
952$d	Date acquired	YYYY-MM-DD	Date formats in the 952 subfields are required to be in the system internal format for data loading and subsequent item editing: YYYY-MM-DD
952$e	Source of acquisition	Coded value or vendor string	Filled in automatically with the Koha assigned vendor id by Acquisitions when an item is received.
952$g	Purchase price	Decimal number, no currency symbol (ex. 10.00)	Filled in automatically by Acquisitions when an item is received.
952$h	Serial enumeration		Filled in automatically by Serials if the issue is received there.
952$o	Koha full call number		Can be filled in automatically based on the *itemcallnumber* system preference.
952$p	Barcode *	Max 20 characters	

MARC21 Tag/subfield	Data Element	Description	Notes
952$t	Copy number	Max 32 characters	
952$u	Uniform Resource Identifier	Item specific URL	Full URL starting with http:// Only needed if your item has its own URL, not necessary if the bib record has a 856$u that applies to all items on the record.
952$v	Replacement price	Decimal number, no currency symbol (ex. 10.00)	Filled in automatically by Acquisitions when an item is received.
952$w	Price effective from	YYYY-MM-DD	Date formats in the 952 subfields are required to be in the system internal format for data loading and subsequent item editing: YYYY-MM-DD. Filled in automatically by Acquisitions when an item is received.
952$x	Nonpublic note		This is a note field for notes that will not appear in the OPAC. Right now this note does not appear anywhere but in the item edit screen in the staff client.
952$y	Koha item type **	Coded value, required field for circulation	**Required**. Coded value, must be defined in *Item types*
952$z	Public note		

* - required for circulation

** - required by Koha

6.4.3. *Handling On Order Items and Holds*

VOKAL

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If you tend to import your MARC records when you have ordered the book (as opposed to when you receive the books), and allow patrons to place holds on those books, you may need to add item records to the *.mrc file before importing.

The easiest way to import your latest order is to first run your records through *MARCEdit*[1]. Download your MARC records, saving them to your desktop or some other location you use/will remember. If you

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[1] http://marcedit.reeset.net/

have MARCEdit already installed you should simply have to double click on your MARC records, and they will automatically open in MARCEdit.

Important

This tutorial was written with MARCEdit version 5.2.3769.41641 on Windows XP, instructions may be different if your version or operating system is different.

- Your original file will automatically be in the input; ensure MarcBreaker is chosen, and then click "Execute"
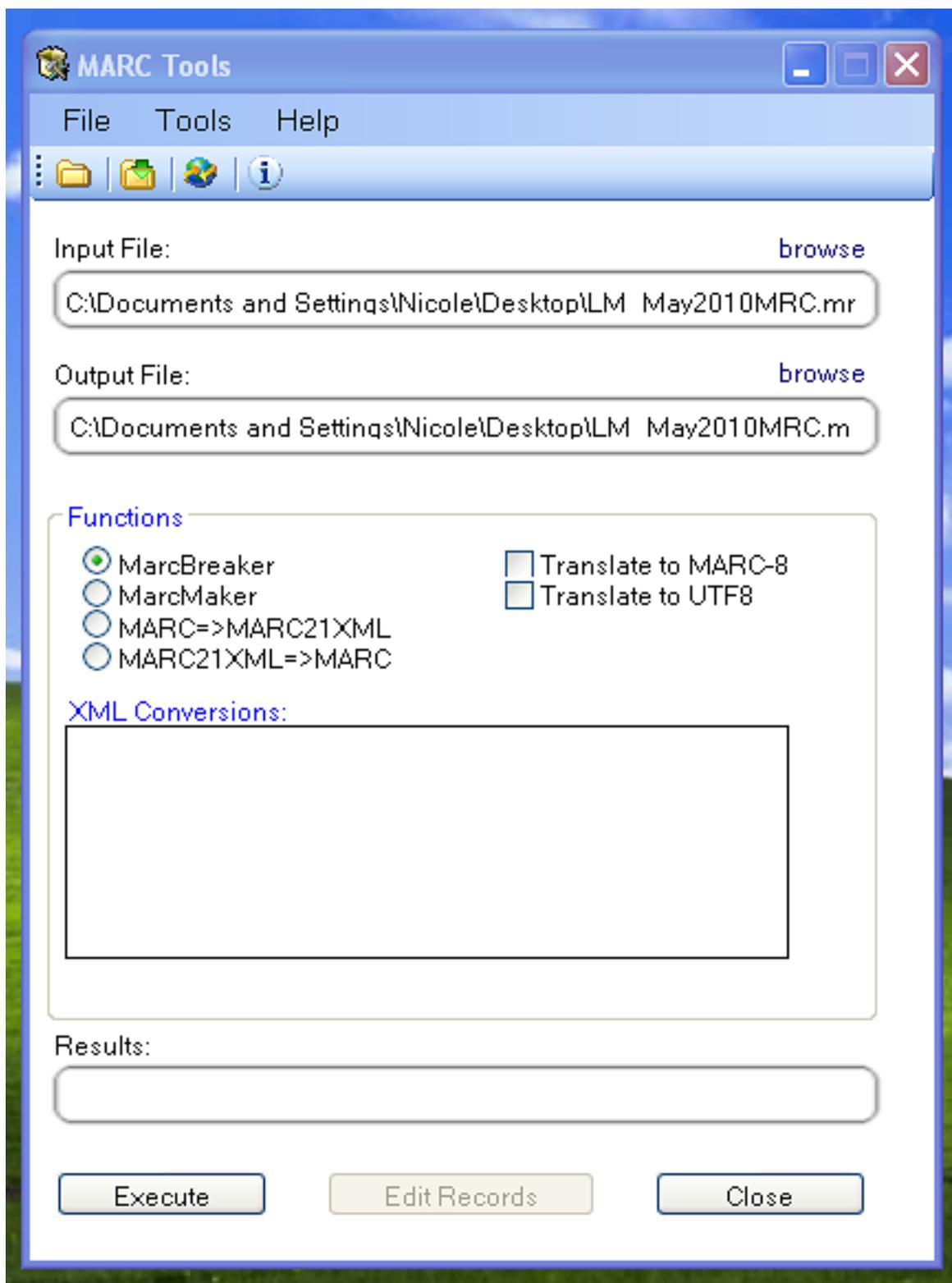
- You will be presented with a summary of the records processed at the bottom of the screen

- Click 'Edit Records' to continue on to adding item records

- Your screen will be replaced with a larger screen containing the MARC records
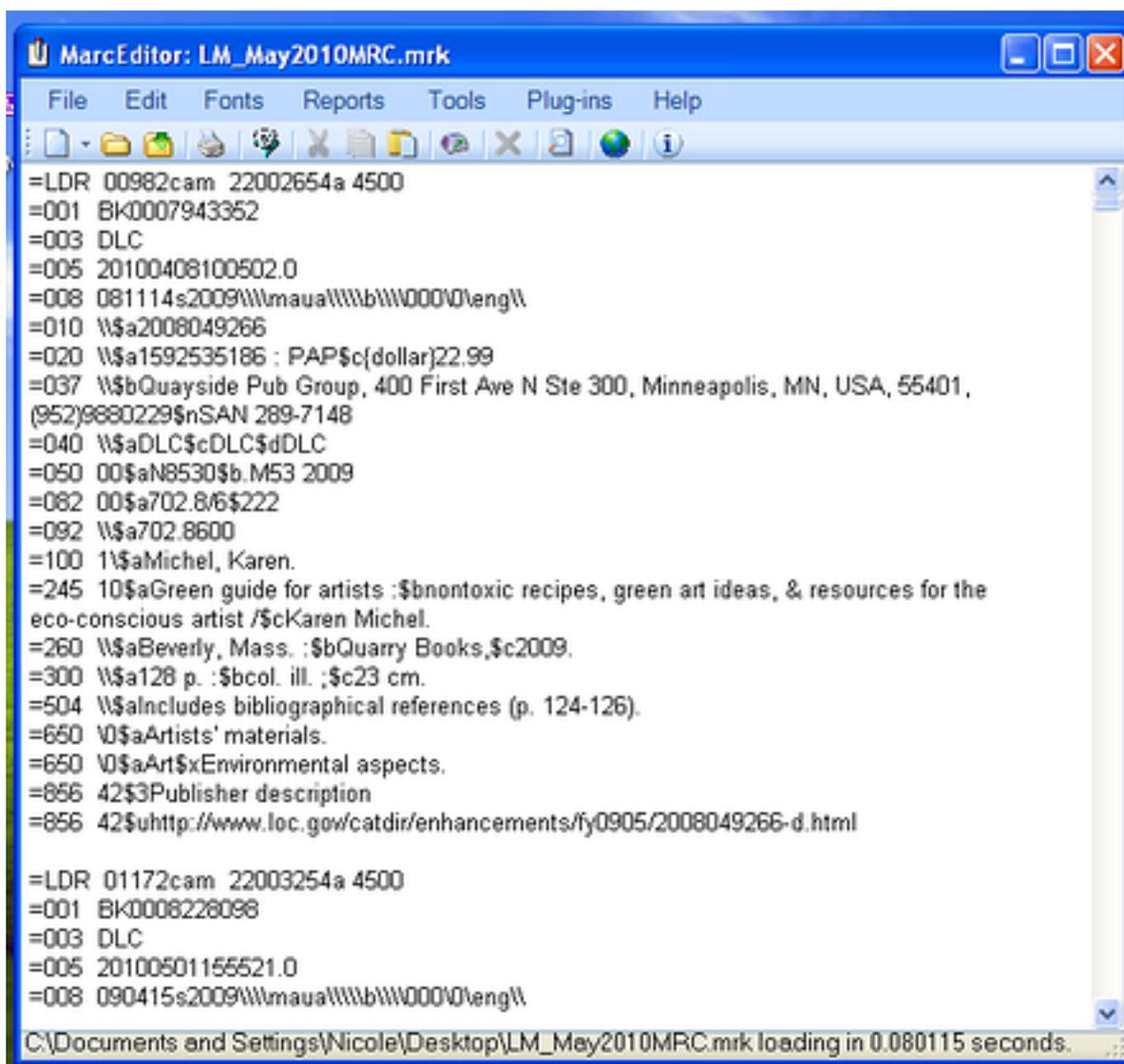
- Click on Tools > Add/Edit Field
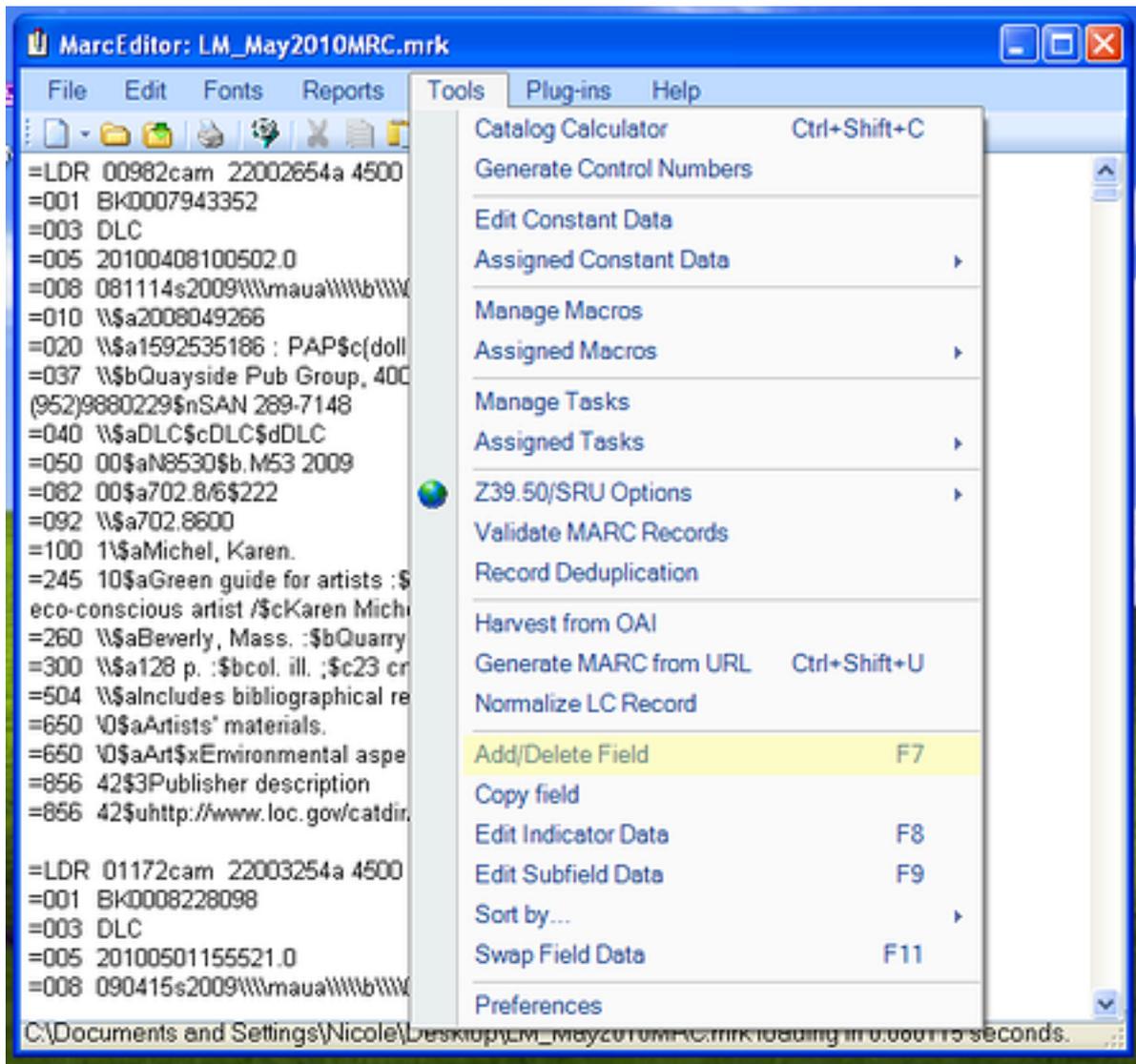
- Enter in the Koha specific item info

- In the Field box, type 942

- In the Field Data box, type \\$c and the item type code (\\$cBOOK in this example)

- Check the 'Insert last' option

- Click 'Add Field'

• Enter in the item record data

- In the Field box, type 952

- In the Field Data box, type $7ORDERED_STATUS$aPERM_LOC$bCURR_LOC
  $cSHELVING_LOCATION$eSOURCE_OF_ACQ$yITEM_TYPE

  - ex. $7-1$aCPL$bCPL$cNEW$eBrodart$yBOOK

    - In a default install of Koha -1 is the value for the Ordered status

  - You may want to look at other subfields you would like data in -- for example, changing the collection code to put all the items in the same collection (8), automatically fill in the acquisition date (d), or put in a public note (z).

  - Be sure you use the $ to separate subfields; adding each subfield on a separate line will cause that many items to be imported with your MARC record (in the example above, four items, each with one of those subfields corrected)

  - Make sure you look at the Administration > Authorized Values in Koha to put the correct code into the field

- Check the 'Insert last' option

- Click 'Add Field'

• Close the field editor window

• Click on File > Compile into MARC
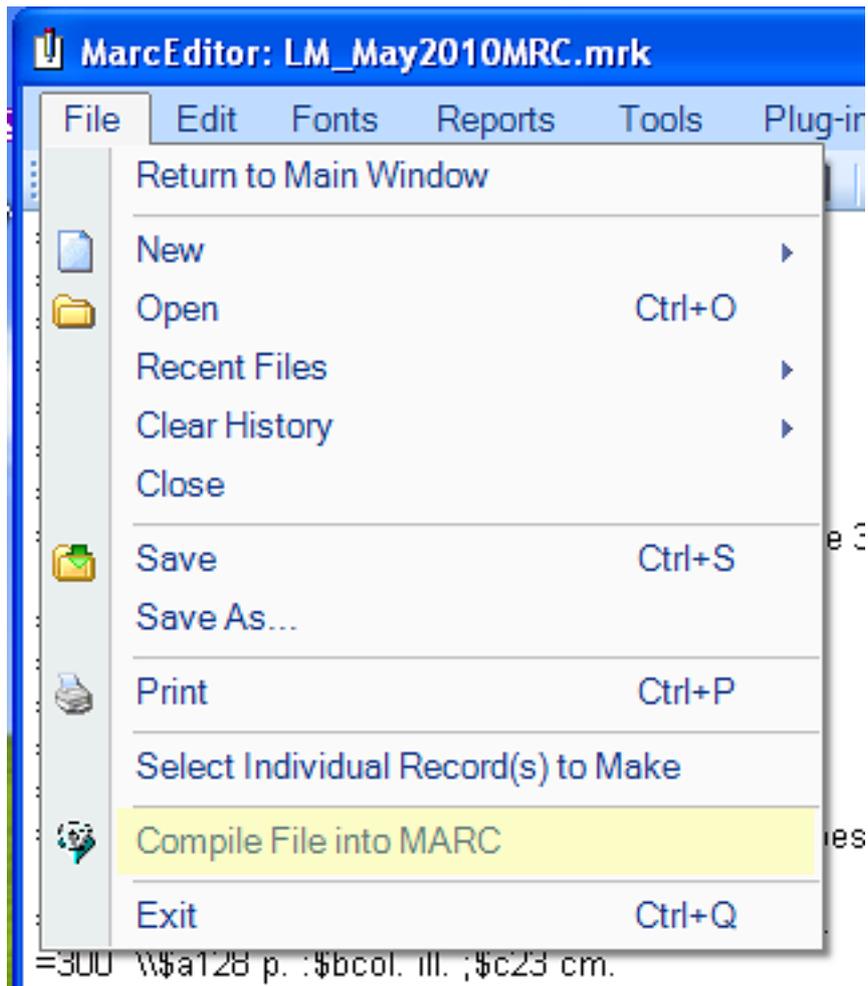
- Choose where to save your file

Now you want to go into your Koha system and follow the instructions for *importing MARC records*.

Once the item has come in, you will need to go to the item record and individually change the item to have the correct barcode, and manually change the status from Ordered to the blank line in the Not for Loan field.

> **Note**
>
> If you purchase your cataloged item records, you may want to request your vendor put in the information you need into the MARC records for you; that way, you could import the edited-by-the-vendor file, overwriting the current record, automatically replacing the data with what you need.

Course Reserves

The course reserves module in Koha allows you to temporarily move items to 'reserve' and assign different circulation rules to these items while they are being used for a specific course.

7.1. *Course Reserves Setup*

Before using Course Reserves you will need to do some set up.

First you will need to enable course reserves by setting the *UseCourseReserves* preference to 'Use'.

Next you will need to have all of your course instructors *added as patrons*.

Next you will want to add a couple of new *authorized values* for Departments and Terms.

You may also want to create new *item types*, *collection codes* and/or *shelving locations* to make it clear that the items are on reserve to your patrons. You will also want to be sure to confirm that your *circulation and fine rules* are right for your new item types (whether they be hourly or daily loans).

7.2. *Adding Courses*

Once you have completed your set up for Course Reserves you can start creating courses and adding titles to the reserve list.

From the main course reserves page you can add a new course by clicking the 'New course' button at the top left.

Your new course will need a Department, Number and Name at the bare minimum. You can also add in additional details like course section number and term. To link an instructor to this course simply start typing their name and Koha will search your patron database to find you the right person.

Once the instructor you want appears just click their name and they will be added. You can repeat this for all instructors on this course. Each instructor will appear above the search box and can be removed by clicking the 'Remove' link to the right of their name.

If you would like your course to show publicly you'll want to be sure to check the 'Enabled?' box before saving your new course.

Once your course is saved it will show on the main course reserves page and be searchable by any field in the course.

7.3. *Adding Reserve Materials*

Before adding reserve materials you will need at least one course to add them to. To add materials visit the Course Reserves module.

Click on the title of the course you would like to add materials to.

At the top of the course description click the 'Add reserves' button to add titles to this reserve list. You will be asked to enter the barcode for the reserve item.

After you are done scanning the barcodes to add to the course you can see them on the course page

7.4. *Course Reserves in the OPAC*

Once you have enabled Course Reserves and added courses you will see a link to Course Reserves below your search box in the OPAC.
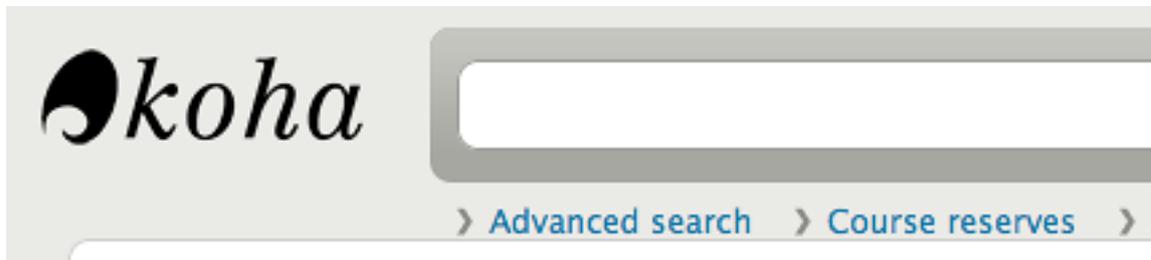
Clicking that link will show you your list of enabled courses (if you have only one course you will just see the contents of that one course).

You can search course reserves by any field (course number, course name, instructor name, department) that is visible in the list of courses. Clicking a course name will show you the details and reserve items.

Course Name	Intro to Library Science
Term	Spring
Department	Library Science
Course Number	101
Section	
Instructors	Nicole Engard
Notes	

Title	Item type	Location	Collection	Call number	Copy	Status	Date due	Notes
Library mashups :	Books	Nicole's Library	Library & Information Science	Z674.75.W67 L52 2009		Available		

Serials

Serials actions can be accessed by going to the More menu at the top of your screen and choosing Serials or by clicking Serials on the main Koha staff client page. The Serials module in Koha is used for keeping track of journals, newspapers and other items that come on a regular schedule. As with all modules, make sure you go through the related *Implementation Checklist* before using the Serials module.

- *Get there:* More > Serials

8.1. *Manage Serial Frequencies*

Koha keeps a record of publication frequencies for easy management and duplication.

- *Get there:* More > Serials > Manage frequencies

From this page you can view all of the existing frequencies in your system

Frequencies

New frequency

Description	Unit	Issues per unit	Units per issue	Display order	
2/day	day	2	1	1	Modify | Delete
1/day	day	1	1	2	Modify | Delete
3/week	week	3	1	3	Modify | Delete
1/week	week	1	1	4	Modify | Delete
1/2 weeks	week	1	2	5	Modify | Delete
1/3 weeks	week	1	3	6	Modify | Delete
1/month	month	1	1	7	Modify | Delete
1/2 months	month	1	2	8	Modify | Delete
1/3 months	month	1	3	9	Modify | Delete
2/year	month	1	6	10	Modify | Delete
1/year	year	1	1	11	Modify | Delete
1/2 year	year	1	2	12	Modify | Delete
Irregular		1	1	13	Modify | Delete

and create new ones.

New frequency

8.2. *Manage Serial Numbering Patterns*

Everytime you create a new numbering pattern in serials you can save it for later use. These patters are accessible via the Manage numbering patterns page.

- *Get there:* More > Serials > Manage numbering patterns

This page will list for you the numbering patterns you have saved in the past as well as a few canned patterns.

Number patterns

New numbering pattern

Name	Description	Numbering formula	Display order	
CIL V/N		Vol {X}, No {Y}		Edit | Delete
Number	Simple Numbering method	No.{X}	1	Edit | Delete
Volume, Number, Issue	Volume Number Issue 1	Vol.{X}, Number {Y}, Issue {Z}	2	Edit | Delete
Volume, Number	Volume Number 1	Vol {X}, No {Y}	3	Edit | Delete
Seasonal	Season Year	{X} {Y}	4	Edit | Delete
Backup pattern 1	Automatically created pattern by updatedatabase	V. {X}, N. {Y}	5	Edit | Delete
Backup pattern 2	Automatically created pattern by updatedatabase	V {X}, N {Y}	6	Edit | Delete
Backup pattern 3	Automatically created pattern by updatedatabase	Vol {X}, No {Y}	7	Edit | Delete
Backup pattern 4	Automatically created pattern by updatedatabase	Volume {X} / Number {Y}	8	Edit | Delete
Backup pattern 5	Automatically created pattern by updatedatabase	Volume {X}, Number {Y}	9	Edit | Delete
Backup pattern 6	Automatically created pattern by updatedatabase	Vol {X}, No {Y}	10	Edit | Delete
Backup pattern 7	Automatically created pattern by updatedatabase	Vol {X}, No {Y}	11	Edit | Delete
Backup pattern 8	Automatically created pattern by updatedatabase	Issue {Y} : {X}	12	Edit | Delete

> **Note**
>
> If you have upgraded from a previous version of Koha you will see 'Backup patterns' listed for patterns used in version before Koha 3.14. This is how Koha saved your old numbering patterns. You can edit these to give them more meaningful names from here.

It will also allow you to create a new numbering pattern without first adding a subscription. To add new new pattern click 'New numbering pattern' at the top of the list of patterns.

New number pattern

	X	Y	Z

Name: [   ]

Description: [   ]

Numbering formula: [   ]

Display order: [   ]

	X	Y	Z
Label			
Add			
Every			
Set back to			
When more than			
Formatting	⬍	⬍	⬍

Save Reset Cancel

Test prediction pattern

Frequency: 2/day ⬍

First issue publication date [   ] 🗓 🖼

Subscription length: issues ⬍ [   ]

Locale: [⬍] If empty, system locale is used

	X	Y	Z
Begins with			
Inner counter			

Test pattern

8.3. *Custom Subscription Fields*

This module will allow you to add custom fields to your serial subscriptions for reporting and searching.

- *Get there:* Serials > Add subscription fields

To add custom fields simply click the 'Add subscription fields' link on the left of the Serial page and choose the 'New field' button

Home › Serials › Manage new fields for subscriptions

- Claims
- Check expiration
- Manage frequencies
- Manage numbering patterns
- Add subscription fields

+ New fields

Additional fields for subscriptions

There is no field defined.

The form that appears will ask for either an authorized value or a marc field to populate the field with

Add field

Name:

Authorised value category: None

Marc field:

Searchable:

Save   Cancel

For example you might want to track which department you're ordering for or the collection code for this serial

Add field

This data will then show when you are adding a subscription

and when you view the subscription

and when you search subscriptions (if you chose to make it 'searchable')

Serials subscriptions (0 found)

Search subscriptions

ISSN: _____

Title: _____

Call number: _____

Publisher: _____

Vendor: _____

Library: All

Location: All

Expires before: _____

Department: All

Search

8.4. *Add a subscription*

Subscriptions can be added by clicking the 'New' button on any bibliographic record
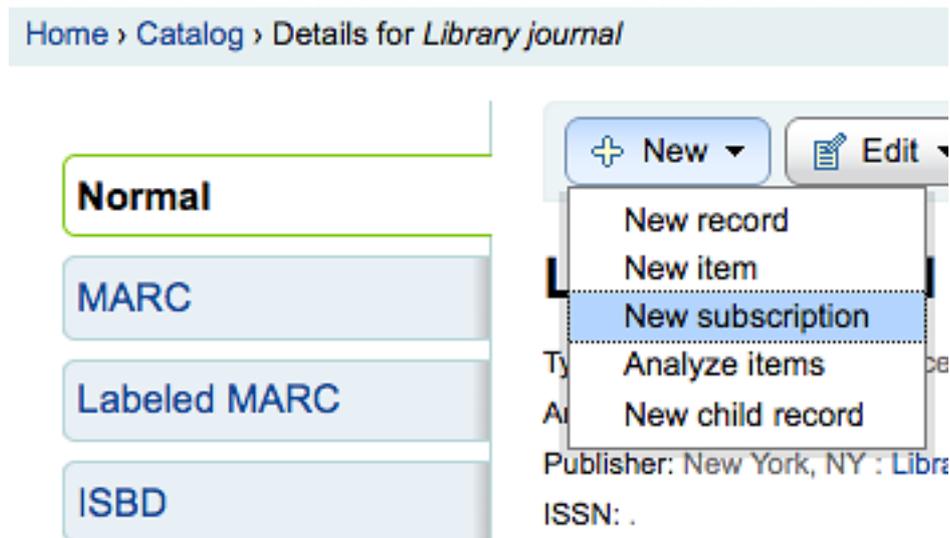
Or by visiting the Serials module and clicking 'New Subscription'
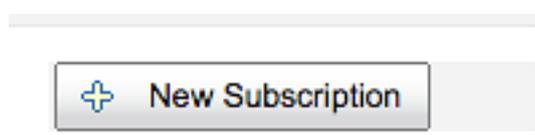
If you are entering a new subscription from the Serials module you will be presented with a blank form (if creating new from a bibliographic record the form will include the bib info).

Add a new subscription (1/2)

- '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
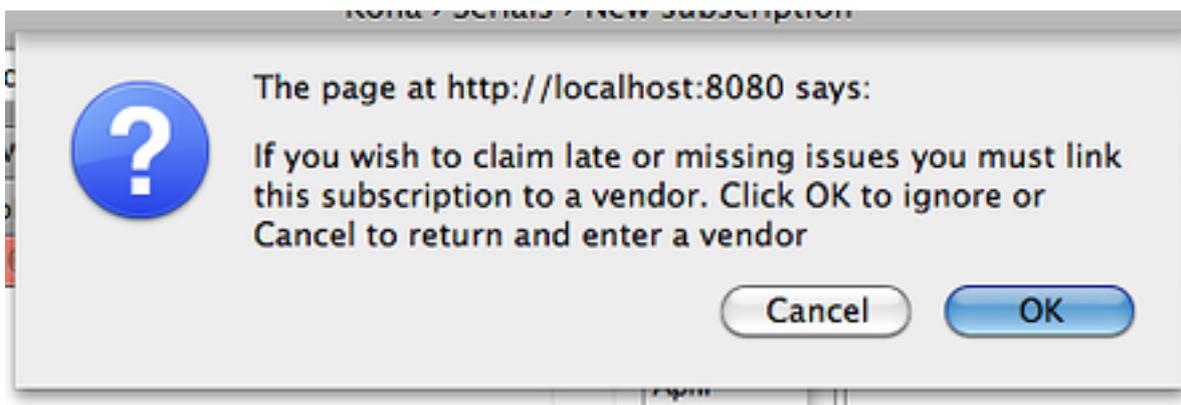
- 'Biblio' is the MARC record you'd like to link this subscription to

  - 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 (if you barcode issues you'll want to create an item at this time)

- In order to determine how to handle irregularities in your subscription answer 'When there is an irregular issue', if the numbers are always sequential you'll want to pick 'Keep issue number'

- Checking the 'Manual history' box will allow you to enter serials outside the prediction pattern once the subscription is saved by going to the 'Planning' tab on the subscription detail page.

- 'Call Number' is for your item's call number or 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
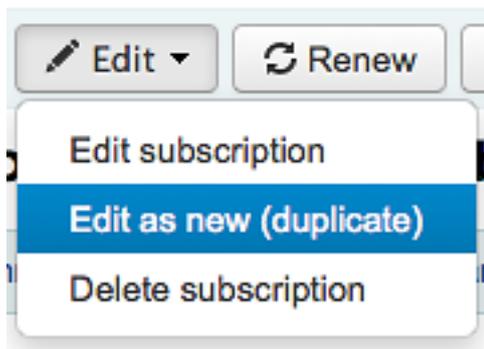
- Use the 'Public Note' for any notes you would like to appear in the OPAC for the patrons

- 'Nonpublic Note' should be used for notes that are only visible to the librarians via the staff client

- The 'Patron notification' option lets you pick a notice to send to patrons who subscribe to updates on this serial via the OPAC.

  - For this option to appear you need to make sure that you have a Routing List notice set up in the *Notices Tool*

- 'Location' is for the shelving location

- 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'

- 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

Once that data is filled in you can click 'Next' to enter the prediction pattern information.

- 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 all of which are visible alongside your own custom frequencies by visiting '*Manage frequencies*'

  - Without periodicy: 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

- 'Subscription length' is the number of issues or months in the subscription. This is also used for setting up renewal alerts

- 'Subscription start date' is the date at which the subscription begins. This is 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)

- 'Numbering pattern' will help you determine how the numbers are printed for each issue. Patterns entered here are saved and editable at any time by visiting '*Manage numbering patterns*'

  - 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

  - 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

Show/Hide advanced pattern

Pattern name: (*) `Volume, Number`

Numbering formula: `Vol {X}, No {Y}`

Advanced prediction pattern			
	X	**Y**	**Z**
Label	Volume	Number	
Begins with	40	10	
Add	1	1	
Every	12	1	
Set back to	1	1	
When more than	99999	12	
Inner counter		10	
Formatting			

Modify pattern

- The 'Locale' option is useful when you want to display days, month or season. For example, if you have a German serial, you can use the German locale option to display days, etc. in German.

- Once a 'Numbering pattern' is chosen the number formula will appear.

- The 'Begins with' number is the number of the issue you're holding in your hand.

- The 'Inner counter' is used to tell Koha where the "receiving cycle" starts
  - For example: If the first issue to receive is "vol. 4, no. 1, iss. 796", you need to set up "inner counter = 0" But if it's "vol. 4, no. 2, iss. 797", the inner counter should be "1".

- After filling in this data click the 'Test prediction pattern' button to see what issues the system will generate, if there are irregularities you can choose which issues don't exist from the list presented.

- If you have added a *custom subscription field*, it will be editable above the buttons at the bottom of the screen

Click 'Save Subscription' to save the information you have entered. *Find sample serial examples in the appendix*.

8.5. *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:

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.

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'

From the page that opens up you can click 'Edit Serial' with the issue you want to receive checked.

All three of these options will open up the issue receive form:

- 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 after choosing 'Arrived'

- If your issue has a supplemental issue with it, fill in the Supplemental Issue information.
    - Key the entire numbering in the box after "Supplemental issue" no numbering will be inherited/auto-filled from the main issue, and exactly what you key in the box after "Supplemental issue" will be auto-filled in the item record's Serial enumeration/chronology [MARC21 952$h] (if you create item records).
        - E.g., key this in its entirety if it's what you would like displayed: "v.69 no.3 (Mar. 2015) suppl."

- 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'

If you are receiving multiple issues at once, or have marked an issue as 'Late' or 'Missing' there you can click the 'Generate Next' button below the list of issues.

Clicking this button will generate the next issue for you and mark the previously expected issue as 'Late' automatically. You can then check the 'Edit' box to the right of each issue and edit the status on multiple issues at once.

8.6. *Create a Routing List*

A routing list is a list of people who receive the serial before it goes to the shelf. To enable routing lists you want to set your *RoutingSerials* preference to 'Add'.

When on the subscription page you will see a link to the left that reads 'Create Routing List' or 'Edit Routing List'

Clicking that link will bring you to the menu to add a new routing list.

Edit routing list for *Library journal*

Issue:	Issue 6 : 2012 (06/14/2012) ⇕
Recipients:	Add recipients
Notes:	

Save

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:	engard
Library:	Any ⇕
Category:	Any ⇕

Search

Results 1 to 5 of 5 found for 'engard'

Card	Name	Library	Add
9876543456	Engard, Beau	FFL	Add
9876543453	Engard, Brian	NIC	Add
9876543452	Engard, Coda	FFL	Add
9876543457	Engard, Nicole	NIC	Add
23529001223643	Engard, Unnamed Puppy	NIC	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 *Library journal*

Issue:	Issue 6 : 2012 (06/14/2012) ⬍		
Recipients:	**Name**	**Rank**	**Delete**
	Brian Engard	1 ⬍	Delete
	Coda Engard	2 ⬍	Delete
	Nicole Engard	3 ⬍	Delete

Add recipients   Delete all

Notes:	

Save

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 *Library journal*

Issue:	Issue 6 : 2012 (06/14/2012)
List member:	

Name
Engard, Brian
Engard, Coda
Engard, Nicole

Notes:

| Save and preview routing slip | Edit | Delete |

If *RoutingListAddReserves* is set to on then patrons listed in the routing list will automatically be added to the holds list for the issue.

To see a list of all of the routing lists a specific patron is on visit the *Routing Lists tab* on their patron record.

8.7. *Subscriptions in Staff Client*

Subscription information will appear on bibliographic records under the 'Subscriptions' tab

Computers in libraries 2010.

Type: Continuing resource

Analytics: Show analytics

Publisher: Westport, CT : Meckler Corp., 1989-

Description: v. ; 28 cm.

ISSN: 1041-7915.

Subject(s): Libraries -- Automation -- Periodicals | Computers -- Periodicals | Library science -- Data processing -- Periodicals

Continues: Small computers in libraries

OPAC view: Open in new window.

MARC Preview: Show

Holds: 4

| Holdings | **Subscriptions** | Acquisition details | Images |

This is a serial subscription

(There are 2 subscriptions associated with this title).

At library: Centerville

This subscription is closed.

Callnumber: MAG

Combined Issues Jan/Feb and Jul/Aug.

The 10 latest issues related to this subscription:

Issue #	Date arrived	Date published	Status	Note
V 30, N 3	07/11/2012	04/15/2010	Arrived	

Subscription details

At library: Centerville

This subscription is closed.

Callnumber: MAG

Combined Issues Jan/Feb and Jul/Aug.

The 10 latest issues related to this subscription:

Issue #	Date arrived	Date published	Status	Note
Vol 1, No 5	11/27/2011	11/01/2011	Arrived	
Vol 1, No 1	11/27/2011	04/15/2010	Arrived	

Subscription details

Clicking the 'Subscription Details' link will take you to the Subscription summary page in the staff client.

Subscription for Computers in libraries.

Information	Planning	Issues	Summary

Subscription ID:	5	Number of issues to display to staff:	12
Librarian identity:	nce	Number of issues to display in OPAC:	4
Vendor:			
Biblio:	Computers in libraries. (4038)		
Library:	Centerville	Patron notification:	RLIST (subscribers)
Items:	Serial receipt does not create an item record.		
Serial number: found.	Serial number is kept when an irregularity is		
Grace period:	10		

If you are using the *Acquisitions* module to keep *track of serial subscriptions* you will see that info before your subscription details.

Subscription for Computers in libraries.

Information	Planning	Issues	Summary

Subscription ID:	2	Location:	Periodicals
Librarian identity:	koha	Call number:	MAG
Vendor:		Number of issues to display to staff:	12
Biblio:	Computers in libraries. (47805)		
Library:	Main Library	Number of issues to display in OPAC:	3
Items:	Serial receipt creates an item record.		
Grace period:	0	Routing:	yes

Acquisition details

	Price exc. taxes	Price inc. taxes	Fund	
Ordered amount	18.00	18.00	Non-Fiction	See basket information
Spent amount				

8.8. *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.

Computers in libraries.

⊞ Normal View   ⊞ MARC View   ⊞ ISBD View

Published by : Meckler, (Westport, CT :)

Physical details: v. : ill. ; 28 cm.

ISSN:1041-7915

Subject(s): 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

Year : 1988

Tags from this library:
No tags from this library for this title.
Add

| Holdings (3) | Title Notes | **Subscriptions** | Comments |

This is a serial

There are 1 subscription(s) associated with this title.

At library: Fairview

Combined issues in November & July.

Issues between: and: 01/15/2010

The 3 latest issues for 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	

More details

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

From this compact display patrons can subscribe to be notified of new issues as they are released by clicking the 'Subscribe to email notifications of new issues' button. For this link to appear you will want to have chosen to notify patrons *on the subscription* itself.

Subscription information for Computers in libraries.

The current subscription began on 01/01/2012 and is issued every 3 months for 8 months

The first subscription was started on

Centerville

Combined issues

Available issues

Volume 35 / Number 8; Volume 35 / Number 10; Volume 35 / Number 9; Volume 36 / Number 1; Volume 36 / Number 2; ; Volume 36 / Number 7; Volume 36 / Number 6; Volume 36 / Number 5; Volume 36 / Number 4

Unavailable issues

Volume 36 / Number 6; not issued Volume 36 / Number 4

Subscribe to email notification on new issues

You can see thos who subscribe to new issue alerts by going to the subscription page in the staff client and looking on the right of the 'Information' tab.

Whereas the full view shows extensive details, broken out by year, regarding the subscription

8.9. *Claim Late Serials*

Koha can send email messages to your serial vendors if you have late issues. To the left of the main serials page there is a link to 'Claims'

The links to claims also appears to the left of the subscription detail page

If you don't have a claim notice defined yet you will see a warning message that you need to first define a notice.

Clicking 'Claims' will open a report that will ask you to choose from your various serial vendors to generate claims for late issues.

From the list of late issues you can choose which ones you want to send a claim email to by clicking the checkbox to the left of late issue, choosing the notice template to use and clicking the 'Send notification' button.

8.10. *Check Serial Expiration*

When adding serials you enter a subscription length, using the check expiration tool you can see when your subscriptions are about to expire. To use the tool click the link to 'Check expiration' on the serials menu.

In the form that appears you need to enter at least a date to search by.

In your results you will see all subscriptions that will expire before the date you entered. From there you can choose to view the subscription further or renew it in one click.

8.11. *Renewing Serials*

If your serial subscription has expired you won't be able to receive issues. To renew your subscription you can click the 'Renew' button at the top of your subscription detail page.

Another option is to click the 'Renew' link to the right of the subscription on the Serial Collection page.

Serial Collection information for *Computers in libraries*. callnumber: MAG

Subscription Summary

Subscription Num.	Frequency	Numbering pattern	Library	Call number	Notes	Routing	Renew
#1	1/Month	Volume, Number	FFL	MAG	Combined issues in Jan/Feb and Jul/Aug.	Edit Routing List	Renew

Once you click the 'Renew' link or button you will be presenting with renewal options.

Subscription renewal for Computers in libraries 2010.

Start date: 10/15/2013

Subscription length:

Number of num: 0

Number of weeks: 0

Number of months: 12

Note for the librarian that will manage your renewal request:

Submit

- The start date should be the date your subscription period starts.

- For the subscription length you'll want to fill in one of the three fields presented: Number of num (issues), Number of months or Number of weeks.

- Finally enter any notes you might have about this renewal.

8.12. *Searching Serials*

Once in the Serials module there is basic search box at the top that you can use to find subscriptions using any part of the ISSN and/or title.

You can also click the 'Advanced Search' link to the right of the 'Submit' button to do a more thorough search of your serials.

From your results you can filter by using the search boxes at the bottom of each column and adjust the number of resutls using the toolbar at the top of the results set.

Acquisitions

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

- *Get there:* More > Acquisitions

9.1. *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. Before setting your *EDI Accounts* and *Library EANs* you will need to have *entered your vendors*.

On the main acquisitions page you will see your library's funds listed.

> **Note**
>
> If the total line is confusing for the funds you have set up you can hide it by adding
>
> ```
> #funds_total {display:none;}
> ```
>
> to the *IntranetUserCSS* preference.

To see all active funds you can click the checkbox next to 'Show active and inactive' above the funds table.

To see a history of all orders in a fund you can click on the linked amount and it will run a search for you.

Learn more in the *Budget/Fund Tracking* section of this manual.

9.2. *Vendors*

Before any orders can be places you must first enter at least one vendor.

9.2.1. *Add a Vendor*

To add a vendor click the 'New Vendor' button on the Acquisitions page
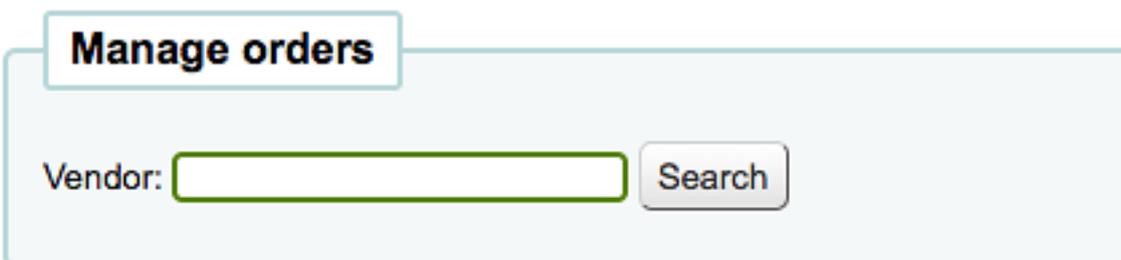
The vendor add form is broken into three pieces

- The first section is for basic information about the Vendor

Company details

Name: *Required*

Postal address:

Physical address:

Phone:

Fax:

Website:

Account number:

- 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

- 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

- 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 your library is charged tax mark your Tax Number as registered

- Note if you list prices and/or invoice prices include tax

- If the vendor offers a consistent blank discount, enter that in the 'Discount' field

  - You can enter item specific discounts when placing an order

- Enter your tax rate if your library is charged taxes on orders

- If you know about how long it usually takes orders to arrive from this vendor you can enter a delivery time. This will allow Koha to estimate when orders will arrive at your library on the late orders report.

- Notes are for internal use

9.2.2. *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:

From the results, click on the name of the vendor you want to view or edit

To make changes to the vendor, simply click the 'Edit vendor' button.

If the vendor has no baskets attached to it then a 'Delete vendor' button will also be visible and the vendor can be deleted. Otherwise you will see a 'Receive shipment' button.

9.2.3. *Vendor Contracts*

You can define contracts (with a start and end date) and attach them 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.

9.2.3.1. *Add a Contract*

At the top of a Vendor Information Page, you will see a 'New Contract' button.
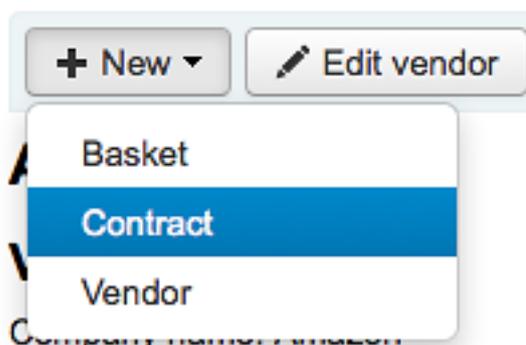
The contract form will ask for some very basic information about the contract

> ⭐ **Important**
>
> You cannot 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.

+ New ▾ **✎ Edit vendor** **▣ Receive shipments**

Amazon

Vendor details

Company name: Amazon

Postal address:

Physical address:

Phone:

Fax:

Website: http://amazon.com

Account number: AMZ123432

Contact details

Contact name:

Position:

Phone:

Alternative phone:

Fax:

Ordering information

Vendor is: Active

List prices are: USD

Invoice prices are: USD

Discount: 0.0 %

Tax rate: 0.0 %

Contract(s)

Name ▲	Description ⇕	Start date ⇕	End date ⇕		
Fiction 2013		01/01/2013	12/31/2013	Edit	Delete

It will also be an option when creating a basket

Add a basket to Amazon

Basket name	PO3388282
Billing place:	Nicole's Library ▲▼
Delivery place:	Nicole's Library ▲▼
Vendor	Amazon ▲▼
Internal note	
Vendor note	
Contract	▲▼

Fiction 2013

Save   Cancel

9.3. *Managing Suggestions*

Purchase suggestions can be generated in one of two ways. You can create suggestions via the staff client either for the library or *on the patron's behalf* from their record. Depending on your settings in the *suggestion* system preference, patrons may also 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 under the vendor search.

It will also appear on the main staff dashboard under the module labels:

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.

Your suggestions will be sorted into several tabs: Accepted, Pending, Checked, Ordered and/or 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').

An 'Accepted' suggestion is one that you have marked as 'Accepted' using the form below the suggestions. A 'Pending' suggestion is one that is awaiting action from the library. A 'Checked' suggestion is one that has been marked as 'Checked' using the form before the suggestions. An 'Ordered' suggestion is on that has been ordered using the '*From a purchase suggestion*' link in your basket. A 'Rejected' suggestion is one that you have marked at 'Rejected' using the form below the list of suggestions.

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.

Clicking on the blue headings will expand the filtering options and clicking '[clear]' will clear all filters and show all suggestions.

> **Note**
>
> The suggestions page will automatically be limited to suggestions for your library. To see information for all (or any other) libraries click on the 'Acquisition information' filter and change the library.

Organize by:

Status ⇕ | Go

Filter by: [clear]

Bibliographic information

Suggestion information

Acquisition information

Book fund:

Any ⇕

For:

Any ⇕

Any
Centerville
Fairfield
Fairview
Franklin
Goleta Public Library
Liberty
Midway
Nicole's Library
Pleasant Valley
Riverside
Springfield
Troy
Union

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.

Another option for libraries with long lists of suggestions is to approve or reject suggestions one by one by clicking on the title of the suggestion to open a summary of the suggestion, including information if the item was purchased.

Clicking 'edit' to the right of the suggested title or at the to pof the suggestion detail page will open a suggestion editing page.

Edit purchase suggestion #10

Bibliographic information

Title:	Practical Open Source Software for Libraries
Author:	Nicole C. Engard
Copyright date:	2011
ISBN or ISSN or other standard number:	
Publisher:	Chandos
Publication place:	
Collection title:	
Document type:	⋮
Reason for suggestion:	Upcoming title by popular author ⋮
Notes:	I saw this at a conference and thought it would be helpful.

Suggestion management

Status: Pending ⋮
- No Status
- Pending
- Accepted
- Checked
- Rejected

		By
Suggestion creation	12	Engard, Beau FFL (Juvenile)
Suggestion management	05/22/2012	Engard, Nicole NIC (Staff)
Suggestion accepted		

From this form you can make edits to the suggestion (adding more details or updating incorrect information provided by the patron). You can also choose to accept or reject the suggestion on an individual basis.

- Choosing to mark a request as 'Pending' will move the request back to the 'Pending' tab.

Reasons for accepting and rejecting suggestions are defined by the *SUGGEST* authorized value.

) with this reason: -- Choose a 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.

You can also assign this suggestion to a fund.

This edit can trigger a notice (defined in the *Notices & Slips* tool with the *TO_PROCESS* notice) to the fund owner that there is a suggestion ready for them to manage if you have turned on the *cron job to generate these notices*.

Once you have clicked 'Submit' the suggestion will be moved to the matching tab. The status will also be updated on the patron's account in the OPAC and an *email notice* will be sent to the patron using the template that matches the status you have chosen.

My Purchase Suggestions

Select All   Clear All | New purchase suggestion

Summary ▾	Note	Managed by	Status
Practical Open Source Software for Libraries Nicole C. Engard, - 2010, - Chandos (UK)			Requested
Road Trip USA - 2008,	would be a great pick	Engard, Nicole	Accepted by the library (Library Copy Lost)
The Importance of Open Access, Open Source, and Open Standards for Libraries --		Engard, Nicole	Accepted by the library (Bestseller)

Delete Checked Items

9.4. *Placing Orders*

To place an order you must first search for the vendor or bookseller you want to send the order to.

> ### Important
>
> If you are planning on using EDIFACT to submit your order you will need to first set up your library's *EDI Accounts* and *EANs*.

9.4.1. *Create a basket*

> ### Note
>
> If you're using EDI for ordering you will want to download your order record from your vendor before starting the process in Koha.

To create a basket you must first search for the vendor you're ordering from:

And click the 'New basket' button to the right of the vendor name.

> **Note**
>
> You can also add to an existing basket by clicking the 'Add to basket' link to the far right of each basket's information in the results table.

After clicking 'New basket' you will be asked to enter some information about the order:

Add a basket to Amazon

Basket name:	[ ]	*Required*
Billing place:	Nicole's Library ⇕	
Delivery place:	Nicole's Library ⇕	
Vendor:	Amazon ⇕	
Internal note:	[ ]	
Vendor note:	[ ]	
Orders are standing:	☐ Standing orders do not close when received.	

Save   Cancel

- When adding a basket you want to give it a name that will help you identify it later

- Enter in the Billing Place and Delivery Place (this will default the library you're logged in at)

- If you would like to change the vendor you're ordering from you can use the Vendor pull down menu

- The notes fields are optional and can contain any type of information

- If you're ordering standing items (items which arrive regularly) then you will want to check the 'Orders are standing' box for this basket

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.

Add a basket to Baker & Taylor

Basket name	
Billing Place:	Nicole's Library
Delivery Place:	Nicole's Library
Vendor	Baker & Taylor
Internal note	
Vendor note	
Contract	
	Contract

Save

When finished, click 'Save'

+ Add to basket | ✎ Edit basket | ✖ Delete this basket | ⊕ Export this basket as CSV

Basket PO38388 (16) for Amazon

Delivery place:	Nicole's Library
Billing place:	Nicole's Library
Created by:	Nicole Engard
Managed by:	

Add user | Save changes

Branch:	No branch

Nicole's Library | Change

Opened on:	05/12/2014

Add order to basket

- From an existing record: [   ] Search
- From a suggestion
- From a subscription
- From a new (empty) record
- From an external source
- From a staged file
- From titles with highest hold ratios

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

3 results found

Summary	Publisher	Copyright		
Library mashups : 9781573873727 (pbk.) | 1573873721 (pbk.) - xvii, 334 p. : ; 23 cm.	Information Today, Inc., ; Medford, N.J. :	2009	View MARC	Order
Piping out Library Data by Engard, Nicole C.,, : Test ; 8			View MARC	Order
Tu shu guan "hun da" : by Engard, Nicole C.,, 9787562459835 | 7562459835 - 294 p. : : Ying wen ti ming qu zi ban quan ye. ; 23 cm.	Chongqing da xue chu ban she, : Chongqing :	2011	View MARC	Order

- From the results, simply click 'Order' to be brought to the order form.

New order

Basket details

Managed by: Nicole Engard

Open on: 05/21/2015

Patrons

To notify on receiving: Add user

Catalog details Edit record

Title **Library mashups :**

Author:

Publisher: Information Today, Inc.,

Edition:

Publication year: 2009

ISBN: 9781573873727 (pbk.) \| 1573873721 (pbk.)

