

Koha 3.14 Manual (en)

Nicole C. Engard

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by Nicole C. Engard

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Contents

1	Introduction	1
1.1	Basics	1
1.2	Recommendations	1
2	Administration	3
2.1	Global System Preferences	3
2.1.1	Acquisitions	4
2.1.1.1	Policy	4
2.1.1.1.1	AcqCreateItem	4
2.1.1.1.2	AcqItemSetSubfieldsWhenReceived	5
2.1.1.1.3	AcqViewBaskets	5
2.1.1.1.4	AcqWarnOnDuplicateInvoice	5
2.1.1.1.5	BasketConfirmations	5
2.1.1.1.6	CurrencyFormat	5
2.1.1.1.7	gist	6
2.1.1.1.8	UniqueItemFields	6
2.1.1.2	Printing	6
2.1.1.2.1	OrderPdfFormat	6
2.1.2	Administration	6
2.1.2.1	CAS Authentication	6
2.1.2.1.1	AllowPKIAuth	6
2.1.2.1.2	casAuthentication	6
2.1.2.1.3	casLogout	6
2.1.2.1.4	casServerUrl	6
2.1.2.2	Interface options	7
2.1.2.2.1	DebugLevel	7
2.1.2.2.2	delimiter	7
2.1.2.2.3	KohaAdminEmailAddress	7
2.1.2.2.4	noItemTypeImages	8
2.1.2.2.5	virtualshelves	8
2.1.2.3	Login options	8
2.1.2.3.1	AutoLocation	8
2.1.2.3.2	IndependentBranches	8
2.1.2.3.3	SessionStorage	9
2.1.2.3.4	timeout	9
2.1.2.4	Mozilla Persona	9
2.1.2.4.1	Persona	9
2.1.2.5	Search Engine	10
2.1.2.5.1	SearchEngine	10
2.1.3	Authorities	11
2.1.3.1	General	11
2.1.3.1.1	AuthDisplayHierarchy	11
2.1.3.1.2	AutoCreateAuthorities	11
2.1.3.1.3	BiblioAddsAuthorities	12
2.1.3.1.4	dontmerge	12
2.1.3.1.5	MARCAuthorityControlField008	12
2.1.3.1.6	UNIMARCAuthorityField100	13
2.1.3.1.7	UseAuthoritiesForTracings	13
2.1.3.2	Linker	13
2.1.3.2.1	CatalogModuleRelink	13
2.1.3.2.2	LinkerKeepStale	14
2.1.3.2.3	LinkerModule	14
2.1.3.2.4	LinkerOptions	14
2.1.3.2.5	LinkerRelink	15

2.1.4	Cataloging	15
2.1.4.1	Display	15
2.1.4.1.1	authoritysep	15
2.1.4.1.2	hide_marc	15
2.1.4.1.3	IntranetBiblioDefaultView	16
2.1.4.1.4	ISBD	16
2.1.4.1.5	LabelMARCView	16
2.1.4.1.6	NotesBlacklist	17
2.1.4.1.7	OpacSuppression and OpacSuppressionByIPRange	17
2.1.4.1.8	SeparateHoldings & SeparateHoldingsBranch	18
2.1.4.1.9	URLLinkText	19
2.1.4.1.10	UseControlNumber	19
2.1.4.2	Interface	20
2.1.4.2.1	advancedMARCeditor	20
2.1.4.2.2	DefaultClassificationSource	20
2.1.4.2.3	EasyAnalyticalRecords	21
2.1.4.3	Record Structure	21
2.1.4.3.1	AlternateHoldingsField & AlternateHoldingsSeparator	21
2.1.4.3.2	autoBarcode	21
2.1.4.3.3	DefaultLanguageField008	22
2.1.4.3.4	item-level_itypes	22
2.1.4.3.5	itemcallnumber	23
2.1.4.3.6	marcflavour	23
2.1.4.3.7	MARCOrgCode	24
2.1.4.3.8	NewItemsDefaultLocation	24
2.1.4.3.9	PrefillItem	24
2.1.4.3.10	SubfieldsToUseWhenPrefill	24
2.1.4.3.11	z3950NormalizeAuthor & z3950AuthorAuthFields	25
2.1.4.4	Spine Labels	25
2.1.4.4.1	SpineLabelAutoPrint	25
2.1.4.4.2	SpineLabelFormat	25
2.1.4.4.3	SpineLabelShowPrintOnBibDetails	25
2.1.5	Circulation	25
2.1.5.1	Checkin Policy	25
2.1.5.1.1	BlockReturnOfWithdrawnItems	25
2.1.5.1.2	CalculateFinesOnReturn	26
2.1.5.2	Checkout Policy	26
2.1.5.2.1	AgeRestrictionMarker	26
2.1.5.2.2	AgeRestrictionOverride	26
2.1.5.2.3	AllFinesNeedOverride	27
2.1.5.2.4	AllowFineOverride	27
2.1.5.2.5	AllowItemsOnHoldCheckout	27
2.1.5.2.6	AllowNotForLoanOverride	28
2.1.5.2.7	AllowRenewalLimitOverride	28
2.1.5.2.8	AllowReturnToBranch	28
2.1.5.2.9	AllowTooManyOverride	29
2.1.5.2.10	AutomaticItemReturn	29
2.1.5.2.11	AutoRemoveOverduesRestrictions	29
2.1.5.2.12	CircControl	30
2.1.5.2.13	HomeOrHoldingBranch	30
2.1.5.2.14	HomeOrHoldingBranchReturn	30
2.1.5.2.15	InProcessingToShelvingCart	31
2.1.5.2.16	IssuingInProcess	31
2.1.5.2.17	IssueLostItem	31
2.1.5.2.18	ManInvInNoissuesCharge	32
2.1.5.2.19	maxoutstanding	32
2.1.5.2.20	noissuescharge	32
2.1.5.2.21	OverduesBlockCirc	32
2.1.5.2.22	OverdueNoticeBcc	32