Series:

- 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. In order to keep track of suggestions that have been ordered and received you must place the order using this link.

- From the results, click 'Order' next to the item you want to order and you will be presented with the order form including a link to the suggestion

New order

Basket details

Managed by: Nicole Engard

Open on: 05/21/2015

Patrons

To notify on receiving: [Add user]

Catalog details

Title: Storm Front   *Required*

Author: Butcher

Publisher:

Edition:

Publication year: 0

ISBN:

Series:

Suggestion

Suggested by: Acevedo, Henry (suggestion #1)

- From this form you can make changes to the Catalog Details if necessary.

- When the item appears in your basket it will include a link to the suggestion.

- Orders added to the basket in this way will notify the patron via email that their suggestion has been ordered and will update the patron's '*My purchase suggestions*' page in the OPAC.

- If you're using the *Serials* module you can link your subscription order information to acquisitions by choosing to order 'From a subscription'
  - After clicking the order link you will be brought to a search page that will help you find your subscription

- Your results will appear to the right of the form and each subscription will have an 'Order' link to the right

Serials subscriptions

☐ Show only renewed

Showing 1 to 3 of 3 Show [10 ⇕] entries ⓘ Previous Next ⓘ Search: [   ]

ISSN ▲	Title ⇕	Notes ⇕	Library ⇕	Call number ⇕	Expiration date ⇕	⇕
1041-7915	Computers in libraries.		M	MAG	12/15/2014	Order
1041-7915	Computers in libraries.		M	MAG	01/01/2013	Order
1041-7915	Computers in libraries.		E		01/01/2014	Order

Showing 1 to 3 of 3 ⓘ Previous Next ⓘ

- Clicking 'Order' will bring the subscription info in to the order form without an 'Add item' section since you are just ordering a subscription and an item isn't needed

New order

Basket details

Managed by:	Nicole Engard
Open on:	05/21/2015

Patrons

To notify on receiving: [Add user]

Catalog details Edit record

Title	**Computers in libraries.**
Author:	
Publisher:	Meckler,	Information Today, Inc.
Edition:	
Publication year:	1988
ISBN:	
Series:	

Accounting details

Quantity:	1 *Required*
Fund:	Books ⇕ *Required* **Show all:** ☐
Currency:	USD ⇕
Vendor price:	0.00 (tax exc.)

- To order from a record that can't be found anywhere else, choose the 'From a new (empty) record.'

New order

Basket details

Managed by: Nicole Engard

Open on: 05/21/2015

Patrons

To notify on receiving: [Add user]

Catalog details

Title: [   ] *Required*

Author: [   ]

Publisher: [   ]

Edition: [   ]

Publication year: [   ]

ISBN: [   ]

Series: [   ]

- 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 that will allow you to order from a MARC record found via a Z39.50 search.

Z39.50 Search Points

Title:		Author:	
ISBN/ISSN:		Subject Heading:	
LC Call Number:		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]

Search   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

- If the item you're ordering from an external source looks like it might be a duplicate, Koha will warn you and give you options on how to proceed.

Duplicate warning

You selected a record from an external source that matches an existing record in your catalog: The tenth circle / ᐸ

Use existing record

Do not create a duplicate record. Add an order from the existing record in your catalog.

Use Existing

Create new record

Create a new record by importing the external (duplicate) record.

Create New

Cancel and return to order

Return to the basket without making a new order.

Cancel

- From the warning, you can choose to order another copy on the existing bib record, create a new bib record, or cancel your order of this item.

- In the order form that pops up, you will not be able to edit the catalog details.

- The next option for ordering is to order from a staged record (*learn more about staging records*).

> **Note**
>
> This is the option you will choose if you have an order file from your vendor.

- From the list of files you are presented with, choose the 'Add orders' link to add the records in the staged file to your order.

- Next to each title is a checkbox, check the items you would like to order, or choose 'Check all' at the top. Depending on your settings in the *MarcFieldsToOrder* preference Koha will populate the next screen with with the relevant Quantity, Price, Fund, Statistic 1, and Statistic 2 found within the staged file.

- In the 'Item Information' tab you can enter information that will be added to every ordered item such as item type, collection code and not for loan status.

- If no information is imported from the MARC record regarding fund information the 'Default accounting details' tab can be used to apply values related to the accounting.

- The final option for ordering is to order from a list of titles with the highest hold ratios
  - This option will take you to the Holds Ratio report where you can find items with a high hold ratio and order additional copies. Next to each title will be a link with the number of items to order, click that and it will add the item to your basket.

With any of the above ordering options you're presented with an option to notify patrons of the new item when it's received. The contents of that notification can be edited in the *Notices & Slips* tool and will have the code of ACQ_NOTIF_ON_RECEIV. In the 'Patrons' section you will see an option to 'Add user'. Click that button to add patrons who will be notified of the new issue.

- In the window that pops up search for the patrons you'd like to notify and click 'Select'

- Once you're done you can close the window and you'll see the list of patrons under the 'Patrons' section

After bringing in the bib information (for all import methods except for the staged file), if your *AcqCreateItem* system preference is set to add an item when ordering you will enter the item info next. You need to fill out at least one item record and then click the 'Add' button at the bottom left of the item form.

Item

2 - Source of classification or shelving scheme	Library of Congress Classification ⬍
3 - Materials specified (bound volume or other part)	
7 - Not for loan	Ordered ⬍
8 - Koha collection	⬍
a - Location (home branch)	Nicole's Library ⬍
b - Sublocation or collection (holding branch)	Nicole's Library ⬍
c - Shelving location	⬍
d - Date acquired	...
e - Source of acquisition	
g - Cost, normal purchase price	
h - Serial Enumeration / chronology	
o - Koha full call number	
p - Piece designation (barcode)	...
t - Copy number	
u - Uniform Resource Identifier	
v - Cost, replacement price	
w - Price effective from	
x - Nonpublic note	
y - Koha item type	Books ⬍
z - Public note	

Add item   Clear

After clicking the 'Add item' button below the item record the item will appear above the form and then you can enter your next item the same way (if ordering more than one item).

Once you have entered the info about the item, you need to enter the Accounting information.

- Quantity is populated by the number of items you've added to the order above.

-

> **Important**
>
> You cannot edit the quantity manually, you must click 'Add' below the item form to add as many items as you're ordering.

- The list of funds is populated by the *funds* you have assigned in the Acquisitions Administration area.

- The currency pull down will have the *currencies* you set up in the *Acquisitions Administration* area.

- The vendor price is the price before any taxes or discounts are applied.

- If the price is uncertain, check the uncertain price box.

  - A basket with at least one uncertain price can't be closed.

- If you are charged sales tax, choose that from the gstrate field

- Enter the percentage discount you're receiving on this order, once you enter this, hit tab and Koha will populate the rest of the cost fields below.

- If you added Planning Values when *creating the Fund*, those values will appear in the two Planning Value fields.

Once you have filled in all of the fields click 'Save' to add the item to your basket. If your price goes over the amount availalbe in the fund you will be presented with a confirmation.

The confirmation warning will allow you order past your fund amount if you so choose.

After an item is added to the basket you will be presented with a basket summary.

Basket 21 (9) for Amazon

Delivery place:	Nicole's Library
Billing place:	Nicole's Library
Created by:	Nicole Engard
Managed by:	Add user Save changes
Branch:	No branch Nicole's Library ⇕ Change
Opened on:	08/05/2013

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.	Qty.	Total tax exc. (USD)	GST %	GST	Fund	Modify	Delete
Cognitive Surplus by Clay Shirky - 0143119583 , Penguin Suggested by: Engard, Beau (suggestion #2) [Add note]	15.00	15.00	1	15.00	0.00	0.00	Non Fiction	Modify Transfer	Delete order Delete order and catalog record
House, M.D. by , Universal Studios Home Entertainment, [Add note] Transferred from basket: PO3837292 (Baker & Taylor) on 12/13/2013	11.00	11.00	1	11.00	0.00	0.00	Audio Visual stuff	Modify Transfer	Delete order Can't delete order and catalog record 3 item(s) left 2 order(s) left
Total (GST 0.00)			**2**	**26**		**0**			
Total (USD)			**2**	**26.00**		**0.00**			

Showing 1 to 2 of 2   ⓘ First ⓘ Previous Next ⓘ   Last ⓘ

If you would like to see more details you can check the 'Show all details' checkbox

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. (USD)	Total tax inc. (USD)	GST %	GST	Fund	Modify	Delete
Cognitive Surplus by Clay Shirky - 0143119583 , Penguin Suggested by: Engard, Beau (suggestion #2) [Add note]	15.00	15.00	15.00	15.00	1	15.00	15.00	0.00	0.00	Non Fiction	Modify Transfer	Delete order Delete order and catalog record
House, M.D. by , Universal Studios Home Entertainment, [Add note] Transferred from basket: PO3837292 (Baker & Taylor) on 12/13/2013	11.00	11.00	11.00	11.00	1	11.00	11.00	0.00	0.00	Audio Visual stuff	Modify Transfer	Delete order Can't delete order and catalog record 3 item(s) left 2 order(s) left
Total (GST 0.00)					**2**	**26**	**26**		**0**			
Total (USD)					**2**	**26.00**	**26.00**		**0.00**			

Showing 1 to 2 of 2   ⓘ First ⓘ Previous Next ⓘ   Last ⓘ

From here, you can edit or remove the items that you have added.

- Choosing to 'Delete the order' will delete the order line but leave the record in the catalog.

- Choosing to 'Delete order and catalog record' removes both the order line and the record in the cat-alog.

  - The catalog record cannot always be deleted. You might see notes explaining why.

On the summary page, you also have the option to edit the information that you entered about the basket by clicking the 'Edit basket header information' button, to delete the basket altogether by click-ing the 'Delete this basket' button, or to export your basket as a CSV file by clicking the 'Export this basket as CSV' button.

If you're using EDI for your order you can click the 'Create EDIFACT order' button when you're done to send the file to the vendor and close the basket.

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.

> **Important**
>
> You must close the basket to be able to *receive items* when they arrive. Only items in closed bas-kets will show as ready to receive.

If you have your *BasketConfirmations* preference set to show a confirmation, you will be asked if you are sure about closing the basket.

When closing the basket you can choose to add the basket to a group for easy printing and retrieval. If you check the box to 'Attach this basket to a new basket group' you will be brought to the group list where you can print a PDF of the order.

> **Important**
>
> A basket with at least one item marked as 'uncertain price' will not be able to be closed.

Clicking the 'Uncertain Prices' button will call up a list of items with uncertain prices to quick editing. From that list, you can quickly edit the items by entering new prices and quantities.

Orders with uncertain prices for vendor Amazon

Contact information

Address: http://amazon.com

Phone: / Fax:

Contact:

Orders with uncertain prices

Orders from: [me ⇕] [Filter]

Showing 1 to 10 of 157   Show [10 ⇕] entries   (‹‹) First (‹) Previous Next (›) Last (››)   Search: [   ]

Basket ⇕	Order	By ⇕	Uncertain	Price	Quantity
PO77662	Adventures of Pinocchio / Project Gutenberg Literary Archive Foundation,, edit	Nicole Engard	☑	0.000000	1
PO77662	Aesop's Fables; a new translation / Project Gutenberg Literary Archive Foundation,, edit	Nicole Engard	☑	0.000000	1

> **Important**
>
> The Uncertain Prices page is independent of the basket. It is linked to the vendor so you will see all items on order with uncertain prices for that vendor.

Once your order is entered you can search for it through acquisitions or view the information on the biblio detail page in the staff client (if the *AcquisitionDetails* preference is set to 'Display).

Holdings	Descriptions	**Acquisition details**	Images

Basket ⇕	Order number ⇕	Creation date ▾	Receive date ⇕	Status ⇕	Quantity / items ⇕
test	202	01/08/2014		Partial	1 (48177)
test	203	01/08/2014	01/08/2014	Complete	1 (48176)

9.4.2. *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.

9.4.3. *Printing baskets*

When you are finished adding items to your basket, click 'Close this Basket.'

You will be asked if you want to 'Attach this basket to a new basket group with the same name'. A basket group is necessary if you want to be able to print PDFs of your orders.

Your completed order will be listed on the Basket Grouping page for printing or further modification.

If you closed the basket before generating the EDIFACT order you can do so from the basket grouping page.

Clicking the 'Print' button next to your order will generate a PDF for printing, which will have all of your library information followed by the items in your order.

Basket (No.)	Document	Qty	RRP tax inc.	Discount	GST	Total tax exc.	Total tax inc.
9	Cognitive Surplus / Clay Shirky ISBN : 0143119583, published by Penguin	1	15.00	0.00%	0.00%	15.00	15.00
9	House, M.D. / , BK published by Universal Studios Home Entertainment,	1	11.00	0.00%	0.00%	11.00	11.00

9.5. *Receiving Orders*

> ⭐ **Important**
>
> You must close the basket to be able to *receive items* when they arrive. Only items in closed baskets will show as ready to receive.

Orders can be received from the vendor information page

or the vendor search results page

After clicking 'Receive shipment' you will be asked to enter a vendor invoice number, a shipment received date, a shipping cost and a budget to subtract that shipping amount from.

The receive page will list all items still on order with the vendor regardless of the basket the item is from.

Receipt summary for *Baker & Taylor [434312321] on 12/13/2013*

Invoice number: 434312321 Received by: nce On: 12/13/2013

Pending orders

Showing 1 to 3 of 3 (filtered from 21 total entries) Show [10 ♦] entries ⊕ First ⊕ Previous Next ⊕ Last ⊕ Search: [   ] [!]

Basket	Basket group	Order line	Summary	View record	Quantity	Unit cost	Order cost	Fund		
Basket search	Basket group s	Order line sea	he		Quantity search	Unit cost se	Order cost se	Fund search		
PO38923783927 (11)	No basket group	179	The red garden / by Hoffman, Alice. – 0307393879 : HRD [Add note]	MARC | Card	1	25.00	25.00	A test	Receive Transfer	Delete order Delete order and catalog record
PO38923783927 (11)	No basket group	185	Home free / by Michaels, Fern. – 0758246943 : HRD [Add note]	MARC | Card	1	27.95	27.95	A test	Receive Transfer	Delete order Delete order and catalog record
PO38923783927 (11)	No basket group	189	Love, honor, and betray / by Roby, Kimberla Lawson. – 0446572454 : HRD [Add note]	MARC | Card	1	24.99	24.99	A test	Receive Transfer	Delete order Delete order and catalog record

Showing 1 to 3 of 3 (filtered from 21 total entries) ⊕ 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 : Baker & Taylor [5322312] (order #28)

Catalog details

Title:	Seer of Sevenwaters /
Author:	Marillier, Juliet.
Copyright:	2010
ISBN:	0451463552 : HRD
Series:	

Accounting details

Date received:	07/10/2012
Budget:	Fiction
Created by:	Nicole Engard
Quantity to receive:	1
Quantity received:	1
Replacement cost:	24.95
Budgeted cost:	25.00
Actual cost:	22.00
Notes:	

Items

Receive?		Barcode	Home branch	Holding branch	Not for loan	Restricted
☑	Edit		Midway	Midway	Ordered	

[Save] Cancel

From this form you can alter the cost information. You can also choose to mark only part of the order as received if the vendor didn't send your entire order by checking only the boxes next to the items on the left that you want to receive. The values you enter in the 'Replacement cost' and 'Actual cost' will automatically populate the item record by filling in subfield v (Cost, replacement price) and subfield g (Cost, normal purchase price) on the item record after saving.

Items for Seer of Sevenwaters / by Marillier, Juliet. (Record #5938)

	Withdrawn status	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Source of acquisition	Cost, normal purchase price	Date last seen	Cost, replacement price	Price effective from	Koha item type
Edit Delete			Ordered	Midway	Midway	2012-07-10	3	22.00	2011-11-09	24.95	2012-07-10	Books

You can also make edits to the item record from this form by clicking the 'Edit' link next to each item. This will allow you to enter in accurate call numbers and barcodes if you'd like to do that at the point of receipt. Once you have made any changes necessary (to the order and/or items, click 'Save' to mark the item(s) as received.

> **Note**
>
> If you have your *AcqItemSetSubfieldsWhenReceived* preference set to add or change values on received items those changes will take place after you hit 'Save'.

Already received

Basket	Order line	Summary	View record	Quantity	Est cost	Actual cost	TOTAL
29	31	The Judas Gate /	MARC | Card	1	16.17	16.00	16.00
29	36	Seer of Sevenwaters /	MARC | Card	1	14.97	14.97	14.97
			SUBTOTAL			30.97	30.97
			TOTAL	2			30.97

[Finish receiving]

If the item is no longer available from this vendor you can transfer the order to another vendor's basket by clicking the 'Transfer' link to the right of the title. This will pop up a vendor search box.

Search for a vendor to transfer to

Vendor: [   ] [Search]

Cancel

From the results you can click 'Choose' to the right of the vendor you would like to reorder this item from.

Choose a vendor to transfer to

Name	
Amazon	Choose
Baker & Taylor	Choose
Information Today IInc.	Choose

You will then be presented with the open baskets for that vendor to choose from. To move the item simply click 'Choose' to the right of the basket you would like to add the item to.

Baskets for Amazon

Basket (#)	Created by	Date	
PO77662 (#4)	Engard, Nicole	2012-10-25	Choose
5423321312 (#7)	Engard, Nicole	2013-05-20	Choose
21 (#9)	Engard, Nicole	2013-08-05	Choose

Once you have chosen you will be presented with a confirmation message.

Do you want to transfer order 108 from basket PO3837292 (Baker & Taylor) to basket 21 (Amazon) ?
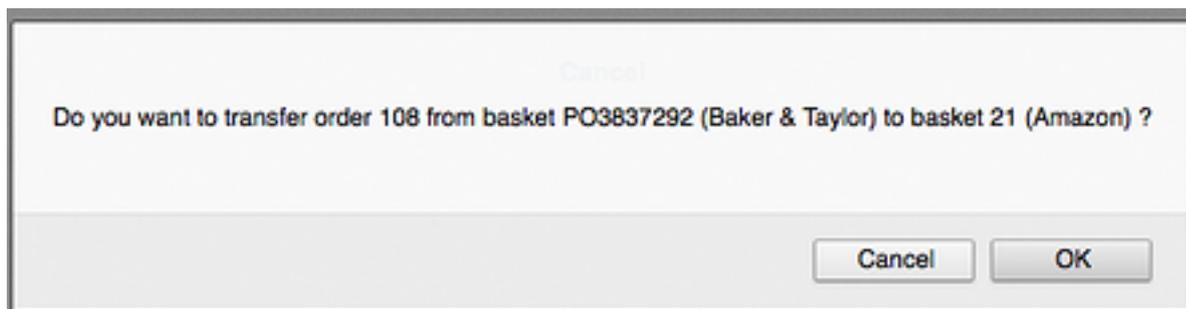
Cancel   OK

When you're finished receiving items you can navigate away from this page or click the 'Finish receiving' button at the bottom of the screen.

If the item cannot be found anywhere you can cancel the order by clicking 'Delete order' to the far right. This will prompt you to enter your reason and confirm cancellation.

Are you sure you want to cancel this order (1)

Bibliographic record will not be deleted.

Reason of cancellation

✓ Yes, cancel   ✗ No, don't cancel

You will also see that the item is received and/or cancelled if you view the basket.

Basket 2011-02-21 (2) for Amazon

Managed by: Nicole Engard
Opened on: 02/19/2011

Order Details

Order	RRP	Est.	Qty.	Total	Fund	Modify	Delete
(rcvd) The tenth circle / by Picoult, Jodi, - 074349671X (pbk.) | 9780743496 , Washington Square Press, **Note:** Includes readers club guide (p.[6]-[20]). [Change note]	15.00	15.00	1	15.00	Fiction	Modify	Delete order Can't delete order and catalog record **2 item(s) left**
Total (USD)	15.00		1	15.00			

Cancelled orders

Order	RRP	Est.	Qty.	Total	Fund
Korean-English Dictionary by Records generated from Project Gutenberg RDF data. | ISO 639-2 language code: , Project Gutenberg Literary Archive Foundation,	5.00	5.00	1	5.00	Fiction
Deleted bibliographic record, can't find title	14.00	14.00	1	14.00	Fiction

9.6. *Invoices*

When orders are received invoices are generated. Invoices can be searched by clicking on 'Invoices' in the left of the Acquisitions page.

After searching, your results will appear to the right of the search options.

Invoices

From the results you can click the 'Details' link to see the full invoice or 'Close' to note that the invoice is closed/paid for.

If you're allowing the uploading of acquisitions files with the *AcqEnableFiles* preference you will see the option to manage invoice files next to the link to 'Go to receipt page'

Invoice: 654321123

Vendor: Amazon

Shipment date:	10/13/2012
Billing date:	
Shipping cost:	5.000000
Fund:	Book
Status:	Open.
Close:	☐

Save

Go to receipt page | Manage invoice files

Invoice details

☐ Show all details

Summary	▲	Publisher ⇕	Library ⇕	Actual cost tax exc. ⇕	Qty. ⇕
Mercy / by Picoult, Jodi,				0.00	1
Practical open source software for libraries / by Engard, Nicole C.,				40.00	2

To see or attach new files click the 'Manage invoice files' link

Files for invoice: 654321123

Vendor: Amazon

This invoice has no files attached.

Upload New File

Description:	
File:	Browse... No file selected.

Upload File

From here you can find a file to upload and/or see the files you have already attached.

Files for invoice: 654321123

Vendor: Amazon

Name	Type	Description	Uploaded	Bytes		
Screen Shot 2014-11-13 at Thu, Nov 13 - 3.27 PM.png	image/png	invoice123	11/13/2014	35631	Delete	Download

Upload New File

Description: [   ]

File: [Browse...] No file selected.

[Upload File]

From the invoice search results you can also merge together two invoices should you need to. Simply click the checkbox to the left of the invoices you would like to merge and click the 'Merge selected invoices' button at the bottom of the page. You will be presented with a confirmation screen:

Merge invoices

Invoice no.	Shipment date	Billing date	Shipment cost
654321123	10/13/2012		5.000000
4323213	05/20/2013		

Invoice number: 654321123

Shipment date: [10/13/2012] 📅

Billing date: [   ] 📅

Shipment cost: [5.000000] 🔼

Fund: [Book ▾]

Status: Open

[Merge]

Click on the row of the invoice number you would like to keep and it will be highlighted in yellow. Enter any different billing information in the fields provided and click 'Merge'. The two invoices will become one.

9.7. *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 [334]*.

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. These filters will be applied only closed baskets.

Filter results:

Order date:

[   ] days ago

Estimated delivery date from:

[   ] [📅]
(MM/DD/YYYY)

To:

[   ] [📅]
(MM/DD/YYYY)

Vendor:

[▲▼]

[Filter]

> **Note**
>
> The vendor pull down only shows vendors with closed baskets that are late.

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.

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' at the bottom right of the list. This will automatically send an email to the vendor at the email address you have on file.

Note

The Estimated Delivery Date is based on the Delivery time value entered on the vendor record.

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.

9.8. *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.

In the Vendor Search you can enter any part of the vendor name to get results.

Using the Orders Search you can search for items that have been ordered with or without the vendor.

You can enter info in one or both fields and you can enter any part of the title and/or vendor name.

Clicking the plus sign to the right of the Vendor search box will expand the search and allow you to search for additional fields.

Clicking Advanced Search to the right of the search button will give you all of the order search options available.

9.9. *Budget/Fund Tracking*

On the main acquisitions page there will be a table showing you all of your active funds and a break-down of what has been ordered or spent against them.

Clicking on the linked amounts under spent or ordered will show you a summary of the titles or-dered/received on that budget.

Fund: FIC

Spent

Showing 1 to 4 of 4   Show 10 entries   (‹‹) First (‹) Previous Next (›)   Last (››)   Search:

Title	Order	Vendor	Invoice	Itemtype	Received	Unit price	Date ordered	Date received	Subtotal
Library mashups :	203	1	3131312	BK	1	10.00	01/08/2014	01/08/2014	10.00
Scrubs.	200	2	123131	BK	1	22.00	12/16/2013	12/16/2013	22.00
Scrubs.	201	2	123131	BK	1	11.00	12/16/2013	12/16/2013	11.00
Sesame Street	110	4	4323234524	BK	1	12.00	06/17/2013	06/17/2013	12.00
TOTAL									55.00

Showing 1 to 4 of 4   (‹‹) First (‹) Previous Next (›)   Last (››)

9.10. *EDI Process*

Previous sections explain all ordering options, this section pulls out the parts related to EDI or EDI-FACT ordering to help those who are only using EDI for ordering.

> ⭐ **Important**
>
> Koha uses the EDIFACT standard not the X12 standard for electronic ordering.

9.10.1. *EDI Questions for Vendors*

You will want to gather the following information from your vendors before beginning the set up process in Koha.

EDI Accounts: *This is the basic connection information for your vendor. This will be used to fill in the* EDI Accounts *section.*

- **Vendor:** The name of the vendor

- **Description:** A short description if additional explanation is needed (especially if you have multiple accounts for one vendor).

- **Transport:** Does the vendor transmit EDI files via FTP, SFTP, or something else the requires special processing?

- **Remote host:** The URL or IP address of the FTP/SFTP server

- **Username:** The username for the above server

- **Password:** The password for the above server

- **Download directory:** The path on the server that contains files for Koha to download and process

- **Upload directory:** The path on the server that Koha will upload files to for your vendor to process

- **Qualifier:** Who assigned the SAN below?

  - Choose one of the following:

    (14) EAN International

(31B) US SAN Agency

(91) Assigned by supplier

(92) Assigned by buyer

- **SAN:** The identifier for the vendor

Buyer qualifier and SAN are optional. Some vendors require a second buyer identifier in addition to the account EAN.

- **Buyer qualifier:** Who assigned the SAN below?

  - Choose one of the following:

    (14) EAN International

    (31B) US SAN Agency

    (91) Assigned by supplier

    (92) Assigned by buyer

- **Buyer SAN:** The identifier for the library

- **Quotes enabled:** [y/n] Does this vendor support sending and receiving quotes via EDIfact and do you want to send and receive quotes via EDIfact?

- **Orders enabled:** [y/n] Does this vendor support sending and receiving orders via EDIfact and do you want to send and receive orders via EDIfact?

- **Invoices enabled:** [y/n] Does this vendor support sending and receiving invoices via EDIfact and do you want to send and receive invoices via EDIfact?

- **Order file suffix:** The file suffix for order files

- **Quote file suffix:** The file suffix for quote files

- **Invoice file suffix:** The file suffix for invoice files

- **Account number(s):** (list them all)

- **Account description(s):** (the summary of what this number is for)

EANs: *Each library using EDIfact needs to specify a buyer identifier know as a SAN or EAN. This will fill in the Library EANs setting.*

- **Library**

- **EAN**

  - Choose one of the following:

    (14) EAN International

    (31B) US SAN Agency

    (91) Assigned by supplier

(92) Assigned by buyer

MARC Order Fields or Grid Ordering: *These values will fill in the MarcFieldsToOrder preference.*

- **price:** MARC21 field that contains the item price

- **quantity:** MARC21 field that contains the number of items for the given record

- **budget_code:** MARC21 field that contains the Koha budget code to be debited

- **discount:** MARC21 field the contains the discount as a percentage the the price will be discounted by

- **sort2:** MARC21 field that will populate custom field sort1

- **sort2:** MARC21 field that will populate custom field sort2

9.10.2. *EDI Setup*

Before you begin ordering using EDI you will want to take the following steps:
- Ask your vendor/bookseller/jobber for *connection information*
  - It might also be beneficial to ask for a few sample EDIFACT files from the vendor

- Share with your vendor/bookseller/jobber your *library codes*, *item type codes*, *fund codes*, and any other codes or *authorized values* they might need for creating your MARC order records

- Communicate with your support provider or the community about whether you will need a plugin based on your vendor's answers
  - For example ByWater Solutions has published plugins for specific vendors here: *https:// github.com/bywatersolutions/koha-plugin-edifact-enhanced*

- *Enter the vendor/bookseller/jobber* in Acquisitions

- Review your *Acquisitions system preferences*
  - Be sure to fill in the *MarcFieldsToOrder* preference with values for order files

- Enter your *EDI Accounts*

- Enter your *Library EANs*

- Turn on the *EDI Cron* so that it can process files

9.10.3. *EDI Ordering*

The first step in ordering using EDI happens on the book vendor's website. Each seller will use different language, but you will need to place your order on their site and then download the MARC order file. Some language that you might see included "basket", "order", "cart", and/or "MARC order." Once you have this MARC file downloaded to your computer you will want to log in to Koha and continue the process there.

Visit the *Stage MARC Records for Import* tool and upload your file. Once presented with the confirmation screen proceed to Acquisitions.

In Acquisitions *create a basket* for the vendor you ordered from. From the basket, choose to *order from a staged file* and click 'Order' next to the file you downloaded from your vendor and staged in Koha.

From the confirmation screen you will see all of the data in the MARC file related to your order. If you are not seeing fields such as fund and quanity filled in then be sure to confirm that your *MarcFieldsTo-Order* preference is set right.

Once you have added all of the items to the basket you can click the 'Create EDIFACT order' button.

This will generate a pending file in the *EDIFACT Messages* in Koha. The pending files will be processed by the *EDI Cron Job* and sent to your vendor.

9.10.4. *EDI Invoicing*

When the book vendor is done processing your files they will send an invoice via EDI as well. The *EDI Cron Job* will grab invoices and mark items found in the invoice as received and update your funds without any need for manual intervention.

9.11. *EDIFACT Messages*

A log of all messages sent and received via EDIFACT can be found under EDIFACT Messages.

Lists & Cart

Lists are a way to save a collection of content on a specific topic or for a specific purpose. The Cart is a session specific storage space.

- *Get there:* More > Lists

10.1. *Lists*

10.1.1. *Create a List*

A list can be created by visiting the Lists page and clicking 'New List'

The new list form offers several options for creating your list:

- The name is what will appear on the list of Lists

- You can also choose how to sort the list

- Next decide if your list is going to be private or public

  - A Private List is managed by you and can be seen only by you (depending on your permissions settings below)

  - A Public List can be seen by everybody, but managed only by you (depending on your permissions settings below)

- Finally decide what your permissions will be on the list. You can all or disallow:

- anyone else to add entries

- anyone to remove his own contributed entries

  -
    > **Note**
    >
    > The owner of a list is always allowed to add entries, but needs permission to remove.

- anyone to remove other contributed entries

A list can also be created from the catalog search results
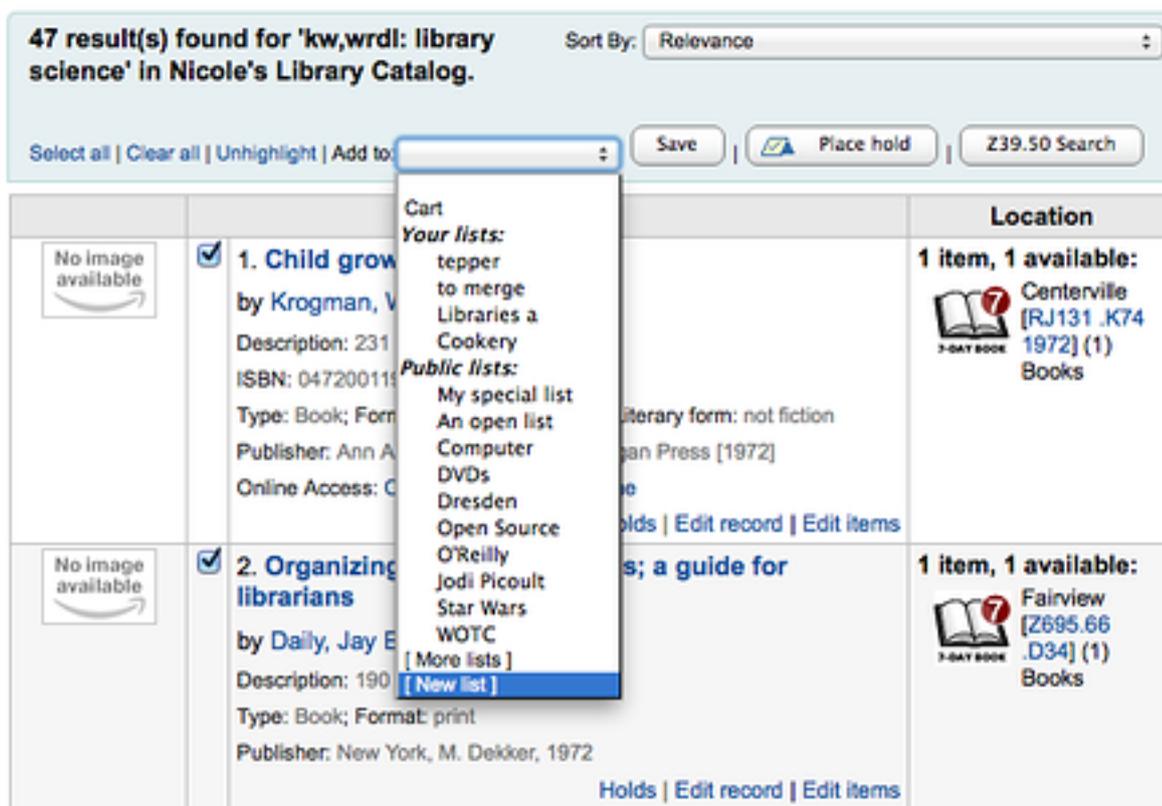
- Check the box to the left of the titles you want to add to the new list

- Choose [New List] from the 'Add to:' pull down menu

- Name the list and choose what type of list this is

  - A Private List is managed by you and can be seen only by you

  - A Public List can be seen by everybody, but managed only by you

Once the list is saved it will accessible from the Lists page and from the 'Add to' menu at the top of the search results.

10.1.2. *Add to a List*

To add titles to an existing list click on the list name from the page of lists

To open a list you can click the list name.

From that page you can add titles by scanning barcodes into the box at the bottom of the page

A title can also be added to a list by selecting titles on the search results page and choosing the list from the 'Add to' menu

10.1.3. *Viewing Lists*

To see the contents of a list, visit the Lists page on the staff client

Clicking on the 'List Name' will show the contents of the list

From this list of items you can perform several actions

* 'New list' will allow you to create another list

* 'Edit' will allow you to edit the description and permissions for this list

* 'Send list' will send the list to the email address you enter (*view sample List email*)

* 'Download list' will allow you to download the cart using one of 3 default formats or your *CSV Profiles*

- 'Print list' will present you with a printable version of the list

Using the filters at the top of each column you can find specific items in your list.

10.1.4. *Merging Bibliographic Records Via Lists*

One way to merge together duplicate bibliographic records is to add them to a list and use the Merge Tool from there.

Once you have selected the records to merge together the process is the same as if you had chosen to *merge via cataloging*.

10.2. *Cart*

The cart is a temporary holding place for items in the OPAC and/or staff client. The cart will be emptied once the session is ended (by closing the browser or logging out). The cart is best used for performing batch operations (holds, printing, emailing) or for getting a list of items to be printed or emailed to yourself or a patron.

If you would like to enable the cart in the staff client, you need to set the *intranetbookbag* system preference to 'Show.' To add things to the cart, search the catalog and select the items you would like added to your cart and choose 'Cart' from the 'Add to' menu
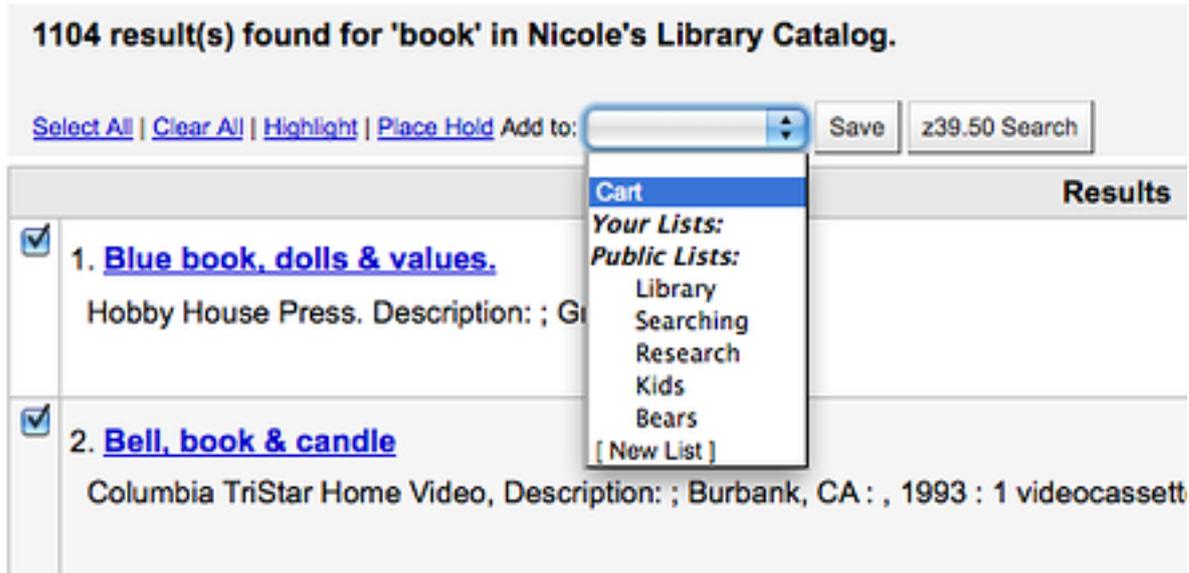
A confirmation will appear below the cart button at the top of the staff client
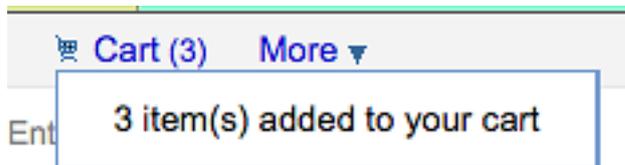
Clicking on the Cart icon will provide you with the contents of the cart

From this list of items you can perform several actions

- 'More details' will show more information about the items in the cart

- 'Send' will send the list to the email address you enter (*view sample Cart email*)

- 'Download' will allow you to download the cart using one of 3 default formats or your *CSV Profiles*

- 'Print' will present you with a printable version of the cart

- 'Empty and Close' will empty the list and close the window

- 'Hide Window' will close the window

Reports

Reports in Koha are a way to gather data. Reports are used to generate statistics, member lists, shelving lists, or any list of data in your database.

- *Get there:* More > Reports

11.1. *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*.

11.1.1. *Add Custom Report*

11.1.1.1. *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.

'Report is public' should be left to the default of 'No' in most cases. A report can be made public if you intend to allow access to it through the JSON webservice interface. This is a system that can be used by developers to make custom presentations of the data from the report, for example displaying it using a graphing API. To learn more speak to your local developer.

- A public report is accessible via a URL that looks like this: http://MYOPAC/cgi-bin/koha/svc/report?id=REPORTID

> **Note**
>
> If your system administrator has set up memcache on your server you might see one more option
> for the Cache expiry. This is related to your public reports. If you make the report public then it's
> constantly running and will cause a large load on your system. Setting this value prevents that.

Step 1 of 6: Choose a module to report on, Set cache expiry, and Choose report visibility

Choose: Circulation

Report is public: No (default)

Cache expiry: 300   Seconds (default)
                     Seconds (default)
                     Minutes
                     Hours
                     Days

Next >>

Step 2: Choose a report type. For now, Tabular is the only option available.

New ▾

Build A Report

Step 2 of 6: Pick a report type

Choose: Tabular

<< 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 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 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

| ☐ borrowers.surname | sum ⇕ |
| ☐ borrowers.firstname | sum ⇕ |

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

| ☐ borrowers.surname | asc ⇕ |
| ☐ borrowers.firstname | asc ⇕ |

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

You will need to save the report before you can execute it

If you choose to save the report you will be asked to name your report, sort it in to groups and subgroups and enter any notes regarding it.

Once your report is saved it will appear on the 'Use Saved' page with all other saved reports.

From here you can make edits, run the report, or schedule a time to have the report run. To find the report you created you can sort by any of the columns by clicking the on the column header (creation date is the best bet for finding the report you just added). You can also filter your results using the filter menu on the left or use the tabs to find reports based on your custom groups.

11.1.1.2. *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://schema.koha-community.org*[1].

To add your query, click the link to 'Create from SQL' on the main reports module or the 'New report' button at the top of the 'Saved reports' page.

Fill in the form presented

---

[1] http://schema.koha-community.org/

- The 'Name' is what will appear on the Saved Reports page to help you identify the report later. It will also be searchable using the filters found the left of the Saved Reports page.

- You can use the 'Report group' to organize your reports so that you can easily filter reports by groups. Report groups are set in the *REPORT_GROUP* authorized value category or can be added on the fly when creating the report by choosing the 'or create' radio button.

-

> ### Note
>
> If you're adding a report group on the fly, remember that you code should be fewer than 10 characters and should not include special characters or spaces.

- You can use 'Report subgroup' to further organize your reports so that you can easily filter reports by groups and subgroups. Report subgroups are set in the *REPORT_SUBGROUP* authorized value category or can be added on the fly when creating the report by choosing the 'or create' radio button.

- 'Report is public' should be left to the default of 'No' in most cases. A report can be made public if you intend to allow access to it through the JSON webservice interface. This is a system that can be used by developers to make custom presentations of the data from the report, for example displaying it using a graphing API. To learn more speak to your local developer.

  - A public report is accessible via a URL that looks like this: http://MYOPAC/cgi-bin/koha/svc/report?id=REPORTID

- 'Notes' will also appear on the Saved Reports page, this can be used to provide more details about the report or tips on how to enter values when it runs

- The type should always be 'Tabular' at this time since the other formats have not been implemented

- In the 'SQL' box you will type or paste the SQL for the report

- 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 or biblio_framework, 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>>

- SELECT title , author FROM biblio WHERE frameworkcode=<<Enter the framework-code|biblio_framework>>

> **Note**
>
> To generate a date picker calendar to the right of the field when running a report you can use the 'date' keyword like this: <<Enter Date|date>>
>
> Added: [   ] 🗓

> **Note**
>
> 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**
>
> In addition to using any authorized value code to generate a dropdown, you can use the following values as well: Framework codes (biblio_framework), Branches (branches), Item Types (itemtypes) and Patron Categories (categorycode). For example a branch pull down would be generated like this <<Branch|branches>>
>
> Owning branch: [Centerville   ‡]

> **Note**
>
> There is a limit of 10,000 records put on SQL statements entered in Koha. To get around this you want to add 'LIMIT 100000' to the end of your SQL statement (or any other number above 10,000).

> **Note**
>
> If your system administrator has set up memcache on your server you might see one more option for the Cache expiry. This is related to your public reports. If you make the report public then it's constantly running and will cause a large load on your system. Setting this value prevents that.

Once everything is entered click the 'Save Report' button and you'll be presented with options to run it. Once a report is saved you do not have to recreate it you can simply find it on the Saved Reports page and *run* or *edit* it.

11.1.1.3. *Duplicate Report*

Reports can also be added by duplicating an existing report. Visit the 'Saved reports' page to see all of the reports listed on your system already.

To the right of every report there is an 'Actions' pull down. Clickin that and choose 'Duplicate' to use an existing report as the basis for your new report. That will populate the new report form with the existing SQL for easy editing and resaving.

11.1.2. *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.'
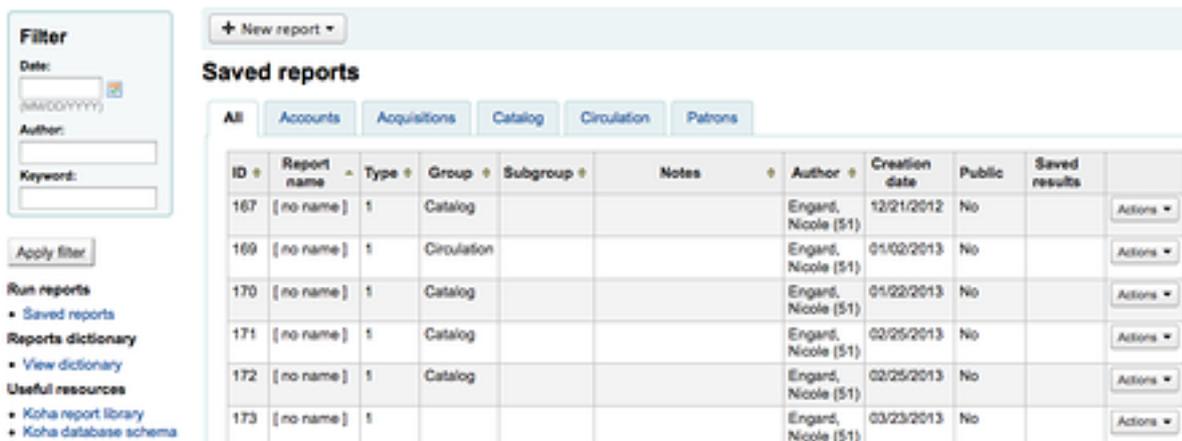
To find the report you'd like to edit you can sort by any of the columns by clicking the on the column header. You can also filter your results using the filter menu on the left or use the tabs to find reports based on your custom groups.

From this list you can edit any custom report by clicking 'Actions' to the right of the report and choosing 'Edit' from the menu that appears.
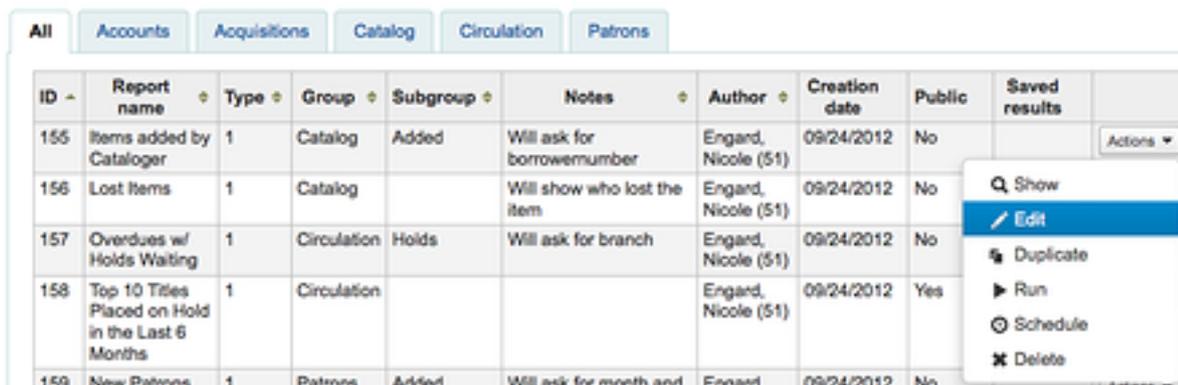
The form to edit the report will appear.

11.1.3. *Running Custom Reports*

Once custom reports are saved to Koha, you can run them by going to the Saved Reports page and clicking the 'Actions' button to the right of the report and choosing 'Run'.

When you report runs you will either be asked for some values

or you will see the results right away

New Patrons

Will ask for month and year

Total number of rows matching the (unlimited) query is 3.

```
SELECT branchcode,categorycode,COUNT(*)
  FROM borrowers WHERE MONTH(dateenrolled) = '02' AND YEAR(dateenrolled)= '2011'
  GROUP BY branchcode,categorycode
  ORDER BY branchcode
```

branchcode	categorycode	COUNT(*)
FFL	J	2
NIC	PT	1
NIC	S	1

Download the report: Comma separated text ⬧ Download

From the results you can choose to rerun the report by clicking 'Run report' at the top, edit the report by clicking the 'Edit' button or starting over and creating a new report by using the 'New' button. You can also download your results by choosing a file type at the bottom of the results next to the 'Download the report' label and clicking 'Download.'

> **Note**
>
> A Comma Separated Text file is a CSV file and it can be opened by any spreadsheet application.

11.2. *Statistics Reports*

Statistic 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*. These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

11.2.1. *Acquisitions Statistics*

> **Note**
>
> These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

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.

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

11.2.2. *Patron Statistics*

> **Note**
>
> These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

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.

11.2.3. *Catalog Statistics*

> **Note**
>
> These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

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.

11.2.4. *Circulation Statistics*

> **Note**
>
> These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

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.

> **Note**
>
> To get a complete picture of your monthly or daily circulation, you can run the report twice, once for 'Type' of 'Checkout' and again for 'Renewal.'
>
> This report uses 'Period,' or date, filtering that allows you to limit to a month by simply selecting the first day of the first month through the first day of the next month. For example, 10/1 to 11/1 to find statistics for the month of October.
>
> - To find daily statistics, set your date range.</br> Example: "I want circulation data starting with date XXX up to, but not including, date XXX."
>
> - For a whole month, an example range would be: 11/01/2009 to 12/01/2009
>
> - For a whole year, an example range would be: 01/01/2009 to 01/01/2010
>
> - For a single day, an example would be: 11/15/2009 to 11/16/2009 to find what circulated on the 15th

11.2.4.1. *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:

11.2.5. *Serials Statistics*

> **Note**
>
> These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

Using the form provided, choose how you would like to list the serials in your system.

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.

11.2.6. *Holds Statistics*

> **Note**
>
> These reports are limited in what data they can look at, so it's often recommended to use *custom reports* for official end of the year statistics.

Using the form provided you can see statistics for holds placed, filled, cancelled and more at your library. From the form choose what value you want to display in the column and what value to show in the row. You can also choose from the filters on the far right of the form.

If you choose to output to the browser your results will print to the screen.

Holds statistics

reserves.branchcode / reservestatus	1- placed	2- processed	3- pending	4- satisfied	TOTAL
Nicole's Library	2	3	3	3	11
TOTAL	2	3	3	3	11

You can also choose to export to a file that you can manipulate to your needs.

11.2.7. *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:	06/01/2009 To: 12/31/2009
Check-in date from:	To:
Library:	Any Library
Item Type:	Any item type
Patron Category:	Any Category code
Day:	
Month:	
Year:	

Limit to: 5
By: Library

Output

To screen into the browser: ⊙

To a file: ○ Named: Export Into an application: EXCEL Delimiter: :

Submit

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.

11.2.8. *Most Circulated Items*

This report will simply list the items that have the been checked out the most.

Most-Circulated Items

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.

11.2.9. *Patrons with no checkouts*

This report will list for you the patrons in your system who haven't checked any items out.

Patrons with no Checkouts

Patron category:	Any Category code
Not checked out since:	

Limits

Limit to:	None
By:	None

Output

To screen into the browser:	⦿
To a file:	○ Named: Export Into an application CSV :

Submit

If you choose to output to the browser your results will print to the screen.

Patrons with no Checkouts

Num/Patrons	Global
1	Admin Koha 1
2	Welch Marcus 23529000152273
3	Daniels Tanya 23529000445172
4	Dillon Eva 23529000105040
5	Acosta Edna 23529001000463

You can also choose to export to a file that you can manipulate to your needs.

11.2.10. *Items with no checkouts*

This report will list items in your collection that have never been checked out.

Items with no checkouts

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.

11.2.11. *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   Fairview ▲▼ 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.

11.2.12. *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

Show / Hide columns

Title	Author	Lost code	Barcode	Call number	Date last seen	Price	Rep.price	Library	Item type	Current location	Location	Notes
Library mashups :		Long Overdue (Lost)	1000000	Z674.75.W67	03/04/2015			Nicole's Library	BK	Nicole's Library		
Wertheimer's cataloging and classification :	Saye, Jerry D.	Lost	1000006	Z693 .S28 2000	03/04/2015			Franklin	BK	Nicole's Library		

11.2.13. *Average Loan Time*

This report will list the average time items are out on loan based on the criteria you enter:

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.

11.3. *Report Dictionary*

The report dictionary is a way to pre-define common filters you'd like to apply to your reports. This is a good way to add in filters that the report wizard doesn't include by default. To add a new definition, or filter, click 'New Definition' on the Reports Dictionary page and follow the 4 step process.

Step 1: Name the definition and provide a description if necessary

Add New Definition

Step 1 of 5: Name the new definition

Definition Name: Info Today Publications

Definition Description:

[Next]

Step 2: Choose the module that the will be queried.

Add New Definition

Step 2 of 5: Choose the area

Select table
✓ Circulation
Catalog
Patrons
Acquisitions
Accounts

[Next]

Step 3: Choose columns to query from the tables presented.

Add New Definition

Step 3 of 5: Choose columns

Next

Step 4: Choose the value(s) from the field(s). These will be automatically populated with options available in your database.

Add New Definition

Step 4 of 5: Specify a value

Confirm your selections to save the definition.

Add New Definition

Step 5 of 5: Confirm details

Name: Info Today Publications

Description:

Area: Catalog

Data:

Columns	Values
biblioitems.publishercode	Information Today,

Save

Your definitions will all appear on the Reports Dictionary page

New Definition

Dictionary

Use the dictionary to define custom criteria for reporting.

Current Terms

Filter by area [All   ‡] Go

Name	Description	Area	Definition	
zip		Patrons	AND borrowers.zipcode='44236'	Delete Definition
last name		Patrons	AND borrowers.surname='en%'	Delete Definition
testing2		Circulation	AND borrowers.dateofbirth >= '2011-07-17' AND borrowers.dateofbirth <= '2011-07-27'	Delete Definition
Call Number	my call number rule	Catalog	AND items.itemcallnumber='PS3566.I372 N56 2007'	Delete Definition
Info Today Publications		Catalog	AND biblioitems.publishercode='Information Today,'	Delete Definition

Then when generating reports on the module you created the value for you will see an option to limit by the definition at the bottom of the usual filters.

Step 4 of 6: Select Criteria to Limit on

☐ Item-level Item Type	BK ⬍
☐ Item Number (koha internal)	from [ ] to [ ]
☐ Biblio Number (koha internal)	from [ ] to [ ]
☐ Barcode	from [ ] to [ ]
☐ Framework Code	Default ⬍
☐ Current Branch	CPL ⬍
☐ Permanent Branch Code	CPL ⬍
☐ Creation Date	from [ ] to [ ]
☐ Modification Date	from [ ] to [ ]
☐ On loan	from [ ] to [ ]
☐ Koha Collection	NFIC ⬍
☐ Item Call Number	from [ ] to [ ]
☐ Item-level Item Type	BK ⬍
☐ Item Lost	0 ⬍
☐ Location	CART ⬍

Dictionary Definitions

☐ Info Today Publications

[<< Back] [Next >>]

OPAC

This chapter assumes that you have the following preferences set as follows:

- *opacthemes* = bootstrap

- *OPACXSLTResultsDisplay* = default

- *OPACXSLTDetailsDisplay* = default

- *DisplayOPACiconsXSLT* = show

- *TagsEnabled* = Allow

- *TagsInputOnDetail* =Allow

- *TagsInputOnList* = Allow

- *reviewson* = Allow

- *ShowReviewer* = Allow

- *ShowReviewerPhoto* =Allow

- *OPACFRBRizeEditions* = Show

- *OPACAmazonCoverImages* = Show

- *XISBN* = Use

- *OPACSearchForTitleIn* = Default set of links

- *OPACShowCheckoutName* = Don't show

- *RequestOnOpac* = Allow

- *AutoResumeSuspendedHolds* = Allow

- *OpacBrowseResults* = Enable

- *SuspendHoldsOpac* = Allow

- *OPACShowBarcode* = Don't show

- *OpacSeparateHoldings* = Don't separate

- *OpacSeparateHoldingsBranch* = home library

- *DisplayLibraryFacets* = holding library

If your system preferences are set differently your displays may differ.

12.1. *Search Results*

To search the OPAC you can either choose to enter your search words in the box at the top of the OPAC or click on the 'Advanced Search' link to perform a more detailed search.
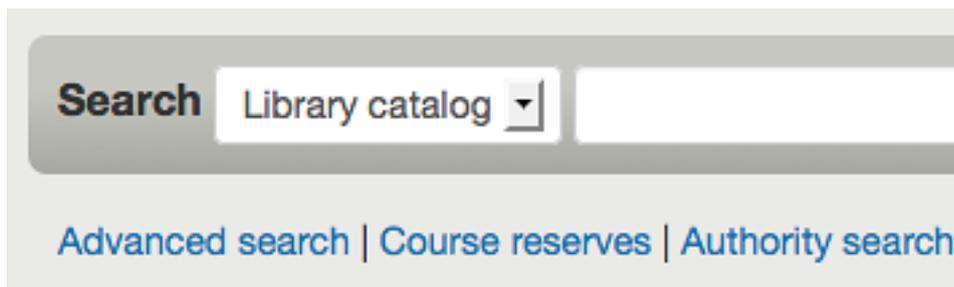
For more on searching check the '*Searching*' chapter in this manual.

12.1.1. *Results Overview*

After performing a search the number of results found for your search will appear above the results
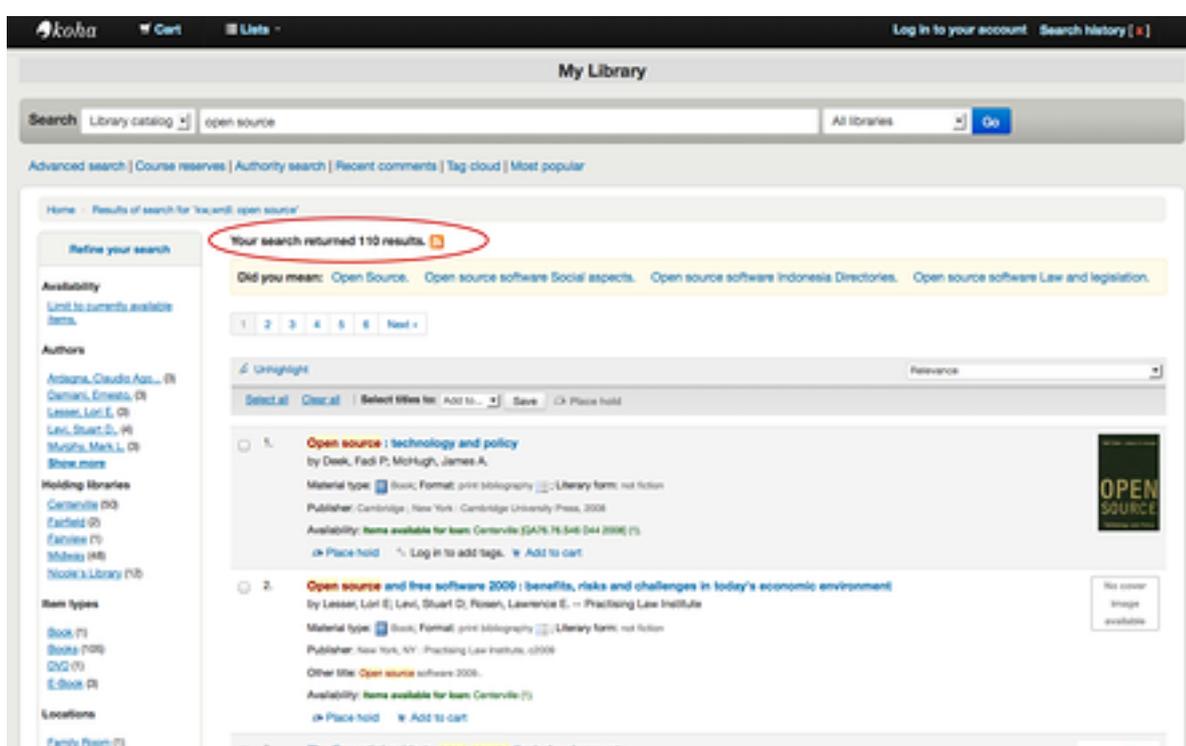
By default your search results will be sorted based on your *OPACdefaultSortField and OPACdefaultSortOrder* system preference values. To change this you can choose another sorting method from the pull down on the right.

Under each title on your results list a series of values from your leader will appear. It is important to note that this has nothing to do with the item types or collection codes you have applied to your records, this data is all pulled from your fixed fields. This can be turned on or off with the *Display-OPACiconsXSLT* system preference.

Below each title you will see the availability for the items attached to the record.

> **Note**
>
> Even if you filtered on one library location all locations that hold the item will appear on the search results.

> **Important**
>
> An item's hold status doesn't not affect whether or not the item is 'available' until the item is in 'waiting' status. Items with on-shelf holds will show as available until a librarian has pulled them from the shelf and checked the item in make it show 'waiting'.
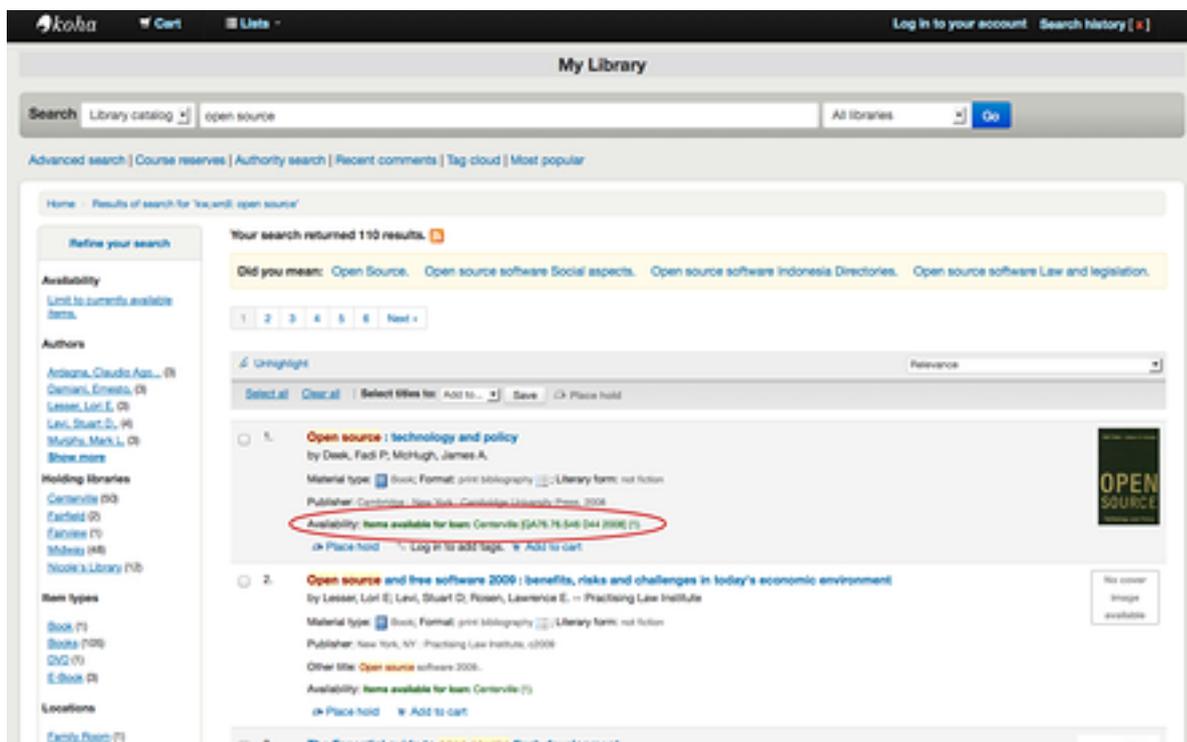
If you have turned on *Enhanced Content* preferences you may have book jackets on your search results.

If you have set your *Did you mean?* options you will see a yellow bar across the top of your results will other related searches.

If you performed an advanced search you see an option to go back and edit your advanced search blow the list of results pages.

12.1.2. *Filters*

To filter your results click on the links below the 'Refine Your Search' menu on the left of your screen
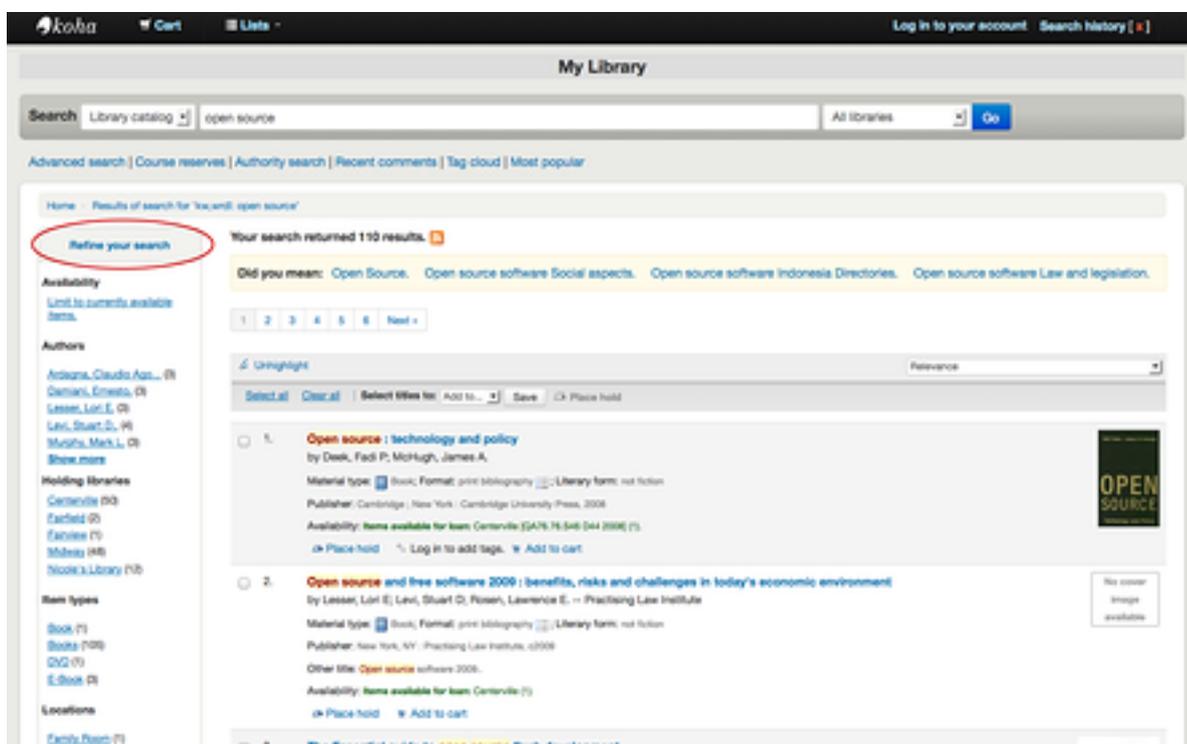
Depending on your setting for the *DisplayLibraryFacets* system preference you will see filters for your home, holding or both libraries.

Refine your search

Availability

Limit to currently available items.

Authors

Ardagna, Claudio Ago... (3)
Damiani, Ernesto, (3)
Lesser, Lori E. (3)
Levi, Stuart D., (4)
Murphy, Mark L. (3)
Show more

Holding libraries

Centerville (50)
Fairfield (2)
Fairview (1)
Midway (48)
Nicole's Library (12)

Item types

Book (1)
Books (105)
DVD (1)
E-Book (3)

Locations

Family Room (1)
Living Room (6)

After clicking a facet you can remove that filter from your results by clicking the small 'x' that appears to the right of the facet.

12.1.3. *Search RSS Feeds*

You will be able to subscribe to your search results as an RSS feed by clicking the RSS icon in your address bar or next to the number of results. To learn more about what RSS feeds are check out *this tutorial video*[1].

---

[1] http://www.youtube.com/watch?v=0klgLsSxGsU

Subscribing to search results as RSS feeds will allow you to see when a new item is added to the catalog in your area of interest.

12.2. *Bibliographic Record*

When you click on a title from the search results, you're brought to the bibliographic detail of the record. This page is broken down in several different areas.

At the top of your screen will be the title and the GMD:

Below the title the authors will be listed. These come from your 1xx and 7xx fields. Clicking the author will run a search for other titles with that author.

If you have an authority file you will see a magnifying glass to the right of author (and other) authorities. Clicking that magnifying glass will take you directly to the authority record.

If you have your *DisplayOPACiconsXSLT* preference set to 'show' you will see a material type that is determined by values in your fixed fields (learn more in the *XSLT Item Types* Appendix).

Next you'll see the description of the record you're viewing:

Following that information you'll find the subject headings which can be clicked to search for other titles on similar topics

If your record has a table of contents or summary it will appear next to the 'Summary' or 'Table of Contents' label

If your record has data in the 856 fields you'll see the links to the right of the 'Online Resources' label

If the title you're viewing is in a public list then you'll see a list of those to the right of the 'List(s) this item appears in' label and if it has tags they will appear below the 'Tags from this library' label

In the tabs below the details you will find your holdings data

Any notes (5xx fields) that have been cataloged will appear under 'Title Notes'

If you're allowing comments they will appear in the next tab

And finally if you have enabled FRBR and you have other editions of the title in your collection you will see the 'Editions' tab.

To the right of the details you'll find a series of boxes. The first box is a list of buttons to help navigate the search results. From there you can see the next or previous result from your search or return to the results.
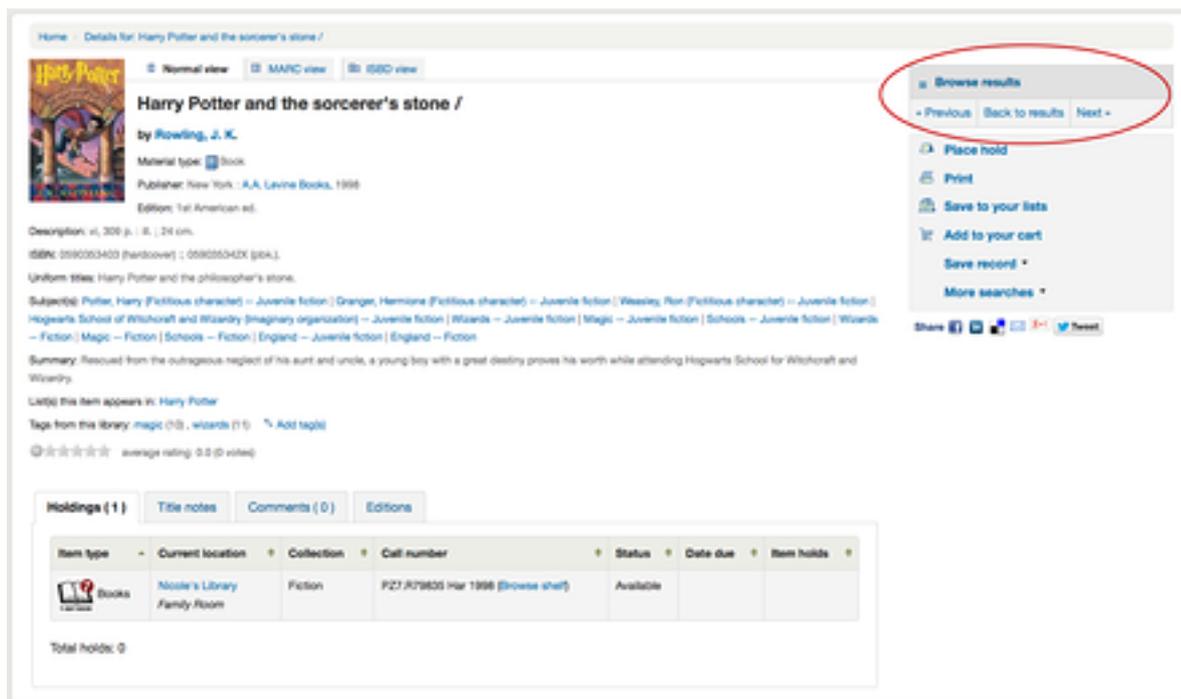
Clicking Browse Results at the top of the right column will open up your search results on the detail page
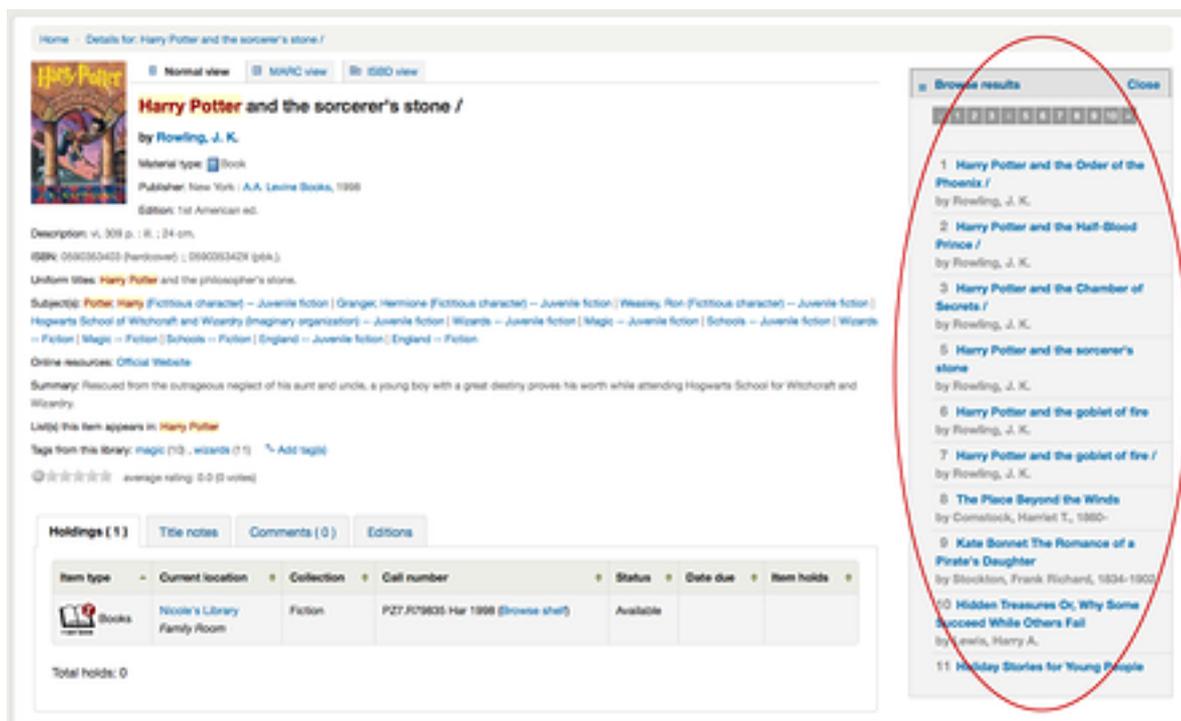
Below the search buttons you'll find the links to place a hold, print the record, save the record to your lists, or add it to your cart

Clicking 'More Searches' will show the list of libraries you entered in your *OPACSearchForTitleIn* preference

Under the 'Save Record' label you will find a series of file formats you can save the record as. This list can be customized by altering the *OpacExportOptions* system preference.
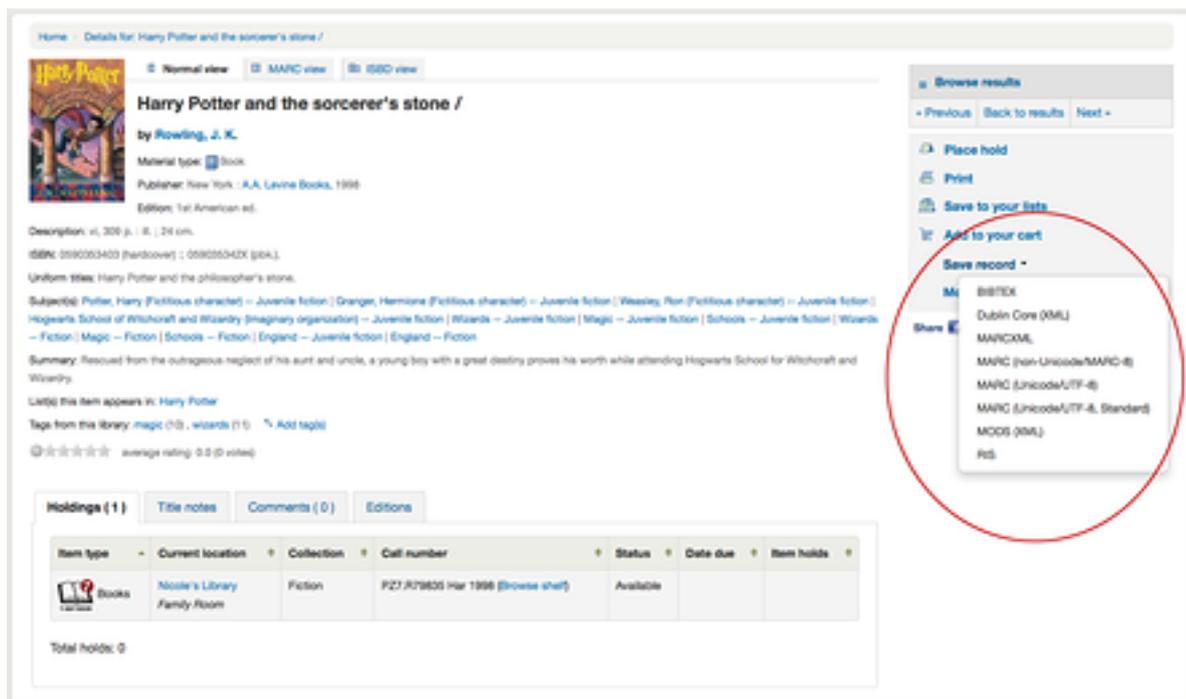
If at any time you want to change the view from the 'Normal' view to see the Marc or the ISBD you can click the tabs across the top of the record
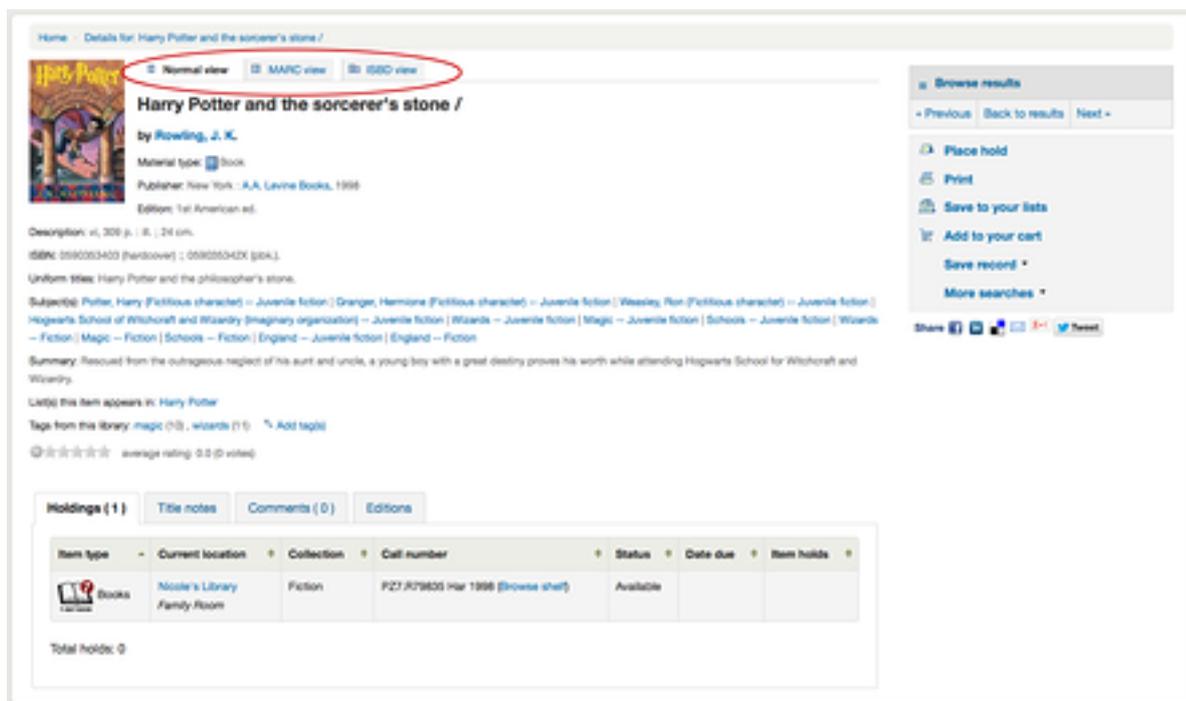
12.3. *Lists & Cart*

A cart is a temporary holding place for records you're interested in finding during this session. That means that once you log out of the OPAC or close the browser you lose the items in your cart. A list is a more permanent location for saving items. To learn more about lists, check the *Lists in the Staff Client* chapter of this manual.

12.3.1. *Lists*

Patrons can manage their own private lists by visiting the 'my lists' section of their account.
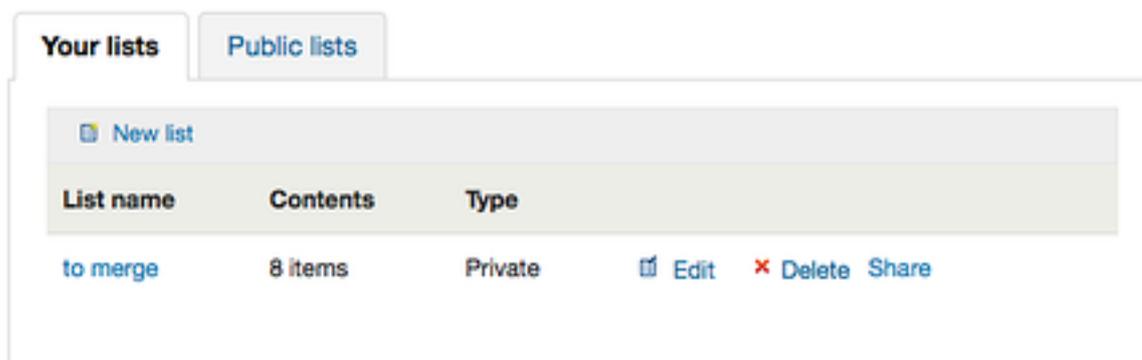
12.3.1.1. *Creating Lists*

Lists can also be created by choosing the 'New List' option in the 'Add to' menu on the search results
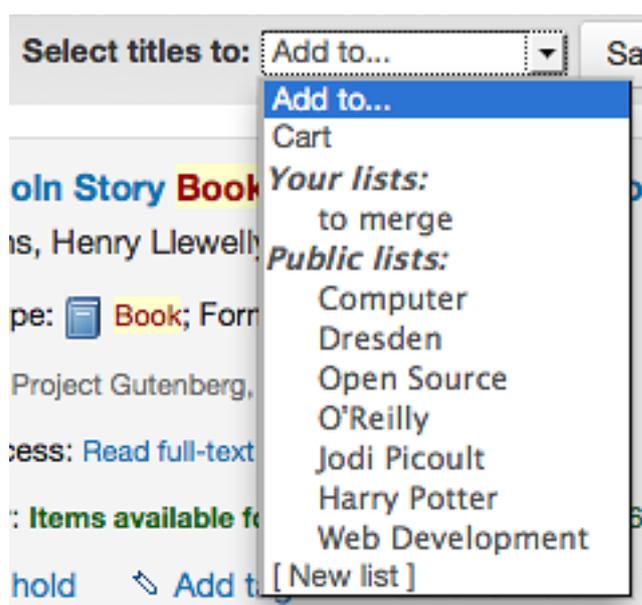
To create a list the patron simply needs to click the 'New List' link and populate the form that appears

Create a new list

The only field required is the 'List Name,' but the patron can also choose how they want the list sorted and if the list is public or private.

- A Private List is managed by you and can be seen only by you (depending on your permissions settings below)

- A Public List can be seen by everybody, but managed only by you (depending on your permissions settings below)

> **Important**
>
> If you aren't allowing patrons to create public lists with the *OpacAllowPublicListCreation* preference then patrons will only be able to create private lists.

Create a new list

List name: [   ]

Sort this list by: [Title ▾]

[Save] Cancel

- Finally decide what your permissions will be on the list. You can all or disallow:
  - anyone else to add entries

  - anyone to remove his own contributed entries
    -
      > **Note**
      >
      > The owner of a list is always allowed to add entries, but needs permission to remove.

  - anyone to remove other contributed entries

12.3.1.2. *Adding titles to Lists*

Titles can be added to lists from the search results and/or from the bibliographic record. On the search results options to add items to the list appear below each result and across the top of the results page
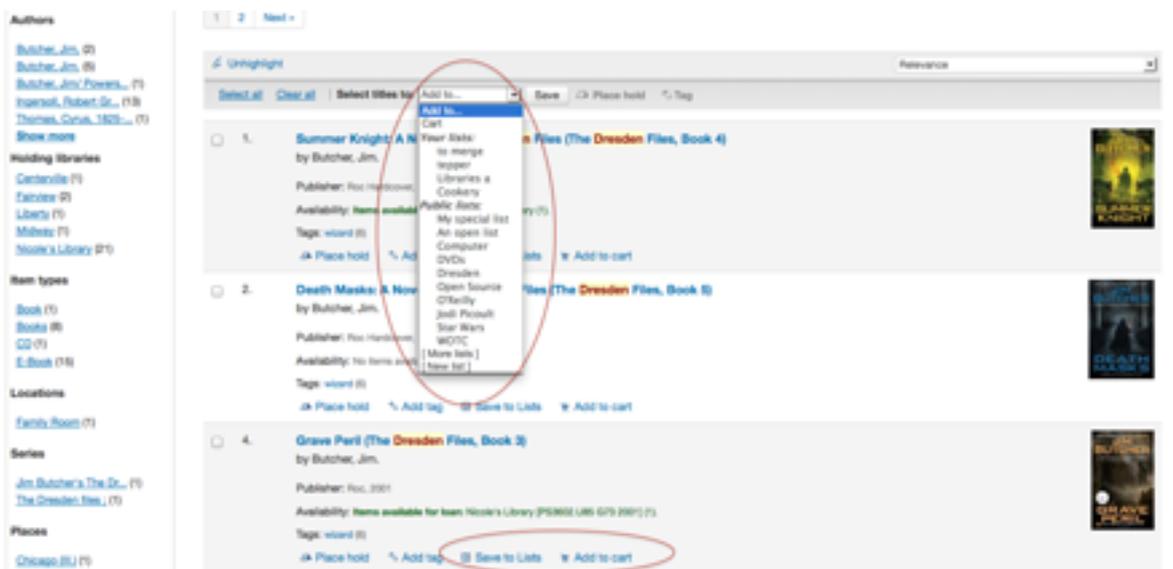
To add a single title to a list, click the 'Save to Lists' option and then choose the list you'd like to add the title to. To add multiple titles to a list check the boxes on the left of the titles you want to add and then choose the list you want to add the titles to from the 'Add too' pull down at the top of the screen.

12.3.1.3. *Viewing Lists Contents*

To view the contents of a list, click on the list name under the Lists button.
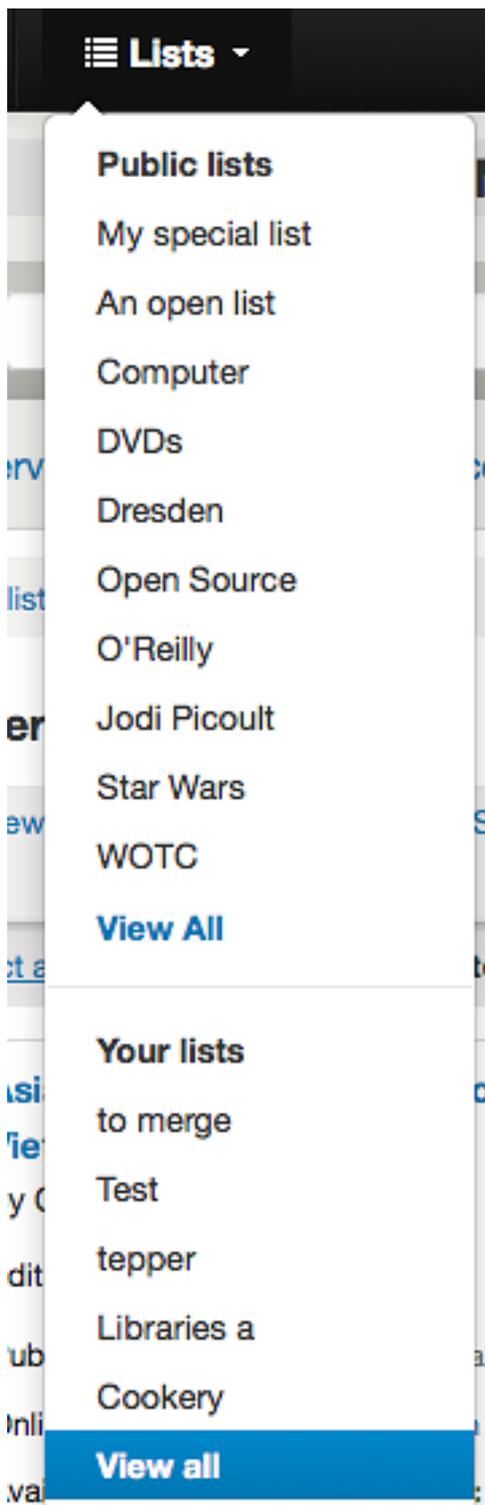
The contents of the list will look similar to your search results pages except that there will be different menu options across the top of the list.

To the right of the list title there is an RSS icon that will allow you to subscribe to updates to the list.

Using the menu options above the list you can place multiple items on hold, download the list contents, email the list or print the list out.

- To place a hold on one or more list items check the box to the left of the item and click the 'Place Hold' link at the top

- To download the list contents click the 'Download List' link and choose the format you'd like to download the list in

- To email the list contents to someone, click the 'Send List' link and enter in your email details in the form that pops up (*view a sample Lists email*)

Sending your list

Email address:

Comment:

Send   Cancel

- To print the contents of your list out click the 'Print List' link

12.3.1.4. *Managing Lists*

Once the list is saved patrons can begin adding items to it. From the 'my lists' tab on the patron record the patron can edit and delete the lists they have created by clicking the appropriate link to the right of the list name.

To edit the list's title or sorting patrons click the 'Edit' link to the right of the list description.

When clicking 'Delete' next to a list you will be asked to confirm that you want to delete the list.

The list will not be deleted until the 'Confirm' button is clicked to the right of the list you'd like to delete.

If the library is allowing you to share private lists with the *OpacAllowSharingPrivateLists* preference then you will see the 'Share' link on your list of lists and the 'Share list' link at the top of each individual list. Clicking this will ask you to enter the email address of a patron.

Once the email address is entered Koha will present you with a confirmation message

and will send a message to that patron.

12.3.2. *Cart*

12.3.2.1. *Adding titles to the Cart*

Titles can be added to the cart from the search results and/or from the bibliographic record. On the search results options to add items to the cart appear below each result and across the top of the results page
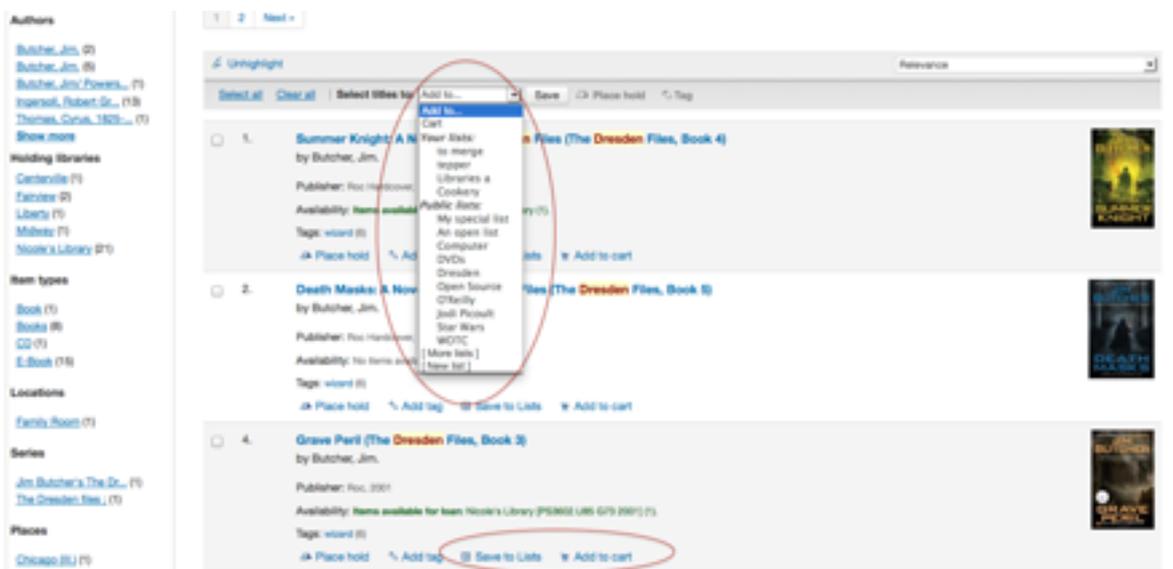
Clicking the 'Add to Cart' button will add the one title to your cart. To add multiple titles at once, check the box to the left of each result and then choose 'Cart' from the 'Add to' pull down at the top of the screen. Once titles are added to the cart you will be presented with a confirmation
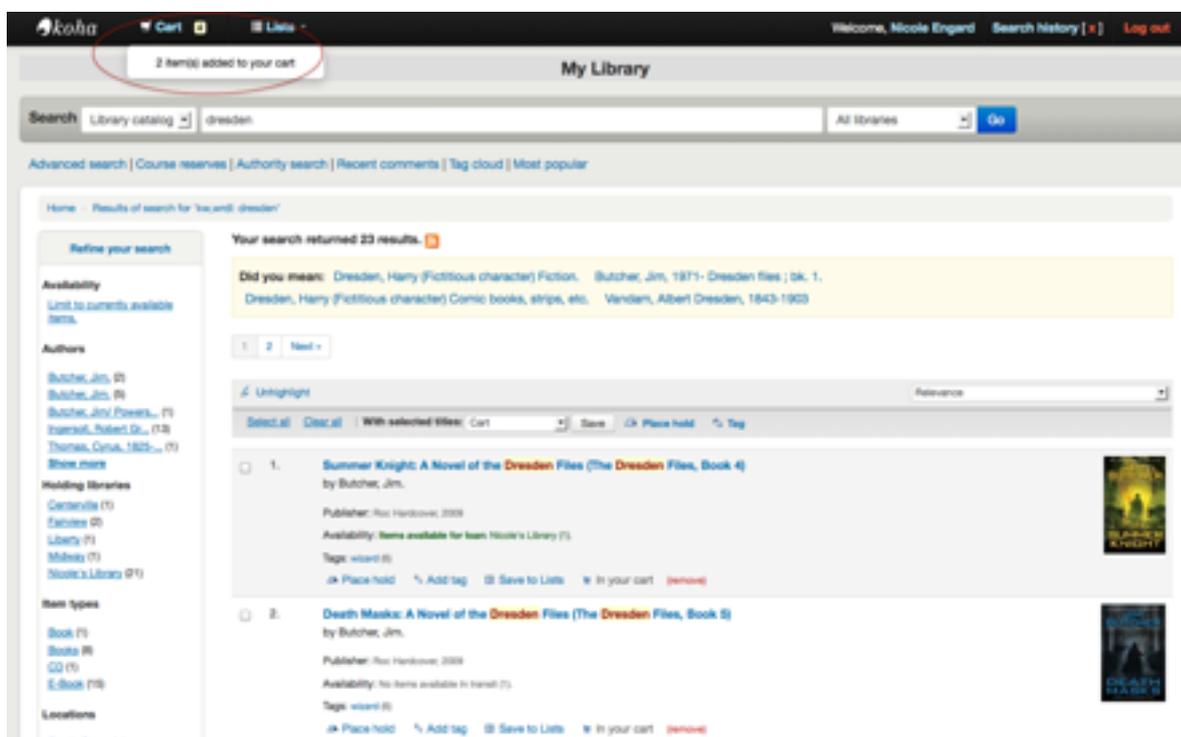
From the results you will see which items are in your cart and will be able to remove those items by clicking '(remove)'.
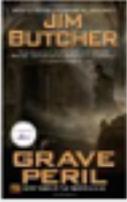
12.3.2.2. *Managing the Cart*

Once you have titles in your cart you can manage the contents by clicking on the 'Cart' button usually found at the top of the screen. Your cart will open in a new window.

From this window you are presented with several options. Across the top of the cart are several buttons.

First is the 'More details' button. Clicking this will show you additional information about the titles in your cart (ISBNs, Subjects, Publisher Info, Notes and more).

Next is the option to send the contents of your cart to an email address. This is handy if you want to send the resources you found at the library to your home email account to refer to later or to send to a patron researching a specific topic. Clicking this link will open up a new window that asks for the email address and message to send. *View a sample Cart email*.

Sending your cart

Email address:

Comment:

Send   Cancel

Important

The cart can only be emailed by logged in users. This will prevent your cart email function from being used for spamming.

In addition to sending your cart you can download the contents of your cart in several pre-defined formats or using a *CSV Profile* that you defined in the Tools module.

Download cart

-- Choose format --

-- Choose format --
RIS (Zotero, EndNote, others)
BibTeX
MARC
CSV - TitleAuthor
CSV - Subjects

Finally you can print out the contents of your cart by choosing the 'Print' link.

In addition to the various different ways to save the contents of your cart, there are ways to add value to the data in your cart. By selecting one or more titles from the cart you can add them to a list (click 'Add to a List'), place hold(s) (click 'Place hold'), or tag them (click 'Tag'). All of these operations follow the same procedure as they do when performing them in the OPAC.

12.4. *Placing Holds*

Patrons can place holds on items via the OPAC if they're logged in and you have the *RequestOnOpac* preference set to 'Allow'. If the item can be placed on hold the option to place it on hold will appear in several different places.

- When viewing a list or search results page you'll see the option to place hold on multiple items by checking the boxes to the left of the results and clicking 'Place Hold' at the top

- When viewing a list or search results page you'll see the option to place the item on hold below the basic information about the title

- When viewing an individual title you'll see the option to place a hold in the box on the right side of the screen
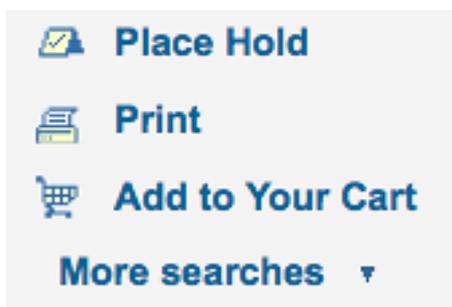
No matter which of the above links you click to place your hold you'll be brought to the same hold screen.

- Check the box to the left of the items you'd like to place on hold

- The title includes a link back to the detail page for the record

- The priority shows where in the holds queue this hold will fall

- If allowed by your *OPACAllowUserToChooseBranch* preference the patron can choose where they'd like to pick up their hold

- If you would like to see more options you can click 'Show more options'

- If you have the *AllowHoldItemTypeSelection* preference set to 'Allow' and the record had more than one item type attached you will see an option to choose to limit the hold to a specific item type

- If allowed by your *OPACAllowHoldDateInFuture* preference, the 'Hold Starts on Date' column will show. This field allows the patron to have their hold start on a future date.

- By default holds placed in the system remain until canceled, but if the patron fills in a 'Hold Not Needed After' date then the hold has an expiration date.

-

  Important

  Expired holds are removed by the *Expired Holds Cron Job*, this is not an automatic process and must be set up by your system administrator

- If allowed by the *OpacHoldNotes* preference then patrons can leave notes about their holds for the library by clicking the 'Edit notes' button

- Depending on the rules you set regarding item specific holds in your *circulation and fines rules* the patron will be allowed to choose whether to place the hold on the next available copy and/or a specific copy

After clicking the Place Hold button the patron will be brought to their account page where they'll see all of the items they have on hold.

12.5. *Enhanced Content*

12.5.1. *Tagging*

Depending on your settings for the *TagsEnabled*, *TagsInputOnList* and *TagsInputOnDetail* preferences you may be able to add tags to bibliographic records from the search results and/or bibliographic records. If you are allowing patrons to add tags from the search results screen you will see an input box below each result and a 'Tag' option at the top of the screen.
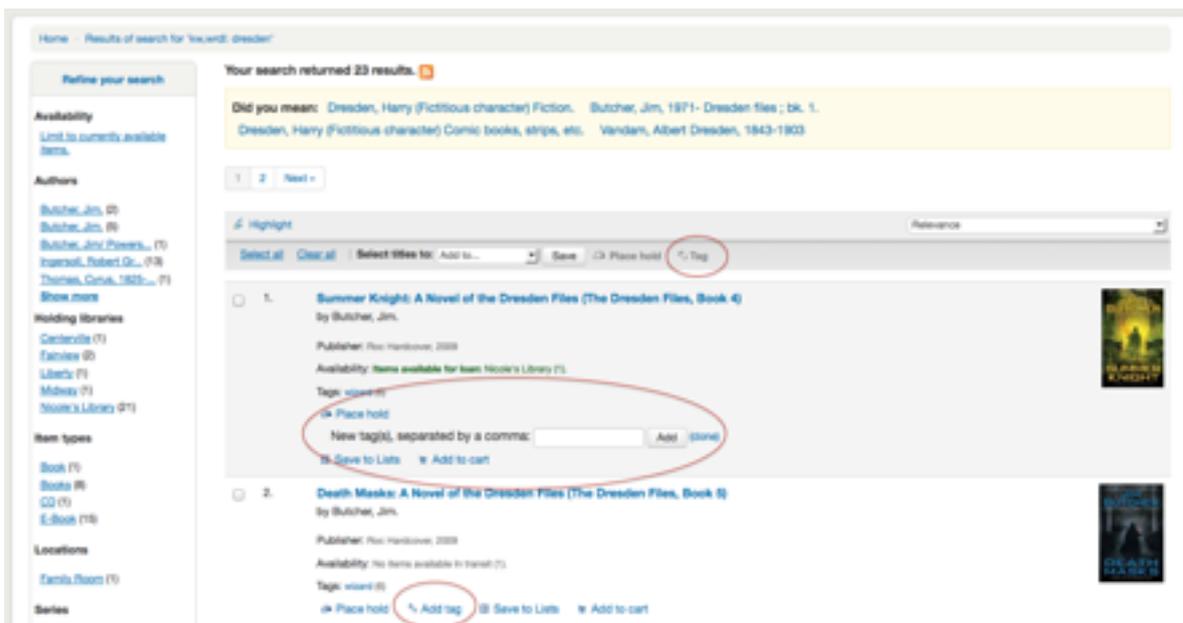
To add a tag to one item, type the tabs (separated by commas) in the 'New tag' box and click 'Add'. You will be presented with a confirmation of your tags being added.
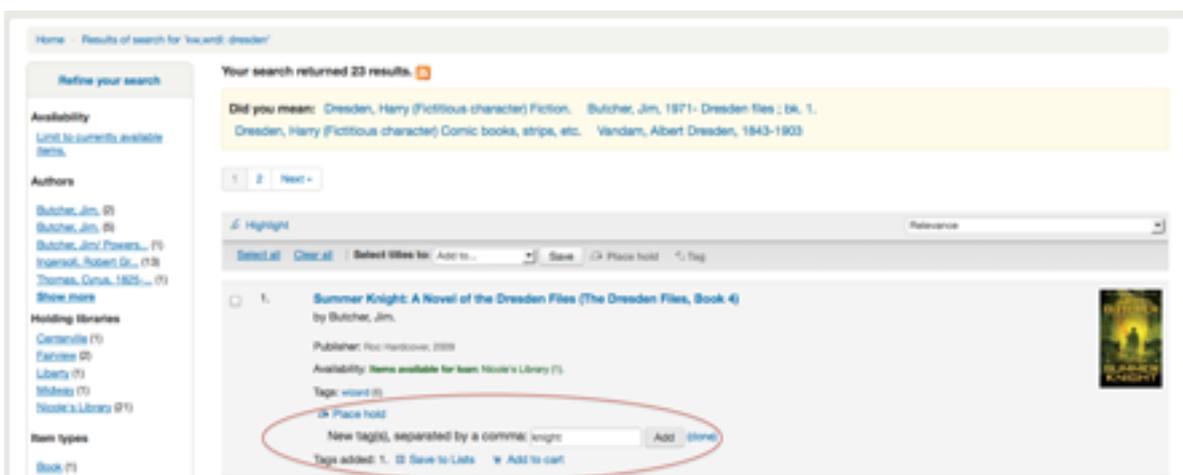
From the results you can also tag items in bulk by clicking the checkboxes on the left and then clicking the 'Tag' button at the top. After clicking the button it will change into an input box for you to add tags to all of the items you have selected.
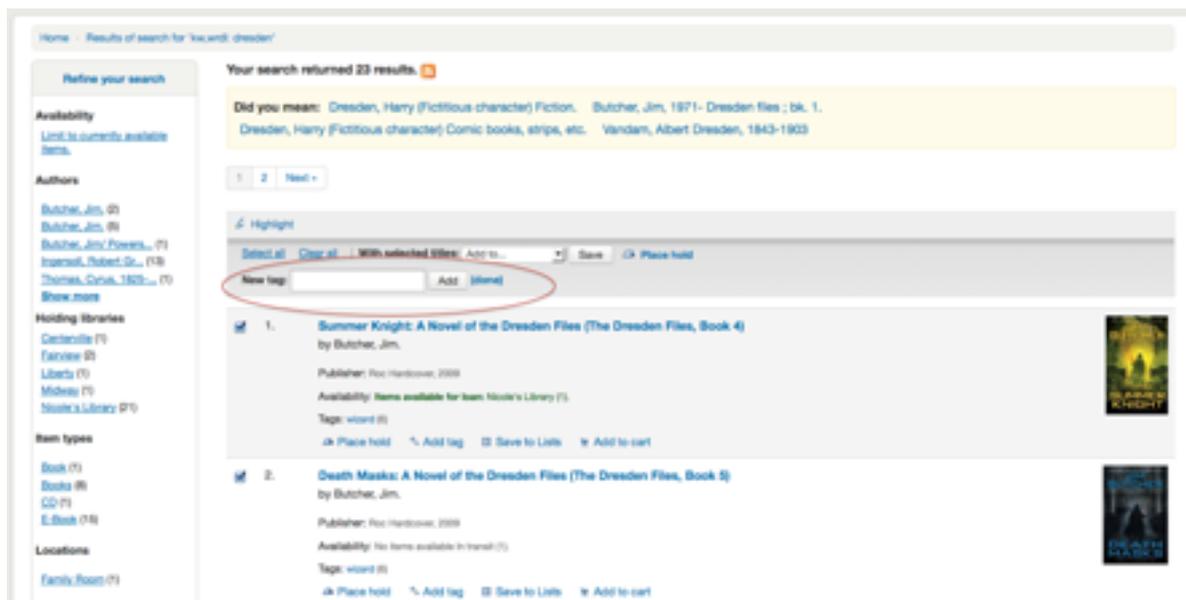
12.5.2. *Comments*

Patrons can leave comments in the OPAC if you have the *reviewson* preference set to allow this. Each bibliographic record has a comments tab below the bibliographic information.

If the patron is logged in they will see a link to add a comment to the item. Clicking this link will open a pop up window with a box for their comments.

Comments on *Summer knight :*

Note: Your comment must be approved by a librarian.

Submit and close this window   Cancel

Once the comment has been typed and the 'Submit' button clicked, the patron will see their comment as pending and other patrons will simply see that there are no comments on the item.

Once the comment is approved the patron will see the number of comments on the 'Comments' tab and their comment labeled amongst the other comments. If you have set your *ShowReviewerPhoto* preference to 'Show' then you'll see the patron's photo pulled from the *Libravatar*[2] library.

---

[2] https://www.libravatar.org

Other patrons will see the comment with the name of the patron who left the comment (unless you have set the *ShowReviewer* preference to not show patron names).

If you have your *OpacShowRecentComments* set to show then you'll see the approved comments on that page.
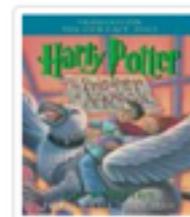
From this page patrons can subscribe to the recent comments using RSS if they would like.

12.5.3. *Zotero*

Zotero is a Firefox add on that allows for the saving and generating of a bibliography. Learn more about and download Zotero at *http://zotero.org*.

When on the search results in the Koha OPAC, if you have Zotero installed, you will see a folder icon in the address bar to the right of the URL. Clicking that folder will open up a list of titles on the page for you to pick from to add to Zotero.
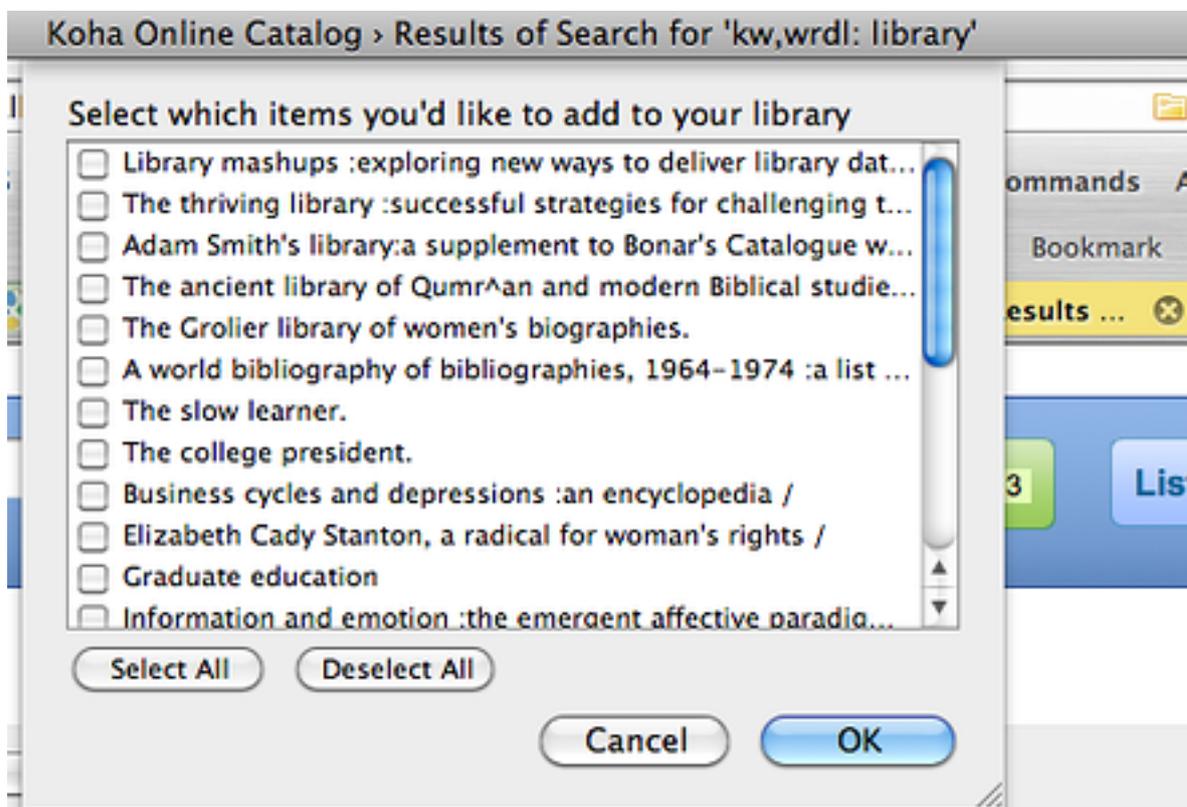
Select the titles you want to add to Zotero and then click the 'OK' button. This will add the title to Zotero. You can see the title by opening your Zotero library.
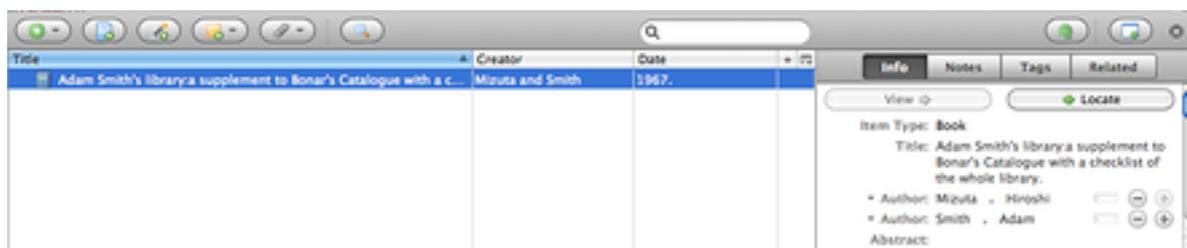
12.5.4. *Custom RSS Feeds*

Using misc/cronjobs/rss/rss.pl you can generate an RSS feed for any SQL query (for example a new acquisitions RSS feed). rss.pl is run on the command line to produce an RSS XML document.

The output should be placed in a directory accessible to the OPAC (or staff) web interface so that users can download the RSS feed.

An example of usage can be found at: misc/cronjobs/rss.pl lastAcquired.conf

Normally rss.pl should be run periodically (e.g., daily) to keep the feed up-to-date.

The configuration file (e.g., lastAcquired.conf) lists

- name of the template file to use

- path of output file

- SQL query

rss.pl runs the SQL query, then feeds the output of the query through the template to produce the output file.

> ⭐ **Important**
>
> To use custom RSS feeds you need to turn on the rss.pl cron job.

12.6. *OPAC Self Registration*

If you allow it, patrons can register for their own accounts via the OPAC. If you have the *PatronSelfRegistration* preference set to 'Allow' then patrons will see a link to register below the log in box on the right of the main OPAC page.

Log in to your account:

Login:

Password:

Log in

Don't have an account? Register here.

When the patron clicks the 'Register here' link they will be brough to a registration page. The options on the registration page can be conrolled by editing the *PatronSelfRegistrationBorrowerMandatoryField* and the *PatronSelfRegistrationBorrowerUnwantedField* preferences.

Library

Card number [   ]

Home library: [Centerville   ▼]

Identity

Surname: [   ] Required

First name: [   ] Required

Date of birth: [   ] Clear date

Other names: [   ]

Female: ○   Male: ○   N/A: ◉

Main address

Address: [   ] Required

Address 2: [   ]

City: [   ] Required

State: [   ] Required

Zip/Postal code: [   ] Required

Contact information

Primary phone: [   ] Required

Secondary phone: [   ]

Once the patron has confirmed submitted their registration they will either be sent an email to confirm their account (if you have the *PatronSelfRegistrationVerifyByEmail* preference to require this) or presented with their new username and password.

Registration Complete!

You have successfully registered your new account. To log in, use the following credentials:

Username: koha.library
Password: hpxFJcNcju

For your convenience, the login box on this page has been pre-filled with this data. Please log in and change your password.

Patrons registered in this way will not have a cardnumber until assigned one by the library, but will have access to all OPAC functionality immediately. For this reason it is recommended that you:

• set up a provisional *patron category* for self registered patrons (such as 'Self Registered) instead of using an existing patron category and set that value in the *PatronSelfRegistrationDefaultCategory* preference

• give this patron category minimal circulation privileges in the *Circulation and Fine Rules* (such as allowing a couple holds, but no check outs)

That way patrons will either have to come in to the library to verify their identity before given a cardnumber and the ability to check items out or the library will have to come up with internal policy on generating cardnumbers before providing them to self registered patrons. Once this is done the library can change the category to one that is more appropriate (be it an adult, resident, non resident, student, etc) and add a cardnumber/barcode.

12.7. *My Account*

From the OPAC patrons can log in and access their account if you have set the *opacuserlogin* preference to 'Allow'. Once logged in patrons are brought to their account summary. If you would like to get to your account in the OPAC, you can click on your name in the top right of any page in the OPAC.

12.7.1. *Resetting your password*

If you have the *OpacResetPassword* set to allow patrons to reset their password they can click 'Forgot your password?' link found under the log in box to reset their passwords.

Once clicked they will be presented with a form asking for their username and their email address (patrons must have an email address on file to reset their password).

The system will then email the patron instructions for resetting their password.

12.7.2. *My Summary*

From the 'my summary' tab, patrons will see all of the items they have checked out with the overdue items highlighted in red. If you have *OpacRenewalAllowed* set to 'Allow' then your patrons will be able to renew their books right from the OPAC. If you have HTML entered in the *OPACMySummaryHTML* preference then you will see that to the right of the 'Fines' column.

If your patrons would like to see the items barcodes on their list of checked out items you can set up a *patron attribute* with the value of SHOW_BCODE and *authorized value* of YES_NO.

Add patron attribute type

Patron attribute type code:	SHOW_BCOI
Description:	Show barcode on patron's check outs in OPAC
Repeatable:	☐ Check to let a patron record have multiple values of t
Unique identifier:	☐ If checked, attribute will be a unique identifier — if a '
Allow password:	☐ Check to make it possible to associate a password w
Display in OPAC:	☐ Check to display this attribute on a patron's details pa
Searchable:	☐ Check to make this attribute staff_searchable in the s
Authorized value category:	Authorized value category; if one i

BOR_NOTES
CCODE
DAMAGED
HINGS_AS
HINGS_C
HINGS_PF
HINGS_RD
HINGS_UT
LOC
LOST
MANUAL_INV
NOT_LOAN
OPAC_SUG
RESTRICTED
SUGGEST
WITHDRAWN
YES_NO

Save   Cancel

Then on the *patron's record set the value* for SHOW_BCODE to yes.

Modify Staff patron Nicole Engard

Additional attributes and identifiers

Type	Value	
DL (Driver's License)	PA1234567890	Clear
HBR (Home Branch)		Clear
SHOW_BCODE (Show Barcode in OPAC)	Yes ⇕	Clear

No
Yes

Save   Cancel

This will add a column to the check out summary in the OPAC that shows the patrons the barcodes of the items they have checked out.

If their guarantee has allowed it via *their privacy*, when the guarantor logs in they will see a tab labeled "Relatives' checkouts" on their summary tab.

Hello, Nicole Engard

Click here if you're not Nicole Engard

Checked out (18)	Relatives' checkouts	Overdue (18)	Fines (10.00)	Holds (1)

Title ⬍	Due ⬍	Barcode ⬍	Call no. ⬍	Relative ▲
Do Dead People Walk Their Dogs?: Questions You'd Ask a Medium If You Had the Chance.	01/29/2016	0061706086		Coda Engard

Clicking on the 'Overdue' tab will show only the items that are overdue.

Checked out (5)	Overdue (5)	Fines (54.04)	Holds (8)

Overdues (5 total)

	Title ▼	Barcode ⬍	Call no. ⬍	Due ⬍	Renew	Fines ⬍
	Using Moodle : Cole, Jason R.	100039	LB1028.68 .C65 2008	10/25/2013	Renew (3 of 4 renewals remaining)	Yes
	My sister's keeper : Picoult, Jodi,	19938313	PS3566.I372 M9 2005	11/04/2013	Renew (4 of 4 renewals remaining)	Yes

The 'Fines' tab will show just a total of what the patron owes. Clicking on the total will take them to the 'my fines' tab where they will see a complete breakdown of their fines and bills. If you don't charge fines at your library you can turn the display of these tabs off by setting the *OPACFinesTab* preference to 'Don't Allow.'

Checked out (5)	Overdue (5)	Fines (54.04)	Holds (8)

Fines and charges

Amount
You currently owe fines and charges amounting to: 54.04

Finally, clicking on the 'Holds' tab will show the patron the status of all of the items they have on hold.

Patrons can cancel or suspend (depending on the value of your *SuspendHoldsOpac* system preference) their own holds if they are not in transit or already waiting for them. When they click 'Suspend' they will be presented with the option to choose a date for their hold to resume.

They can also suspend all of their holds indefinitely or until a specific date if they choose by filling in the suspend options at the bottom of the page.

> **Note**
>
> If you have your *AutoResumeSuspendedHolds* preference set to "Don't allow" then you will not have the option to put an end date on the hold suspension

12.7.3. *Patron Flags*

If you have *flagged your patron's account [449]* they may see one of the following error messages at the top of their account.

- Card marked as lost

> • **Please note:** Your library card has been marked as lost or stolen. If this is an error, please take your card to the circulation desk at your local library and the error will be corrected.

- Patron address in question

> • **Please note:** According to our records, we don't have up-to-date **contact information** on file. Please contact your librarian, or use the **online update form** to submit current information (*Please note:* there may be a delay in restoring your account if you submit online)

-

> **Note**
>
> this error message will not include a link to the update form if you have *OPACPatronDetails* set to 'Don't allow'

- Patron marked restricted

> • **Please note:** Your account has been frozen. Usually the reason for freezing an account is old overdues or damage fees.If **your account page** shows your account to be clear, please consult a librarian.

12.7.4. *My Fines*

If your library charges fines the next tab on the left is 'my fines.' Opening this tab will show the patron an entire history of their accounting at the library.

If you are allowing patrons to pay their fines using PayPal with the *EnablePayPalOpacPayments* preference there will be checkboxes to the left of each fine with an outstanding amount.

Fines and charges

	Date	Description	Fine amount	Amount outstanding
	02/01/2016	Payment, thanks (Grass /)	-5.00	0.00
	02/01/2016	Payment, thanks (Prodigal summer :)	-5.00	0.00
☐	01/29/2016	Rental fee , Renewal of Rental Item Ya-Yas in bloom : 0060195347 (Ya-Yas in bloom :)	5.00	5.00
	01/29/2016	Rental fee , Renewal of Rental Item Prodigal summer : 0060199652 (Prodigal summer :)	5.00	0.00
☐	01/29/2016	Rental fee , Renewal of Rental Item Science fiction : 0060469412 (Science fiction :)	5.00	5.00
☐	01/29/2016	Rental fee , Renewal of Rental Item Panini, Bruschetta, Crostini: Sandwiches, Italian Style. 0060095725 (Panini, Bruschetta, Crostini: Sandwiches, Italian Style.)	5.00	5.00

At the bottom the patron will see the option to pay with PayPal for the items they have checked.

Pay selected fines and charges

Payment method

Make payment   Amount to pay: 10.00

After paying they will be presented with a confirmation

Payment applied: your payment of 10.00 has been applied to your account

Fines and charges

	Date	Description	Fine amount	Amount outstanding
	02/01/2016	Payment, thanks (Going Postal (Discworld).)	-5.00	0.00
	02/01/2016	Payment, thanks (Science fiction :)	-5.00	0.00
	02/01/2016	Payment, thanks (Grass /)	-5.00	0.00
	02/01/2016	Payment, thanks (Prodigal summer :)	-5.00	0.00
☐	01/29/2016	Rental fee , Renewal of Rental Item Ya-Yas in bloom : 0060195347 (Ya-Yas in bloom :)	5.00	5.00
	01/29/2016	Rental fee , Renewal of Rental Item Prodigal summer : 0060199652 (Prodigal summer :)	5.00	0.00
	01/29/2016	Rental fee , Renewal of Rental Item Science fiction : 0060469412 (Science fiction :)	5.00	0.00
☐	01/29/2016	Rental fee , Renewal of Rental Item Panini, Bruschetta, Crostini: Sandwiches, Italian Style. 0060095725 (Panini, Bruschetta, Crostini: Sandwiches, Italian Style.)	5.00	5.00
	01/29/2016	Rental fee , Renewal of Rental Item Going Postal (Discworld). 0060502932 (Going Postal (Discworld).)	5.00	0.00

And you will see that the fine was paid using PayPal on the staff side.

12.7.5. *My Details*

If you have your *OPACPatronDetails* preference set to 'Allow', your patrons will see a form filled in with their contacting information by clicking on the 'my personal details' tab. You can control what fields patrons see and can modify via the OPAC by setting the *PatronSelfRegistrationBorrowerMandatoryField PatronSelfRegistrationBorrowerUnwantedField* preferences.

Library

Card number   9876543457

Home library: Nicole's Library

Identity

Surname: Engard   Required

First name: Nicole   Required

Date of birth: [ ]   Clear date

Other names: nengard

Female: ⦿   **Male:** ○   **N/A:** ○

Main address

Address: 123 My Street   Required

Address 2:   [ ]

City: Austin   Required

State: TX   Required

Zip/Postal code: 78741   Required

Contact information

Primary phone: 555.111.2345   Required

Patrons can edit their details in this form and click 'Submit Changes' to have their edits sent to the library for review before their record is updated. Staff will see all patrons requesting modification to their record listed below the modules on the main dashboard along with anything else awaiting library attention.

If the *OPACPatronDetails* preference is set to 'Don't allow' then patrons will simply see their details and a message stating that they should contact the library for changes.

12.7.6. *My Tags*

If your library has *TagsEnabled* set to 'Allowed' then the next tab on the left will be 'my tags.' This tab will show patrons all of the tags in the system as a cloud and then all of the tags they have applied in a list format. From here patrons have the ability to remove tags that they have added if they want.

12.7.7. *Change My Password*

Next, if you have *OpacPasswordChange* set to 'Allow' the next tab will be 'change my password,' where patrons can change their password for logging into the OPAC. Patrons will be presented with a standard form asking them to enter their old password and then their new password twice.

12.7.8. *My Search History*

If you have your *EnableOpacSearchHistory* preference set to 'Allow' then your patrons can access their search history via the 'my search history' tab.

The search history is a record of all searches run by the patron. Clicking on any of the search phrases will re-run the search for the patron. The search history can be deleted by the patron at any time by clicking the 'Delete your search history' link found at the top of this tab or by clicking the little red 'x' next to the 'Search history' link at the top right of the OPAC.

12.7.9. *My Reading History*

Depending on your library's setting for *opacreadinghistory* your patrons may see the 'my reading history' tab next. This will show the patron their entire reading history unless they have asked the library to not keep that information via the 'my privacy' tab which will appear if you have the *OPACPrivacy* preference set to 'Allow.'

If you have HTML entered in the *OPACMySummaryHTML* preference then you will see that to the right of the 'Date' column.

12.7.10. *My Privacy*

The 'my privacy' tab will appear if you have both the *opacreadinghistory* and the *OPACPrivacy* preferences set to 'Allow.' This tab will allow the patrons to decide how the library keeps their circulation history data.

The patron can choose from three options:

* Forever: keep my reading history without limit. This is the option for users who want to keep track of what they are reading.

- Default: keep my reading history according to local laws. This is the default option : the library will keep your reading history for the duration permitted by local laws.

- Never: Delete my reading history immediately. This will delete all record of the item that was checked-out upon check-in.

Depending on the patron's suggestions the contents of the '*my reading history*' tab and the '*Circulation History*' tab in the staff client may change.

Regardless of the patron's choice they can delete their reading history in bulk at any time by clicking the 'Immediate deletion' button.

Immediate deletion

Whatever your privacy rule you choose, you can delete all your reading history immediately by clicking here. **BE CAREFUL.** Once you've confirmed the deletion, no one can retrieve the list!

Immediate deletion

Clicking this button will not delete items that are currently checked out, but will clear the patron's past reading history.

> **Important**
>
> In order for the patron to be able to delete their reading history you must have the *AnonymousPatron* preference set.

If you're allowing guarantees to grand permission to their guarantors to view their current checkouts with the *AllowPatronToSetCheckoutsVisibilityForGuarantor* preference they will see that option on this screen.

Please choose your privacy rule:

Default

Allow your guarantor to view your current checkouts?

No   Your guarantor is *Nicole Engard*

Save

When the guarantor logs in they will see a tab labeled "Relatives' checkouts" on their summary tab.

Hello, Nicole Engard

Click here if you're not Nicole Engard

	Checked out (18)	**Relatives' checkouts**	Overdue (18)	Fines (10.00)	Holds (1)

Title ⇕	Due ⇕	Barcode ⇕	Call no. ⇕	Relative ▲
Do Dead People Walk Their Dogs?: Questions You'd Ask a Medium If You Had the Chance.	01/29/2016	0061706086		Coda Engard

12.7.11. *My Purchase Suggestions*

If your library allows patrons to make purchase suggestions the next tab will show all suggestions that the patron made to the library and their statuses. To disable this tab and the suggestion functionality set the *suggestion* preference to 'Don't allow.'

Purchase suggestions

Search for: [   ]   Suggested by: [Anyone   ▾]   [Go]

⊞ New purchase suggestion

Select all   Clear all | Select suggestions to: ✕ Delete

	Summary ▲	Note ⇕	Suggested for ⇕	Managed by ⇕	Status ⇕
☐	**Computers in libraries.** - Meckler,		Nicole's Library		Requested
☐	**Learning from Libraries that Use WordPress** Kyle M. Jones and Polly-Alida Farrington , - 2012, - ALA		Nicole's Library	Engard , Nicole	Suggestion declined
☐	**Test** - CF		Nicole's Library	Engard , Nicole	Suggestion declined (useless)

[Delete selected]

If you have *OPACViewOthersSuggestions* set to 'Show' then patrons will be able to search suggestions from the top of this list.

12.7.12. *My Messaging*

If your library has the *EnhancedMessagingPreferences* and the *EnhancedMessagingPreference-sOPAC* preferences set to 'Allow' then your patrons will be able to choose which messages they receive from the library (with the exception of overdue notices which the library controls).

Your messaging settings

	Days in advance	Email	Digests only?	Do not notify
Advance notice	3	☑	☑	☐
Item checkout	-	☐	-	☐
Hold filled	-	☑	-	☐
Item due	-	☑	☑	☐
Item check-in	-	☐	-	☐

Submit changes   Cancel

If you use an outside driver for sending text messages set with the *SMSSendDriver* preference, you will see an additional column to receive these messages as SMS (or text messages) and a field for a cell (or SMS) number.

Your messaging settings

	Days in advance	SMS	Email	Digests only?	Do not notify
Advance notice	3	☐	☑	☑	☐
Item checkout	-	☑	☐	-	☐
Hold filled	-	☐	☑	-	☐
Item due	-	☐	☑	☑	☐
Item check-in	-	☑	☐	-	☐

SMS number: 555.555.5555

Submit changes   Cancel

If you are using the Email protocol for sending text messages set with the *SMSSendDriver* preference, you will see an additional column to receive these messages as SMS (or text messages), a field for a cell (or SMS) number, and a pull down listing *cellular providers entered in administration*.

If you are using the *Itiva Talking Tech* service you will see an additional column to receive these messages via Phone.

- These notices are:

  - Advanced notice : A notice in advance of the patron's items being due (The patron can choose the number of days in advance)

  - Item checkout : A notice that lists all the of the items the patron has just checked out and/or renewed, this is an electronic form of the checkout receipt

  - Hold filled : A notice when you have confirmed the hold is waiting for the patron

  - Item due : A notice on the day and item is due back at the library

  - Item check-in : A notice that lists all the of the items the patron has just checked in

Patrons can choose to receive their notices as a digest by checking the 'Digest only?' box along with the delivery method. A digest is a combination of all the messages of that type (so all items due in 3 days in one email) in to one email instead of multiple emails for each alert.

> ⭐ **Important**
>
> You must choose a delivery method (SMS or Email or Phone) along with 'Digest only?' if you would like to receive a digest of the messages.

12.7.13. *My Lists*

Finally, if your library has the *virtualshelves* set to 'Allow' then the last tab will by 'my lists.' From here your patrons can review public lists and create or edit their own private lists.

12.7.14. *Ask for a Discharge*

If you have enabled the *useDischarge* preference then patrons will be able to request a discharge via the OPAC.
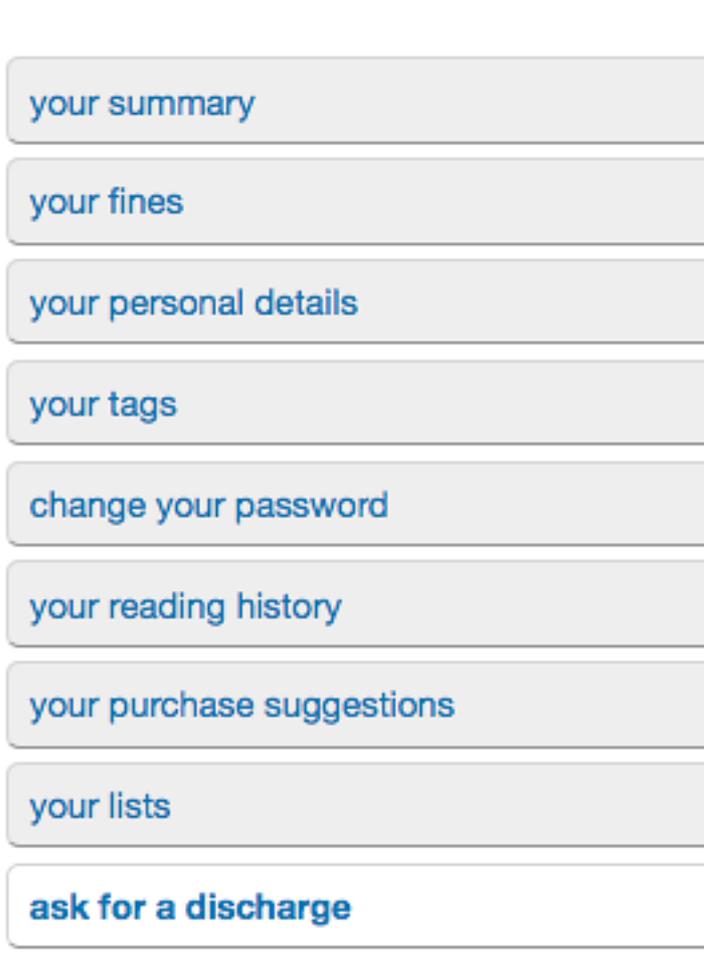
From here patrons can request a discharge

Discharge

What is a discharge?

This document certifies that you have returned all borrowed items. It is sometimes asked during a file transfer from a school to another. The discharge is sent by us to your school. You will also find it available on your reader account.

Warning: This request is only valid if you are in good standing with the library. Once the application is made, you can not borrow library materials.

Ask for a discharge

And will receive confirmation of their request.

Discharge

Your discharge request has been sent. Your discharge will be available on this page within a few days.

12.8. *Purchase Suggestions*

If your library has the *suggestion* preference set to 'Allow' then patrons will have the option to make purchase suggestions in several areas in the OPAC.

If you are allowing everyone to see the purchase suggestions made by others with the *OPACViewOthersSuggestions* preference, then there will be a link at the top of your OPAC under the search box.

There will be a link when the patron finds nothing for their search.
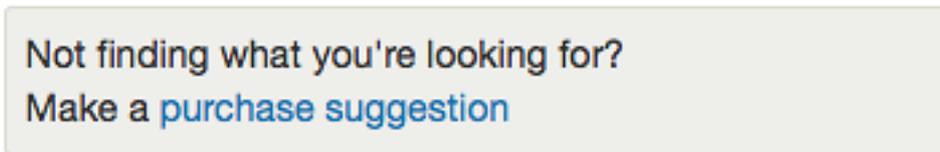
And there will be a link on the patron's *My Purchase Suggestions* tab.
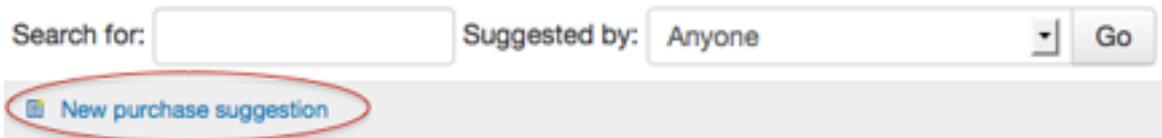
Clicking any one of these links will open the purchase suggestion form.

- From the form on the 'Title' is required by the library.

- The Item type list can be edited by editing the SUGGEST_FORMAT *authorized value*.

- If you would like the 'Reason for suggestion' menu shown in the screenshot above to appear on your suggestions list you need to add an *authorized value* category titled 'OPAC_SUG' and include reasons as values in that list.

- If you would like the patron to be able to choose which branch they are making a suggestion for you need to set the *AllowPurchaseSuggestionBranchChoice* preference to 'Allow'

Once the form is submitted the data will be saved to the *Acquisitions* module for the librarians to manage.

Searching

13.1. *Advanced Search Prefixes*

The following prefixes can be added to search terms in the keyword search box to limit items returned

- ti: title search

  - ex. ti:hamlet

- su: subject search

  - ex. su:cooking

- pb: publisher search

  - ex. pb:penguin

- au: author search

  - ex. au:rowling

- su-geo: geographic subjects

  - ex. su-geo:wales and kw:description and kw:travel

- bc: barcode

  - ex. bc:502326000912

- lex: lexile

  - levels lex:510

13.2. *Guide to Searching*

Becky Bell
Edited by Nicole C. Engard
October 2008
This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

13.2.1. *Indexing and Searching Description*

Koha's databases are indexed by the Zebra open-source software. The overview to the documentation describes Zebra as:

> "...Zebra is a high-performance, general-purpose structured text indexing and retrieval engine. It reads records in a variety of input formats (eg. email, XML, MARC) and provides access to them through a powerful combination of Boolean search expressions and relevance-ranked free-text queries.

> Zebra supports large databases (tens of millions of records, tens of gigabytes of da-
> ta). It allows safe, incremental database updates on live systems. Because Zebra sup-
> ports the industry-standard information retrieval protocol, Z39.50, you can search Ze-
> bra databases using an enormous variety of programs and toolkits, both commercial
> and free, which understands this protocol..." Zebra - User's Guide and Reference, p.
> 1, *http://www.indexdata.dk/zebra/doc/zebra.pdf*

This brief guide will explain a chart that shows a sample of how a MARC21 database can be config-
ured, as well as a brief introductory searching guide. The indexing fields described in this document
relate to the bibliographic data and does not address authority database indexing.

> ### Note
>
> The indexing described in this document is the set used by SouthEastern University. Your local
> indexing may vary.

13.2.2. *Indexing Configuration*

There are three configuration files that Koha uses while indexing.

The first configuration file (etc/zebradb/biblios/etc/bib1.att) contains the Z39.50 bib-1 attribute list, plus
the Koha local use attributes for Biblio Indexes, Items Index, and Fixed Fields and other special index-
es. The Z39.50 Bib-1 profile is made up of several different types of attributes: Use, Relation, Posi-
tion, Structure, Truncation, and Completeness. The bib-1 'Use' attribute is represented on the chart;
the other attributes are used primarily when doing searches. While there are over 150+ use attrib-
utes that could be used to define your indexing set, it's unlikely that you will choose to use them all.
The attributes you elect to use are those that become the indexing rules for your database. The oth-
er five attribute sets define the various ways that a search can be further defined, and will not specif-
ically be addressed in this document. For a complete list of the standard Bib-1 attributes, go to *http://
www.loc.gov/z3950/agency/defns/bib1.html*.

The second file is etc/zebradb/marc_defs/[marc21|unimarc]/biblios/record.abs if you use grs1 indexing
[the default until 3.16] or etc/zebradb/marc_defs/[marc21|unimarc]/biblios/biblio-koha-indexdefs.xml if
you use dom indexing [the default from 3.18]. Either files contains the abstract syntax which maps the
MARC21 tags to the set of Use Attributes you choose to use. To be more precise the xml file to be ac-
tivate needs to be transform into biblio-zebra-indexdefs.xsl, read the head of biblio-zebra-indexdefs.xsl
to know more about this topic. The rules established in this file provides a passable Bath level 0 and 1
service, which includes author, title, subject, keyword and exact services such as standard identifiers
(LCCN, ISBN, ISSN, etc.)

The third file (etc/zebradb/ccl.properties) is the Common Command Language (CCL) field mappings.
This file combines the bib-1 attribute set file and the abstract file and adds the qualifiers, usually
known as index names. The qualifiers, or indexes, for this database are: pn, cpn, cfn, ti, se, ut, nb, ns,
sn, lcn, callnum, su, su-to, su-geo, su-ut, yr,pubdate, acqdate, ln, pl, ab, nt, rtype, mc-rtype, mus, au,
su-na, kw, pb, ctype, and an.

The *Koha Indexing Chart* summarizes the contents of all three of these files in a more readable format.
The first two columns labeled Z39.50 attribute and Z39.50 name matches the Z39.50 bib-1 attributes
file. The third column labeled MARC tags indexed is where you find which MARC tags are mapped to
an attribute. The fourth column labeled Qualifiers identifies the search abbreviations used in the inter-
nal CCL query. The following description provides a definition for the word 'qualifiers'.

Qualifiers are used to direct the search to a particular searchable index, such as title (ti) and author indexes (au). The CCL standard itself doesn't specify a particular set of qualifiers, but it does suggest a few shorthand notations. You can customize the CCL parser to support a particular set of qualifiers to reflect the current target profile. Traditionally, a qualifier would map to a particular use-attribute within the BIB-1attribute set. It is also possible to set other attributes, such as the structure attribute.

In the MARC tags indexed column, there are some conventions used that have specific meanings. They are:

- A three digit tag (100) means that all subfields in the tag can be used in a search query. So, if you enter a search for 'Jackson' as an author, you will retrieve records where Jackson could be the last name or the first name.

- A three digit tag that has a '$' followed by a letter (600$a) means that a search query will only search the 'a' subfield.

- A three digit tag that is followed by a ':' and a letter (240:w) means that a search query can be further qualified. The letter following the ':' identifies how to conduct the search. The most common values you'll see are 'w' (word), 'p' (phrase), 's' (sort), and 'n' (numeric).

The contents of the MARC tags, subfields, and/or fixed field elements that are listed in this chart are all indexed. You'll see that every attribute line is not mapped to a specific qualifier (index)-LC card number, line 9 is one example. However, every indexed word (a string of characters preceded and succeeded by a space) can be searched using a keyword (kw) search. So, although an LC card number specific index doesn't exist, you can still search by the LCCN since tag 010 is assigned to the LC-card-number attribute. To verify this, enter 72180055 in the persistent search box. You should retrieve The gods themselves, by Isaac Asimov.

Examples of fixed field elements indexing can be seen on the chart between Attribute 8822 and Attribute 8703. These attributes are most commonly used for limiting. The fixed field attributes currently represent the BK codes. Other format codes, if needed, could be defined.

13.2.3. *Basic Searching*

The search box that library staff and library patrons will see most often is the persistent search box at the top of the page. Koha interprets the searches as keyword searches.

To start a search, you enter a word or multiple words in the search box. When a single word is entered, a keyword search is performed. You can check this out by typing one word into the form and note the number of results located. Then, repeat the search with a minor change. In front of the search word, type 'kw=' followed by the same search term. The results will be identical.

When you have more than one word in the search box, Koha will still do a keyword search, but a bit differently. Each word will be searched on its own, then the Boolean connector 'and' will narrow your search to those items with all words contained in matching records.

Suppose you want to find material about how libraries are using mashups. You'll select the major words and enter them into the persistent search box.

Enter search keywords:

library mashups | Submit

Check Out   Check In   **Search the Catalog**

The response to this search is:

4 result(s) found for 'library mashups' in Nicole's Library Catalog.   Sort By: Relevance

The order of the words does not affect the retrieval results, so you could also enter the search as "mashups library". The response to this search is results

4 result(s) found for 'mashups library' in Nicole's Library Catalog.

Too many words in the search box will find very few matches, as the following example illustrates:

No results found

No results match your search for 'library mashups mashing programming' in Nicole's Library Catalog.   z39.50 Search

13.2.4. *Advanced Searching*

When you can't find the most appropriate material with a general search, you can move to the Advanced Search page by clicking on the Search option on the persistent toolbar.

Circulation   Patrons   Search   🛒 Cart   More ▾

The Advanced Search page offers many ways to limit the results of your search. You can search using the Boolean operators AND, OR, and NOT; limit by item type; limit by year and language; limit by subtypes audience, content, format, or additional content types; by location and by availability.

The first limiting section on the Advanced Search page provides a quick and simple way to use the Boolean operators in your search. Note that this display depends on a system preference setting. This option can be found on the Administration > System Preferences > Searching page. The option called *expandedSearchOption* must be set to 'show' to see the following display.

Search for

Keyword			Scan indexes ☐
and	Keyword		
and	Keyword		[+]

In this section you can choose among the many indexes by clicking on the arrow in the first box. The blank box that follows is where you enter your first search term or terms. On the second line, you can choose the Boolean operator you want to use in your search. The options are 'and', 'or', and 'not'. Then, you would again choose the index to search, followed by the second term or terms. If you have more concepts you want to include in your search, you can click the [+] to add another line for your search.

A sample search is shown next, followed by its results:

When you use the Boolean operators to broaden or narrow a search, remember the action of each operator. The 'and' operator narrows the results you'll retrieve because the search will retrieve the records that include all your search terms. The 'or' operator expands the results because the search will look for occurrences of all of your search terms. The 'not' operator excludes records with the term that follows the operator.

Note: If you leave this *expandedSearchOption* set to 'don't show', this is the display you will see:

The Advanced Search page then shows the multiple kinds of limits that can be applied to your search results. Either check a box or select from the drop down menus to narrow your search. You will type the year, year range, or a 'greater than (>)' or 'less than (<)' year.

Finally, you can choose how the results will be sorted. The pre-defined sort options are in the final area of the Advanced Search screen.

The default sort is by relevance, although you can choose to sort by author, by title, by call number, by dates, or by popularity (which uses the information on total issues found in the items table). If you would prefer a different default sort, you can set *defaultSortField* to one of the other choices in Administration > System Preferences > Searching.

13.2.5. *Item Searching*

If you are looking for specific items you can use the item search engine in the staff client to find them.

• *Get there:* Search > Go to item search

At the top of the advanced search page in the staff client you will see a link to 'Go to item search'

Clicking that link will open up a item specific search engine.

Item search

Go to advanced search

Using the search form that is presented you can find a list of specific items that can be output to the screen or to a CSV file. If your results are printed to the screen you will have the option to narrow your search further using filters at the top.

13.2.6. *Common Command Language Searching*

Koha uses the Common Command Language (CCL) (ISO 8777) as its internal search protocol. Searches initiated in the graphical interface use this protocol as well, although the searcher doesn't know which indexes, operators and limiters are available and being used to conduct their search. The searcher can use the Advanced Search when more precise results set are desired and where the search indexes are somewhat known. However, some library users and many library staff prefer using a command based structure. This part of the document will present and explain the use of the Koha command based structure. The indexes, operators, and limiters used are identical to those used in the graphical interface.

13.2.6.1. *Indexes*

The CCL standard itself doesn't specify a particular set of qualifiers (indexes), but it does suggest a few short-hand notations such as 'ti', 'au', and 'su'. Koha has a default set of indexes; it's possible to customize that set by adding needed indexes based on local requirements. A qualifier (index) maps to a particular use-attribute within the Z39.50 BIB-1 attribute set. The complete Z39.50 Bib-1 Attribute can be viewed at *http://www.loc.gov/z3950/agency/defns/bib1.html*.

The standard Koha set of indexes is a fairly common example of MARC21 indexing rules. The indexes that are defined in Koha are indexes typically used by other integrated library systems. The defined Z39.50 Bib-1 Attribute mapped to the indexes include:

Table 13.1. Attributes

Bib-1 Attribute	Qualifier (index)
Personal-name	pn
Corporate-name	cpn
Conference-name	cfn
Title	ti
Title-series	se
Title-uniform	ut
ISBN	nb
ISSN	ns
Local number	sn
Local-classification	lcn and callnum
Subject	su, su-to, su-geo, su-ut

Bib-1 Attribute	Qualifier (index)
Pubdate	yr,pubdate
Date-of-Acquisition	acqdate
Language	ln
Place-of-publication	pl
Abstract	ab
Notes	nt
Record-type	rtype, mc-rtype, mus
Author	au, aut
Subject-person-name	su-na
Any (keyword)	kw
Publisher	pb
Content-type	ctype
Koha-Auth-Number	an
Author-personal-bibliography	aub
Author-in-order	auo

Refer to the *Koha Indexing Chart* for the MARC21 tags mapped to each Bib-1 Attribute and index combination.

13.2.6.1.1. *Audience Examples*

- aud:a Preschool

- aud:b Primary

- aud:c Pre-Adolescent

- aud:d Adolescent

- aud:e Adult

- aud:f Specialized

- aud:g General

- aud:j Juvenile

13.2.6.1.2. *Contents Examples*

- fic:1 Fiction

- fic:0 Non Fiction

- bio:b Biography

- mus:j Musical recording

- mus:I Non musical record

13.2.6.2. *Search Syntax*

In the persistent search box, single words generally retrieve large sets. To narrow a search, you can use multiple words. Koha automatically uses the 'and' Boolean operator to create a set of records matching your input. When you want to narrow the search to an author or a title or a subject or some other specific field or use a Boolean operator, there isn't an obvious way to accomplish that specificity. The library user can, of course, go to the Advanced Search page; however, if you know how to construct a CCL search, you can achieve more specificity while using the persistent search box on any page.

There is a specific order to the CCL search syntax. Although it can be used for simple searches, it is an especially effective way to perform complex searches, as it affords you a great deal of control over your search results. To construct a CCL search, first enter a desired index code, then an equal sign, followed by your search word(s). Following are examples of simple CCL searches.

- ti=principles of accounting

- au=brown joseph

- su=poetry

- su-na=Shakespeare

- kw=marlin

You can refine your search by combining search terms with Boolean operators 'and', 'or', or 'not'. Following are examples of searches using Boolean operators.

- ti=principles of accounting and au=brown joseph

- su=poetry not su-na=Shakespeare

- kw=communication and su=debate

You can also choose to search for things that start with a character or series of characters

- ti,first-in-subfield=C (will show you all titles that start with the letter 'C')

Other string location searches can be performed with the following keywords:

- rtrn : right truncation

- ltrn : left truncation

- lrtrn : left and right truncation

- st-date : type date

- st-numeric : type number (integer)

- ext : exact search on whole subfield (does not work with icu)

- phr : search on phrase anywhere in the subfield

- startswithnt : subfield starts with

Using specific indexes and Boolean operators are not the only way a search can be refined. You can also refine your search as a phrase when looking for a title, author, or subject. The syntax for this search is *index,phr=search words*.

To illustrate the results of various search types, a search was done for the words 'supreme court'. The results illustrate that the search index and the word order make a difference in search results. Only the results count and the search itself is in these examples. The search executed will always be between the single quotes.

768 result(s) found for 'supreme court'.

768 result(s) found for 'court supreme'.

112 result(s) found for 'au=supreme court'.

496 result(s) found for 'cpn=supreme court'.

No results found

No results match your search for **'cfn=supreme court'**.

430 result(s) found for 'ti=supreme court'.

430 result(s) found for 'ti,phr=supreme court'.

435 result(s) found for 'ti=supreme and ti=court'.

401 result(s) found for 'su=supreme court'.

You can also choose to use limiters in your search query. Some common limiters include dates, languages, record types, and item types. In the Advance Search, you can either click a box or key in data to limit your search. You can also apply the same limits with CCL by using the syntax in the following examples. In all

By Date: su=supreme court and yr,st-numeric=>2000

36 result(s) found for 'su=supreme court and yr,st-numeric>2000'.

When you limit by date, you can use the '>' (greater than), '<' (less than), '=' (equal), or 'yyyy-yyyy' (range) symbols.

By Item Type: su=nursing and itype:BK

17 result(s) found for 'su=nursing and mc-itype:BK' in Steelman Library, Southeastern University Catalog.

Each library will have a different set of item types defined in their circulation configuration. When you set up item types, you define a code and a name for each one. The name will appear on the Advance Search page. The code you assigned is used as a CCL search limit, formatted as 'itype:x', where 'x' is the assigned code. The initial set of item types in Koha will usually be edited to reflect your collections, so your item type limiters may be different than the initial ones. The initial item type limiters follow.

• itype:BKS Books, Booklets, Workbooks

- itype:SR Audio Cassettes, CDs

- itype:IR Binders

- itype:CF CD-ROMs, DVD-ROMs, General Online Resources

- itype:VR DVDs, VHS

- itype:KT Kit

- itype:AR Models

- itype:SER Serials

By format: su=supreme court not l-format:sr

401 result(s) found for 'su=supreme court not l-format:sr'.

The format limiters are derived from a combination of LDR, 006 and 007 positions. The formats that are currently defined are the following.

- l-format:ta Regular print

- l-format:tb Large print

- l-format:fk Braille

- l-format:sd CD audio

- l-format:ss Cassette recording

- l-format:vf VHS tape

- l-format:vd DVD video

- l-format:co CD software

- l-format:cr Website

By content type: su=supreme court not ctype:l

396 result(s) found for 'su=supreme court not ctype:l'.

The content types are taken from the 008 MARC tag, positions 24-27.

There are two other limiter types that are not described in this document. They are: Audience and Content. The only difference in the syntax of the CCL is the actual limiter. They are reproduced here just in case you would like to use these limiters.

13.3. *Koha Search Indexes*

By default, not all fields are indexed in the Zebra search engine, but many are. Below are the MARC21 fields that are indexed in Zebra.

Table 13.2. Indexes

Field	Description
Leader/06	Record-type, rtype

Field	Description
Leader/07	Bib-level
Leader/06-07	Material-type
001	Control-number
005	Date/time-last-modified, dtlm, date-time-last-modified
007	Microform-generation:n:range(data,11,1), Material-type,ff7-00:w:range(data,0,1), ff7-01:w:range(data,1,1), ff7-02:w:range(data,2,1), ff7-01-02:w:range(data,0,2)
008	date-entered-on-file:n:range(data,0,5), date-entered-on-file:s:range(data,0,5), pubdate:w:range(data,7,4), pubdate:n:range(data,7,4), pubdate:y:range(data,7,4), pubdate:s:range(data,7,4), pl:w:range(data,15,3), ta:w:range(data,22,1), ff8-23:w:range(data,23,1), ff8-29:w:range(data,29,1), lf:w:range(data,33,1), bio:w:range(data,34,1), ln:n:range(data,35,3), ctype:w:range(data,24,4), Record-source:w:range(data,39,0)
010	LC-card-number, Identifier-standard
011	LC-card-number, Identifier-standard
015	BNB-card-number, BGF-number, Number-db, Number-natl-biblio, Identifier-standard
017	Number-legal-deposit, Identifier-standard
018	Identifier-standard
020$a	ISBN:w, Identifier-standard:w
020	Identifier-standard
022$a	ISSN:w, Identifier-standard:w
022	Identifier-standard
023	Identifier-standard
024$a	Identifier-other
024	Identifier-standard
025	Identifier-standard
027	Report-number, Identifier-standard
028	Number-music-publisher, Identifier-standard
030	CODEN, Identifier-standard
034	Map-scale
037	Identifier-standard, Stock-number
040	Code-institution, Record-source
041$a	ln-audio
041$h	language-original

Field	Description
041$j	In-subtitle
041	In
043	Code-geographic
050$b	LC-call-number:w, LC-call-number:p, LC-call-number:s
050	LC-call-number:w, LC-call-number:p, LC-call-number:s
052	Geographic-class
060	NLM-call-number
070	NAL-call-number
080	UDC-classification
082	Dewey-classification:w, Dewey-classification:s
086	Number-govt-pub
100$9	Cross-Reference:w, Koha-Auth-Number
100$a	Author,Author:p, Author:s, Editor, Author-personal-bibliography, Author-personal-bibliography:p, Author-personal-bibliography:s
100	Author, Author-title, Author-name-personal, Name, Name-and-title, Personal-name
110$9	Koha-Auth-Number
110	Author, Author-title, Author-name-corporate, Name, Name-and-title, Corporate-name
111$9	Koha-Auth-Number
111	Author, Author-title, Author-name-corporate, Name, Name-and-title, Conference-name
130$n	Thematic-number
130$r	Music-key
130$9	Koha-Auth-Number
130	Title, Title-uniform
210	Title, Title-abbreviated
211	Title, Title-abbreviated
212	Title, Title-other-variant
214	Title, Title-expanded
222	Title, Title-key
240$r	Music-key
240$n	Thematic-number
240	Title:w, Title:p, Title-uniform
243$n	Thematic-number
243$r	Music-key
243	Title:w, Title:p, Title-collective

Field	Description
245$a	Title-cover:w, Title-cover:p, Title-cover:s, Title:w, Title:p, Title:s
245$c	Author, Author-in-order:w, Author-in-order:p, Author-in-order:s
245$9	Cross-Reference:w, Koha-Auth-Number
245	Title:w, Title:p
246	Title, Title:p, Title-abbreviated, Title-expanded, Title-former
247	Title, Title:p, Title-former, Title-other-variant, Related-periodical
260$a	pl:w, pl:p
260$b	Publisher:w, Publisher:p
260$c	copydate, copydate:s
260	Provider, pl
264	Provider
300	Extent:w, Extent:p
400$a	Name-and-title
400$t	Author-title, Name-and-title, Title, Title-series
400$9	Koha-Auth-Number
400	Author, Author-name-personal, Name, Personal-name
410	Author, Corporate-name
410$a	Name-and-title
410$t	Author-title, Title, Title-series
410$9	Koha-Auth-Number
410	Author-name-corporate, Name
411	Author, Conference-name
411$a	Name-and-title
411$t	Author-title, Title-series
411	Author-name-corporate, Name
440$a	Title-series:w, Title-series:p
440$9	Koha-Auth-Number
440	Title-series:w, Title-series:p, Title, Title-series
490$a	Title-series:w, Title-series:p
490	Title, Title-series
490$9	Koha-Auth-Number
500	Note:w, Note:p
502	Material-type
505$r	Author
505$t	Title

Field	Description
505	Note:w, Note:p
510	Indexed-by
520	Abstract:w, Abstract:p
521$a	lex:n
526$c	arl, arl:n
526$d	arp, arp:n
590	Note:w, Note:p
600$a	Name-and-title, Name, Personal-name, Subject-name-personal, Subject
600$t	Name-and-title, Title, Subject
600$9	Koha-Auth-Number
600	Name, Personal-name, Subject-name-personal, Subject
610$a	Name-and-title
610$t	Name-and-title, Title
610$9	Koha-Auth-Number
610	Name, Subject, Corporate-name
611	Conference-name
611$a	Name-and-title
611$t	Name-and-title, Title
611$9	Koha-Auth-Number
611	Name, Subject
630$n	Thematic-number
630$r	Music-key
630$9	Koha-Auth-Number
630	Subject
650$9	Koha-Auth-Number
650	Subject, Subject:p
651$9	Koha-Auth-Number
651	Name-geographic, Subject,Subject:p
652$9	Koha-Auth-Number
653$9	Koha-Auth-Number
653	Subject, Subject:p
654$9	Koha-Auth-Number
654	Subject
655$9	Koha-Auth-Number
655	Subject
656$9	Koha-Auth-Number
656	Subject

Field	Description
657$9	Koha-Auth-Number
657	Subject
690$9	Koha-Auth-Number
690	Subject, Subject:p
700$9	Cross-Reference, Koha-Auth-Number
700$a	Author, Author:p
700$n	Thematic-number
700$r	Music-key
700$t	Author-title, Name-and-title, Title, Title-uniform
700	Author, Author-name-corporate, Author-name-personal, Name, Editor, Personal-name
710	Author, Corporate-name
710$t	Author-title, Name-and-title, Title, Title-uniform
710$a	Name-and-title
710$9	Koha-Auth-Number
710	Author, Name
711$a	Name-and-title
711$t	Author-title, Title, Title-uniform
711$9	Koha-Auth-Number
711	Author-name-corporate, Name, Conference-name
730$n	Thematic-number
730$r	Music-key
730$9	Koha-Auth-Number
730	Title, Title-uniform
740	Title, Title-other-variant
773$t	Host-item
780$t	Title
780$w	Record-control-number
780	Title, Title-former, Related-periodical
785$w	Record-control-number
785	Related-periodical
787$w	Record-control-number
800$a	Name-and-title
800$t	Author-title, Name-and-title, Title, Title-series
800$9	Koha-Auth-Number
800	Author, Author-name-personal, Name, Personal-name
810$a	Name-and-title

Field	Description
810$t	Author-title, Name-and-title, Title, Title-series
810$9	Koha-Auth-Number
810	Author, Corporate-name, Author-name-corporate, Name
811$a	Name-and-title
811$9	Koha-Auth-Number
811$t	Author-title, Name-and-title, Title, Title-series
811	Author, Author-name-corporate, Name, Conference-name
830$9	Koha-Auth-Number
830	Title, Title-series
840	Title, Title-series
942$0	totalissues:n, totalissues:s
942$2	cn-bib-source
942$6	cn-bib-sort:n, cn-bib-sort:s
942$c	itemtype:w
942$n	Suppress:w, Suppress:n
942$h	cn-class
942$i	cn-item
942$k	cn-prefix
942$m	cn-suffix
952$0	withdrawn:n, withdrawn:w
952$1	lost, lost:n
952$2	classification-source
952$3	materials-specified
952$4	damaged:n, damaged:w
952$5	restricted:n, restricted:w
952$6	cn-sort:n, cn-sort:s
952$7	notforloan:n, notforloan:w
952$8	ccode
952$9	itemnumber:n, itemnumber:s
952$a	homebranch
952$b	holdingbranch
952$c	location
952$d	Date-of-acquisition, Date-of-acquisition:d, Date-of-acquisition:s
952$e	acqsource
952$f	coded-location-qualifier
952$g	price

Field	Description
952$j	stack:n, stack:w
952$l	issues:n, issues:w, issues:s
952$m	renewals:n, renewals:w
952$n	reserves:n, reserves:w
952$o	Local-classification:w, Local-classification:p, Local-classification:s
952$p	barcode, barcode:n
952$q	onloan:n, onloan:w
952$r	datelastseen
952$s	datelastborrowed
952$t	copynumber
952$u	uri:u
952$v	replacementprice
952$w	replacementpricedate
952$y	itype:w
952$z	Note:w, Note:p
999$c	Local-Number:n, Local-Number:w, Local-Number:s
999$d	biblioitemnumber:n, biblioitemnumber:w, biblioitemnumber:s

Plugin System

Koha's Plugin System allows for you to add additional tools and reports to Koha that are specific to your library. Plugins are installed by uploading KPZ (Koha Plugin Zip) packages. A KPZ file is just a zip file containing the perl files, template files, and any other files necessary to make the plugin work.

The plugin system needs to be turned on by a system administrator.

14.1. *Set up*

To set up the Koha plugin system you must first make some changes to your install.

- Change <enable_plugins>0</enable_plugins> to <enable_plugins>1</enable_plugins> in your koha-conf.xml file

- Restart your webserver

Once set up is complete you will need to alter your *UseKohaPlugins* system preference. On the Tools page you will see the Tools Plugins and on the Reports page you will see the Reports Plugins.

Search History

If you have your *EnableSearchHistory* preference set to keep your search history then you can access this information by clicking on your username in the top right of the staff client and choosing 'Search history'.
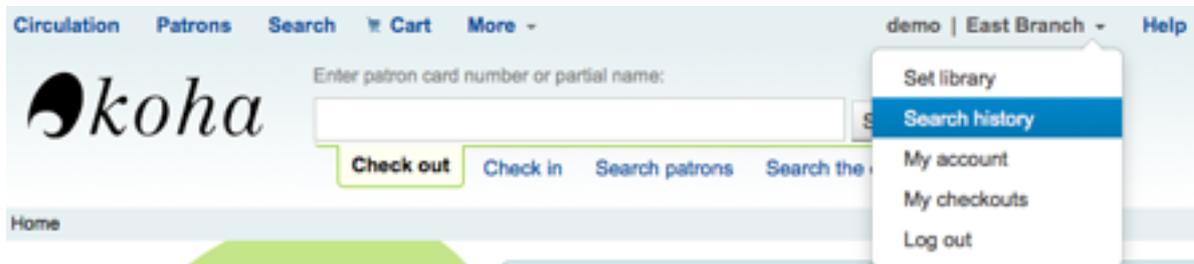
From this page you will see your bibliographic search history

And your authority search history.

Search history

Catalog | **Authority**

Current session

Delete your current authority search history

Showing 1 to 2 of 2 Show 20 entries « Previous Next » Search:

Date	Search	Results
07/31/2014 11:26	tepper	6
07/31/2014 11:26	engard	3

Showing 1 to 2 of 2 « Previous Next »

About Koha

The 'About Koha' area will give you important server information as well as general information about Koha.

- *Get there:* More > About Koha

16.1. *Server Information*

Under the 'Server Information' tab you will find information about the Koha version and the machine you have installed Koha on. This information is very important for debugging problems. When reporting issues to your support provider or to the various other support avenues (mailing lists, chat room, etc), it's always good to give the information from this screen.

16.2. *Perl Modules*

In order to take advantage of all of the functionalities of Koha, you will need to keep your Perl modules up to date. The 'Perl Modules' tab will show you all of the modules required by Koha, the version you have installed and whether you need to upgrade certain modules.

Items listed in bold are required by Koha, items highlighed in red are missing completely and items highlighted in yellow simply need to be upgraded.

16.3. *System Information*

This tab will provide you with warnings if you are using system preferences that have since been deprecated or system preferences that you have set without other required preferences

Implementation Checklist

The following guide will walk you through the areas of Koha you need to look at in order to prepare to start using the system.

17.1. *Data Migration*

Before you can start using Koha you'll need to have some data. This can be done by entering it all by hand, but most people already have their data in electronic format of some sort and just need to reformat it a bit for importing into Koha.

- Create a list of libraries and enter their info and codes into *Libraries & Groups*

- Define your list of *Item Types*

- Define your patron categories and enter the categories and their codes into *Patron Categories*

- Enter any additional patron information fields you use in your library in the *Patron Attributes*

  - Requires that you first set the *ExtendedPatronAttributes* system preference if you have custom fields

- Define all of your *Authorized Values*

  - *Collection codes*

  - *Shelving locations*

  - Item statuses (*lost*, *not for loan*, *damaged*, *withdrawn*)

  - Plus any others that are needed in your library

- Optionally define *City/State/Postal Code* combos

- *Map your bibliographic data* from your legacy system to Koha fields and migrate (remembering to use the collection, shelving, item type and library codes you entered in the above setting areas)

- *Map your patron data* from your legacy system to the Koha fields and migrate (remembering to use the patron and library codes you defined above)

- Test your migrated data to be sure that everything is as you expect it to be, some things to test include:

  - Check some of your titles with diacritics and make sure that they migrated properly.

  - Check titles in a series and make sure that series information migrated properly.

  - Make sure that your patrons have their contact information in the right fields.

  - If your serials data was migrated search for these records in the catalog and confirm that they look right.

  - If your serials data was migrated search for these records in the serials module and confirm that they look right.

  - Check marc records to verify a variety of items are cataloged correctly

  - Check cataloging process to see if all necessary fields are available

- If fines are migrated, check to see that they are applied correctly

- If holds are migrated, check to see they are accurate in catalog and patron record

17.2. *Admin Configuration*

Most of these preferences won't need to be changed to use your Koha system, but there are a few that you might want to customize.

- If your library uses CAS Authentication, you'll want to set the various *CAS system preferences*

- Administration System Preferences

  - *KohaAdminEmailAddress* : This is the email address that will be used by the system in 'from' lines and to send errors to if there is no email set for the branch

  - *noItemTypeImages* : Decide if you want to show item type icons in the staff client and opac

  - *delimiter* : This value will be put in between fields when exporting data from Koha

  - *virtualshelves* : Decide if you want the staff and/or patrons to use lists in Koha

  - *AutoLocation* : Require staff to log in to the staff client from a specific IP range

  - *IndependentBranches* : Prevent librarians from editing content that belongs to other branches

- Go through the *Log System Preferences* and decide which actions you want to keep track of in the logs

- Decide if you'd like to share your library's information with the Koha community by setting the *Sharing system preferences*.

- Decide what *cron jobs* you need to run and when.
  - If you're using the long overdue cron job be sure to set your *DefaultLongOverdueChargeValue*, *DefaultLongOverdueLostValue* & *DefaultLongOverdueDays* preferences.

17.3. *Localization Configuration*

Koha is used worldwide and so you need to make sure you set your localization preferences so that options throughout Koha appear properly for your location/language.

- Localization/Internationalization System Preferences

  - *dateformat* : Decide how dates are displayed throughout Koha

  - *opaclanguagesdisplay* : Decide if patrons can choose what language the OPAC appears in

    - *opaclanguages* : Decide which languages the patrons can choose from

  - *language* : Decide which languages appear in the staff client

  - *CalendarFirstDayOfWeek* : Define your first day of the week

17.4. *Circulation Configuration*

Before you start circulating your collection you'll need to set up your rules and preferences for circulation.

- Define your *Circulation/Fine rules*

- Enter the *days your library is closed* for fines and due date calculations

- Circulation System Preferences

  - *CircControl* : Define whether circ rules are based on item's location, patron's location or transaction location

  - *useDaysMode* : Define how due dates are calculated

  - *finesCalendar* : Define how fines are calculated (for every late date or only for days the library is open)

  - *SpecifyDueDate* : Decide if staff are allowed to override due dates on checkout

  - *SpecifyReturnDate* : Decide if you want to let the staff specify an arbitrary return date on checkin

  - *itemBarcodeFallbackSearch* : Decide if you want staff to be able to checkout using a keyword search (title, call number, etc)

  - *AutomaticItemReturn* : Decide if items are sent back to the owning branch when checked in

  - *todaysIssuesDefaultSortOrder* : Decide how items checked out today display on the patron record

  - *previousIssuesDefaultSortOrder* : Decide how items checked out prior to today display on the patron record

  - *noissuescharge* : Define the maximum amount a patron can owe before checkouts are blocked

  - *ReturnBeforeExpiry* : Decide if patrons need to return items before their accounts expire

  - *AllowHoldsOnDamagedItems* : Decide if patrons can place holds on items that are marked as damaged

    - *AllowHoldPolicyOverride* : Decide if you want the staff to be able to override the setting for the above at checkout

  - *maxreserves* : Decide how many items a patron can have on hold at once

    - *AllowHoldPolicyOverride* : Decide if you want the staff to be able to override the setting for the above at checkout

  - *maxoutstanding* : Define the maximum amount a patron can owe before holds are blocked

    - *AllowHoldPolicyOverride* : Decide if you want the staff to be able to override the setting for the above at checkout

  - *ReservesMaxPickUpDelay* : Define the number of days before a hold expires

  - *WebBasedSelfCheck* : Decide if you want to use the built in web-based self-checkout system

    - *AutoSelfCheckAllowed* : Decide if the self-checkout system requires login

    - *ShowPatronImageInWebBasedSelfCheck* : Decide if you want patron images to show on the self checkout screen

  - *AllowNotForLoanOverride* : Decide if you want the staff to be able to checkout items marked as 'not for loan'

- *AllowRenewalLimitOverride* : Decide if you want staff to override the limit put on renewals

- *AllowFineOverride* : Decide if you want staff to be able to override fine limits

- *AllowTooManyOverride* : Descide if you want staff to be able to check out more than the limit to a patron

- *RenewalPeriodBase* : Decide what date renewals are based on

- *finesMode* : Switch to 'Calculate and Charge' before go live if you charge fines

- *OverdueNoticeBcc* : If you want to receive a copy of every overdue notice sent out, enter your email address here

- *emailLibrarianWhenHoldIsPlaced* : Decide if you want an email every time a hold is placed

- *ReservesControlBranch* : Decide which branch's hold rules are considered first

- *soundon* : Decide if you want to have sounds on for circulation actions

- *FilterBeforeOverdueReport* : If you have a large amount of overdues, you might want to turn this preference on so as to allow you to filter before results appear

- *DisplayClearScreenButton* : If you have a lot of staff members sharing one circ computer you might want to enable this so that staff can clear the screen in between checkouts to protect patron's privacy

- *CircAutoPrintQuickSlip* : Decide how you want Koha to react if you scan in a blank barcode on the checkout screen

- *SuspendHoldsIntranet* and/or *SuspendHoldsOpac* : Decide if you want patrons and/or staff to be able to suspend holds

  - *AutoResumeSuspendedHolds* : If you allow holds to be suspended decide if you want them to automatically resume on the date entered by the staff and/or patron

- *OnSiteCheckouts* : Decide if you want to allow items to be checked out for use within the library

- *RecordLocalUseOnReturn* : Set this to record local use of items when you check them in

- Customize your *Notices & Slips*

- Define your *Overdue Notice Triggers*

- Set up your *cron jobs*

  - Populate *your holds queue* (every 1-4 hours)

  - Decide *when holds expire* (daily)

  - *Calculate fines due* (daily)

    - Fines on hourly loans will calculate when you check the items in

  - *Mark long overdue items as lost* (daily)

  - Decide when the system *sends out messages* (1-4 hours)

  - Decide when the system *queues overdue notices* (daily)

- Set up *hold notices that didn't send for printing* (daily after overdues and message queue)

- Decide when the system *queues the advanced notice of items due* (daily)

- Find holds that need to be *resumed and remove suspension* (daily)

- If you're allowing automatic renewal of items *set them to renew* (nightly)

17.5. *Patron Configuration*

You have already imported patron data from your old system, but there are plenty of options available to you regarding patrons and their accounts.

- Enter your *staff members as patrons*

  - Define *staff members access permissions*

- Patron System Preferences

  - *autoMemberNum* : Decide if the patrons barcodes are auto-generated or if you enter them yourself

  - *MaxFine* : Determine the maximum amount that people can owe in fines

  - *NotifyBorrowerDeparture* : Decide when to warn staff that the patron account is about to expire

  - *intranetreadinghistory* : Decide if the staff can see the patron's reading/checkout history

  - *BorrowerMandatoryField* : List fields that you want to appear as mandatory on the patron add/edit form

  - *BorrowersTitles* : Add or change the titles for your patrons

  - *borrowerRelationship* : Add or change borrower relationships (child to adult and professional to organization)

  - *AutoEmailPrimaryAddress* : Determine if the patrons get an email confirming the creation of their account

  - *EnhancedMessagingPreferences* : Decide if staff can choose from a series of notices (other than overdues) for patrons

  - *EnhancedMessagingPreferencesOPAC*: Decide if patrons can choose from a series of notices (other than ovedues) for themselves

  - *patronimages* : Decide if you want to save patron images in your system

  - *ExtendedPatronAttributes* : Decide if you want to enable custom patron fields

  - *minPasswordLength* : Enter the minimum number of characters you want passwords to have

  - *BorrowerUnwantedField* : Decide what fields your library doesn't need to see on the patron entry form

- Set up your *cron jobs*
  - Decide if you would like *children to automatically be come adults*

17.6. *Cataloging Configuration*

Before you start cataloging in Koha you'll want to set up your preferences and other rules.

- Define your cataloging templates aka *MARC Bibliographic Frameworks*

  - Run the *MARC Bibliographic Framework Test* to be sure your changes are valid

- Define any *authorized values* you might want to use in cataloging

- Set up *custom classification sources* (if you use something other than the defaults)

- Set up *MARC matching rules* for importing records from mrc files or Z39.50

- Set up *Koha to Keyword mapping* for deciding how to display marc fields to the screen (still in beta - only one field)

- Set up the *Z39.50 targets* you want to search for cataloging (and acquisitions)

- Cataloging System Preferences

  - *URLLinkText* : Enter text to display when 856 fields do not have pre-defined labels

  - *hide_marc* : If you are unfamiliar with MARC you can have the MARC fields number hidden

  - *LabelMARCView* : Choose how you want duplicate fields to appear on the editor

  - *DefaultClassificationSource* : Choose which classification source is the default in your library

  - *advancedMARCeditor* : Decide if you need labels to appear on your MARC editor

  - *marcflavour* : Choose your MARC format

  - *itemcallnumber* : Enter which field and subfields to look into for the call number

  - *MARCOrgCode* : Enter your MARC Organizational Code (not the same as your OCLC number)

  - *autoBarcode* : Decide if Koha generates item barcodes for you

  - *OpacSuppression* : Decide if you want to hide items marked as suppressed from the OPAC search results

- Set up your *cron jobs*

  - Decide when the system *checks URLs in catalog records* to see if they are still valid

17.7. *Authorities Configuration*

Koha has the ability to keep track of your authority records and how they're linked to your bibliographic records. Before using authorities you should configure several preferences.

- Set *Authority Frameworks* aka templates

- Authority System Preferences

  - *BiblioAddsAuthorities* : Decide if Koha creates authorities when cataloging

  - *dontmerge* : Decide if updates to authorities trigger updates to the bibliographic records that link to them

- *AutoCreateAuthorities* : Decide when authorities are created

- *LinkerModule* : Decide which match the authority linker should use

- *LinkerOptions* : Decide if you want authority linking to be broader or more specific

- *CatalogModuleRelink* : Decide if you want to enable authority linking while cataloging

- Set up your *cron jobs*

  - Choose when the system looks for authorities updates to *merge changes into bibliographic records*

17.8. *Searching Configuration*

There are several system preferences related to searching, it is not always recommended to make too many changes to these preferences since they are set to get you the most relevant results. If you would like to change the default way that Koha handles searching, view the *Searching system preferences* tab.

- Set up your *cron jobs*

  - Decide how often your *system rebuilds the search index* (4-10 min)

- Searching System Preferences

  - *AdvancedSearchTypes* : Decide which authorized value fields you want patrons and staff to be able to limit their advanced searches by

  - *AdvancedSearchLanguages* : Decide which languages you want people to be able to limit to via the search engine

  - *UseAuthoritiesForTracings* : Decide how you want Koha to handle subject searches in the OPAC

    - *TraceCompleteSubfields* : Decide how you want Koha to handle subject searches in the OPAC

    - *TraceSubjectSubdivisions* : Decide how you want Koha to handle subject searches in the OPAC

  - *displayFacetCount* : Decide whether to show facet counts on search results

17.9. *OPAC Configuration*

There are a lot of ways you can customize your OPAC in Koha.

- Decide how you want your OPAC to look & what content you want on the main page

- Create a library branded stylesheet using CSS

-

> ⭐ **Important**
>
> Do not edit the default CSS files, instead create a new one, that way the system can always fall back on the original CSS.

- Create a custom XSLT stylesheet to change the way search results and bib records appear in the OPAC

- OPAC System preferences

  - *OPACBaseURL* : Enter your library's url

  - *opacuserlogin* : Decide if you want to allow patrons to login to the OPAC to access customized functionality (searching will be allowed without logging in)

    - *RequestOnOpac* : Decide if patrons can place holds via the OPAC

    - *OpacPasswordChange* : Decide if patrons can change their password (don't allow this if you're using LDAP)

    - *OpacRenewalAllowed* : Decide if patrons can renew their checked out items via the OPAC

    - *opacreadinghistory* : Decide if patrons can view their reading/checkout history via the OPAC

    - *reviewson* : Decide if you want to allow patrons to comment on bib records via the OPAC

    - *OpacStarRatings* : Decide if patrons can leave star ratings

    - *virtualshelves* : Decide if you want patrons to be able to create Lists

    - *OpacAllowPublicListCreation* : If patrons can create lists then decide if they are allowed to create public lists

    - *suggestion* : Decide if you want patrons to be able to submit purchase suggestions

    - *OPACViewOthersSuggestions* : Decide if you want patrons to be able to see purchase suggestions made by other patrons

  - *opacbookbag* : Decide if patrons can save items into their cart

  - *AnonSuggestions* : Decide if you want non logged in users to be able to make purchase suggestions

  - *LibraryName* : Enter your library name for display in the <title> tag and on the top of the OPAC

  - *opaccredits* : Enter HTML to appear at the bottom of every page in the OPAC

  - *OpacMainUserBlock* : Enter HTML that will appear in the center of the main OPAC page

  - *OpacNav* : Enter HTML that will appear to the left on the main OPAC page

  - *OpacNavBottom* : Enter HTML that will appear below OpacNav

- *OpacNavRight* : Enter HTML that will appear below the login box on the right

- *opacheader* : Enter the HTML that will appear above the search box on the OPAC

- *OPACNoResultsFound* : Enter the HTML that will appear when no results are found

- *OPACResultsSidebar* : Enter the HTML that will appear below the facets on your search results

- *OPACMySummaryHTML* : Enter the HTML that will appear in the far right of the circulation summary in the OPAC

- Customize your stylesheets:

    - *OPACUserCSS* : Enter any additional fields you want to define styles for

    - *opaclayoutstylesheet* : Point to a CSS file on your Koha server

- *OpacHighlightedWords* : Decide if you want search terms to be highlighted on the search results

- *hidelostitems* : Decide if you want to show patrons items you have marked as lost

- *BiblioDefaultView* : Decide what view is the default for bib records on the OPAC

- *OPACShelfBrowser* : Decide if you want to enable the shelf browse functionality

- *OPACURLOpenInNewWindow* : Decide if URLs clicked in the OPAC are opened in a new window

- *SearchMyLibraryFirst* : If you have a multi-branch system decide if you want patrons to search their library first

- *OpacAuthorities* : Decide if you want patrons to be able to search your authority file

- *OpacBrowser* : Decide if you want patrons to browse your authority file (French libraries only)

- *OPACSearchForTitleIn* : Choose which libraries you want patrons to be able to re-run their search in

- *OpacAddMastheadLibraryPulldown* : If you're a multi-branch system you can add a pull down to the search bar for patrons to search which library to search

- *EnableOpacSearchHistory* : Decide if you want the system to keep a search history

- Set up your *cron jobs*

    - If you have the *OpacBrowser* preference set decide *when you want the contents to rebuild* (French libraries only)

    - If you have *custom RSS feeds*, decide when you want the *feed to be populated*

17.9.1. *Editable OPAC Regions*

Using the OPAC system preferences you can customize various regions, the following graphic will define what preferences update each of the regions in the Bootstrap theme.
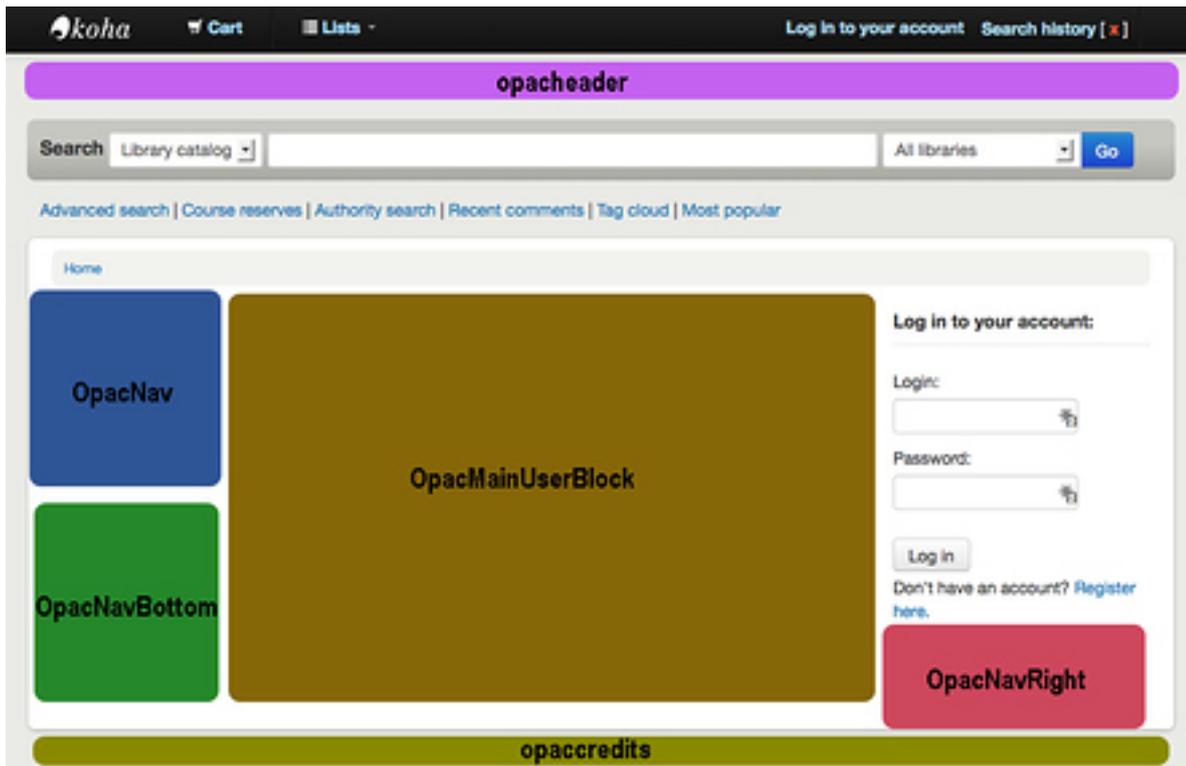
17.10. *Enhanced Content Configuration*

Koha allows you to pull in content from outside sources to enhance your bib records. All of this content can be toggled on and off using the enhanced content system preferences.

- *FRBR/Editions*

  - If you would like to have your OPAC and/or staff client show an 'Editions' tab on the bib record, you want to enable one or the other FRBR preferences and then either one or both of the ISBN services (XISBN and ThingISBN).

- *Amazon* : This service is free and just requires that you visit *http://aws.amazon.com* to sign up

  - Using the Amazon preferences you can choose to show cover images from Amazon.

- *Babelthèque*

  - This is a pay service. Contact Babelthèque to learn how to enable this content in the OPAC.

- *Baker and Taylor*

  - This is a pay service from Baker & Taylor. Contact Baker & Taylor for the information to enter into these preferences.

- *HTML5 Media*
  - This allows libraries to embed streaming media in their catalog

- *Google*

  - This service is free and does not require registration, simply enable GoogleJackets and you're set to go.

- *I Deam Books*

- This is a free service that compiles reviews for popular titles from many different sources.

- *LibraryThing*

  - With the exception of ThingISBN, you will need to contact LibraryThing for the information to enter into these preferences

  - Enabling ThingISBN will help to populate the editions tab on the bib record display if you have enabled FRBR.

- *Novelist*

  - This is a pay service from Ebsco. Contact Ebsco for the information to enter into these preferences

- *OCLC*

  - XISBN is used to populate the editions tab on the bib record display if you have enabled FRBR. This service is free for up to 999 queries a day.

- *Open Library*
  - Open Library project is an open system that you can pull cover images (and in the future additional content) from

- *Overdrive*
  - This is a pay service that libraries can subscribe to for ebook content. If the library subscribes to Overdrive they can integrate that content in to Koha for free.

- *Syndetics*

  - This is a pay service from Syndetics to add content for your bib records. Contact Syndetics for the information to enter into these preferences.

- *Tagging*

  - Choose whether or not you want to allow patrons to add tags to records in Koha.

17.11. *Acquisitions Configuration*

When using acquisitions in Koha you first need to define some defaults.

- Set up your *funds & budgets*

- Choose your *default currency* and enter others if you order from multiple countries

- Enter in your *vendor information*

- Create an *Framework with the code ACQ* (if you're going to enter item records at the time of ordering or receiving)

- Acquisitions System preferences

  - *AcqCreateItem* : Decide if an item record is created during acquisition

  - *CurrencyFormat* : Decide how you want monetary amounts to display

  - *gist* : Enter your sales tax (if you are billed for tax)

  - *OrderPdfFormat* : Decide what format you want your print orders to use

17.12. *Serials Configuration*

When you use serials there are a few options you can set before hand.

- Serials System Preferences

  - *RenewSerialAddsSuggestion* : Decide if you want renewing serials to add a suggestion for easy purchasing

  - *RoutingSerials* : Decide if you want to route serials around your library

  - *RoutingListAddReserves* : Decide if holds are placed on serials when there is a routing list in place

- Cataloging System Preferences

  - *StaffSerialIssueDisplayCount* : Decide how many of the most recent issues to display in the staff client

  - *OPACSerialIssueDisplayCount* : Decide how many of the most recent issues to display in the OPAC

  - *SubscriptionHistory* : Decide how you want the subscription information to display in the OPAC

17.13. *Planning for Go-Live*

Once you have all of your settings ready, you need to prepare for making your system live:

- Decide if you need training by an outside service or if your staff can do the training themselves.

- Make sure that there is time for your staff to play with your test system and get comfortable with it

- If this is a migration, work with your previous company to extract data right before you go live

- Come up with URLs for your new Koha OPAC & Staff Client

- Make sure that if you're hosting your own system you have a backup plan

SOPAC2 Installation

18.1. *Introduction*

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Edited by Nicole C. Engard
August 2009
This is an installation guide for SOPAC2 and its Koha connector. It has been tested on Debian Lenny and Ubuntu Jaunty with Drupal 6.12 and Koha 3.0.x. It does not cover the installation of Koha and Drupal, only SOPAC, its dependencies and the connector.

18.2. *Installation of Locum and Insurge*

Locum and Insurge are the two libraries used primarily by SOPAC. They serve as a layer of abstraction to the data. Insurge manages the social aspect (tags, reviews, ratings), while Locum manages the connection to the ILS via the connector. Both libraries use a different database from that of Drupal.

18.2.1. *Dependencies*

There are no packages for Debian MDB2 yet, you can install it via pear:

```
# apt-get install php-pear
# pear install MDB2
# pear install MDB2#mysql
```

18.2.2. *Download*

Download the Locum and Insurge libraries from SVN:

```
# cd /usr/local/lib
# svn co http://dobby.darienlibrary.org/svn/locum/trunk/ locum
# svn co http://dobby.darienlibrary.org/svn/insurge/trunk/ insurge
```

18.2.3. *Creation of the Database*

```
$ mysql -u root
mysql> create database scas;
mysql> grant all privileges on scas.* to scas_user@'localhost' identified by 'scas_pass';
mysql> flush privileges;
mysql> exit
```

18.2.4. *Sync DSN*

This file will provide the connection information to a DB libraries:

```
# nano /usr/local/etc/locum_insurge_dsn.php
```

It should contain:

```
<?php
```

```
$dsn = 'mysql://scas_user:scas_pass@localhost/scas';
```

18.2.5. *Installation of Insurge*

If you customize the name of the database, remember to edit the sql file:

```
# nano /usr/local/lib/insurge/sql/scas_insurge.sql
```

Import Insurge:

```
$ mysql -u root -p < /usr/local/lib/insurge/sql/scas_insurge.sql
```

Configure Insurge:

```
# nano /usr/local/lib/insurge/config/insurge.ini
```

The variables in insurge.ini are empty. The default values are too long and cause MySQL errors.

Here is a sample of insurge.ini

```
; This is the Locum configuration file
; General configuration options for your installation of Insurge.
[insurge_config]
dsn_file = "/usr/local/etc/locum_insurge_dsn.php"
; This is where you configure your repository membership information.
;
; parent_server is the server name of the repository parent server you have been
; told to use.
; group_id = The group ID you have been given by your repository admin.
; These configuration points are OPTIONAL and are only necessary if you are
; participating in a repository relationship.
[repository_info]
parent_server = ""
group_id = ""
group_key = ""
```

18.2.6. *Installation of Locum*

The same procedure applies to Locum

```
# nano /usr/local/lib/locum/sql/scas_locum.sql
# mysql < /usr/local/lib/locum/sql/scas_locum.sql
# nano /usr/local/lib/locum/sql/locum_init.sql
# mysql < /usr/local/lib/locum/sql/locum_init.sql
# nano /usr/local/lib/locum/config/locum.ini
# mkdir /usr/local/var
# mkdir /usr/local/var/log
```

Configure the DSN:

```
[locum_config]
dsn_file = "/usr/local/etc/locum_insurge_dsn.php"
```

And the information for your Koha installation:

```
[ils_config]
ils = "koha";
```

```
ils_version = "30x"
ils_server = "localhost"
ils_harvest_port = "80"
```

The rest depends on your Koha configuration.

18.3. *Installation of Koha Connector*

Download the Koha connector using SVN:

```
# cd /usr/local/lib/locum/connectors/
# svn co http://dobby.darienlibrary.org/svn/connectors/koha/ locum_koha_30x
```

18.4. *Harvest Records*

Now that the connector is in place, we will be able to launch harvest.php, a tool that will reap Locum DB Koha and fill the locum.

Start by configuring harvest.php:

```
# nano /usr/local/lib/locum/tools/harvest.php
```

Here are the variables you must change:

```
$first_record = 1;
$last_record = 30;
```

These are the minimum and maximum biblionumbers from your Koha install.

Then start the harvest:

```
# chmod +x /usr/local/lib/locum/tools/harvest.php
$ /usr/local/lib/locum/tools/harvest.php
```

18.5. *Installation of Sphinx*

Sphinx is the indexer for the database used by Locum and Insurge.

18.5.1. *Dependencies*

There is no Debian package for Sphinx so you'll have to compile the source directly:

```
# apt-get install g++ make libmysql++-dev
```

18.5.2. *Download and Compile*

```
$ wget http://sphinxsearch.com/downloads/sphinx-0.9.8.tar.gz
$ tar zxvf sphinx-0.9.8.tar.gz
$ cd sphinx-0.9.8
$ ./configure --prefix=/usr/local/sphinx
$ make
# make install
# mkdir /usr/local/sphinx
# mkdir /usr/local/sphinx/lib
```

```
# cp api/sphinxapi.php /usr/local/sphinx/lib/
$ rm -R sphinx-0.9.8*
```

18.5.3. *Creation of User and Group*

Creating a Sphinx user and change the owner:

```
# adduser sphinx
# addgroup sphinx
# usermod -G sphinx sphinx
# mkdir /usr/local/sphinx/var/run
# chown -R sphinx.sphinx /usr/local/sphinx/var
```

18.5.4. *The Sphinx daemon*

Download:

```
# cd /etc/init.d
# wget http://www.thesocialopac.net/sites/thesocialopac.net/files/sphinx
# chmod +x /etc/init.d/sphinx
```

Add Sphinx to the default boot services:

```
# update-rc.d sphinx defaults
```

18.5.5. *Configuration*

Copy the configuration file supplied with the source of Sphinx before the change:

```
# cp /usr/local/lib/locum/sphinx/sphinx.conf /usr/local/sphinx/etc/
# sed 's/locum_db_user/scas_user/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile;
mv tmpfile /usr/local/sphinx/etc/sphinx.conf
# sed 's/locum_db_pass/scas_pass/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile; mv tmpfile /
usr/local/sphinx/etc/sphinx.conf
```

And if you personalize the name of the database:

```
# sed 's/scas/MY_DB/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile; mv tmpfile /usr/lo\
cal/sphinx/etc/sphinx.conf
```

18.5.6. *Indexing documents*

Indexing is necessary if you want to use the search features of SOPAC.

You must first complete the Insurge table index

```
# chmod +x /usr/local/lib/insurge/tools/update-index.php
$ /usr/local/lib/insurge/tools/update-index.php
```

Then start indexing Sphinx

```
$ /usr/local/sphinx/bin/indexer --all
```

Finally, we must start the daemon:

```
# /etc/init.d/sphinx start
```

When the daemon is running, you can update the index with:

```
$ /usr/local/sphinx/bin/indexer --all --rotate
```

18.6. *Installation of SOPAC2*

Now to the SOPAC software itself:

18.6.1. *Download*

Download from SVN:

```
$ cd /chemin/vers/drupal/sites/all/
$ mkdir modules
$ cd modules/
$ svn co http://dobby.darienlibrary.org/svn/sopac/trunk/ sopac
```

18.6.2. *Installation*

In Drupal's administration settings, activate the module. Also, enable the dependencies:

- Profile

- PHP Filter

- Path

The Drupal menu should now list these entries.

18.6.3. *Configuration*

Then go into the settings of SOPAC.

- Configure the paths to the Locum and Insurge libraries

- Choose a URL prefix SOPAC, in my "catalog". Create a node with content like:

```
<?php
print sopac_search_form('both');
print theme('pages_catalog');
```

- Check the Input Format "PHP Code"

- Check Move to front page

- In URL path settings, set the SOPAC URL prefix you have chosen.

Go to the root of Drupal, a search form will appear.

Remember to empty Drupal's cache when something does not work.

Drupal offers a few blocks, which are not configured by default. You must specify on which page they should appear.

Cron Jobs

A cron job is a Linux command for scheduling a command or script on your server to complete repetitive tasks automatically. Scripts executed as a cron job are typically used to modify files or databases; however, they can perform other tasks that do not modify data on the server, like sending out email notifications. Koha has many cron jobs in place that you can enable (search engine indexing, overdue notice generation, data cleanup and more), this chapter will explain those for you.

19.1. *Cron Jobs*

The locations below assume a dev install which puts the crons in misc/, if you have a standard install you may want to look in bin/ for these files if you cannot find them in misc/

19.1.1. *Search*

19.1.1.1. *Rebuild Index*

Script path: misc/migration_tools/rebuild_zebra.pl

Does: Updates Zebra indexes with recently changed data.

Required by: Zebra

Frequency suggestion: every x minutes, (between 5-15 minutes) depending on performance needs

19.1.2. *Circulation*

19.1.2.1. *Holds Queue*

Script path: misc/cronjobs/holds/build_holds_queue.pl

Does: Updates holds queue report

Required by: *Holds Queue Report*

Frequency suggestion: every 1-4 hours

Description:

- A script that should be run periodically if your library system allows borrowers to place on-shelf holds. This script decides which library should be responsible for fulfilling a given hold request.

  It's behavior is controlled by the system preferences *StaticHoldsQueueWeight* and *RandomizeHoldsQueueWeight*.

  If you do not want all of your libraries to participate in the on-shelf holds fulfillment process, you should list the the libraries that *do* participate in the process here by inputting all the participating library's branchcodes, separated by commas (e.g. "MPL,CPL,SPL,BML" etc.).

  By default, the holds queue will be generated such that the system will first attempt to hold fulfillment using items already at the pickup library if possible. If there are no items available at the pickup library to fill a hold, build_holds_queue.pl will then use the list of libraries defined in StaticHoldsQueueWeight. If RandomizeHoldsQueueWeight is disabled (which it is by default), the script will

assign fulfillment requests in the order the branches are placed in the StaticHoldsQueueWeight system preference.

For example, if your system has three libraries, of varying sizes (small, medium and large) and you want the burden of holds fulfillment to be on larger libraries before smaller libraries, you would want StaticHoldsQueueWeight to look something like "LRG,MED,SML".

If you want the burden of holds fulfillment to be spread out equally throughout your library system, simply enable RandomizeHoldsQueueWeight. When this system preference is enabled, the order in which libraries will be requested to fulfill an on-shelf hold will be randomized each time the list is re-generated.

Leaving StaticHoldsQueueWeight empty is contraindicated at this time. Doing so will cause the build_holds_queue script to ignore RandomizeHoldsQueueWeight, causing the script to request hold fulfillment not randomly, but by alphabetical order.

19.1.2.1.1. *Perl Documentation*

GetBibsWithPendingHoldRequests

my $biblionumber_aref = GetBibsWithPendingHoldRequests();

Return an arrayref of the biblionumbers of all bibs that have one or more unfilled hold requests.

GetPendingHoldRequestsForBib

my $requests = GetPendingHoldRequestsForBib($biblionumber);

Returns an arrayref of hashrefs to pending, unfilled hold requests on

the bib identified by $biblionumber. The following keys are present in each hashref:

- biblionumber

- borrowernumber

- itemnumber

- priority

- branchcode

- reservedate

- reservenotes

- borrowerbranch

The arrayref is sorted in order of increasing priority.

GetItemsAvailableToFillHoldRequestsForBib

my $available_items =

GetItemsAvailableToFillHoldRequestsForBib($biblionumber);

Returns an arrayref of items available to fill hold requests for the bib identified by $biblionumber. An item is available to fill a hold

request if and only if:

- it is not on loan

- it is not withdrawn

- it is not marked notforloan

- it is not currently in transit

- it is not lost

- it is not sitting on the hold shelf

MapItemsToHoldRequests

MapItemsToHoldRequests($hold_requests, $available_items);

CreatePickListFromItemMap

AddToHoldTargetMap

_get_branches_to_pull_from

Query system preferences to get ordered list of branches to use to fill hold requests.

19.1.2.2. *Expired Holds*

Script path: misc/cronjobs/holds/cancel_expired_holds.pl

Does: By default, this cron job will only automatically cancel holds where the user has set an expiration date. If the library is using the *ExpireReservesMaxPickUpDelay* and *ExpireReservesMaxPickUpDelayCharge* preferences then this script will also cancel holds that have been sitting on the hold shelf for too long and will (if the library does) charge the patron for not picking up the hold.

Frequency suggestion: daily

19.1.2.3. *Unsuspend Holds*

Script path: misc/cronjobs/holds/auto_unsuspend_holds.pl

Does: This script checks to find holds that should no longer be suspended and removes the suspension if the *AutoResumeSuspendedHolds* preference is set to 'allow'. This puts the patron back in to the queue where they were when the hold was suspended.

Frequency suggestion: daily

19.1.2.4. *Fines*

Script path: misc/cronjobs/fines.pl

Does: Calculates and posts fines to patron accounts.

Required by: *finesMode* system preference

Frequency suggestion: nightly

19.1.2.5. *Long Overdues*

Script path: misc/cronjobs/longoverdue.pl

Does: allows one to specify delays for changing items to different lost statuses, and optionally charge for them using the replacement price listed on the item record.

Frequency suggestion: nightly

> **Note**
>
> Staff can control some of the parameters for the longoverdue cron job with the *DefaultLongOverdueLostValue* and *DefaultLongOverdueChargeValue* preferences.

19.1.2.5.1. *Perl Documentation*

NAME

longoverdue.pl cron script to set lost statuses on overdue materials. Execute without options for help.

DESCRIPTION

--lost | -l

This option takes the form of n=lv, where n is num days overdue, and lv is the lost value. See warning below.

--charge | -c

This specifies what lost value triggers Koha to charge the account for the lost item. Replacement costs are not charged if this is not specified.

--verbose | v

verbose.

--confirm

confirm. without this option, the script will report the number of affected items and return without modifying any records.

--quiet

suppress summary output.

--maxdays

Specifies the end of the range of overdue days to deal with (defaults to 366). This value is universal to all lost num days overdue passed.

--mark-returned

When an item is marked lost, remove it from the borrowers issued items.

19.1.2.6. *Track total checkouts*

Script path: misc/cronjobs/update_totalissues.pl

Does: updates the biblioitems.totalissues field in the database with the latest tally of checkouts.

Frequency suggestion: nightly

19.1.2.6.1. *Perl Documentation*

NAME

update_totalissues.pl

SYNOPSIS

update_totalissues.pl --use-stats

update_totalissues.pl --use-items

update_totalissues.pl --commit=1000

update_totalissues.pl --since='2012-01-01'

update_totalissues.pl --interval=30d

DESCRIPTION

This batch job populates bibliographic records' total issues count based on historical issue statistics.

--help Prints this help

-v|--verbose

Provide verbose log information (list every bib modified).

--use-stats

Use the data in the statistics table for populating total issues.

--use-items

Use items.issues data for populating total issues. Note that issues data from the items table does not respect the --since or --interval options, by definition. Also note that if both --use-stats and --use-items are specified, the count of biblios processed will be misleading.

-s|--since=DATE

Only process issues recorded in the statistics table since DATE.

-i|--interval=S

Only process issues recorded in the statistics table in the last N units of time. The interval should consist of a number with a one- letter unit suffix. The valid suffixes are h (hours), d (days), w (weeks), m (months), and y (years). The default unit is days.

--incremental

Add the number of issues found in the statistics table to the existing total issues count. Intended so that this script can be used as a cron job to update popularity information during low-usage periods. If neither --since or --interval are specified, incremental mode will default to processing the last twenty-four hours.

--commit=N

Commit the results to the database after every N records are processed.

--test

Only test the popularity population script.

WARNING

If the time on your database server does not match the time on your Koha server you will need to take that into account, and probably use the --since argument instead of the --interval argument for incremental updating.

CREDITS

This patch to Koha was sponsored by the Arcadia Public Library and the Arcadia Public Library Foundation in honor of Jackie Faust-Moreno, late director of the Arcadia Public Library.

AUTHOR

Jared Camins-Esakov <jcamins AT cpbibliography DOT com>

19.1.2.7. *Generate Patron File for Offline Circulation*

Script path: misc/cronjobs/create_koc_db.pl

Does: Generates the borrowers.db file for use with the *Koha Offline Circulation* tool

Frequency suggestion: weekly

19.1.2.8. *Automatic renewal*

Script path: misc/cronjobs/automatic_renewals.pl

Does: Will automatically renew items if you're allowing automatic renewal with your *circulation and fine rules*.

Frequency suggestion: nightly

19.1.2.8.1. *Perl Documentation*

NAME

automatic_renewals.pl - cron script to renew loans

SYNOPSIS

./automatic_renewals.pl

or, in crontab: 0 3 * * * automatic_renewals.pl

DESCRIPTION

This script searches for issues scheduled for automatic renewal (issues.auto_renew). If there are still renews left (Renewals allowed) and the renewal isn't premature (No Renewal before) the issue is renewed.

OPTIONS

No options.

19.1.3. *Patrons*

19.1.3.1. *Unverified Registrations*

Script path: misc/cronjobs/delete_expired_opac_registrations.pl

Does: Deletes patron registrations that were submitted via the OPAC but not reviewed by the library within the number of days entered in the *PatronSelfRegistrationExpireTemporaryAccountsDelay* preference.

Frequency suggestion: nightly

19.1.3.2. *Unconfirmed Registrations*

Script path: misc/cronjobs/delete_unverified_opac_registrations.pl

Does: Deletes patron self registrations that were submitted via the OPAC but not confirmed via email within 24 hours. This is only necessary if you are requiring patrons to confirm their registrations via email with the *PatronSelfRegistrationVerifyByEmail* preference.

Frequency suggestion: hourly

19.1.3.3. *Anonymize Patron Data*

Script path: misc/cronjobs/batch_anonymise.pl

Does: Used to anonymize patron data. This will remove borrowernumbers from circulation history so that the stats are kept, but the patron information is removed for privacy reasons.

19.1.3.4. *Update Child to Adult Patron Type*

Script path: misc/cronjobs/j2a.pl

Does: Convert juvenile/child patrons from juvenile patron category and category code to corresponding adult patron category and category code when they reach the upper age limit defined in the Patron Categories.

Frequency suggestion: nightly

19.1.3.4.1. *Perl Documentation*

NAME

juv2adult.pl - convert juvenile/child patrons from juvenile patron category and category code to corresponding adult patron category and category code when they reach the upper age limit defined in the Patron Categories.

SYNOPSIS

juv2adult.pl [-b=<branchcode> -f=<categorycode> -t=<categorycode>]

Options:

--help brief help message

--man full documentation

-v verbose mode

-n take no action, display only

-b <branchname> only deal with patrons from this library/branch

-f <categorycode> change patron category from this category

-t <categorycode> change patron category to this category

=head1 OPTIONS

--help Print a brief help message and exits.

--man Prints the manual page and exits.

-v Verbose. Without this flag set, only fatal errors are reported.

-n No Action. With this flag set, script will report changes but not actually execute them on the database.

-b changes patrons for one specific branch. Use the value in the branches.branchcode table.

-f *required* defines the juvenile category to update. Expects the code from categories.categorycode.

-t *required* defines the category juvenile patrons will be converted to. Expects the code from categories.categorycode.

DESCRIPTION

This script is designed to update patrons from juvenile to adult patron types, remove the guarantor, and update their category codes appropriately when they reach the upper age limit defined in the Patron Categories.

USAGE EXAMPLES

"juv2adult.pl" - Suggests that you read this help. :)

"juv2adult.pl" -b=<branchcode> -f=<categorycode> -t=<categorycode> - Processes a single branch, and updates the patron categories from fromcat to tocat.

"juv2adult.pl" -f=<categorycode> -t=<categorycode> -v -n - Processes all branches, shows all messages, and reports the patrons who would be affected. Takes no action on the database.

19.1.4. *Notices*

19.1.4.1. *Message Queue*
Script path: misc/cronjobs/process_message_queue.pl

Does: processes the message queue to send the check out, check in and hold filled emails and SMS message to users and sends outgoing emails to patrons. requires *EnhancedMessagingPreferences* to be on

Frequency suggestion: 1-4 hours

> **Important**
>
> Item due and Advanced due notices are controlled by the *advance_notices cron*.

19.1.4.2. *Advanced Notice*

Script path: misc/cronjobs/advance_notices.pl

Does: prepares "pre-due" notices and "item due" notices for patrons who request them prepares notices for patrons for items just due or coming due soon. requires *EnhancedMessagingPreferences* to be on

Frequency suggestion: nightly

> **Note**
>
> This script does not actually send the notices. It queues them in the *message queue* for later

19.1.4.2.1. *Perl Documentation*

NAME

advance_notices.pl - cron script to put item due reminders into message queue

SYNOPSIS

./advance_notices.pl -c

or, in crontab: 0 1 * * * advance_notices.pl -c

DESCRIPTION

This script prepares pre-due and item due reminders to be sent to patrons. It queues them in the message queue, which is processed by the process_message_queue.pl cronjob. The type and timing of the messages can be configured by the patrons in their "My Alerts" tab in the OPAC.

METHODS

parse_letter

19.1.4.3. *Overdue Notice*

Script path: misc/cronjobs/overdue_notices.pl

Does: prepares messages to alert patrons of overdue messages (both via email and print)

Frequency suggestion: nightly

> **Note**
>
> This script does not actually send the notices. It queues them in the *message queue* for later or generates the HTML for later printing

19.1.4.3.1. *Perl Documentation*

NAME

overdue_notices.pl - prepare messages to be sent to patrons for overdue items

SYNOPSIS

overdue_notices.pl [-n] [-library <branchcode>] [-library <branchcode>...] [-max <number of days>] [-csv [<filename>]] [-itemscontent <field list>]

Options:

-help brief help message

-man full documentation

-n No email will be sent

-max <days> maximum days overdue to deal with

-library <branchname> only deal with overdues from this library (repeatable : several libraries can be given)

-csv <filename> populate CSV file

-html <filename> Output html to file

-itemscontent <list of fields> item information in templates

-borcat <categorycode> category code that must be included

-borcatout <categorycode> category code that must be excluded

OPTIONS

-help Print a brief help message and exits.

-man Prints the manual page and exits.

-v Verbose. Without this flag set, only fatal errors are reported.

-n Do not send any email. Overdue notices that would have been sent to the patrons or to the admin are printed to standard out. CSV data (if the -csv flag is set) is written to standard out or to any csv file-name given.

-max Items older than max days are assumed to be handled somewhere else, probably the longoverdues.pl script. They are therefore ignored by this program. No notices are sent for them, and they are not added to any CSV files. Defaults to 90 to match longoverdues.pl.

-library

select overdues for one specific library. Use the value in the branches.branchcode table. This option can be repeated in order to select overdues for a group of libraries.

-csv Produces CSV data. if -n (no mail) flag is set, then this CSV data is sent to standard out or to a filename if provided. Otherwise, only overdues that could not be emailed are sent in CSV format to the admin.

-itemscontent

comma separated list of fields that get substituted into templates in places of the <<items.content>> placeholder. This defaults to issuedate,title,barcode,author

Other possible values come from fields in the biblios, items, and issues tables.

-borcat Repetable field, that permit to select only few of patrons categories.

-borcatout

Repetable field, permis to exclude some patrons categories.

-t | --triggered

This option causes a notice to be generated if and only if an item is overdue by the number of days defined in a notice trigger.

By default, a notice is sent each time the script runs, which is suitable for less frequent run cron script, but requires syncing notice triggers with the cron schedule to ensure proper behavior. Add the --triggered option for daily cron, at the risk of no notice being generated if the cron fails to run on time.

-list-all

Default items.content lists only those items that fall in the range of the currently processing notice. Choose list-all to include all overdue items in the list (limited by -max setting).

DESCRIPTION

This script is designed to alert patrons and administrators of overdue items.

Configuration

This script pays attention to the overdue notice configuration performed in the "Overdue notice/status triggers" section of the "Tools" area of the staff interface to Koha. There, you can choose which letter templates are sent out after a configurable number of days to patrons of each library. More information about the use of this section of Koha is available in the Koha manual.

The templates used to craft the emails are defined in the "Tools: Notices" section of the staff interface to Koha.

Outgoing emails

Typically, messages are prepared for each patron with overdue items. Messages for whom there is no email address on file are collected and sent as attachments in a single email to each library administrator, or if that is not set, then to the email address in the "KohaAdminEmailAddress" system preference.

These emails are staged in the outgoing message queue, as are messages produced by other features of Koha. This message queue must be processed regularly by the misc/cron-jobs/process_message_queue.pl program.

In the event that the "-n" flag is passed to this program, no emails are sent. Instead, messages are sent on standard output from this program. They may be redirected to a file if desired.

Templates

Templates can contain variables enclosed in double angle brackets like <<this>>. Those variables will be replaced with values specific to the overdue items or relevant patron. Available variables are:

<<bib>>

the name of the library

<<items.content>>

one line for each item, each line containing a tab separated list of title, author, barcode, issuedate

<<borrowers.*>>

any field from the borrowers table

<<branches.*>>

any field from the branches table

CSV output

The "-csv" command line option lets you specify a file to which overdues data should be output in CSV format.

With the "-n" flag set, data about all overdues is written to the file. Without that flag, only information about overdues that were unable to be sent directly to the patrons will be written. In other words, this CSV file replaces the data that is typically sent to the administrator email address.

USAGE EXAMPLES

"overdue_notices.pl" - In this most basic usage, with no command line arguments, all libraries are processed individually, and notices are prepared for all patrons with overdue items for whom we have email addresses. Messages for those patrons for whom we have no email address are sent in a single attachment to the library administrator's email address, or to the address in the KohaAdminEmailAddress system preference.

"overdue_notices.pl -n -csv /tmp/overdues.csv" - sends no email and populates /tmp/overdues.csv with information about all overdue items.

"overdue_notices.pl -library MAIN max 14" - prepare notices of overdues in the last 2 weeks for the MAIN library.

SEE ALSO

The misc/cronjobs/advance_notices.pl program allows you to send messages to patrons in advance of their items becoming due, or to alert them of items that have just become due.

INTERNAL METHODS

These methods are internal to the operation of overdue_notices.pl.

parse_letter

parses the letter template, replacing the placeholders with data specific to this patron, biblio, or item

named parameters:

letter - required hashref

borrowernumber - required integer

substitute - optional hashref of other key/value pairs that should be substituted in the letter content

returns the "letter" hashref, with the content updated to reflect the substituted keys and values.

prepare_letter_for_printing

returns a string of text appropriate for printing in the event that an overdue notice will not be sent to the patron's email address. Depending on the desired output format, this may be a CSV string, or a human-readable representation of the notice.

required parameters:

letter

borrowernumber

optional parameters:

outputformat

19.1.4.4. *Print Hold Notices*

Script path: misc/cronjobs/gather_print_notices.pl

Does: looks through the message queue for hold notices that didn't go through because the patron didn't have an email address and generates a print notice

Frequency suggestion: nightly

19.1.4.5. *Talking Tech*

To learn more about setting up this third party product view the *Talking Tech Appendix*.

19.1.4.5.1. *Sending Notices File*

Script path: misc/cronjobs/thirdparty/TalkingTech_itiva_outbound.pl

Does: Script to generate Spec C outbound notifications file for Talking Tech i-tiva phone notification system.

Required by: *TalkingTechItivaPhoneNotification*

Frequency suggestion: nightly

19.1.4.5.1.1. *Perl Documentation*
USAGE

TalkingTech_itiva_outbound.pl

TalkingTech_itiva_outbound.pl --type=OVERDUE -w 0 -w 2 -w 6 --output=/tmp/talk-ingtech/outbound.csv

TalkingTech_itiva_outbound.pl --type=RESERVE --type=PREOVERDUE --lang=FR

Script to generate Spec C outbound notifications file for Talking Tech i-tiva phone notification system.

--help -h

Prints this help

-v Provide verbose log information.

--output -o

Destination for outbound notifications file (CSV format). If no value is specified, output is dumped to screen.

--lang

Sets the language for all outbound messages. Currently supported values are EN, FR and ES. If no value is specified, EN will be used by default.

--type

REQUIRED. Sets which messaging types are to be used. Can be given multiple times, to specify multiple types in a single output file. Currently supported values are RESERVE, PREOVERDUE and OVERDUE. If no value is given, this script will not produce any outbound notifications.

--waiting-hold-day -w

OPTIONAL for --type=RESERVE. Sets the days after a hold has been set to waiting on which to call. Use switch as many times as desired. For example, passing "-w 0 -w 2 -w 6" will cause calls to be placed on the day the hold was set to waiting, 2 days after the waiting date, and 6 days after. See example above. If this switch is not used with --type=RESERVE, calls will be placed every day until the waiting reserve is picked up or canceled.

--library-code --code -c

OPTIONAL The code of the source library of the message. The library code is used to group notices together for consortium purposes and apply library specific settings, such as prompts, to those notices. This field can be blank if all messages are from a single library.

19.1.4.5.2. *Receiving Notices File*

Script path: misc/cronjobs/thirdparty/TalkingTech_itiva_inbound.pl

Does: Script to process received Results files for Talking Tech i-tiva phone notification system.

Required by: *TalkingTechItivaPhoneNotification*

Frequency suggestion: nightly

19.1.4.5.2.1. *Perl Documentation*
USAGE

TalkingTech_itiva_inbound.pl

TalkingTech_itiva_inbound.pl -v --input=/tmp/talkingtech/results.csv

Script to process received Results files for Talking Tech i-tiva phone notification system.

--help -h

Prints this help

-v Provide verbose log information.

--input -i

REQUIRED. Path to incoming results file.

19.1.4.6. *Notify Patrons of Expiration*

Script path: misc/cronjobs/membership_expiry.pl

Does: Sends messages to warn patrons of their card expiration to the *messaage queue* cron.

Requires: *MembershipExpiryDaysNotice*

Frequency: nightly

19.1.5. *In Processing/Book Cart*

Script path: misc/cronjobs/cart_to_shelf.pl

Does: Updates all items with a location of CART to the item's permanent location.

Required by: *NewItemsDefaultLocation*, *InProcessingToShelvingCart*, & *ReturnToShelvingCart* system preferences

Frequency suggestion: hourly

19.1.5.1. *Perl Documentation*

NAME

cart_to_shelf.pl cron script to set items with location of CART to original shelving location after X hours. Execute without options for help.

19.1.6. *Catalog*

19.1.6.1. *Check URLs*

Script path: misc/cronjobs/check-url.pl

Does: checks URLs in 856$u field. Script output can now be formatted in CSV or HTML. The HTML version links directly to MARC biblio record editor.

Frequency suggestion: monthly

Learn more: *http://wiki.koha-community.org/wiki/Check-url_enhancements*

19.1.6.1.1. *Perl Documentation*

NAME

C4::URL::Checker - base object for checking URL stored in Koha DB

SYNOPSIS

```
use C4::URL::Checker;

    my $checker = C4::URL::Checker->new( );
    $checker->{ host_default } = 'http://mylib.kohalibrary.com';
    my $checked_urls = $checker->check_biblio( 123 );
    foreach my $url ( @$checked_urls ) {
        print "url:        ", $url->{ url       A }, "\n",
              "is_success: ", $url->{ is_success }, "\n",
              "status:     ", $url->{ status     }, "\n";
    }
```

FUNCTIONS

new

Create a URL Checker. The returned object can be used to set default host variable :

```
my $checker = C4::URL::Checker->new( );
        $checker->{ host_default } = 'http://mylib.kohalibrary.com';
```

check_biblio

Check all URL from a biblio record. Returns a pointer to an array containing all URLs with checking for each of them.

```
  my $checked_urls = $checker->check_biblio( 123 );
```

With 2 URLs, the returned array will look like that:

```
    [
        {
          'url' => 'http://mylib.tamil.fr/img/62265_0055B.JPG',
          'is_success' => 1,
          'status' => 'ok'
        },
        {
          'url' => 'http://mylib.tamil.fr//img/62265_0055C.JPG',
          'is_success' => 0,
          'status' => '404 - Page not found'
        }
      ],
```

NAME

check-url.pl - Check URLs from 856$u field.

USAGE

check-url.pl [--verbose|--help] [--host=http://default.tld]

Scan all URLs found in 856$u of bib records and display if resources are available or not.

PARAMETERS

--host=http://default.tld

Server host used when URL doesn't have one, ie doesn't begin with 'http:'. For example, if --host=http://www.mylib.com, then when 856$u contains 'img/image.jpg', the url checked is: http://www.mylib.com/image.jpg'.

--verbose|-v

Outputs both successful and failed URLs.

--html

Formats output in HTML. The result can be redirected to a file accessible by http. This way, it's possible to link directly to biblio record in edit mode. With this parameter --host-pro is required.

--host-pro=http://koha-pro.tld

Server host used to link to biblio record editing page.

--help|-h

Print this help page.

19.1.6.2. *Update Authorities*

Script path: misc/migration_tools/merge_authority.pl

Does: Updates biblio data with changes to authorities records

> **Note**
>
> The name of this script is misleading. This script does not merge authorities together it instead merges authority data with linked bib records. Edits to authority records will be applied to bibliographic records that use that authority when this script is run.

Required by: *dontmerge* system preference

Frequency suggestion: nightly

19.1.6.3. *Serials Update*

Script path: misc/cronjobs/serialsUpdate.pl

Does: checks if there is a "late" issue on active subscriptions, and if there is, the script will set it as late, and add the next one as expected.

Frequency suggestion: nightly

19.1.6.4. *Automatic item update*

Script path: misc/cronjobs/automatic_item_modification_by_age.pl

Does: updates items based on the list of rules set forth in the *Automatic item modifications by age* tool

Required by: *Automatic item modifications by age*

Frequency suggestions: nightly

19.1.6.4.1. *Perl Documentation*

NAME

automatic_item_modification_by_age.pl

SYNOPSIS

./automatic_item_modification_by_age.pl -h

Toggle recent acquisitions status. Use this script to delete "new" status for items.

OPTIONS

-h|--help Prints this help message.

-v|--verbose Set the verbose flag.

-c|--confirm The script will modify the items.

AUTHOR

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19.1.7. *OPAC*

19.1.7.1. *RSS Feeds*

Script path: misc/cronjobs/rss/rss.pl

Does: Produces an RSS XML document for any SQL query (not used for search results RSS feed). *Learn more*.

Frequency suggestion: hourly

19.1.7.2. *Authorities Browser*

Script path: misc/cronjobs/build_browser_and_cloud.pl

Does: Generate content for authorities browse in OPAC

Required by: *OpacBrowser* system preference

> ⭐ **Important**
>
> This preference and cron job should only be used on French systems.

19.1.7.3. *Subject/Author Clouds*

Script path: misc/cronjobs/cloud-kw.pl

Does: Generates HTML keywords clouds from Koha Zebra indexes. misc/cronjobs/cloud-sample.conf has a sample of how this script operates.

Frequency: This is the type of script you can run once a month or so, the content generated isn't going to change very much over time.

19.1.7.3.1. *Perl Documentation*

NAME

cloud-kw.pl - Creates HTML keywords clouds from Koha Zebra Indexes

USAGE

cloud-kw.pl [--verbose|--help] --conf=cloud.conf

Creates multiple HTML files containing keywords cloud with top terms sorted by their logarithmic weight. cloud.conf is a YAML configuration file driving cloud generation process.

PARAMETERS

--conf=configuration file

Specify configuration file name

--verbose|-v

Enable script verbose mode.

--help|-h

Print this help page.

CONFIGURATION

Configuration file looks like that:

```
---
        # Koha configuration file for a specific installation
        # If not present, defaults to KOHA_CONF
        KohaConf: /home/koha/mylibray/etc/koha-conf.xml
        # Zebra index to scan
        ZebraIndex: Author
        # Koha index used to link found kewords with an opac search URL
        KohaIndex: au
        # Number of top keyword to use for the cloud
        Count: 50
        # Include CSS style directives with the cloud
        # This could be used as a model and then CSS directives are
        # put in the appropriate CSS file directly.
        Withcss: Yes
        # HTML file where to output the cloud
        Output: /home/koha/mylibrary/koharoot/koha-tmpl/cloud-author.html
      ---
        KohaConf: /home/koha/yourlibray/etc/koha-conf.xml
        ZebraIndex: Subject
        KohaIndex: su
        Count: 200
        Withcss: no
        Output: /home/koha/yourlibrary/koharoot/koha-tmpl/cloud-subject.html
```

IMPROVEMENTS

Generated top terms have more informations than those outputted from the time being. Some parameters could be easily added to improve this script:

WithCount

In order to output terms with the number of occurrences they have been found in Koha Catalogue by Zebra.

CloudLevels

Number of levels in the cloud. Now 24 levels are hardcoded.

Weighting

Weighting method used to distribute terms in the cloud. We could have two values: Logarithmic and Linear. Now it's Logarithmic by default.

Order

Now terms are outputted in the lexical order. They could be sorted by their weight.

19.1.8. *System Administration*

19.1.8.1. *Clean up Database*

Script path: misc/cronjobs/cleanup_database.pl

Does: Truncates the sessions table, cleans out old zebraqueue entries, action logs and staged MARC files.

19.1.8.1.1. Perl Documentation
USAGE

kohaclone/misc/cronjobs/cleanup_database.pl [-h|--help] [--sessions] [--sessdays DAYS] [-v|--verbose] [--zebraqueue DAYS] [-m|--mail] [--merged] [--import DAYS] [--logs DAYS] [--searchhistory DAYS]

PARAMETERS

-h --help

prints this help message, and exits, ignoring all other options

--sessions

purge the sessions table. If you use this while users are logged into Koha, they will have to reconnect.

--sessdays DAYS

purge only sessions older than DAYS days

-v --verbose

will cause the script to give you a bit more information about the run.

--zebraqueue DAYS

purge completed zebraqueue entries older than DAYS days. Defaults to 30 days if no days specified.

-m --mail DAYS

purge items from the mail queue that are older than DAYS days. Defaults to 30 days if no days specified.

--merged

purged completed entries from need_merge_authorities.

--import DAYS

purge records from import tables older than DAYS days. Defaults to 60 days if no days specified

--z3950

purge records from import tables that are the result of Z39.50 searches

--logs DAYS

purge entries from action_logs older than DAYS days. Defaults to 180 days if no days specified

--searchhistory DAYS

purge entries from search_history older than DAYS days. Defaults to 30 days if no days specified

--list-invites DAYS

purge (unaccepted) list share invites older than DAYS days. Defaults to 14 days if no days specified.

--restrictions DAYS

purge patrons restrictions expired since more than DAYS days. Defaults to 30 days if no days specified.

19.1.8.2. *Share Usage Stats*

Script path: misc/cronjobs/share_usage_with_koha_community.pl

Does: If you're sharing information via the *UsageStats* feature this will send your info to the *Hea website*[1].

Frequency: monthly

19.1.8.2.1. *Perl Documentation*

NAME

share_usage_with_koha_community.pl - Share your library's usage with the Koha community

SYNOPSIS

share_usage_with_koha_community.pl [-h|--help] [-v|--verbose]

If the *UsageStats* system preference is set, you can launch this script to share your usage data anonymously with the Koha community.

Collecting Koha usage statistics will help developers to know how Koha is used across the world.

---

[1] http://hea.koha-community.org/

This script will send the usage data for the bibliographic and authority records, checkouts, holds, orders, and subscriptions.

Only the total number is retrieved. In no case will private data be shared!

In order to know which parts of Koha modules are used, this script will collect some system preference values.

If you want to tell us who you are, you can fill the *UsageStatsLibraryName* system preference with your library name, *UsageStatsLibraryUrl*, *UsageStatsLibraryType* and/or *UsageStatsCountry*.

All these data will be analyzed on the *http://hea.koha-community.org* Koha community website.

IMPORTANT : please do NOT run the cron on the 1st, but on another day. The idea is to avoid all Koha libraries sending their data at the same time ! So choose any day between 1 and 28 !

OPTIONS

-h|--help

Print a brief help message

-v|--verbose

Verbose mode.

-f|--force

Force the update.

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19.1.9. *Acquisitions*

19.1.9.1. *Clean up old suggestions*

Script path: misc/cronjobs/purge_suggestions.pl

Does: Removes old (defined by you) suggestions from the suggestion management area.

19.1.9.2. *Email suggestions to process*

Script path: misc/cronjobs/notice_unprocessed_suggestions.pl

Does: Generates a notice to the fund owner that there are suggestions in need of processing

19.1.9.2.1. *Perl Documentation*

NAME

notice_unprocessed_suggestions.pl - Generate notification for unprocessed suggestions.

The budget owner will be notified.

The letter template 'TO_PROCESS' will be used.

SYNOPSIS

notice_unprocessed_suggestions.pl [-h|--help] [-v|--verbose] [-c|--confirm] [--days=NUMBER_OF_DAYS]

OPTIONS

-h|--help Print a brief help message

-c|--confirm This flag must be provided in order for the script to actually generate notices. If it is not supplied, the script will only report on the patron it would have noticed.

--days This parameter is mandatory. It must contain an integer representing the number of days elapsed since the last modification of suggestions to process.

-v|--verbose Verbose mode.

19.1.9.3. *EDI Message Processing*

Script path: misc/cronjobs/edi_cron.pl

Does: Sends and received EDI messages

Frequency: Every 15 minutes

19.1.10. *Deprecated scripts*

These should not be run without modification:

Script path: misc/cronjobs/update_items.pl

Script path:misc/cronjobs/smsoverdues.pl

Script path:misc/cronjobs/notifyMailsOp.pl

Script path:misc/cronjobs/reservefix.pl

Script path:misc/cronjobs/zebraqueue_start.pl

Web Services

20.1. *OAI-PMH*

For the Open Archives Initiative-Protocol for Metadata Harvesting (OAI-PMH) there are two groups of 'participants': Data Providers and Service Providers. Data Providers (open archives, repositories) provide free access to metadata, and may, but do not necessarily, offer free access to full texts or other resources. OAI-PMH provides an easy to implement, low barrier solution for Data Providers. Service Providers use the OAI interfaces of the Data Providers to harvest and store metadata. Note that this means that there are no live search requests to the Data Providers; rather, services are based on the harvested data via OAI-PMH.

Koha at present can only act as a Data Provider. It can not harvest from other repositories. The biggest stumbling block to having Koha harvest from other repositories is that MARC is the only metadata format that Koha indexes natively. Visit *http://www.oaforum.org/tutorial/english/page3.htm* for diagrams of how OAI-PMH works.

Learn more about OAI-PMH at: *http://www.openarchives.org/pmh/*

To enable OAI-PMH in Koha edit the *OAI-PMH* preference. Once enabled you can visit http://YOURKOHACATALOG/cgi-bin/koha/oai.pl to see your file.

20.1.1. *Sample OAI Conf File*

```
        format:
          vs:
            metadataPrefix: vs
            metadataNamespace: http://veryspecial.tamil.fr/vs/format-pivot/1.1/vs
            schema: http://veryspecial.tamil.fr/vs/format-pivot/1.1/vs.xsd
            xsl_file: /usr/local/koha/xslt/vs.xsl
          marcxml:
            metadataPrefix: marxml
            metadataNamespace: http://www.loc.gov/MARC21/slim
http://www.loc.gov/standards/marcxml/schema/MARC21slim
            schema: http://www.loc.gov/MARC21/slim
http://www.loc.gov/standards/marcxml/schema/MARC21slim.xsd
         oai_dc:
            metadataPrefix: oai_dc
            metadataNamespace: http://www.openarchives.org/OAI/2.0/oai_dc/
            schema: http://www.openarchives.org/OAI/2.0/oai_dc.xsd
            xsl_file:
/usr/local/koha/koha-tmpl/intranet-tmpl/xslt/UNIMARCslim2OAIDC.xsl
```

20.2. *REST services*

Koha can now be requested by REST http requests. BibLibre wrotes an external module to adds more possibilities than ILS-DI can provide.There is no authentication process, but authorized ips are listed in the config file. Services have been tested in 3.10, 3.12 and 3.14 koha versions. You can find more information about it into README file and opac/rest.pl documentation on http://git.biblibre.com. If you want to add features, send us a patch at dev_patches AT biblibre DOT com.

Services provided in 1.4 version are:

```
        GET branches
```

```
        GET user/byid/:borrowernumber/holds
        GET user/:user_name/holds
        GET user/byid/:borrowernumber/issues
        GET user/:user_name/issues
        GET user/:user_name/issues_history
        GET user/byid/:borrowernumber/issues_history
        GET user/today
        GET user/all
        POST user
        PUT user/:user_name
        GET biblio/:biblionumber/items
        GET biblio/:biblionumber/holdable
        GET biblio/:biblionumber/items_holdable_status
        GET item/:itemnumber/holdable
        PUT auth/change_password
        GET /suggestions
        GET /suggestions/:suggestionid
        POST /suggestions
        PUT /suggestions/:suggestionid
        DELETE /suggestions/:suggestionid
```

Using the SRU server

21.1. *Using the SRU server*

Nicolas Morin
Edited by Nicole C. Engard
December 2009
Koha implements the Search/Retrieve via URL (SRU) protocol. More information about the protocol it-
self can be found at *http://www.loc.gov/standards/sru/*. The version implemented is version 1.1.

21.1.1. *Explain*

If you want to have information about the implementation of SRU on a given server, you should
have access to the Explain file using a request to the server without any parameter. Like <http://
myserver.com:9999/biblios/>. The response from the server is an XML file that should look like the fol-
lowing and will give you information about the default settings of the SRU server.

```
            <zs:explainResponse>
                  <zs:version>1.1</zs:version>
                  <zs:record>
                        <zs:recordSchema>http://explain.z3950.org/dtd/2.0/</zs:recordSchema>
                        <zs:recordPacking>xml</zs:recordPacking>
                        <zs:recordData>
                        <explain xml:base="zebradb/explain-biblios.xml">
                        <!--
                        try stylesheet url: http://./?stylesheet=docpath/sru2.xsl
                        -->
                  <serverInfo protocol="SRW/SRU/Z39.50">
                        <host>biblibre</host>
                        <port>9999</port>
                        <database>biblios</database>
                  </serverInfo>
                  <databaseInfo>
                        <title lang="en" primary="true">Koha 3 Bibliographic SRU/SRW/Z39.50
 server</title>
                        <description lang="en" primary="true">Koha 3 Bibliographic Serv\
er</description>
                        <links>
                              <sru>http://biblibre:9999</sru>
                        </links>
                  </databaseInfo>
                  <indexInfo>
                        <set name="cql" identifier="info:srw/cql-context-set/1/cql-v1.1">
                              <title>CQL Standard Set</title>
                        </set>
                        <index search="true" scan="true" sort="false">
                        <title lang="en">CQL Server Choice</title>
                        <map>
                              <name set="cql">serverChoice</name>
                        </map>
                  <map>
                     <attr type="1" set="bib1">text</attr>
                        </map>
                   </index>
              <index search="true" scan="true" sort="false">
                 <title lang="en">CQL All</title>
                        <map>
        <name set="cql">all</name>
        </map>
```

```
        <map>
        <attr type="1" set="bib1">text</attr>
        </map>
        </index>
        <!-- Record ID index -->
        <index search="true" scan="true" sort="false">
        <title lang="en">Record ID</title>
        <map>
        <name set="rec">id</name>
        </map>
        <map>
        <attr type="1" set="bib1">rec:id</attr>
        <attr type="4" set="bib1">3</attr>
        </map>
        </index>
```

21.1.2. *Search*

This url : http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=reefs is composed of the following elements:

- base url of the SRU server : http://myserver.com:9999/biblios?

- search part with the 3 required parameters : version, operation and query. The parameters within the search part should be of the key=value form, and can be combined with the & character.

One can add optional parameters to the query, for instance maximumRecords indicating the maximum number of records to be returned by the server. So http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=reefs&maximumRecords=5 will only get the first 5 results results from the server.

http://www.loc.gov/standards/sru/sru1-1archive/search-retrieve-operation.html gives more details about the search operations and in particular the list of optional parameters for searching.

21.1.2.1. *More details about Search*

The "operation" key can take two values: scan or searchRetrieve.

If operation=searchRetrieve, then the search key should be query. As in :
operation=searchRetrieve&query=reefs

If operation=scan, then the search key should be scanClause. As in :
operation=scan&scanClause=reefs

etc/zebradb/biblios/etc/bib1.att defines Zebra/3950 indexes that exist on your system. For instance you'll see that we have indexes for Subject and for Title: att 21 Subject and att 4 Title respectively.

In the pqf.properties file located under etc/zebradb/pqf.properties I see that an access point already uses my Subject index (index.dc.subject = 1=21) while another uses my Title index (index.dc.title = 1=4) I know this is my Subject index because as I've seen just before in my bib1.att file, it's called with =1=21 in Z3950: so index.dc.subject = 1=21 correctly points to my Subject index. And Title was called with 1=4 so index.dc.title = 1=4 correctly points to my Title index. I can now construct my query just like I would in a search box, just preceding it with the "query" key: query=Subject=reefs and Title=coral searches "reefs" in the subject and "coral" in the title. The full url would be http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Subject=reefs and Title=coral If I want to limit the result set to just 5 records, I can do http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Subject=reefs and Title=coral&maximumRecords=5

I can also play with truncate, relations, etc. Those are also defined in my pqf.properties file. I can see for instance the position properties defined as:

```
         position.first            = 3=1 6=1
       # "first in field"
        position.any              = 3=3 6=1
          # "any position in field"
```

So as an example if I want "coral" to be at the beginning of the title, I can do this query : http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Title=coral first

21.1.3. *Retrieve*

My search for http://univ_lyon3.biblibre.com:9999/bib-lios?version=1.1&operation=searchRetrieve&query=coral reefs&maximumRecords=1 retrieves just on record. The response looks like this:

```
        <zs:searchRetrieveResponse>
<zs:version>1.1</zs:version>
<zs:numberOfRecords>1</zs:numberOfRecords>
<zs:records>
<zs:record>
<zs:recordPacking>xml</zs:recordPacking>
<zs:recordData>
<record xsi:schemaLocation="http://www.loc.gov/MARC21/slim http://www.loc.gov/ standards/mar\
cxml/schema/MARC21slim.xsd">
<leader> cam a22 4500</leader>
<datafield tag="010" ind1=" " ind2=" ">
<subfield code="a">2-603-01193-6</subfield>
<subfield code="b">rel.</subfield>
<subfield code="d">159 F</subfield>
</datafield>
<datafield tag="020" ind1=" " ind2=" ">
<subfield code="a">FR</subfield>
<subfield code="b">00065351</subfield>
</datafield>
<datafield tag="101" ind1="1" ind2=" ">
<subfield code="c">ita</subfield>
</datafield>
<datafield tag="105" ind1=" " ind2=" ">
<subfield code="a">a z 00|y|</subfield>
</datafield>
<datafield tag="106" ind1=" " ind2=" ">
<subfield code="a">r</subfield>
</datafield>
<datafield tag="100" ind1=" " ind2=" ">
<subfield code="a">20091130 frey50 </subfield>
</datafield>
<datafield tag="200" ind1="1" ind2=" ">
<subfield code="a">Guide des récifs coralliens / A Guide to Coral Reefs</subfield>
<subfield code="b">Texte imprimé</subfield>
<subfield code="e">la faune sous-marine des coraux</subfield>
<subfield code="f">A. et A. Ferrari</subfield>
</datafield>
<datafield tag="210" ind1=" " ind2=" ">
<subfield code="a">Lausanne</subfield>
<subfield code="a">Paris</subfield>
<subfield code="c">Delachaux et Niestlé</subfield>
<subfield code="d">cop. 2000</subfield>
<subfield code="e">impr. en Espagne</subfield>
</datafield>
```

```
<datafield tag="215" ind1=" " ind2=" ">
<subfield code="a">287 p.</subfield>
<subfield code="c">ill. en coul., couv. ill. en coul.</subfield>
<subfield code="d">20 cm</subfield>
</datafield>
......
<idzebra>
<size>4725</size>
<localnumber>2</localnumber>
<filename>/tmp/nw10BJv9Pk/upd_biblio/exported_records</filename>
</idzebra>
</record>
</zs:recordData>
<zs:recordPosition>1</zs:recordPosition>
</zs:record>
</zs:records>
</zs:searchRetrieveResponse>
```

Appendix A. New titles slider for OPAC

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Often times libraries will want to add a flowing widget with new materials at the library to their main public catalog page. To do this you can use a widget from any number of services (usually for a cost) or you can *enable plugins* in Koha and use the *Cover Flow plugin*[1] which is based on the *Flipster*[2], a responsive jQuery coverflow plugin.

Once the plugin is installed, the steps to get your coverflow to show up are as follows:

First, you need to create one or more public reports for your coverflow widget or widgets to be based on. This is how the plugin knows what the content of your widget should contain. Each report needs only three columns; title, biblionumber, and isbn. It is important that you have a good and valid isbn, as that is the datum used to actually fetch the cover. In the iteration of the plugin, we are using Amazon cover images, but I believe in the end I will make the cover image fetcher configurable so we can use any data source for cover image fetching.

Second, we need to configure the plugin. The plugin configuration is a single text area that uses YAML (actually, it's JSON, whcih is a subset of YAML) to store the configuration options. In this example it looks like this:

```
- id: 42
  selector: #coverflow
  options:
  style: coverflow
```

In this example, we are telling the plugin to use the report with id 42, and use it to create a coverflow widget to replace the HTML element with the id "coverflow". The options list is passed directly to Flipster, so any options supported by Flipster can be set from the plugin configuration! In fact, in addition to the traditional coverflow, Flipster has a "carousel" mode which is a much more compact version of the coverflow. You can also configure which cover the widget will start on, among other options.

At the time the plugins options are saved or updated, the plugin will then generate some minified JavaScript code that is automatically stored in the Koha system preference OPACUserJS. Here is an example of the output:

```
/* JS for Koha CoverFlow Plugin
 This JS was added automatically by installing the CoverFlow plugin
 Please do not modify */$(document).ready(function(){$.getScript("/plu\
gin/Koha/Plugin/Com/ByWaterSolutions/CoverFlow/jquery-flipster/src/js/
jquery.flipster.min.js",function(data,textStatus,jqxhr){$("head").append("<link
 id='flipster-css' href='/plugin/Koha/Plugin/Com/ByWaterSolutions/Cov\
erFlow/jquery-flipster/src/css/jquery.flipster.min.css' type='text/css'
 rel='stylesheet' />");$('#coverflow').load("/coverflow.pl?id=42",function(){var
 opt={'items':'.item','minfactor':15,'distribution':1.5,'scalethreshold':0,'staticbelowthreshold':false,
{'limit':4,'width':10,'scale':true}};$('#coverflow').flipster({style:'coverflow',});});});});});
/* End of JS for Koha CoverFlow Plugin */
```

Why do this? For speed! Rather than regenerating this code each and every time the page loads, we can generate it once, and use it over and over again.

---

[1] http://git.bywatersolutions.com/koha-plugins.git/shortlog/refs/heads/cover_flow
[2] https://github.com/drien/jquery-flipster

If you inspect the code closely, you'll notice it references a script "coverflow.pl". This is a script that is included with the coverflow plugin. Since we need to access this from the OPAC (and we don't want to set off any XSS attack alarms), we need to modify the web server configuration for the public catalog and add the followup to it:

```
ScriptAlias /coverflow.pl "/var/lib/koha/mykoha/plugins/Koha/Plugin/Com/ByWaterSolutions/Cov\
erFlow/coverflow.pl"
```

This line gives us access to the coverflow.pl script from the OPAC. This script retrieves the report data and passes it back to the public catalog for creating the coverflow widget. Koha::Cache is supported in order to make the widget load as quickly as possible!

The final step is to put your selector element somewhere in your public catalog. In this example, I put the following in the system preference OpacMainUserBlock:

```
<span id="coverflow">Loading...</span>
```

Once that is in place, you need only refresh your OPAC page, and there you have it, your very own catalog coverflow widget! Not only do these coverflows look great on a computer screen, but they look great on mobile platforms as well, and are even touch responsive!
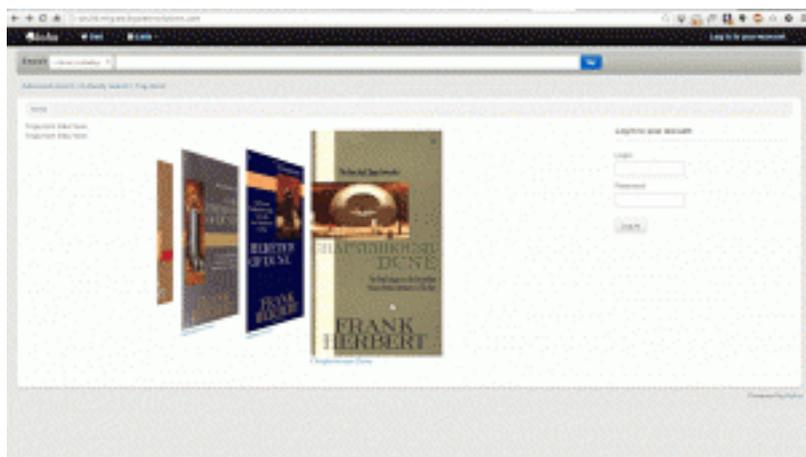
Appendix B. System Preference Defaults

B.1. *ISBD Defaults*

Default values for the *ISBD* preference.

B.1.1. *MARC Default*

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B.2. *OPACISBD Defaults*

Default values for the *OPACISBD* preference.

B.2.1. *MARC*

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|{ 5633 }{ 581a }{ 581z }|

#584|

|{ 5843 }{ 584a }{ 584b }|

#585|

|{ 5853 }{ 585a }|

#586|

|{ 5863 }{ 586a }|

#020|

<label>ISBN: </label>|{ 020a }{ 020c }|

#022|

<label>ISSN: </label>|{ 022a }|

#222| = |{ 222a }{ 222b }|

#210| = |{ 210a }{ 210b }|

#024|

<label>Standard No.: </label>|{ 024a }{ 024c }{ 024d }{ 0242 }|

#027|

<label>Standard Tech. Report. No.: </label>|{ 027a }|

#028|

<label>Publisher. No.: </label>|{ 028a }{ 028b }|

#013|

<label>Patent No.: </label>|{ 013a }{ 013b }{ 013c }{ 013d }{ 013e }{ 013f }|

#030|

<label>CODEN: </label>|{ 030a }|

#037|

<label>Source: </label>|{ 037a }{ 037b }{ 037c }{ 037f }{ 037g }{ 037n }|

#010|

<label>LCCN: </label>|{ 010a }|

#015|

<label>Nat. Bib. No.: </label>|{ 015a }{ 0152 }|

#016|

<label>Nat. Bib. Agency Control No.: </label>|{ 016a }{ 0162 }|

#600|

<label>Subjects--Personal Names: </label>|{\n6003 }{\n600a}{ 600b }{ 600c }{ 600d }{ 600e }{ 600f }{ 600g }{ 600h }{--600k}{ 600l }{ 600m }{ 600n }{ 600o }{--600p}{ 600r }{ 600s }{ 600t }{ 600u }{--600x}{--600z}{--600y}{--600v}|

#610|

<label>Subjects--Corporate Names: </label>|{\n6103 }{\n610a}{ 610b }{ 610c }{ 610d }{ 610e }{ 610f }{ 610g }{ 610h }{--610k}{ 610l }{ 610m }{ 610n }{ 610o }{--610p}{ 610r }{ 610s }{ 610t }{ 610u }{--610x}{--610z}{--610y}{--610v}|

#611|

<label>Subjects--Meeting Names: </label>|{\n6113 }{\n611a}{ 611b }{ 611c }{ 611d }{ 611e }{ 611f }{ 611g }{ 611h }{--611k}{ 611l }{ 611m }{ 611n }{ 611o }{--611p}{ 611r }{ 611s }{ 611t }{ 611u }{--611x}{--611z}{--611y}{--611v}|

#630|

<label>Subjects--Uniform Titles: </label>|{\n630a}{ 630b }{ 630c }{ 630d }{ 630e }{ 630f }{ 630g }{ 630h }{--630k }{ 630l }{ 630m }{ 630n }{ 630o }{--630p}{ 630r }{ 630s }{ 630t }{--630x}{--630z}{--630y}{--630v}|

#648|

<label>Subjects--Chronological Terms: </label>|{\n6483 }{\n648a }{--648x}{--648z}{--648y}{--648v}| #650|

<label>Subjects--Topical Terms: </label>|{\n6503 }{\n650a}{ 650b }{ 650c }{ 650d }{ 650e }{--650x}{--650z}{--650y}{--650v}|

#651|

<label>Subjects--Geographic Terms: </label>|{\n6513 }{\n651a}{ 651b }{ 651c }
{ 651d }{ 651e }{--651x}{--651z}{--651y}{--651v}|

#653|

<label>Subjects--Index Terms: </label>|{ 653a }|

#654|

<label>Subjects--Facted Index Terms: </label>|{\n6543 }{\n654a}{--654b}{--654x}
{--654z}{--654y}{--654v}|

#655|

<label>Index Terms--Genre/Form: </label>|{\n6553 }{\n655a}{--655b}{--655x }{--655z}
{--655y}{--655v}|

#656|

<label>Index Terms--Occupation: </label>|{\n6563 }{\n656a}{--656k}{--656x}{--656z}
{--656y}{--656v}|

#657|

<label>Index Terms--Function: </label>|{\n6573 }{\n657a}{--657x}{--657z}{--657y}
{--657v}|

#658|

<label>Index Terms--Curriculum Objective: </label>|{\n658a}{--658b}{--658c}{--658d}
{--658v}|

#050|

<label>LC Class. No.: </label>|{ 050a }{ / 050b }|

#082|

<label>Dewey Class. No.: </label>|{ 082a }{ / 082b }|

#080|

<label>Universal Decimal Class. No.: </label>|{ 080a }{ 080x }{ / 080b }|

#070|

<label>National Agricultural Library Call No.: </label>|{ 070a }{ / 070b }|

#060|

<label>National Library of Medicine Call No.: </label>|{ 060a }{ / 060b }|

#074|

<label>GPO Item No.: </label>|{ 074a }|

#086|

<label>Gov. Doc. Class. No.: </label>|{ 086a }|

#088|

<label>Report. No.: </label>|{ 088a }|

Appendix C. Configuring Receipt Printers

The following instructions are for specific receipt printers, but can probably be used to help with setup of other brands as well.

C.1. *For Epson TM-T88III (3) & TM-T88IV (4) Printers*

NEKLS

2008

C.1.1. *In the Print Driver*

For these instructions, we are using version 5,0,3,0 of the Epson TM-T88III print driver; the EPSON TM-T88IV version is ReceiptE4. Register at the *EpsonExpert Technical Resource Center website*[1] to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

Click Start > Printers and Faxes > Right click the receipt printer > Properties:

- Advanced Tab, click Printing Defaults button

- Layout Tab: Paper size: Roll Paper 80 x 297mm

- TM-T88III: Layout Tab: Check Reduce Printing and Fit to Printable Width

- TM-T88IV: Check Reduced Size Print; Click OK on the popup window that appears. Fit to Printable Width should be automatically selected.

- OK your way out of there.

C.1.2. *In Firefox*

Under File > Page Setup:

- Shrink to fit page on Format & Options tab

- 0,0,0,0 for Margins on Margins & Header/Footer Tab. This makes the receipts use all available space on the paper roll.

- Set all Headers/Footers to -blank-. This removes all of the gunk you might normally find on a print from Firefox, such as the URL, number of pages, etc.

- Click OK

Set the default printer settings in Firefox so you don't see a "Print" dialog:

- Go to File > Print

- Set the Printer to the receipt printer.

- Click the Advanced (or Properties) button

---

[1] https://www.epsonexpert.com/login

- Layout Tab: Paper size: Roll Paper 80 x 297mm

- TM-T88III: Layout Tab: Check Reduce Printing and Fit to Printable Width

- TM-T88IV: Check Reduced Size Print; click OK on the popup window that appears. Fit to Printable Width should be automatically selected.

- OK your way out, go ahead and print whatever page you are on.

- Type about:config, in the address bar. Click "I'll be careful, I promise!" on the warning message.

- Type, print.always in Filter.

- Look for print.always_print_silent.

  - If the preference is there then set the value to true.

- If the preference is not there (and it shouldn't be in most browsers) you have to add the preference.

  - Right click the preference area and select New > Boolean

  - Type print.always_print_silent in the dialog box and set the value to True. This sets the print settings in Firefox to always use the same settings and print without showing a dialog box.

> ⚠️ **Warning**
>
> Setting the print.always_print_silent setting in about:config DISABLES the ability to choose a printer in Firefox.

C.2. *For Epson TM-T88II (2) Printers*

NEKLS
2008
Register at the *EpsonExpert Technical Resource Center website*[2] to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

C.2.1. *In Firefox*

Under File > Page Setup:

- Shrink to fit page on Format & Options tab

- 0,0,0,0 for Margins on Margins & Header/Footer Tab. This makes the receipts use all available space on the paper roll.

- Set all Headers/Footers to -blank-. This removes all of the gunk you might normally find on a print from Firefox, such as the URL, number of pages, etc.

- Click OK

Set the default printer settings in Firefox so you don't see a "Print" dialog:

---

[2] https://www.epsonexpert.com/login

- Go to File > Print

- Set the Printer to the receipt printer.

- Print whatever page you are on.

- Type about:config, in the address bar. Click "I'll be careful, I promise!" on the warning message.

- Type, print.always in Filter.

- Look for, print.always_print_silent.

  - If the preference is there then set the value to true.

- If the preference is not there (and it shouldn't be in most browsers) you have to add the preference.

  - Right click the preference area and select New > Boolean

  - Type, print.always_print_silent in the dialog box and set the value to True. This sets the print settings in Firefox to always use the same settings and print without showing a dialog box.

> ⚠ **Warning**
>
> Setting the print.always_print_silent setting in about:config DISABLES the ability to choose a printer in Firefox.

C.3. *For Star SP542 Printers*

RHCL
2010

C.3.1. *Installing the Printer*

While the following comments are based on the Star SP542 receipt printer, they probably apply to all printers in the SP5xx series.

The Star SP542 receipt printer works well with Koha and **Firefox on Windows XP SP3**. This printer, with either the parallel or USB interface, is fairly easy to install and configure. You will need the following executable file which is available from numerous places on the Internet:

linemode_2k-xp_20030205.exe

This executable actually does all of the installation; you will not need to use the Microsoft Windows "Add Printer" program. We recommend that when installing, the option for the software monitor not be selected; we have experienced significant pauses and delays in printing with it. Instead, simply choose to install the receipt printer without the monitor.

Additionally, the install program may not put the printer on the correct port, especially if using the USB interface. This is easily corrected by going to "Start -> Printers and Faxes -> Properties for the SP542 printer -> Ports", then check the appropriate port.

A reboot may be required, even if not indicated by the installation software or the operating system.

Windows 7 users should refer to this page: *http://www.starmicronics.com/supports/win7.aspx*.

C.4. *Configuring Firefox to Print to Receipt Printer*

VOKAL

2010

- Open File > Page Setup

- Make all the headers and footers blank

- Set the margins to 0 (zero)

- In the address bar of Firefox, type about:config

- Search for print.always_print_silent and double click it

- Change it from false to true

  - This lets you skip the Print pop up box that comes up, as well as skipping the step where you have to click OK, automatically printing the right sized slip.

- If print.always_print_silent does not come up

  - Right click on a blank area of the preference window

  - Select new > Boolean

  - Enter "print.always_print_silent" as the name (without quotes)

  - Click OK

  - Select true for the value

- You may also want to check what is listed for print.print_printer

  - You may have to choose Generic/Text Only (or whatever your receipt printer might be named)

Appendix D. Notice & Slips Guides

D.1. *Field Guide for Notices & Slips*

Barton Chittenden
Edited by Nicole C. Engard
2014
This guide will break down the notices and slips information in 3 ways. First it will tell you what file generates the notice, then how you will present the item info in that notice and finally if the notice can be branch specific or not.

Letter Code	Used In	Detail tag	Can be branch specific
DUE	advance_notices.pl	<<items.content>>	No
DUEDGST	advance_notices.pl	<<items.content>>	No
PREDUE	advance_notices.pl	<<items.content>>	No
PREDUEDGST	advance_notices.pl	<<items.content>>	No
ODUE*	overdue_notices.pl	<<items.content>> or <item> </item>	Yes
CHECKOUT	C4/Circulation.pm	N/A	Yes
RENEWAL	C4/Circulation.pm	N/A	Yes
TRANSFERSLIP	C4/Circulation.pm	N/A	Yes
ISSUESLIP	C4/Members.pm	<checkedout> </checkedout> <overdue> </overdue> <news> </news>	Yes
ISSUEQSLIP	C4/Members.pm	<checkedout> </checkedout>	Yes
HOLDPLACED	C4/Reserves.pm	N/A	Yes
RESERVESLIP	C4/Reserves.pm	N/A	Yes
ASKED	C4/Suggestions.pm	N/A	Yes
CHECKED	C4/Suggestions.pm	N/A	Yes
ACCEPTED	C4/Suggestions.pm	N/A	Yes
REJECTED	C4/Suggestions.pm	N/A	Yes
OPAC_REG_VERIFY	opac/opac-memberentry.pl	N/A	No

Appendix E. Example Notice

Nicole Engard

410 Library Rd.

Philadelphia, PA 19107

Dear Nicole Engard (23529000035726),

According to our records, at the time of this notice, you have items that are overdue. Please return or renew them as soon as possible to avoid increasing late fines.

If you have registered a password with the library, you may use it with your library card number to re-new online.

If you believe you have returned the items below please call at and library staff will be happy to help resolve the issue.

The following item(s) are currently overdue:

07/08/2008 Creating drug-free schools and communities : 502326000054 Fox, C. Lynn.

06/27/2008 Eating fractions / 502326000022 McMillan, Bruce.

Sincerely, Library Staff

Appendix F. Sample Serials

F.1. *Reader's Digest (0034-0375)*

- Published 12 times a year (monthly)

- The Volume number changes every 6 months and the numbers continues on (requires an advanced pattern).

F.2. *People Weekly (1076-0091)*

- Published weekly

  - The website says "on Saturday except the first week of August, Thanksgiving week, the first and last weeks of the year" but this does not match the pattern for 2007 or 2008

- In the Jul-Dec there are 26 issues

- In the Jan-Jun there are 25 issues (no issue for the first week of January)

Since the irregularity on the first # 26 does not skip a week, this would be set up as to roll over on issue 25. The 26th issue in the second half of the year would have to be received as a supplemental.

The irregularity check will complain that 52 issues were expected, but 25 entered. The current irregularity check can only check that the first position of the numbering pattern matches the expected issue count of the periodicity. But we do need to trigger the rollover on the volume, so we need to define the last two weeks of the year as irregularities. So we receive 50 issues the first 50 weeks, then one supplemental issue in week 51, which we have to define the enumeration for, then the next predicted issue will be the following year's first week.

F.3. *Et-Mol*

This journal is published with the following rules:

- 6 issues a year (every 2 months)

- year changes every 6 issues

- we start in 2011

- the issue number goes up indefinitely

- starting from issue 215

The planning would look like this:

F.4. *Backpacker (0277-867X)*

Published 9 times a year irregularly. The issues continues while the volume and number rolls over every 9 issues. If you're holding Volume 41, Number 3, Issue 302 in your hand the prediction would look like this:

And the received issues would number like this:

v. 41, no. 3, iss. 302

v. 41, no. 4, iss. 303

v. 41, no. 5, iss. 304

v. 41, no. 6, iss. 305

v. 41, no. 7, iss. 306

v. 41, no. 8, iss. 307

v. 41, no. 9, iss. 308

v. 42, no. 1, iss. 309

v. 42, no. 2, iss. 310

v. 42, no. 3, iss. 311

v. 42, no. 4, iss. 312

F.5. *Keats-Shelley Journal (0453-4387)*

This journal is published once per year in July. The numbering follows this pattern:

• Vol. 61 2013

• Vol. 62 2014

• Vol. 63 2015

Setup should look like this (if you're starting in July 2014):

F.6. *Computers in Libraries (1041-7915)*

Computers in Libraries is published ten times per year (monthly with January/February and July/August combined issues).

| 2014 | **2013** |

Edit serials | Generate next | Multi receiving

Select all | Clear all

Edit	Date published ⇕	Date received ⇕	Number ⇕	Status ⇕	Notes ⇕	Library ⇕	Routing ⇕
☐	12/15/2013	12/15/2013	Vol 33, No 10	Arrived		Fairfield	Print list
☐	11/15/2013	11/15/2013	Vol 33, No 9	Arrived		Fairfield	Print list
☐	10/15/2013	10/15/2013	Vol 33, No 8	Arrived		Fairfield	Print list
☐	09/15/2013	09/15/2013	Vol 33, No 7	Arrived		Fairfield	Print list
☐	07/15/2013	07/15/2013	Vol 33, No 6	Arrived		Fairfield	Print list
☐	06/15/2013	06/15/2013	Vol 33, No 5	Arrived		Fairfield	Print list
☐	05/15/2013	05/15/2013	Vol 33, No 4	Arrived		Fairfield	Print list
☐	04/15/2013	04/15/2013	Vol 33, No 3	Arrived		Fairfield	Print list
☐	03/15/2013	03/15/2013	Vol 33, No 2	Arrived		Fairfield	Print list
☐	01/15/2013	01/15/2013	Vol 33, No 1	Arrived		Fairfield	Print list

Appendix G. Sample List & Cart Emails

G.1. *Example Email from List*

Below is an example of an email from a list in Koha.

```
Hi,

Here is your list called If You Like Jodi Picoult, sent from our online catalog.

Please note that the attached file is a MARC bibliographic records file
which can be imported into a Personal Bibliographic Software like EndNote,
Reference Manager or ProCite.
--------------------------------------------

Home safe : a novel /

by Berg, Elizabeth.

Published by: Random House,, 260 p. ;, 25 cm.
Copyright year: 2009
LCCN:   2008049247
In the online catalog:
    http://MYCATALOG/cgi-bin/koha/opac-detail.pl?biblionumber=12113
Items :
    North Branch FIC (FIC Ber) TVSN500088894O
    Main Library FIC (FIC Boh) TVSN5000921548
    South Branch FIC (FIC Boh) TVSN500092156A
    West Branch FIC (FIC Boh) TVSN5000921559


--------------------------------------------

Half a heart /

by Brown, Rosellen.

Published by: Farrar, Straus, and Giroux,, 402 p. ;, 24 cm.
Copyright year: 2000
LCCN:   00022926
In the online catalog:
    http://MYCATALOG/cgi-bin/koha/opac-detail.pl?biblionumber=12501
Items :
    East Branch  (813/.54)
    South Branch FIC (FIC Bro) TVSN5000451333
```

G.2. *Example Email from Cart*

Below is a sample of what an email from the Cart in Koha will look like:

```
Hi,

    Joaquin D'Planque sent you a cart from our online catalog.

    Please note that the attached file is a MARC bibliographic records
    file which can be imported into personal bibliographic software like
    EndNote, Reference Manager or ProCite.

    -----------------------------------------------------------------

    1.  Book /
```

```
     Author(s): Brookfield, Karen. ;
     Published by: Knopf : | Distributed by Random House, , 63 p. : ,
     29 cm.
     Copyright year: 1993
     Notes : Includes index.
     LCCN: 93018833 /AC

     In online catalog:
     http://MYCATALOG/cgi-bin/koha/opac-detail.pl?biblionumber=31644

     Items:

       *  East Branch (JNF 002 Bro) TVSN500017618A

       ----------------------------------------------------------------

  2.  The 1965 World book year book :

     Published by: Field Enterprises Educational Corp., , 628 p. : , 26
     cm.
     Copyright year: 1965
     Notes : Includes index. | Spine title: Year book, 1965. | Cover
     title: The World book year book, 1965.
     URL:
     http://www.archive.org/details/1965worldbookyea00chic%20%7C%20http://
www.openlibrary.org/books/OL24199089M

     In online catalog:
     http://MYCATALOG/cgi-bin/koha/opac-detail.pl?biblionumber=88666

       ----------------------------------------------------------------
```

Appendix H. Using Koha as a Content Management System (CMS)

H.1. *Setup*

These are instructions for taking a default install of Koha and allowing it to function as a little content management system. This will allow a library to publish an arbitrary number of pages based on a template. This example uses the template for the main opac page, but you could just as well use any template you wish with a bit more editing. This may be appropriate if you have a small library, want to allow librarians to easily add pages, and do not want to support a complete CMS.

- Copy /usr/share/koha/opac/cgi-bin/opac/opac-main.pl to /usr/share/koha/opac/cgi-bin/opac/pages.pl (in the same directory)

- Edit pages.pl in an editor

- At approximately line 33 change this code:

```
template_name  => "opac-main.tmpl",
```

- To this code:

```
template_name  => "pages.tmpl",
```

- At approximately line 62 after this code:

```
$template->param(
        koha_news       => $all_koha_news,
        koha_news_count => $koha_news_count,
        display_daily_quote => C4::Context->preference('QuoteOfTheDay'),
        daily_quote         => $quote,
        );
```

- Add these lines:

```
        my $page = "page_" . $input->param('p');         # go for "p" value in URL and do
  the concatenation
        my $preference = C4::Context->preference($page); # Go for preference
        $template->{VARS}->{'page_test'} = $preference;   # pass variable to template
  pages.tt
```

- Note pages.pl file must have Webserver user execution permissions, you can use *chmod*[1] command if you are actually logged in as such user:

```
        $chmod 755 pages.pl
```

- In the browser go to Home > Administration > System Preferences > Local Use and add a New Preference called "page_test"

---

[1] http://en.wikipedia.org/wiki/Chmod

- Fill it out as so

  - Explanation: test page for pages tiny cms

  - Variable: page_test

  - Value: Lorem ipsum

  - Click the TextArea link (or enter "TextArea" into the input field below it)

  - variable options (last field): 80|50

- In a browser go to http://youraddress/cgi-bin/koha/pages.pl?p=test The page should come up with the words "Lorem ipsum" in the main content area of the page. (replace "youraddress" with local-host, 127.0.0.1, or your domain name depending on how you have Apache set up.)

- To add more pages simply create a system preference where the title begins with "page_" followed by any arbitrary letters. You can add any markup you want as the value of the field. Reference the new page by changing the value of the "p" parameter in the URL.

To learn more visit the Koha wiki page on this topic: *http://wiki.koha-community.org/wi-ki/Koha_as_a_CMS*

H.1.1. *Editing the pages template*

The file to create / edit for the pages template will depend on your *opacthemes* system preference set-ting

H.1.1.1. *Editing 'bootstrap' theme template (current)*

- Copy /usr/share/koha/opac/htdocs/opac-tmpl/bootstrap/en/modules/opac-main.tt to /usr/share/ko-ha/opac/htdocs/opac-tmpl/bootstrap/en/modules/pages.tt

- Edit /usr/share/koha/opac/htdocs/opac-tmpl/bootstrap/en/modules/pages.tt

- At approximately line 61, change this:

```
        [% IF ( OpacMainUserBlock ) %]<div id="opacmainuserblock">[% OpacMainUserBlock
    %]</div>[% END %]
```

- To this:

```
        [% IF ( page_test ) %]<div id="opacmainuserblock">[% page_test %]</div>[% END %]
```

Remark: You may wish to disable your News block of these CMS style pages e.g. when you do not want it displayed on the CMS style pages or where the News block is long enough that it actually makes the 'page_test' include scroll outside the default viewport dimensions. In that case, remove the following code from your pages.tt template.

```
            [% IF ( koha_news_count ) %]
                <div id="news">
                <table class="table table-bordered">
                [% FOREACH koha_new IN koha_news %]
                  <thead><tr><th>[% koha_new.title %]</th></tr></thead>
                  <tbody><tr><td><p>[% koha_new.new %]</p>
                  <p class="newsfooter"><i>(published on [% koha_new.newdate %])</i></
    p></td></tr></tbody>
```

```
                                [% END %]
                            </table>
                        </div>
                    [% END %]
```

H.1.2. *Troubleshooting*

If you have problems check file permissions on pages.pl and pages.tmpl. They should have the same user and group as other Koha files like opac-main.pl.

H.1.3. *Bonus Points*

Instead of using the address http://youraddress/cgi-bin/koha/pages.pl?p=test you can shorten it to http://youraddress/pages.pl?p=test Just open up /etc/koha/koha-httpd.conf and add the follow at about line 13:

```
ScriptAlias /pages.pl "/usr/share/koha/opac/cgi-bin/opac/pages.pl"
```

Then restart Apache.

H.2. *Usage*

After setting up Koha as a CMS you can create new pages following these instructions:

H.2.1. *Adding Pages*

To add a new page you need to add a system preference under Local Use.

- Get there: More > Administration > Global System Preferences > Local Use

- Click 'New Preference'

- Enter in a description in the Explanation field

- Enter a value that starts with 'page_' in the Variable field

- Enter starting HTML in the Value field

- Set the Variable Type to Textarea

- Set the Variable options to something like 20|20 for 20 rows and 20 columns

H.2.2. *Viewing your page*

You can view your new page at http://YOUR-OPAC/cgi-bin/koha/pages.pl?p=PAGENAME where PA-GENAME is the part you entered after 'page_' in the Variable field.

H.2.3. *Example*

This process can be used to create recommended reading lists within Koha. So once the code changes have been made per the instructions on 'Koha as a CMS' you go through the 'Adding a New Page' instructions above to great a page for 'Recommended Reading Lists'

Next we need to create pages for our various classes (or categories). To do this, return to the 'Adding a New Page' section and create a preference for the first class.

Next you'll want to link your first page to your new second page, go to the page_recommend prefer-
ence and click 'Edit.' Now you want to edit the HTML to include a link to your newest page:

H.2.4. *Live Examples*

- The Crawford Library at Dallas Christian College is using this method for their recommended read-
  ing lists: *http://opac.dallas.edu/*

Appendix I. Resetting the Koha Database

These notes on how to reset the database for Koha were derived from the following email thread: *http://lists.koha-community.org/pipermail/koha-devel/2009-January/008939.html* and *http://lists.katipo.co.nz/public/koha/2014-June/039701.html*

Resetting the database may be useful if you install Koha with the sample data, and then wish to use real data without reinstalling the software.

I.1. *Delete sample data from Tables*

Use your preferred MySQL client to *delete*[1] the following tables:

- bibio

- biblioitems

- items

- auth_header

- sessions

- zebraqueue

You may need to disable foreign key checks to delete data from same tables. For instructions follow this thread: *https://lists.katipo.co.nz/pipermail/koha/2013-July/036853.html*.

I.2. *Reset the Zebra Index*

Run the following commands to reset the authorities and biblios Zebra indices.

```
$ zebraidx -c /etc/koha/zebradb/zebra-authorities-dom.cfg -g iso2709 -d authorities init
$ zebraidx -c /etc/koha/zebradb/zebra-biblios.cfg -g iso2709 -d biblios init
```

If you are running a package install then you'll want to run the following commands to reset the authorities and biblios Zebra indices instead:

```
$ sudo zebraidx -c /etc/koha/sites/YOURLIBRARY/zebra-authorities-dom.cfg  -g iso2709 -d au\
thorities init
$ sudo zebraidx -c /etc/koha/sites/YOURLIBRARY/zebra-biblios.cfg  -g iso2709 -d biblios init
```

Replacing YOURLIBRARY with your Koha installation name.

---

[1] http://dev.mysql.com/doc/refman/5.5/en/delete.html

Appendix J. Important Links

J.1. *Koha Related*

- Report Koha Bugs - *http://bugs.koha-community.org*

- Koha Versioning Control - *http://git.koha-community.org/*

- Database Structure - *http://schema.koha-community.org*

- Koha Community Statistics - *http://hea.koha-community.org*

- Koha as a CMS - *http://wiki.koha-community.org/wiki/Koha_as_a_CMS*

- Kyles's Koha Tools - *http://kylehall.info/index.php/projects/koha/*

- Koha Bibliography - *http://www.zotero.org/groups/koha*

- Koha Shared Links - *http://groups.diigo.com/group/everything-koha*

J.2. *Circulation Related*

- Koha Desktop Offline Circulation: *https://github.com/bywatersolutions/koha-offline-circulation/releases*

- Koha Firefox Offline Circulation: *https://addons.mozilla.org/en-US/firefox/addon/koct/*

J.3. *Cataloging Related*

- Koha MARC Tutorials - *http://www.pakban.net/brooke/*

- IRSpy Open Z39.50 Server Search - *http://irspy.indexdata.com/*

- Z39.50 Server List - *http://staff.library.mun.ca/staff/toolbox/z3950hosts.htm*

- Open Koha Z39.50 Targets - *http://wiki.koha-community.org/wiki/Koha_Open_Z39.50_Sources*

- Library of Congress Authorities - *http://authorities.loc.gov/*

- MARC Country Codes - *http://www.loc.gov/marc/countries/*

- Search the MARC Code List for Organizations - *http://www.loc.gov/marc/organizations/org-search.php*

- Search for Canadian MARC Codes - *http://www.collectionscanada.gc.ca/illcandir-bin/illsear/l=0/c=1*

- Z39.50 Bib-1 Attribute - *http://www.loc.gov/z3950/agency/defns/bib1.html*

J.4. *Enhanced Content Related*

- Amazon Associates - *https://affiliate-program.amazon.com*[1]

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[1] https://affiliate-program.amazon.com/

- Amazon Web Services - *http://aws.amazon.com*

- WorldCat Affiliate Tools - *http://www.worldcat.org/wcpa/do/AffiliateUserSer-vices?method=initSelfRegister*

- XISBN - *http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp*

- LibraryThing for Libraries - *http://www.librarything.com/forlibraries*

J.5. *Design Related*

- JQuery Library - *http://wiki.koha-community.org/wiki/JQuery_Library*

- HTML & CSS Library - *http://wiki.koha-community.org/wiki/HTML_%26_CSS_Library*

- Owen Leonard's Koha Blog - *http://www.myacpl.org/koha*

J.6. *Reports Related*

- SQL Reports Library - *http://wiki.koha-community.org/wiki/SQL_Reports_Library*

- Database Schema - *http://schema.koha-community.org*

- Sample reports from NEKLS - *http://www.nexpresslibrary.org/training/reports-training/*

J.7. *Installation Guides*

- Installing Koha 3 on Ubuntu - *http://www.blazingmoon.org/guides/k3-on-u810-1.html*

- Koha on Debian installation documentation - *http://openlib.org/home/krichel/courses/lis508/doc/koha_installation_overview.html*

- Koha 3.2 on Debian Squeeze - *http://wiki.koha-community.org/wiki/Koha_3.2_on_Debian_Squeeze*

J.8. *Misc*

- Zotero - *http://zotero.org*

- SOPAC - *http://thesocialopac.net*[2]

---

[2] http://thesocialopac.net/

Appendix K. Koha XSLT Item Types

When you have any of the XSLT system preferences (*OPACXSLTDetailsDisplay*, *OPACXSLTResultsDisplay*, *XSLTDetailsDisplay*, and/or *XSLTResultsDisplay*) along with the *DisplayOPACiconsXSLT* and *DisplayIconsXSLT* preferences turned on you will see item type icons on the related screen.

> **Important**
>
> These images are coming from values found in your leader, if your leader is not cataloged properly it might be best to turn off the *DisplayOPACiconsXSLT* preference (which can be done while leaving the other XSLT preferences turned on).

Type: Book;

- Book [BK]

    - leader6 = a (and one of the leader7 values below)

        - leader7 = a

        - leader7 = c

        - leader7 = d

        - leader7 = m

    - leader6 = t

Type: Computer File;

- Computer File [CF]

    - leader6 = m

Type: Continuing Resource;

- Continuing Resource [CR]

    - leader7 = b

    - leader7 = i

    - leader7 = s

Type: Map;

- Map [MP]

    - leader6 = e

    - leader6 = f

- Mixed [MX]

  - leader6 = p

- Sound [MU]

  - leader6 = c

  - leader6 = d

  - leader6 = i

  - leader6 = j

- Visual Material [VM]

  - leader6 = g

  - leader6 = k

  - leader6 = r

- Kit

  - leader6 = o

Appendix L. MarcEdit

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

> **Important**
>
> Many of the actions described in this chapter can be done in Koha using *Marc Modification Templates*, but this section is here for those who are used to MarcEdit.

L.1. *Adding a prefix to call numbers*

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

- Open MarcEdit

- Click 'MarcEditor'

- Go to Tools > Edit Subfield Data
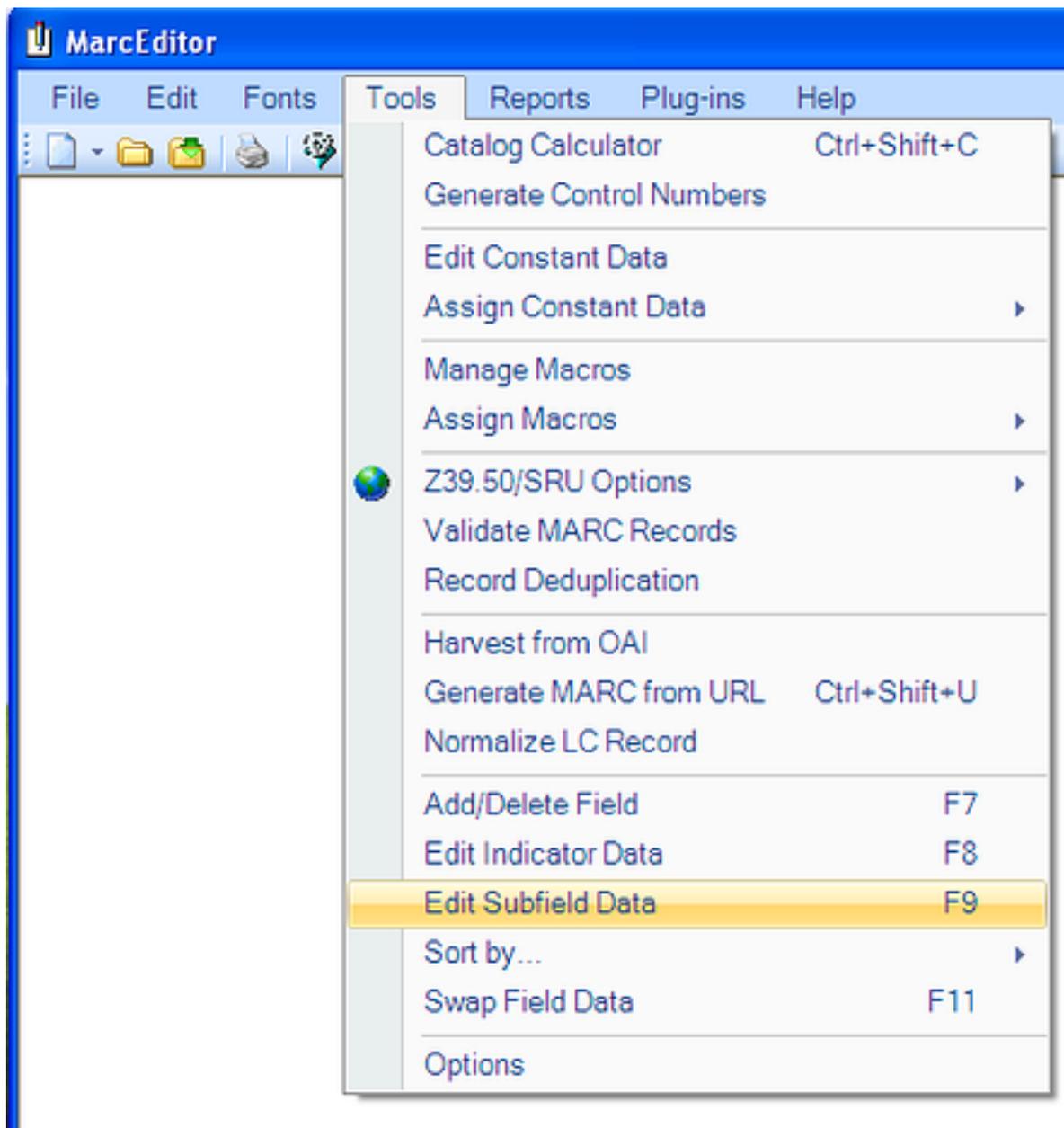
- To prepend data the special character is: ^b To simply prepend data to the beginning of a subfield, add ^b to the Field Data: textbox and the data to be appended in the Replace
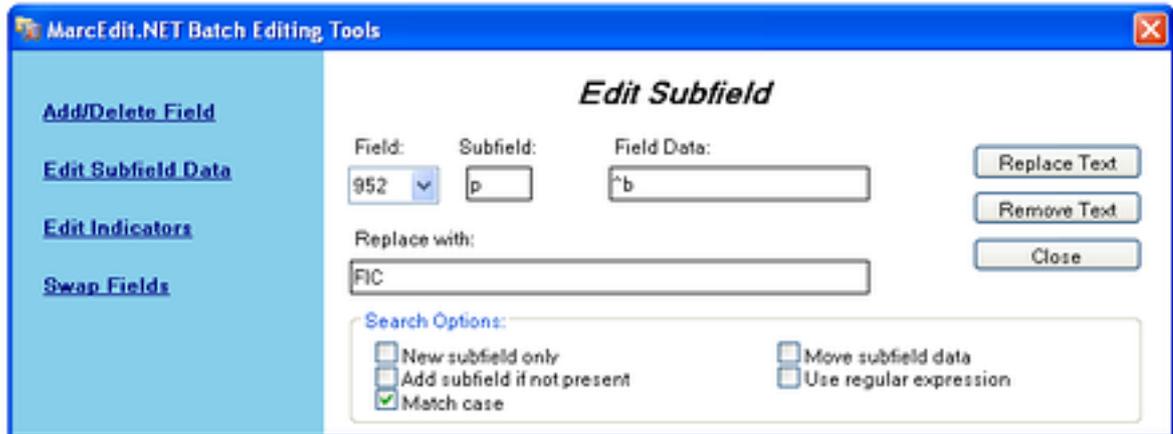
- To prepend data to the beginning of the subfield while replacing a text string, add ^b[string to re-place] to the Field Data textbox and the data to be appended in the Replace With textbox.

L.2. *Importing Excel data into Koha*

Kanika Goyal
Edited by Nicole C. Engard
2010
Suppose you have records of your library in excel data sheet format and want them to import into Ko-ha. But how will you do this? Koha will not let you import excel records directly. Well here is a very simple solution for you which will let you import your excel records in Koha easily. First, we will convert excel file into Marc file and then will import it into Koha.

Follow the given steps to import your excel records into Koha

L.2.1. *Converting from Excel format into .mrk format*

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

Now open it and select Add-ins-->Delimited Text Translator.
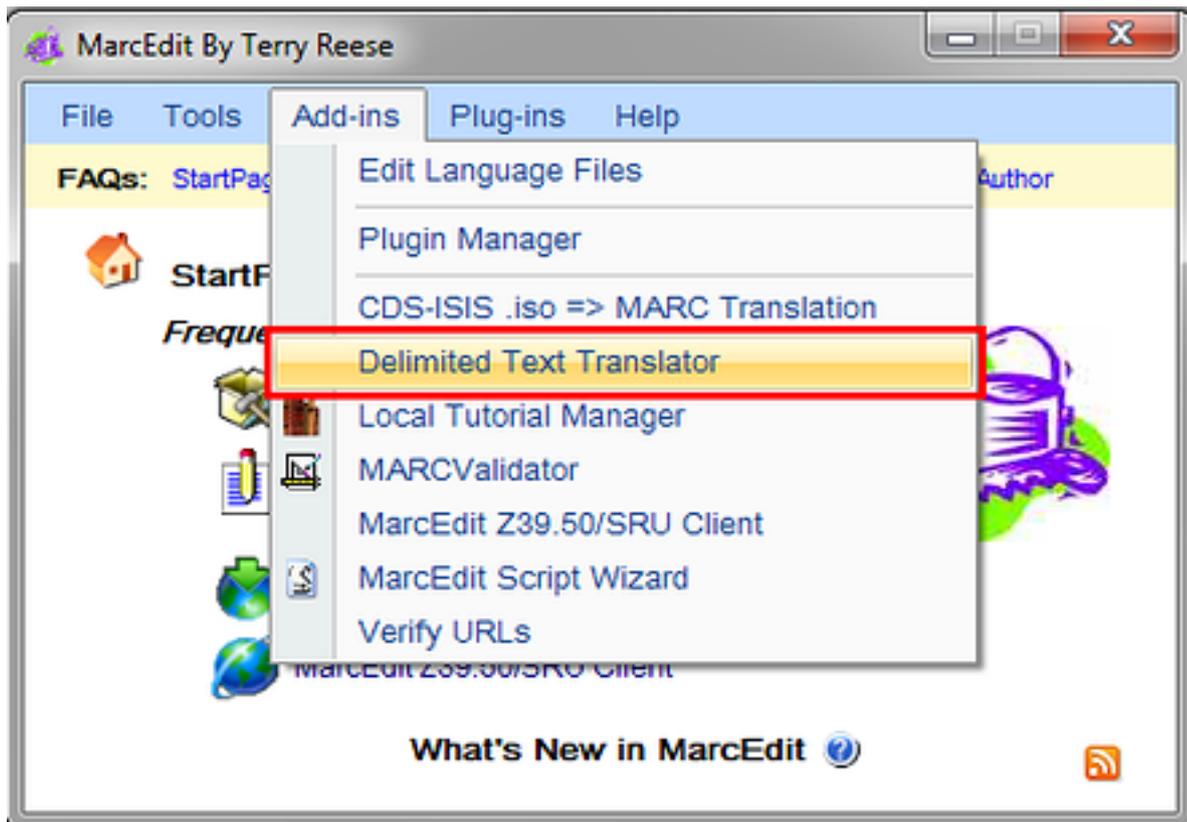
Click Next when the following window appears.
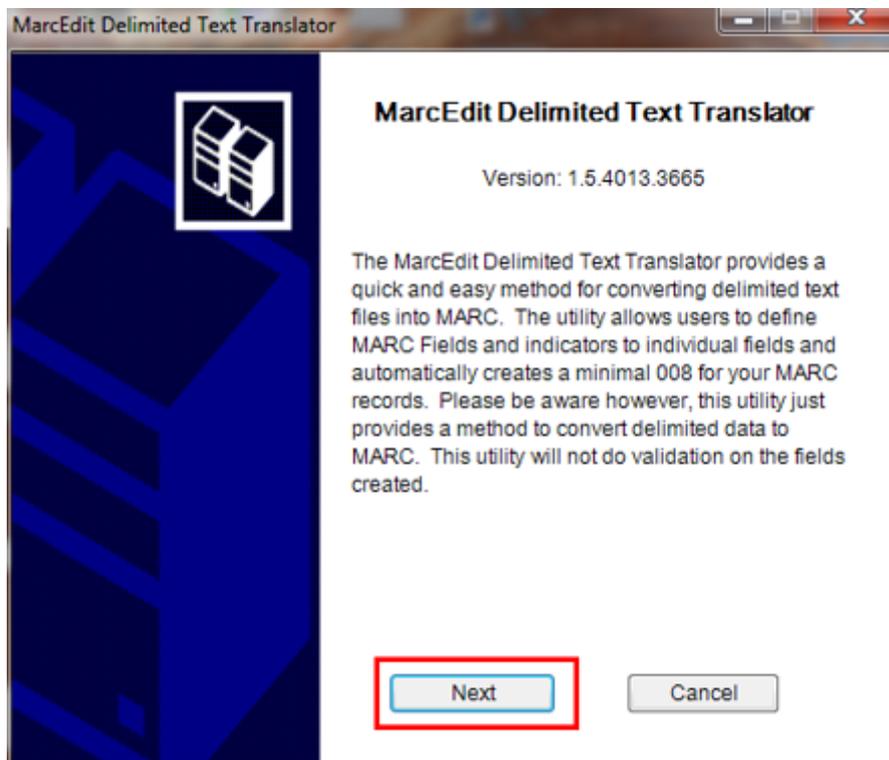
Browse for your excel file.
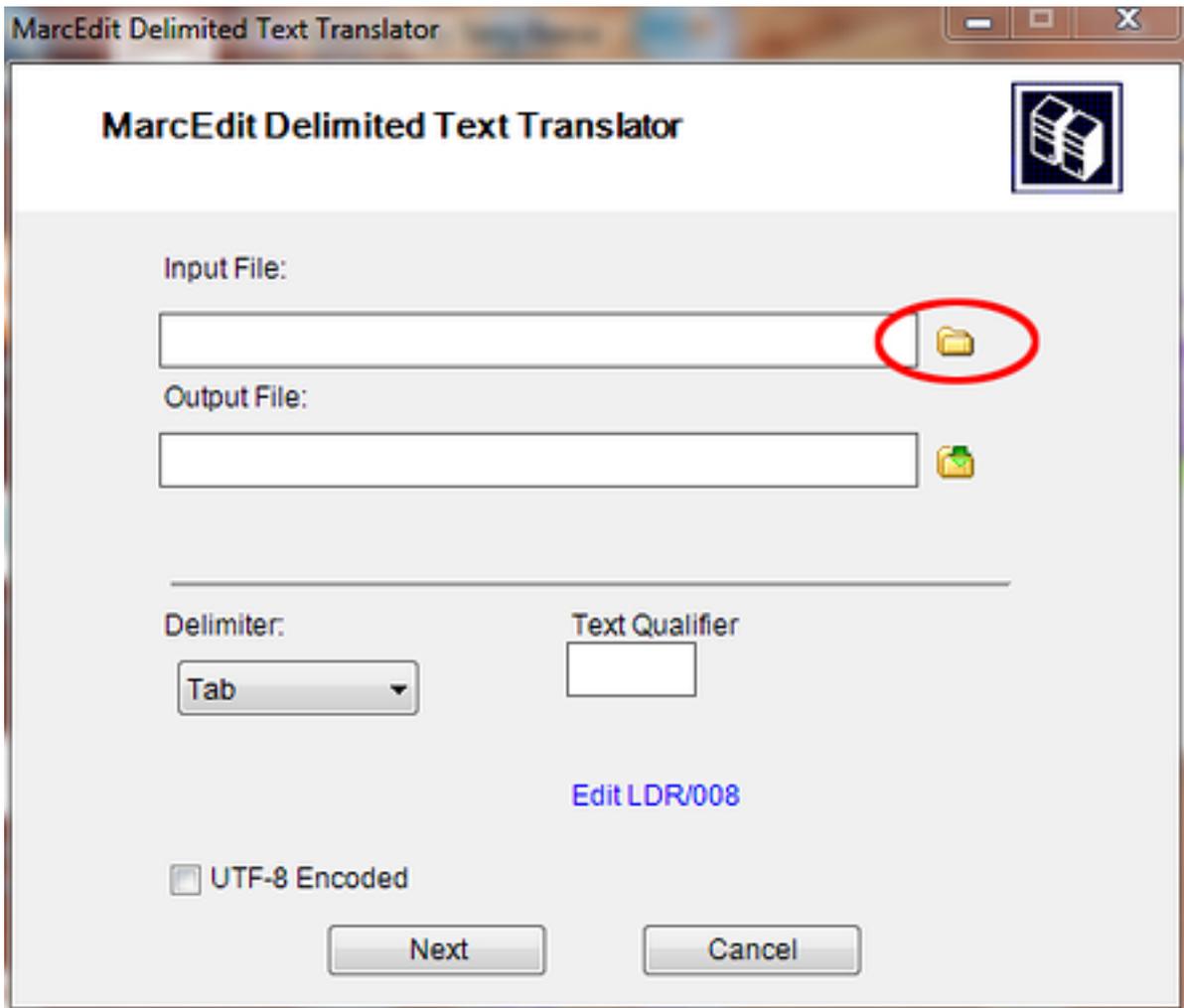
Locate your excel file by choosing the format Excel File(*.xls).
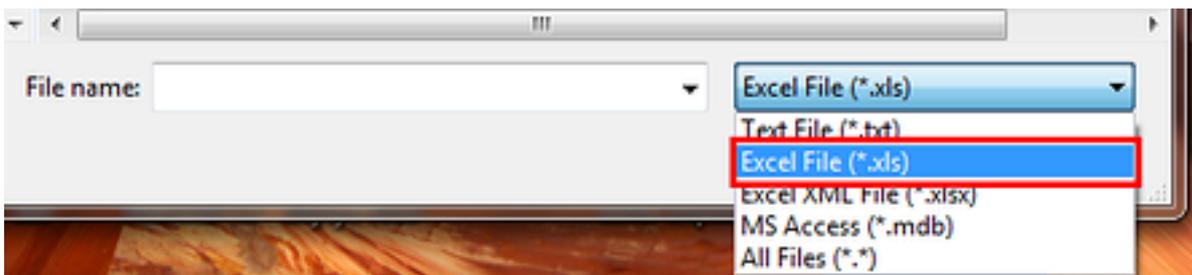
Similarly, fill all the other entries such as Output File, Excel Sheet Name and check UTF-8 Encoded (if required) and Click Next.
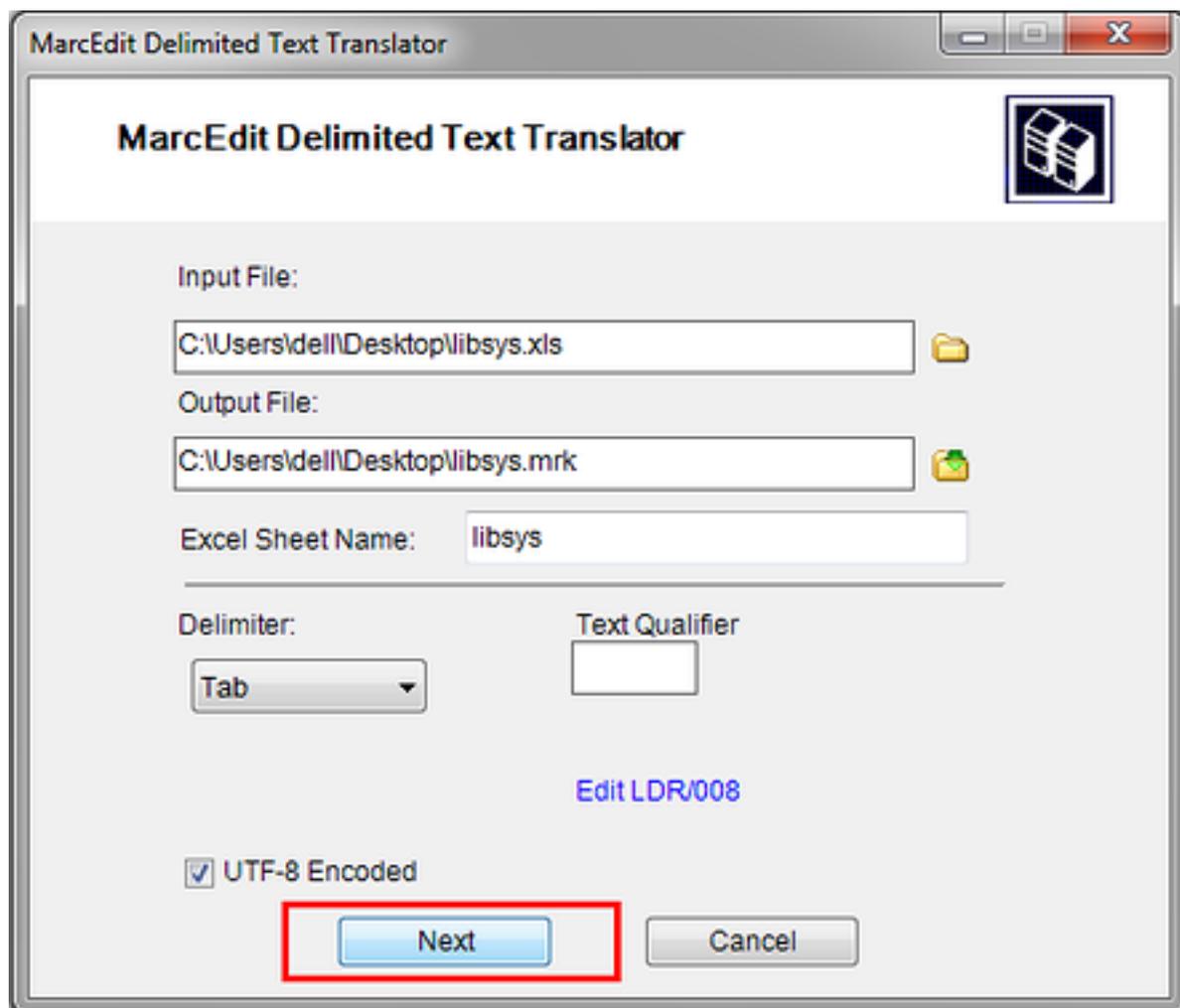
Now you will be prompted for mapping the fields to recognise the fields by standard marc format.

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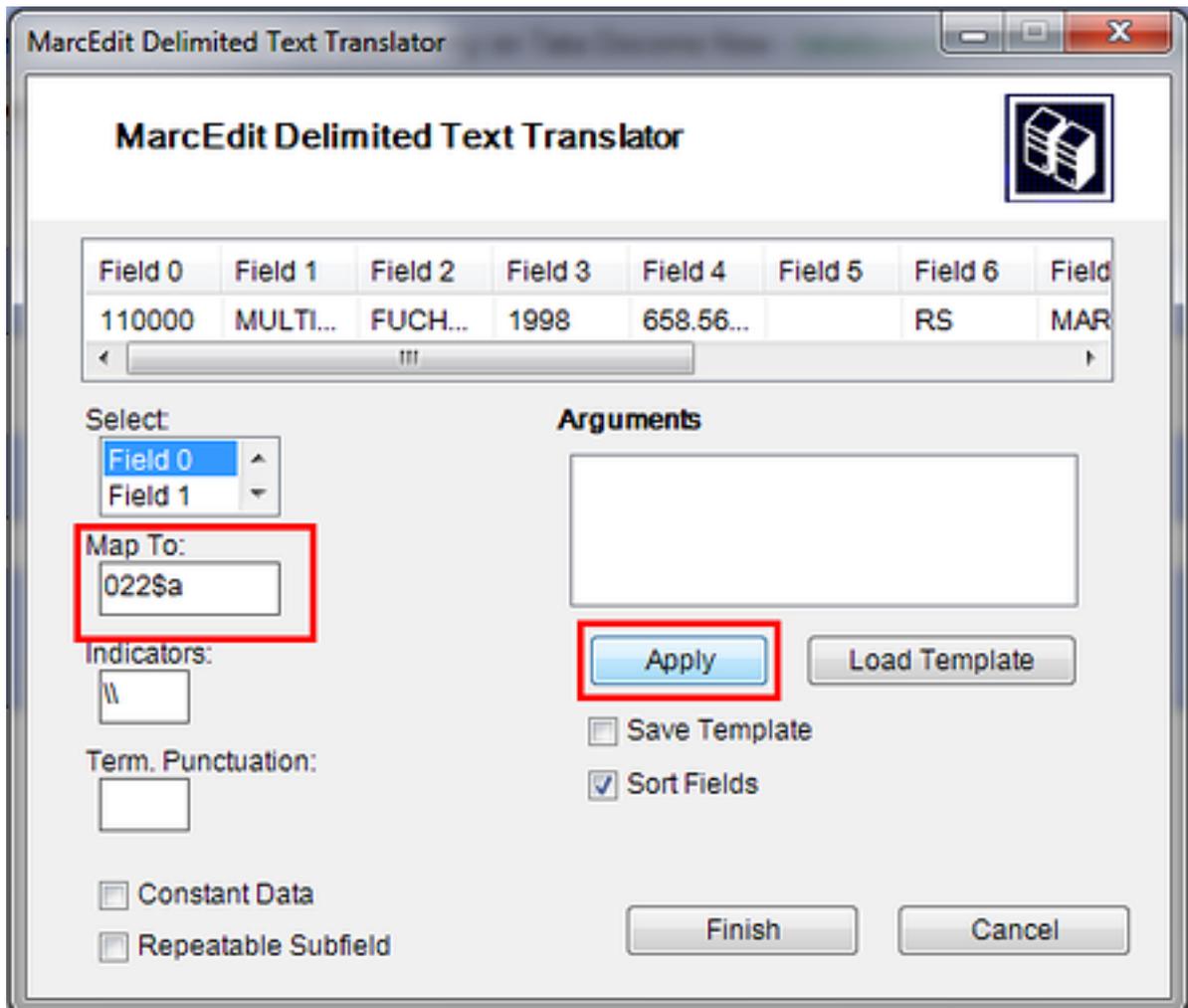
Note

You can customize Indicators and all other things, for more information on marc21 format visit the *official library of congress site*[1].

Similarly map all other fields and then Click on Finish.

---

[1] http://www.loc.gov/marc/bibliographic/
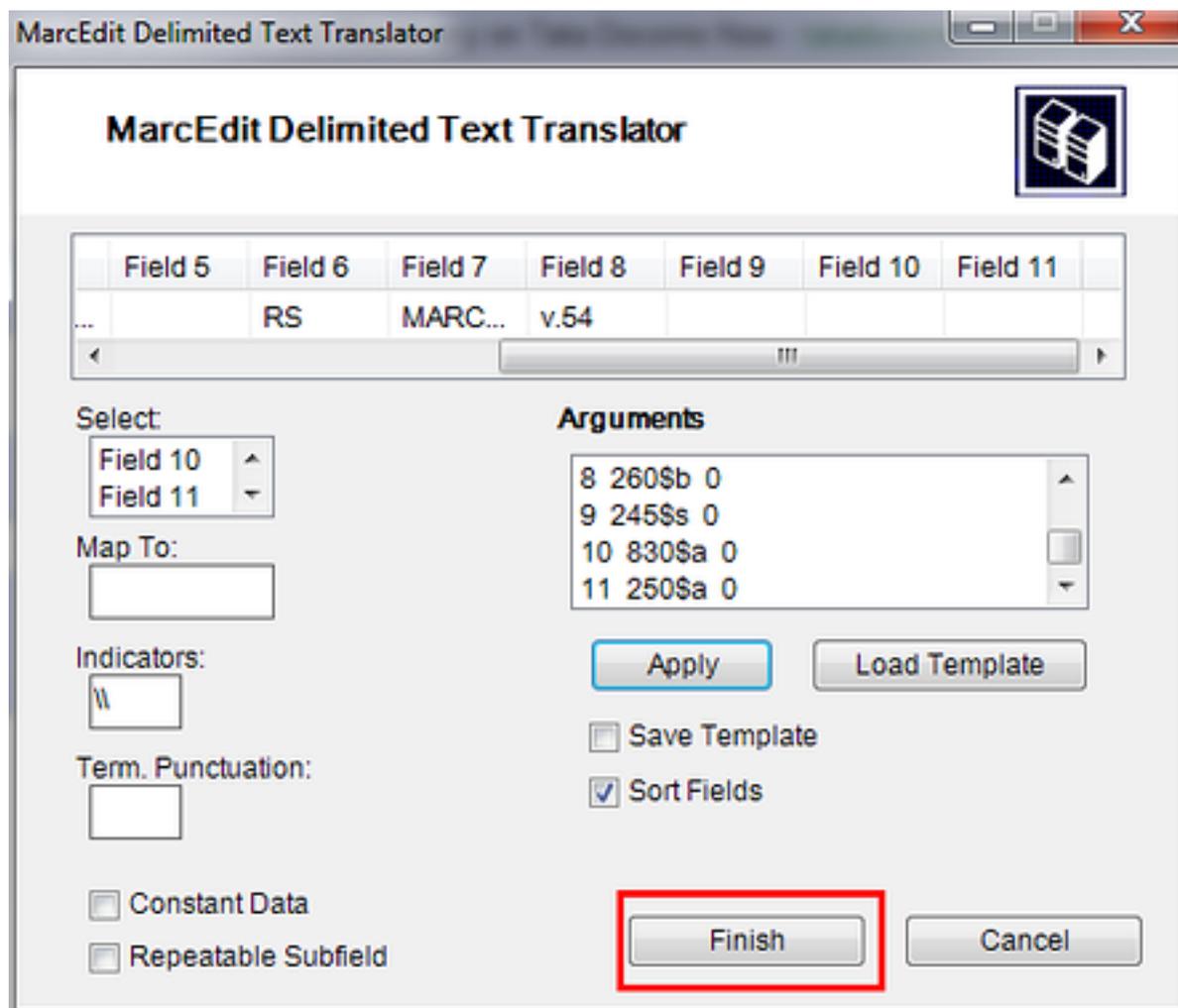
And then a window will appear indicating that your Marc Text File(*.mrk) has been created.
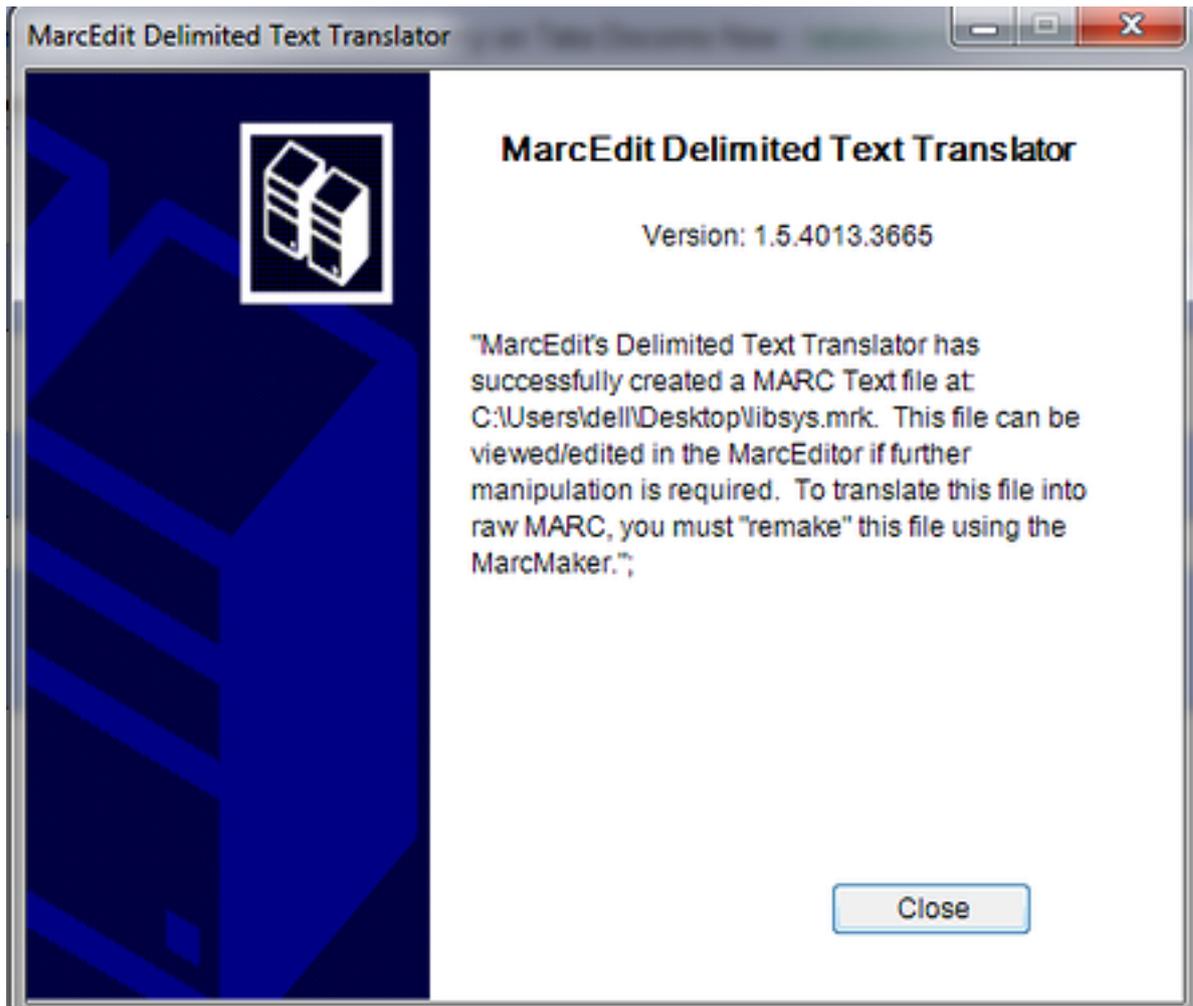
Click Close and we have created a .mrk file from .xls file in this step. You can view the file by double clicking on it.

L.2.2. *Convert .mrk file to .mrc*

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

For this again open MarcEdit and Select MARC Tools.
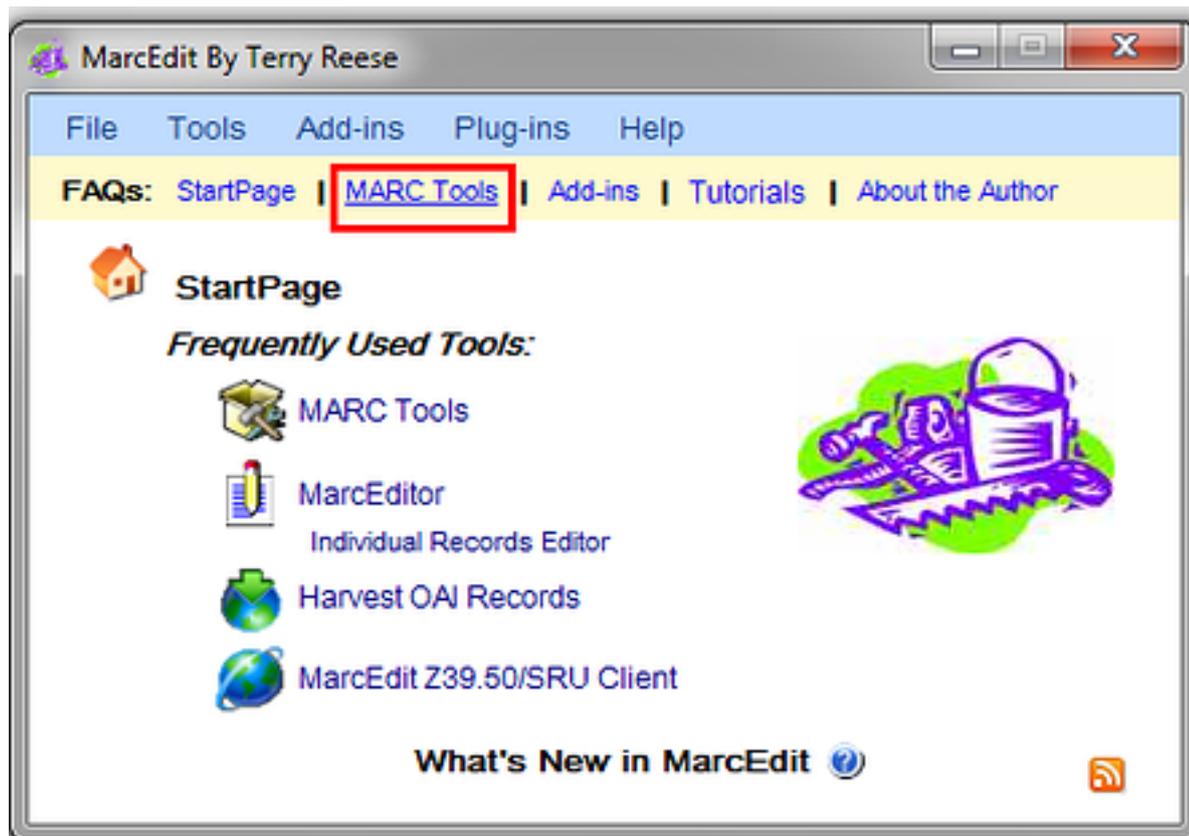
Next Select MarcMaker to convert .mrk file into .mrc format.
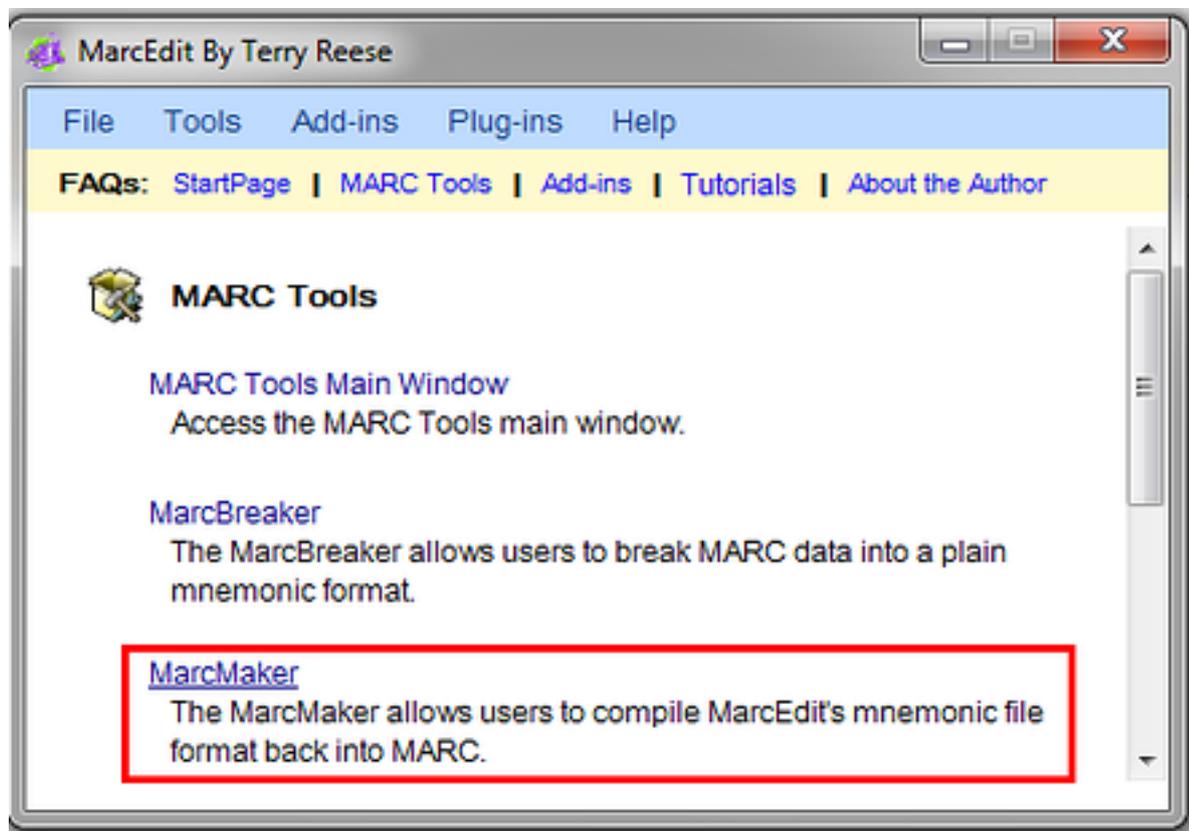
Locate your input file and name your output file. Then Click Execute.
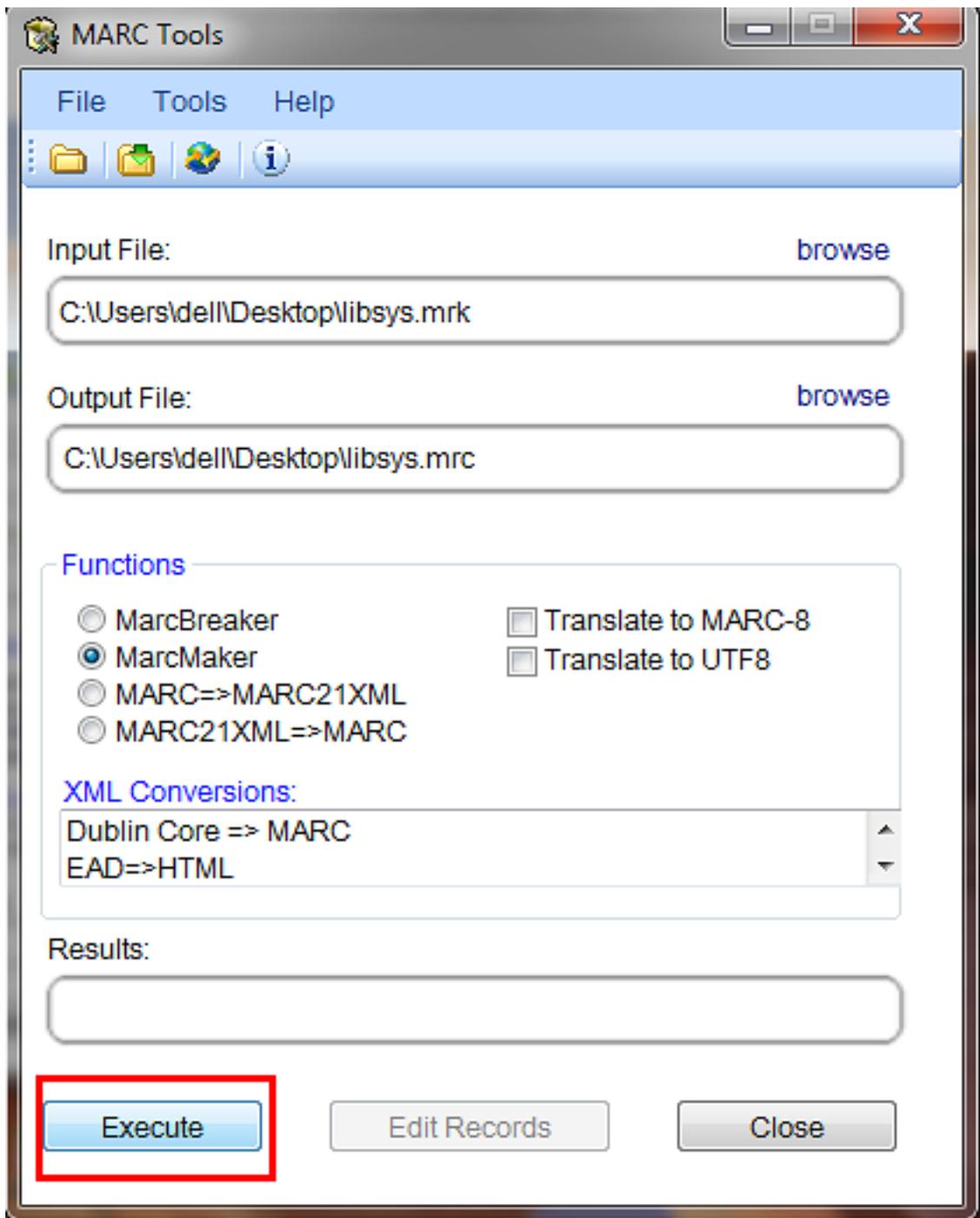
And it will show you the Result.
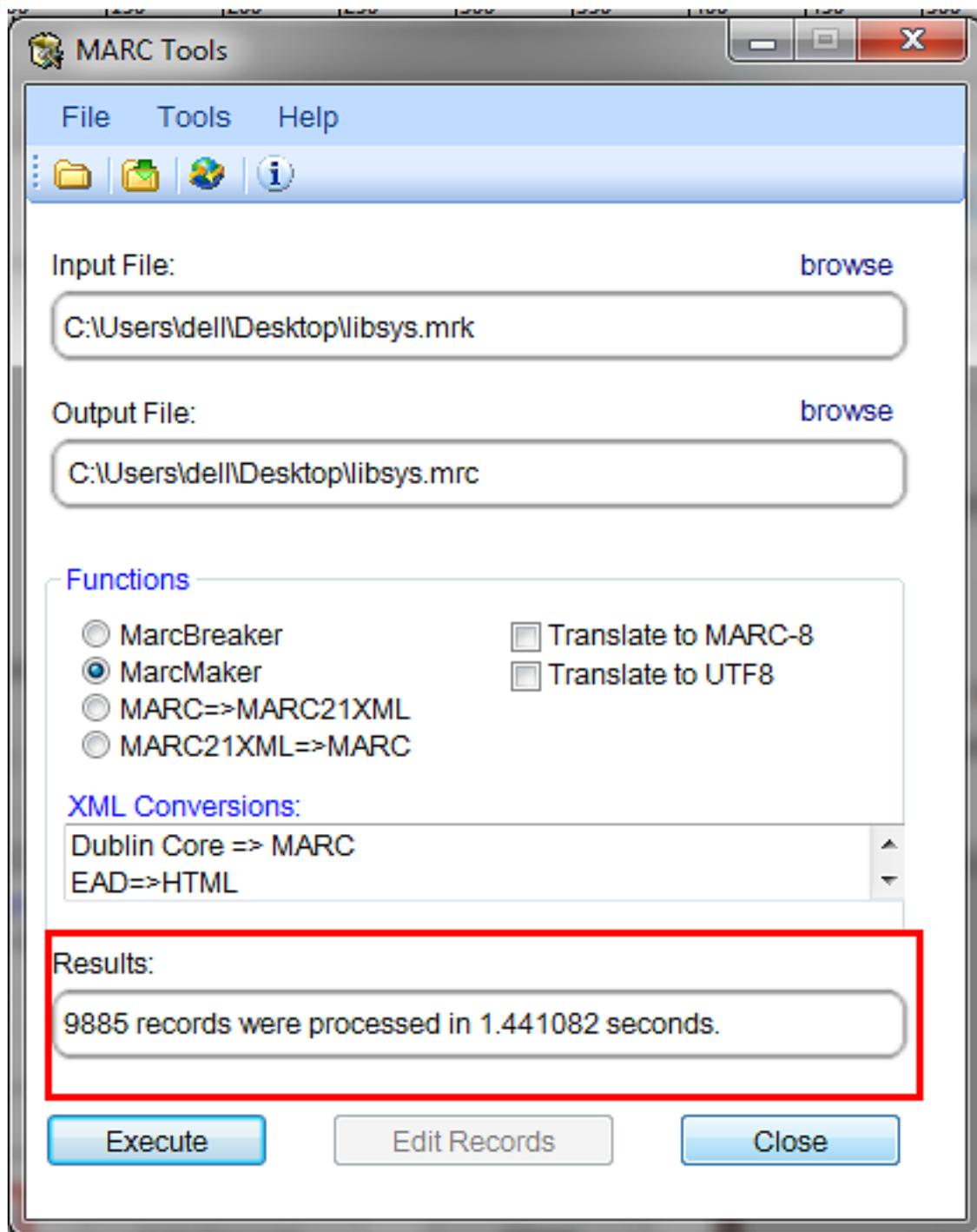
Click Close and now we have raw Marc records with us (.mrc file).

L.2.3. *Import .mrc into Koha*

More information on importing records into Koha can be found in the '*Stage MARC Records for Import*' section of this manual.

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

Click on Tools in your Koha staff client.
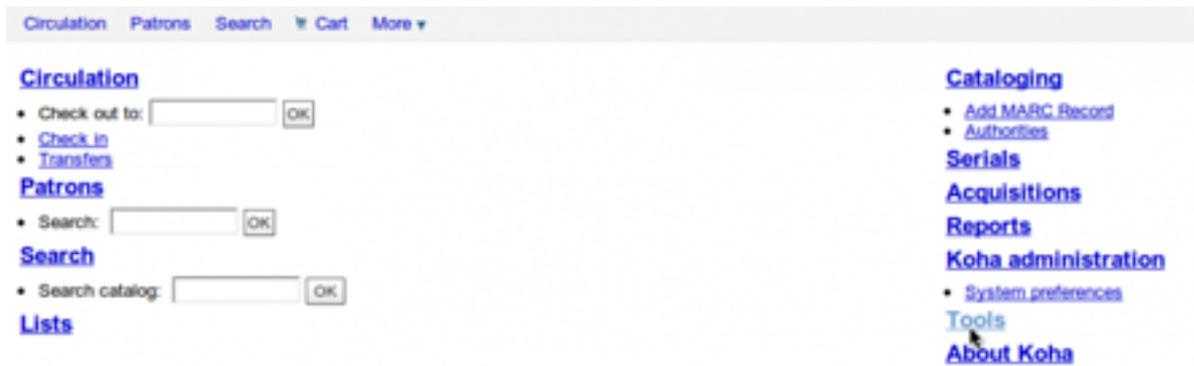
Next Click on Stage MARC Records for Import.
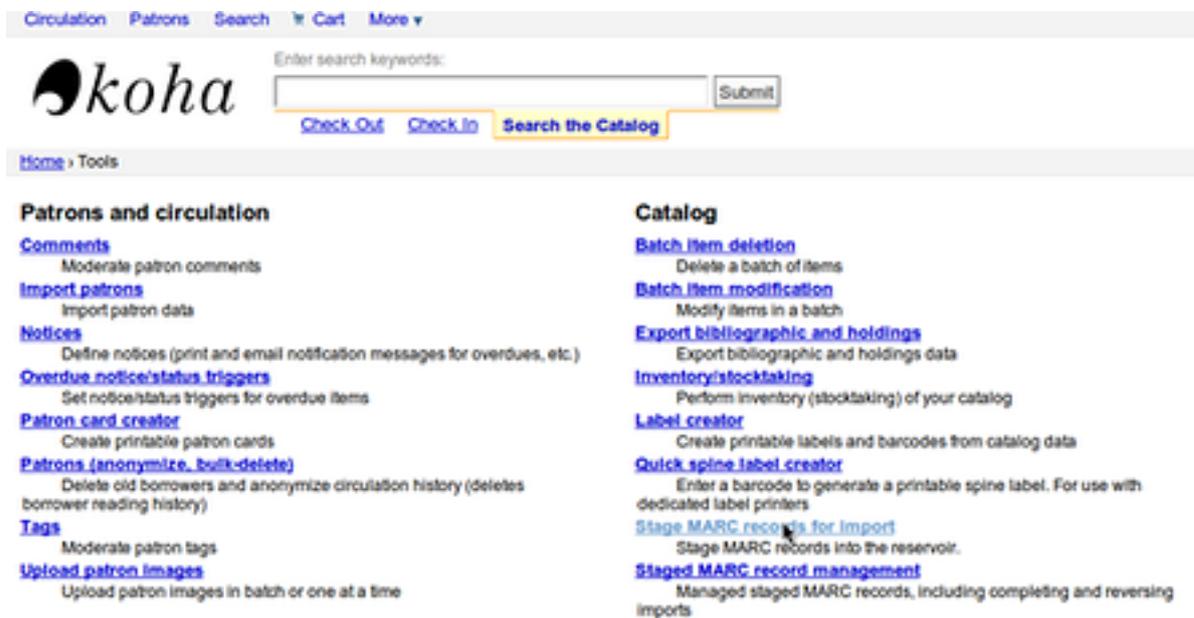
After this, choose your previously created .mrc file and click on Upload.
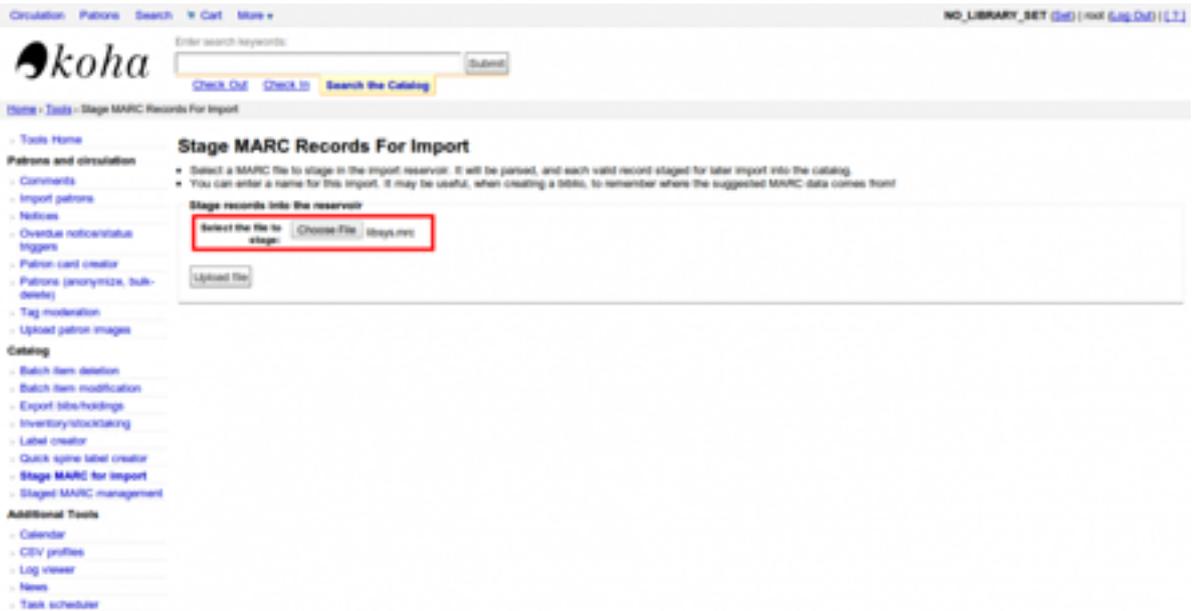
You can also add comment about file and finally click on Stage For Import.
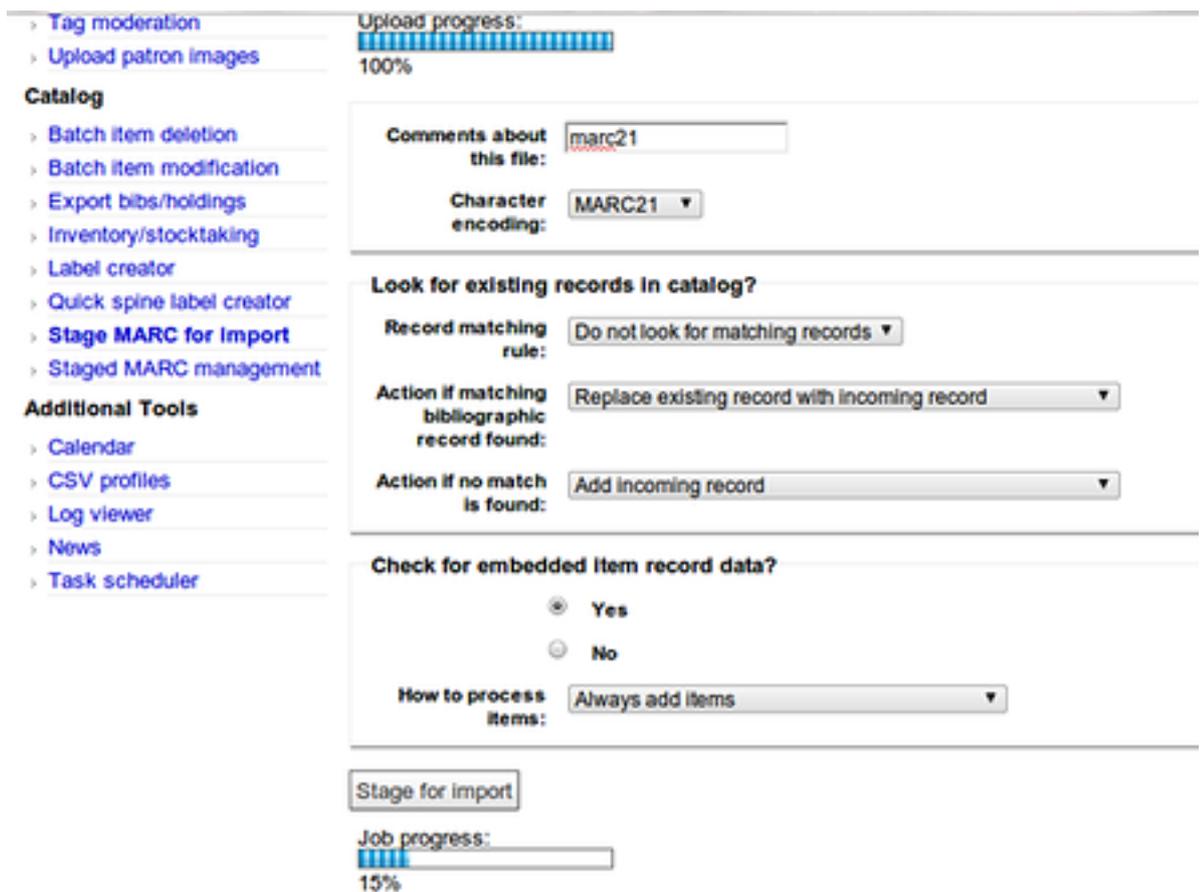
When the import is done, you will get a result something like this

Next, click on Manage staged records.

Here you can even change matching rules.

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

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

You can even undo the Import operation.

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

Appendix M. Talking Tech

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

M.1. *Installation and Setup Instructions*

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

To use, *TalkingTechItivaPhoneNotification* syspref must be turned on.

If you wish to process PREOVERDUE or RESERVES messages, you'll need the *EnhancedMessagingPreferences* system preference turned on, and patrons to have filled in a preference for receiving these notices by phone.

For OVERDUE messages, overdue notice triggers must be configured under Koha -> Tools -> *Overdue Notice Triggers*. Either branch-specific triggers or the default level triggers may be used (script will select whichever is appropriate).

M.2. *Sending Notices File*

1. Add the *TalkingTech_itiva_outbound.pl* script to your crontab

2. Add an FTP/SFTP or other transport method to send the output file to the I-tiva server

3. If you wish, archive the sent notices file in another directory after sending

Run TalkingTech_itiva_outbound.pl --help for more information

M.3. *Receiving Results File*

1. Add an FTP/SFTP or other transport method to send the Results file to a known directory on your Koha server

2. Add the *TalkingTech_itiva_inbound.pl* script to your crontab, aimed at that directory

3. If you wish, archive the results file in another directory after processing

Run TalkingTech_itiva_inbound.pl --help for more information

Appendix N. OCLC Connexion Gateway

Koha can be set to work with the OCLC Connextion Gateway. This allows libraries to use OCLC Connexion as their cataloging tool and simply send those records to Koha with a single click. The following instructions will help you set up the OCLC Connexion Gateway, if you have a system administrator you will want to consult with them on this process.

N.1. *Setting up OCLC service on Koha*

D. Ruth Bavousett
Edited by Nicole C. Engard
2012
First, you'll need to create a file somewhere on your system with configuration information. You could put this anywhere that is visible to the account that will be running the service.

The file contains 11 lines. The first 6 will be about your Koha system:

```
host: The IP address of your Koha server
port: The port you want to use for the Connexion service. This port must be different from
 your SIP port, or any other service
koha: The full URL of your staff client
log: The location (full file specification) of your log for the service
user: The default Koha username to use for importing
password: The password that goes with that username
```

The remaining lines describe how to do the staging:

```
match: The name of the matching rule from your system to use
overlay_action: "replace", "create_new", or "ignore"-- what to do if there is a match
nomatch_action: "create_new" or "ignore"-- what to do if there is no match
item_action: "always_add","add_only_for_matches","add_only_for_new", or "ignore" -- what to
 do with embedded 952 item data
import_mode: "direct" or "stage"
```

A sample file would look like this:

```
host: 1.2.3.4
port: 8000
log: /home/koha/koha-dev/var/log/connexion.log
koha: http://kohastaff.myuniversity.edu
user: koha_generic_staff
password: password
match: 001
overlay_action: replace
nomatch_action: create_new
item_action: ignore
import_mode: direct
```

When choosing an 'import_mode' if you use "direct" then the staged record will be immediately imported into Koha, and should be searchable after your indexes catch up. If you choose "stage", then the record will be placed in a staged batch for you to later go the *Manage Staged MARC Records* tool to finish the import.

If you import multiple records, they'll be in the same batch, until that batch is imported, then a new batch will be created.

In "direct" mode, each record will be in its' own batch.

To start the service, run the script:

```
/location/of/connexion/import/daemon/connexion_import_daemon.pl -d -c /location/of/con\
fig/file.cnf
```

N.2. *Setting up your OCLC desktop client*

D. Ruth Bavousett
Heather Hernandez
Edited by Nicole C. Engard
2012/2014

> **Note**
>
> Screenshots are OCLC Connexion Client v.2.50, Koha v.3.12

To set up the OCLC Connexion desktop client to connect to Koha, go to Tools > Options, then choose the Export tab.
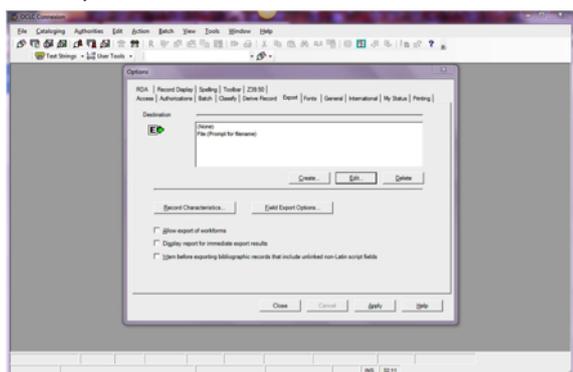
- Click the "Create..." button to set up a new destination, then choose "OCLC Gateway Export" and click OK.

  - Enter the following information:

    - "Host Name:" Your catalog's appropriate IP address (from your *config file above*)

    - "Port:" Your catalog's appropriate port number (from your *config file above*)

    - "Login ID:" The cataloger's Koha login

    - "Password:" The cataloger's Koha password

    - "Notify Host Before Disconnect" = checked,

    - "Timeout" = 100, "Retries" = 3, "Delay" = 0 (zero),

    - "Send Local System Logon ID Password" = checked.
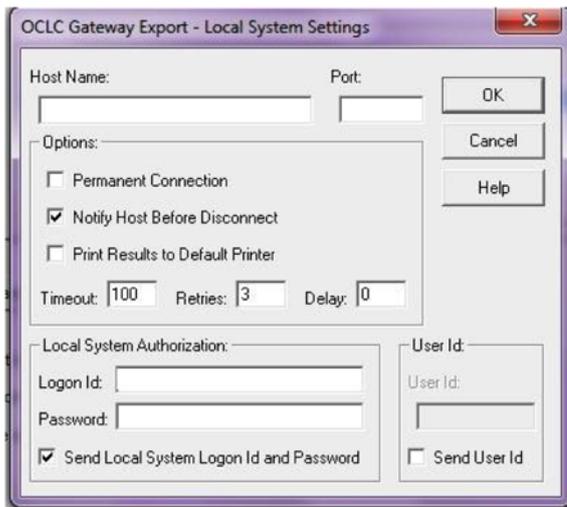
- Select "OK" when finished, and you should see your new "Gateway Export" option listed (The catalog's IP address and port are blacked out in the following screenshot)
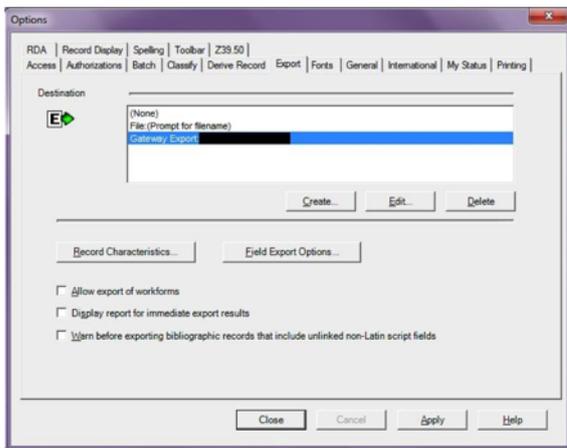
- Click on "Record Characteristics" and make sure that the bibliographic records are using MARC21, UTF-8 Unicode, and click OK to save.

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

N.3. *Using the OCLC Connexion Gateway*

Heather Hernandez
Edited by Nicole C. Engard
2014
Records can be exported from Connexion either in a batch or one by one.

N.3.1. *Exporting records one by one*

To export bibliographic records one by one, be sure your "Batch" options are correct: from the "Tools" menu, select "Options", and select the "Batch" tab. In the "Perform local actions in batch" area, "Bibliographic Record Export" should be unchecked
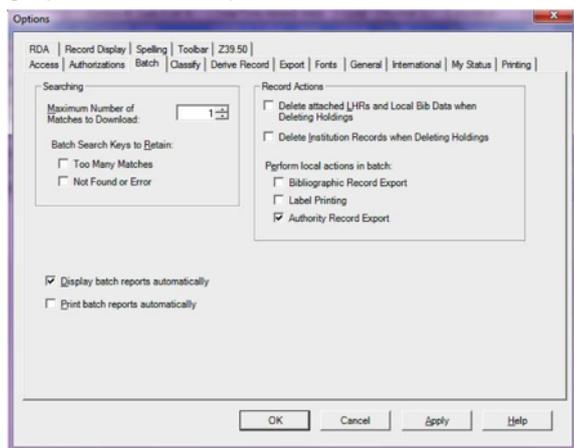
When ready to export, from the "Action" menu, select "Export" or use the F5 key. You will see a screen similar to the following if the import is successful and if the record is new to the Catalog; you may copy & paste the resulting URL into your Koha catalog to see the new record.
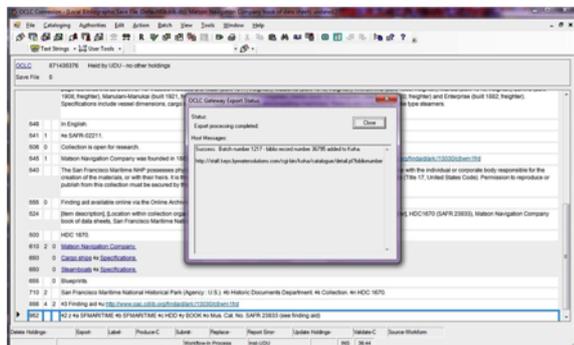
If the record was overlaid, you will see a message to that effect in the "OCLC Gateway Export Status" window

N.3.2. *Exporting records in a batch*

To export bibliographic records in a batch, be sure your "Batch" options are correct: from the "Tools" menu, select "Options", and select the "Batch" tab. In the "Perform local actions in batch" area, "Bibliographic Record Export" should be checked
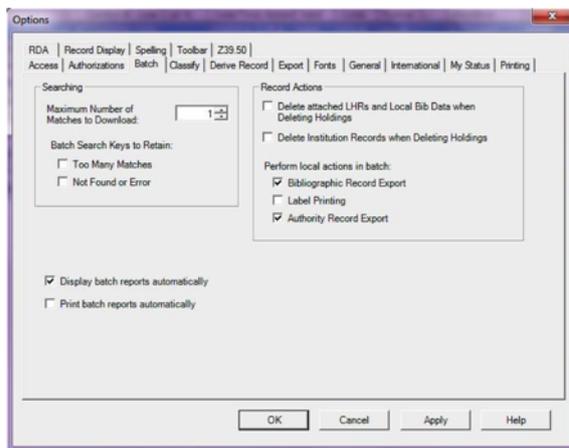
When a record is ready to export, from the "Action" menu, select "Export" or use the F5 key, and it's export status will be "ready."

When ready to export the batch, from the "Batch" menu, select "Process batch" and check the appropriate "Path" and "Export" boxes
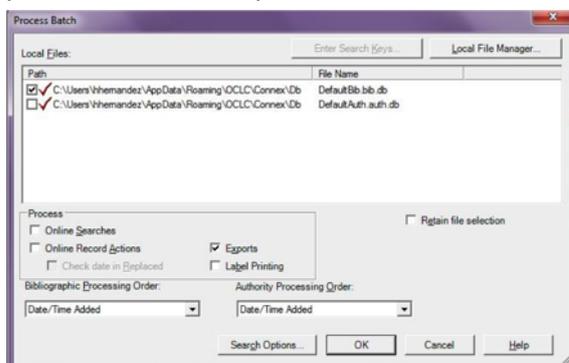
The export will begin, and the bib records will be exported & imported into Koha one by one; you will see "OCLC Gateway Export Status" windows, as above, showing you the results of each export. That window will stay there until you select "Close," and then the next record's export/import will begin. The

process will continue until all records in the batch are completed. Then you may or may not see the Connexion Client export report (depending on your Client options for that).

N.3.3. *Items in OCLC*

If you'd like to create your item records in OCLC you can do so by addding a 952 for each item to the bib record you're cataloging. The *Item/Holdings Cataloging Guide* will break down what subfields you can use in the 952, but at the minimum you want to have subfield 2, a, b, and y on your items.

> Example N.1. Item record example
>
> 952 \\\$2CLASSIFICATION\$aHOMEBRANCHCODE\$bHOLDINGBRANCHCODE\$yITEMTYPE-CODE

- The subfield 2 holds the classification code. This can be ddc for Dewey or lcc for Library of Congress or z for Custom. Other classification sources can be found in the *Classification Sources* area in administration

- Subfield a is your home library and needs to be the code for your home library, not the library name. You can find these codes in the *Libraries & Groups* administration area.

- Subfield b is your holding library and needs to be the code for your holding library, not the library name. You can find these codes in the *Libraries & Groups* administration area.

- Subfield y is your item type code. It needs to be the code, not the item type name. You can find these codes in the *Item Types* administration area.

> Example N.2. Item record example
>
> 952 \\\$2ddc\$aMAIN\$bMAIN\$yBOOK

In addition to these required fields you can enter any other subfield you'd like. Most libraries will enter a call number in subfield o and a barcode in subfield p as well. Review the *Item/Holdings Cataloging Guide* for a full list of subfields and values.

Appendix O. FAQs

O.1. *Display*

O.1.1. *Custom Item Type/Authorized Value Icons*

Question: Can I have my own set of item type images (or authorized value icons)?

Answer: Absolutely. To add additional icons to your system you simply add a new directory to ko-ha-tmpl/intranet-tmpl/prog/img/itemtypeimg/ and to koha-tmpl/opac-tmpl/prog/itemtypeimg and put your icons in the new directory. Your icons will show up in a new tab as soon as they are in the folders.

-
  > **Note**
  >
  > Remember to put the icons in both places (on the OPAC and the intranet).

O.1.2. *Customizing Koha Images*

Question: Can I customize the images in the OPAC?

Answer: Absolutely. Koha comes with a series of original images that you can alter to meet your needs. The originals can be found in the misc/interface_customization/ directory.

O.1.3. *OPAC Display Fields*

Question: What MARC fields print to the different OPAC screens in Koha?

Answer: The XSLT preference must be set as follows for the following fields to show

- *OPACXSLTResultsDisplay* = using XSLT stylesheets

- *OPACXSLTDetailsDisplay* = using XSLT stylesheets

- *DisplayOPACiconsXSLT* = show

The OPAC Results page shows:

- 245

- 100, 110, 111

- 700, 710, 711

- 250

- 260

- 246

- 856

The OPAC Details page shows:

- 245

- 100, 110, 111

- 700, 710, 711

- 440, 490

- 260

- 250

- 300

- 020

- 022

- 246

- 130, 240

- 6xx

- 856

- 505

- 773

- 520

- 866

- 775

- 780

- 785

- plus all of the 5xx fields in the Notes tab at the bottom

O.1.4. *Subtitle Display on Bib Records*

Question: How do I get the subtitle to display on the detail pages for my bib records?

Answer: Subtitle display now depends on there being a *keyword mapping* for the MARC field in question. Adding a mapping for "subtitle" -> "245b" for an item's framework results in display of the subtitle in OPAC and staff client search and detail pages (although not in all instances where subtitles might be displayed, e.g. the Cart).

O.1.5. *Show patrons the barcodes of items they have checked out*

Question: Can patrons see the barcodes for the items they have checked out.

Answer: Not by default, but with a few edits to the patron record you can make a barcode column appear on the patron's check out summary in the OPAC. You can set up a *patron attribute* with the value of SHOW_BCODE and *authorized value* of YES_NO to make this happen.

Add patron attribute type

Patron attribute type code:	SHOW_BCOI
Description:	Show barcode on patron's check outs in OPAC
Repeatable:	☐ Check to let a patron record have multiple values of t
Unique identifier:	☐ If checked, attribute will be a unique identifier — if a v
Allow password:	☐ Check to make it possible to associate a password w
Display in OPAC:	☐ Check to display this attribute on a patron's details pa
Searchable:	☐ Check to make this attribute staff_searchable in the s
Authorized value category:	⬍ Authorized value category; if one i

BOR_NOTES
CCODE
DAMAGED
HINGS_AS
HINGS_C
HINGS_PF
HINGS_RD
HINGS_UT
LOC
LOST
MANUAL_INV
NOT_LOAN
OPAC_SUG
RESTRICTED
SUGGEST
WITHDRAWN
YES_NO

Save   Cancel

Then on the *patron's record set the value* for SHOW_BCODE to yes.

Modify Staff patron Nicole Engard

Additional attributes and identifiers

Type	Value	
DL (Driver's License)	PA1234567890	Clear
HBR (Home Branch)		Clear
SHOW_BCODE (Show Barcode in OPAC)	Yes	Clear

No
Yes

Save   Cancel

This will add a column to the check out summary in the OPAC that shows the patrons the barcodes of the items they have checked out.

Clicking on the 'Overdue' tab will show only the items that are overdue.

O.2. *Circulation/Notices*

O.2.1. *Book drop Date*

Question: How is the book drop date is determined? Is it the last open date for the checkout branch? Is it today's date minus one? Can the book drop checkin date be set?

Answer: If the library is closed for four days for renovations, for example, there would be more than one day needed for the book drop date. You will only have one book drop date and that will be the last day that the library open (determined by the holiday calendar) because there is no real way to know what day the books were dropped into the box during the 4 closed days. The only way to change the effective checkin date in book drop mode is to modify the calendar.

O.2.2. *Holds to Pull and Holds Queue*

Question: What is the difference between the *Holds Queue* and *Holds to Pull*?

Answer: The holds to pull report gives a simple list of what holds need to be filled with available items. It should only be used in Koha installations where there is only one library.

The holds queue tries to do the same thing, but in a 'smarter' way. This allows it to split up the list by library, consult the *transport cost matrix* and refresh regularly to provide different pull lists to each library.

O.2.3. *Duplicate Overdue Notices*

Question: Why are patrons getting two overdue notices?

Answer: This tool takes all branches in the overdue rules and sent notifications to them. So, if you have a default rule & a branch rule, the notification will be generated twice. A quick fix is to discard "default rule" for instance.

O.2.4. *Printing Overdue Notices*

Question: Can I print overdue notices for patrons without email addresses on file?

Answer: Yes. The *overdue notice cron job* has a setting to generate the overdue notices as HTML for printing. An example of this usage would be:

```
overdue_notices.pl -t -html /tmp/noticedir -itemscontent
  issuedate,date_due,title,barcode,author
```

In this example, we wanted to use only certain item fields in our notices, so we specified itemscontent fields in the cron entry; that's not a requirement for the feature.

The command line needs to specify a web-accessible directory where the print notices will go -- they get a filename like notices-2009-11-24.html (or holdnotices-2009-11-24.html). The overdue notice itself can be formatted to fit a Z-mailer. Within the notice file, the text is spaced down or over to where it will print properly on the form. The script has code that wraps around the notice file to tell the HTML to obey the formatting, and to do a page break between notices. That's so that when staff print it out, they get one per page. We had to add an extra syspref (*PrintNoticesMaxLines*) to specify page length because our client allows a _lot_ of checkouts which meant some notices were running onto multiple pages. That syspref says to truncate the print notice at that page length and put in a message about go check your OPAC account for the full list.

The print and email overdues use the same notice file. The print notices for holds are different -- there's a separate HOLD_PRINT notice file and the system uses it if there's no email address. Then a nightly cron job runs to gather those up from the message queue and put them in an HTML file in the notice directory, as above.

The cron entry is gather_print_notices.pl /tmp/noticedir

O.2.5. *Unable to Renew Items*

Question: We're trying to renew some items for our patron. One of the items is on hold and ineligible for renewal, but the other two items refuse to renew even though they should be eligible. When I try to use the override renewal limit, it just returns a little message that says "renewal failed". Any idea what's going on here?

Answer: At the very least you will need to set an absolute *default circulation rule*. This rule should be set for the default itemtype, default branchcode and default patron category. That will catch anyone who doesn't match a specific rule. Patrons who do not match a specific rule will get blocked from placing holds or renewing items, since there was no baseline number of holds or renewals to utilize.

O.2.6. *Unable to Place Holds*

Question: Why can't I place holds when I have all of the preferences turned on.

Answer: You probably need to set a default circulation rule. At the very least you will need to set an default circulation rule. This rule should be set for all item types, all branches 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 the default branch, default item and default patron category then you may see patrons getting blocked from placing holds.

O.2.7. *Keyboard Shortcuts*

Question: Do I have to use my mouse to access the checkout, checkin and cataloging tabs at the top of the circulation pages?

Answer: You can jump between the tabs on the quick search box at the top of the screen by using the following hot keys (if the tab is available):

- 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

> **Note**
>
> Mac users use the OPTION button in place of ALT

O.2.8. *SMS Notices/Messages*

Question: I want Koha to send notices via SMS, what do I need to do?

Answer: First you need to choose a SMS service to use with Koha. There is a list available here: *http://search.cpan.org/search?query=sms%3A%3Asend&mode=all* Not all SMS services available to libraries have Perl drivers, so be sure to check this list to see if the provider you're considering is listed. If not you want to ask your provider if they have a Perl module, if not you should consider another service. Some common options in the US (that have Perl drivers) are:

- AQL (*www.aql.com*[1])

- Wadja (*wadja.com*[2])

- Ipipi (*ipipi.com*[3])

- T-mobile

- SMSDiscount (*smsdiscount.com*[4])

- Clickatell

Question: What about in India?

Answer: India does not yet have too many options here. This is partly due to the Telecom regulatory authority's (TRAI) stipulations about transactional SMSes and limits on the number of SMSes that may be sent / received per users per day. India specific drivers include:
- Unicel Technologies Pvt Ltd (*unicel.in*[5])

O.3. *Cataloging*

O.3.1. *Authority Fields*

Question: Why can't I edit 1xx, 6xx, or 7xx fields in my catalog record?

Answer: These fields are authority controlled and you probably have the *BiblioAddsAuthorities* set to "Don't allow". When it is set to "Don't allow" these fields will be locked and require you to search for an existing authority record to populate the field with. To allow typing in these authority fields set *BiblioAddsAuthorities* to 'Allow'.

> **Note**
>
> Fields affected by this preference will show a lock symbol in them

O.3.2. *Koha to MARC Mapping*

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

---

[1] http://www.aql.com
[2] http://wadja.com
[3] http://ipipi.com
[4] http://smsdiscount.com
[5] http://unicel.in

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

O.3.3. *Number of Items Per Bib Record*

Question: Is there a limit on the number of items I can attach to a bib record?

Answer: There is no explicit limit to the number of items you can attach to a bibliographic record, but if you attach enough of them, your MARC record will exceed the maximum file size limit for the ISO 2709 standard, which breaks indexing for that record. I've found this occurs somewhere between 600 and 1000 items on a 'normal' bibliographic record.

O.3.4. *Analytics*

Question: I am using the *EasyAnalyticalRecords* feature, but my links in the OPAC and Staff Client to 'Show Analytics' are not working.

Answer: If you plan on using *EasyAnalyticalRecords* you will want to make sure to set your *UseControlNumber* preference to "Don't use," this will prevent broken links.

O.4. *Acquisitions*

O.4.1. *Planning Categories*

Question: What is a planning category?

Answer: When you plan in advance for the way your budget is going to be spent, you initially plan for how it's going to be spent over time, that's the most natural thing to do.

So you plan for $1000 in Jan. $1000 in Feb., $3000 in March, etc. You can basically do the same thing with a list of values in lieu of the months.

Say you have a list like this one:

- < 1 month

- < 6 months

- < 1 year

- < 3 years

- < 10 years

- > 10 years

The list is meant to represent when the books acquired where published. Then you plan for it, saying: we went to spend at list 40% of our budgets on books published less than a year ago, 10% on books more than 10 years old, etc.

Upon acquiring new material, you'll be able to select, for a given item, a value from this list in a drop down. Then, after the material has been acquired, at the end of the year, you'll be able to compare the goals set, with what's been achieved.

O.5. *Serials*

O.5.1. *Advanced Patterns*

Question: What is the 'inner counter' on the advanced serials pattern interface?

Answer: I think it is better to give an example to understand this :

Example for a monthly subscription :

- First issue publication date : April 2010

- Numbering : No {X}, year {Y}

- First issue : No 4, year 2010

For the year Y : you will want the year change on January 2011

So, the advanced pattern for Y will be :

- Add : 1

- once every : 12

- When more than 9999999

- inner counter : 3

- Set back to 0

- Begins with 2010

Year is going to change after 12 received issues from April 2010, that is in April 2011 if you don't set inner counter. Set inner counter to 3 will say to Koha : change year after 12-3 = 9 received issues.

Inner counter says to Koha to take into account the first issues of the year, even if they are not received with Koha. If you begin with first issue of the year write nothing or 0.

O.6. *Reports*

O.6.1. *Define Codes Stored in DB*

O.6.1.1. *Fines Table*

Question: What do the codes in the accounttype field in the accountlines table stand for?

Answer:

- A = Account management fee

- C = Credit

- F = Overdue fine

- FOR = Forgiven

- FU = Overdue, still acccruing

- L = Lost item

- LR = Lost item returned/refunded

- M = Sundry

- N = New card

- PAY = Payment

- W = Writeoff

O.6.1.2. *Statistics Table*

Question: What are the possible codes for the type field in the statistics table?

Answer:

- localuse

  - Registers if an item that had been checked out to a statistics patron (category type = 'X') is returned

- issue

- return

- renew

- writeoff

- payment

- CreditXXX

  - The XXX stores different types of fee credits, so a query to catch them all would include a clause like "type LIKE 'Credit%'"

O.6.1.3. *Reserves Table*

Question: What are the possible codes for the found field in the reserves and old_reserves tables?

Answer:

- NULL: means the patron requested the 1st available, and we haven't chosen the item

- T = Transit: the reserve is linked to an item but is in transit to the pickup branch

- W = Waiting: the reserve is linked to an item, is at the pickup branch, and is waiting on the hold shelf

- F = Finished: the reserve has been completed, and is done

O.6.1.4. *Reports Dictionary Table*

Question: What are the possible codes for the area field in the reports_dictionary table?

Answer:

- 1 = Circulation

- 2 = Catalog

- 3 = Patrons

- 4 = Acquisitions

- 5 = Accounts

O.6.1.5. *Messages Table*

Question: What are the possible codes for the message_type field in the messages table?

Answer:

- L = For Librarians

- B = For Patrons/Borrowers

O.6.1.6. *Serial Table*

Question: What are the possible codes for the status field in the serial table?

Answer:

- 1 = Expected

- 2 = Arrived

- 3 = Late

- 4 = Missing

- 5 = Not available

- 6 = Delete

- 7 = Claimed

- 8 = Stopped

- 41 = Missing (not received)

- 42 = Missing (sold out)

- 43 = Missing (damaged)

- 44 = Missing (lost)

O.6.1.7. *Borrowers Table*

Question: What are the possible codes for the privacy field in the borrowers table?

Answer:
- 0 = Forever

- 1 = Default

- 2 = Never

O.6.1.8. *Messaging Preferences*

Question: What are the possible codes in the message_attribute_id field in the borrower_message_preferences table?

Answer:

- 2 = advanced notice

- 6 = item checkout

- 4 = hold filled

- 1 = item due

- 5 = item check in

O.6.2. *Runtime Parameters*

Question: Is there a way to filter my custom SQL reports before they run?

Answer: 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 or biblio_framework, 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>>

- SELECT title , author FROM biblio WHERE frameworkcode=<<Enter the frameworkcode|biblio_framework>>

Note

To generate a date picker calendar to the right of the field when running a report you can use the 'date' keyword like this: <<Enter Date|date>>

Note

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

In addition to using any authorized value code to generate a dropdown, you can use the following values as well: Framework codes (biblio_framework), Branches (branches), Item Types (itemtypes) and Patron Categories (categorycode). For example a branch pull down would be generated like this <<Branch|branches>>

O.6.3. *Results Limited*

Question: When I download my report it's limited to 10,000 results, how do I get all of the results to download?

Answer: There is a limit of 10,000 records put on SQL statements entered in Koha. To get around this you want to add 'LIMIT 100000' to the end of your SQL statement (or any other number above 10,000.

O.7. *Searching*

O.7.1. *Advanced Search*

O.7.1.1. *Scan Indexes*

Question: What does 'scan indexes' on the advanced search page mean?

Answer: When you choose an index, enter a term, click 'scan indexes' and do the search, Koha displays the searched term and the following terms found in this index with the number of corresponding

records That is search is not made directly in the catalog, but first in the indexes It works only for one index at once, and only with no limit in Location (All libraries needed)

O.7.1.2. *Searching for Terms that Start With a Character*

Question: How do I search for all titles that start with the letter 'C'?

Answer: You can choose to search for things that start with a character or series of characters by using the CCL 'first-in-subfield'

- example: ti,first-in-subfield=C

O.7.2. *Wildcard Searching*

Question:What is the difference between a keyword search using the '*' (asterisk) versus a keyword search using the '%' (percent)? Both work in the catalog, but return different sets. Why?

Answer: A wildcard is a character (*,?,%,.) that can be used to represent one or more characters in a word. Two of the wildcard characters that can be used in Koha searches are the asterisk ('*') and the percent sign ('%'). However, these two characters act differently when used in searching.

The '*' is going to force a more exact search of the first few characters you enter prior to the '*'. The asterisk will allow for an infinite number of characters in the search as long as the first few characters designated by your search remain the same. For example, searching for authors using the term, Smi*, will return a list that may include Smith, Smithers, Smithfield, Smiley, etc depending on the authors in your database.

The '%' will treat the words you enter in the terms of "is like". So a search of Smi% will search for words like Smi. This results in a much more varied results list. For example, a search on Smi% will return a list containing Smothers, Smith, Smelley, Smithfield and many others depending on what is your database.

The bottom line in searching with wildcards: '*' is more exact while '%' searches for like terms.

O.7.3. *Title Searching*

Question: Why does my Zebra title search for 'Help' not turn up 'The help' in the first pages of results?

Answer: When doing a title search, you actually want to search for the title (i.e., 'the help' rather than just 'help'), and it will bubble right up to the top. If you're just searching for 'help' then the relevance ranking is going to affect the results you see.

When it comes to relevance in Zebra, here's what's happening. First, the search is done. If you search for the title "help", then any title that has "help" in it comes back. Then from those records, separately, it does relevance on the *whole* record. The more your word appears, the more relevant, and some MARC tags are worth more points than others. So a self-help book with 505 notes where "help" appears a *lot* will be at the top, regardless of keyword or title.

But when you add a *second word*, that helps it figure things out, as it's weighing the relevance of both words and the phrase. Because of the way relevance works, if you search "the help", then "the help" or "the help I need" are more relevant than "the way to help", because they appear together in order. Likewise, "help the girl" would be lower relevance, because it's out of order, and "help for the homeless" would be lower still, as they're out of order, and apart.

The moral of the story is that single word searches, particularly on common words, will always struggle a bit; it can't evaluate relevance well, because you've not given it enough input.

O.8. *Enhanced Content*

O.8.1. *FRBRizing Content*

Question: At our public library we are running a Koha installation and we've tried to turn on all the nice functionalities in Koha such as the frbrising tool, but do not get the same result as Nelsonville public library.

Answer: In fact, this feature is quite tricky to make that right. First it looks at XISBN service. And then search in your database for that ISBN. So both XISBN and your internal ISBN (in biblio table) have to be normalized. You could therefore use the script misc/batchupdateISBNs.pl (it removes all the - in your local ISBNs)

O.8.2. *Amazon*

O.8.2.1. *All Amazon Content*

Question: I have all of the Amazon preferences turned on and have entered both of my keys, but none of the content appears in my system, why is that?

Answer: Amazon's API checks your server time on all requests and if your server time is not set properly requests will be denied. To resolve this issue be sure to set your system time appropriately. Once that change in made Amazon content should appear immediately.

On Debian the the command is *date -s "2010-06-30 17:21"* (with the proper date and time for your timezone).

O.9. *System Administration*

O.9.1. *Errors in Zebra Cron*

Question: I am noticing some errors in the koha-zebradaemon-output.log file. When new records are added it takes a bit longer to index than we think they should. Running rebuild zebra is often faster. Zebra ends up indexing and search works, but I am concerned about the errors. Any ideas?

Answer: Rebuild_zebra.pl -r deletes all of the files in the Zebra db directories (such as reci-0.mf) and then recreates them. Thus, permissions will be lost, and the files will be owned by the user who ran rebuild_zebra.pl. If one rebuilds the zebra indexes as root, the daemons, which typically run under the user Koha, will not be able to update the indexes. Thus, it's important then that the zebra rebuilds are put in the cronjob file of the user Koha, and not root. Also important is that other users, such as root, don't manually execute rebuilds.

If one desires that another user be able to execute rebuild_zebra.pl, he should be given the permission to execute 'sudo -u Koha .../rebuild_zebra.pl,' (if you want to do this, you also have to edit the sudoers file to pass the PERL5LIB variable with the env_keep option as by default sudo strips away almost all environment variables). Or, as root user, one can use a simple 'su koha' and then the rebuild_zebra.pl command.

I've also tried to set the sticky bit on rebuild_zebra.pl, but for whatever reason it didn't seem to work due to some problem with the PERL5LIB variable that I wasn't able to figure. That seems to me the easiest thing to do, if anybody has any idea how to make it work. If it worked and were the default, I think it would help folks to avoid a great deal of the problems that come up with zebra.

O.9.2. *Making Z39.50 Target Public*

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

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

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

to be:

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

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

O.9.3. *Shelving Location Authorized Values*

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

Answer: This is because you created the new shelving location with a code value of 0 (zero) Just FYI the system interprets authorized values of 0 as equaling a null so when you edit a record in cataloging where the authorized value in a field was assigned where the code was 0, the value displays as null in the item editor (or MARC editor) instead of the value the library meant it to be.

O.9.4. *Why do I need Authorized Values?*

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

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

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

O.9.5. *How do I clean up the sessions table?*

Question: Is there a periodic job that can be run to cull old sessions from the table? We don't want to backup all the useless session data every night.

Answer: You can run *cleanup database cron job*.

Or just before doing a backup command (mysqldump), you can truncate session table:

```
mysql -u<kohauser -p<password <koha-db-name -e 'TRUNCATE TABLE sessions'
```

O.10. *Hardware*

O.10.1. *Barcode Scanners*

Question: What barcode scanners have been known to work with Koha?

Answer: The simple rule of thumb is, does it act like a keyboard device?, if so, it will work. (i.e. can you take the scanner, scan a barcode and have it show up in a text editor, if so, it will work.)

The main points to check are that it connects to your PC conveniently (can be USB or "keyboard wedge" which means it connects in line with the keyboard, which is useful with older computers), and that it scans the barcode type that you are using.

It is a good idea to test some 'used' barcodes if you have any, to see whether the scanner can read scuffed or slightly wrinkled ones successfully. Most scanners are capable of reading several barcode types - there are many, and the specification should list the ones it can read. You may need to adjust settings slightly, such as prefix and suffix characters, or whether you want to send an 'enter' character or not.

One more tip - some can be set 'always on' and may come with a stand, some have triggers under the handle, some have buttons on top, some are held like a pen. Think about the staff working with the hardware before choosing, as a button in the wrong place can be very awkward to use.

O.10.2. *Printers*

O.10.2.1. *Printers used by Koha libraries*

- POS-X receipt printer

- Star Micronics printer (exact model unknown) with a generic/plain text driver.

- Star SP2000 (Nelsonville)

- Star TSP-100 futurePRINT (Geauga)

  - "I know there have been a lot of questions on receipt printers so I thought I'd pass on my findings. We have been testing the Star TSP-100 futurePRINT. I found this print to be VERY easy to configure for Koha. I was even able to customize the print job by adding our system logo (a .gif) to the top of every receipt. Also with a bitmap created in Paint was able to add a message at the bottom of each receipt with the contact information, hours and website for the library that the materials were checked out at."

- Epson TM 88 IIIP thermal receipt printers

- Epson TM-T88IV

- 1x1 labels using a Dymolabelwriter printer

O.10.2.2. *Braille Support*

Question: Are there any braille embosser or printer which has inbuilt braille converter and it is accessible with UNIX environment?

Answer: You may want to look into BRLTTY (*http://www.emptech.info/product_details.php?ID=1232*).

O.10.2.3. *Additional Support*

- *http://www.nexpresslibrary.org/go-live/configure-your-receipt-printers/*

Appendix P. Extending Koha

P.1. *Amazon lookup script for Koha libraries*

Cab Vinton
Edited by Nicole C. Engard
September 2009
We order most of our materials from Amazon, so I've been looking for a convenient way to tell if a book under consideration is in our catalog already.

Greasemonkey & a custom user script fit the bill nicely:

- *https://addons.mozilla.org/en-US/firefox/addon/748*

- *http://userscripts.org/scripts/show/56847*

A few caveats:

- Like most scripts, this one was designed to work with Firefox; I haven't explored getting it to work with other browsers.

- I'm not a JavaScript programmer -- this was adapted from others' work. Just a few lines would have to be changed to get the script to work with your catalog.

- It depends on the existence of ISBN for the item in question, so movies, older books, etc. would not work.

Others have added all sorts of bells & whistles: XISBN lookups to search for related titles, custom messages based on the status of items (on order, on hold, etc.), ... just search the UserScripts site for Amazon + library. For a later date!

P.2. *Keyword Clouds*

In addition to the traditional tag cloud available in Koha, there is a way to generate clouds for popular subjects within Koha.

The *Author/Subject Cloud cron job* is used to help with this process. This cron job sends its output to files.

- /home/koha/mylibrary/koharoot/koha-tmpl/cloud-author.html

- /home/koha/yourlibrary/koharoot/koha-tmpl/cloud-subject.html

This means that you can produce clouds for authors, collective author, all kind of subjects, classifications, etc. And since it works on zebra indexes, it is quick, even on large DBs. Tags clouds are sent to files. It's up to library webmaster to deal with those files in order to include them in *OPACMainUserBlock*, or include them into their library CMS.

Some libraries even send the file into a Samba shared folder where webmaster take them, eventually clean them a little bit before integrating them into navigation widgets or pages.

P.3. *Newest Titles Pulldown*

Often we want to add a way for our patrons to do searches for the newest items. In this example I'll show you how to create a pull down menu of the newest items by item type. These tips will work (with a couple changes) for collection codes or shelving locations as well.

First, it's important to note that every link in Koha is a permanent link. This means if I do a search for everything of a specific item type sorted by the acquisitions date and bookmark that URL, whenever I click it I'll see the newest items of that type on the first few pages of the results.

I took this knowledge and wrote a form takes this functionality in to consideration. It basically just does a search of your Koha catalog for a specific item type and sorts the results by acquisitions date.

The first thing I did was write a MySQL statement to generate a list of item types for me - why copy and paste when you can use the power of MySQL?

```
select concat('<option value=\"mc-itype:', itemtype, '\">',description,'</option>') from
 itemtypes
```

The above looks at the itemtypes table and slaps the necessary HTML around each item type for me. I then exported that to CSV and opened it in my text editor and added the other parts of the form.

```
<p><strong>New Items</strong></p>
<p><form name="searchform" method="get" action="/cgi-bin/koha/opac-search.pl">
<input name="idx" value="kw" type="hidden">
<input name="sort_by" value="acqdate_dsc" type="hidden">
<input name="do" value="OK" type="hidden">
<select name="limit" onchange="this.form.submit()">
<option>-- Please choose --</option>
<option value="mc-itype:BOOK">Book</option>
<option value="mc-itype:BOOKCD">Book on CD</option>
<option value="mc-itype:DVD">DVD</option>
<option value="mc-itype:LRG_PRINT">Large print book</option>
<option value="mc-itype:MAGAZINE">Magazine</option>
<option value="mc-itype:NEWSPAPER">Newspaper</option>
<option value="mc-itype:VIDEO">Videocassette</option>
</select>
</form>
</p>
```

Now, what does all of that mean? The important bits are these:

First the starting of the form.

```
<p><form name="searchform" method="get" action="/cgi-bin/koha/opac-search.pl">
```

This tells the browser to take any value selected and put it at the end of this http://YOURSITE/cgi-bin/koha/opac-search.pl. If you want to embed this form on your library website (and not on your OPAC) you can put the full OPAC URL in there.

Next, there is a hidden value that is telling the search to sort by acquisitions date descending (newest items at the top):

```
<input name="sort_by" value="acqdate_dsc" type="hidden">
```

And finally you have an option for each item type you want people to search.

```
<option value="mc-itype:BOOK">Book</option>
```

These options each include the string "mc-itype:" which tells Koha to do an item type search.

Once you have all of that in place you can copy and paste the form to somewhere on your OPAC. The *Farmington Public Libraries OPAC*[1] has a few examples of this on the left.

P.4. *Cataloging and Searching by Color*

One of the icon sets installed in Koha includes a series of colors. This set can be used to catalog and search by color if you'd like. This guide will walk you use changing collection code to color in Koha so that you can do this.

The following SQL could be used to add these colors to the CCODE authorized value category in a batch. If you wanted to use these colors for another authorized value you'd have to edit this to use that category:

```
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','000000','Black','','colors/000000.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','66cc66','Bright Green','','colors/66cc66.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','99cc33','Olive','','colors/99cc33.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','3333cc','Dark Blue','','colors/3333cc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','006600' ,'Dark Green','','colors/006600.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','6600cc','Plum','','colors/6600cc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','6666cc','Purple','','colors/6666cc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','9999cc','Light Purple','','colors/9999cc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','660000' ,'Burgundy','','colors/660000.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','663333' ,'Brown','','colors/663333.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','990000' ,'Red','','colors/990000.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','996633' ,'Tan','','colors/996633.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','999999' ,'Gray','','colors/999999.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','cc66cc','Pink','','colors/cc66cc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','cc99cc','Bubble Gum','','colors/cc99cc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','cc3333' ,'Orange','','colors/cc3333.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','cc6666' ,'Peach','','colors/cc6666.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','cc9999' ,'Rose','','colors/cc9999.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','cccc00' ,'Gold','','colors/cccc00.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','ffff33' ,'Yellow','','colors/ffff33.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','ffffcc','Cream','','colors/ffffcc.png');
    insert into authorised_values (category, authorised_value, lib,
 lib_opac, imageurl) values ('CCODE','ffffff','White','','colors/ffffff.png');
```

[1] http://catalog.farmingtonlibraries.org

If you would like to choose the colors manually you can do that via the *Authorized Values* administration area.

Next you'll want to *update the frameworks* so that the 952$8 (if you're using collection code) label to says Color.

Once you have that in place you can start to catalog items by color.

Finally you'll want to add the following JQuery to your preferences so that it will relabel 'Collection' to 'Color'

IntranetUserJS

```
$(document).ready(function(){
    $("#advsearch-tab-ccode a:contains('Collection')").text("Color");
    $("#holdings th:contains('Collection')").text("Color");
    });
```

OPACUserJS

```
$(document).ready(function(){
    $("#advsearch-tab-ccode a:contains('Collection')").text("Color");
    $('#item_ccode').text("Color");
    });
```

Appendix Q. Koha and Your Website

This appendix will include tips for integrating Koha in to your library website.

Q.1. *Koha search on your site*

Often you'll want to add a Koha search box to your library website. To do so, just copy and paste the following code in to your library website and update the YOURCATALOG bit with your catalog's URL and you're set to go.

```
<form name="searchform" method="get" action="http://YOURCATLOG/cgi-bin/koha/opac-search.pl"
 id="searchform">
<input id="transl1" name="q" type="text"><p>
<select name="idx" id="masthead_search">
<option value="kw">Keyword</option>
<option value="ti">Title</option>
<option value="au">Author</option>
<option value="su">Subject</option>
<option value="nb">ISBN</option>
<option value="se">Series</option>
<option value="callnum">Call Number</option>
</select>
<input value="Search" id="searchsubmit" type="submit">
</p></form>
```

Appendix R. GNU General Public License version 3

Version 3, 29 June 2007

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