2.1.5.2.23	PrintNoticesMaxLines	33
2.1.5.2.24	RenewalPeriodBase	33
2.1.5.2.25	RenewalSendNotice	33
2.1.5.2.26	RentalsInNoissuesCharge	33
2.1.5.2.27	ReturnBeforeExpiry	34
2.1.5.2.28	ReturnToShelvingCart	34
2.1.5.2.29	TransfersMaxDaysWarning	34
2.1.5.2.30	UseBranchTransferLimits & BranchTransferLimitsType	34
2.1.5.2.31	useDaysMode	35
2.1.5.2.32	UseTransportCostMatrix	35
2.1.5.3	Course Reserves	35
2.1.5.3.1	UseCourseReserves	35
2.1.5.4	Fines Policy	36
2.1.5.4.1	finesModuleCalendar	36
2.1.5.4.2	FinesIncludeGracePeriod	36
2.1.5.4.3	finesModuleMode	36
2.1.5.4.4	RefundLostItemFeeOnReturn	36
2.1.5.4.5	WhenLostChargeReplacementFee	37
2.1.5.4.6	WhenLostForgiveFine	37
2.1.5.5	Holds Policy	37
2.1.5.5.1	AllowHoldDateInFuture	37
2.1.5.5.2	AllowHoldsOnDamagedItems	37
2.1.5.5.3	AllowHoldsOnPatronsPossessions	38
2.1.5.5.4	AllowHoldPolicyOverride	38
2.1.5.5.5	AllowOnShelfHolds	38
2.1.5.5.6	AutoResumeSuspendedHolds	39
2.1.5.5.7	canreservefromotherbranches	39
2.1.5.5.8	ConfirmFutureHolds	39
2.1.5.5.9	decreaseLoanHighHolds, decreaseLoanHighHoldsDuration and decreaseLoanHighHoldsValue	40
2.1.5.5.10	DisplayMultiPlaceHold	40
2.1.5.5.11	emailLibrarianWhenHoldIsPlaced	40
2.1.5.5.12	ExpireReservesMaxPickUpDelay	41
2.1.5.5.13	ExpireReservesMaxPickUpDelayCharge	41
2.1.5.5.14	maxreserves	41
2.1.5.5.15	OPACAllowHoldDateInFuture	41
2.1.5.5.16	OPACAllowUserToChooseBranch	41
2.1.5.5.17	ReservesControlBranch	41
2.1.5.5.18	ReservesMaxPickUpDelay	42
2.1.5.5.19	ReservesNeedReturns	42
2.1.5.5.20	StaticHoldsQueueWeight & RandomizeHoldsQueueWeight	42
2.1.5.5.21	SuspendHoldsIntranet	43
2.1.5.5.22	SuspendHoldsOpac	43
2.1.5.6	Interface	43
2.1.5.6.1	AllowAllMessageDeletion	43
2.1.5.6.2	AllowOfflineCirculation	44
2.1.5.6.3	CircAutocompl	44
2.1.5.6.4	CircAutoPrintQuickSlip	44
2.1.5.6.5	FilterBeforeOverdueReport	44
2.1.5.6.6	FineNotifyAtCheckin	46
2.1.5.6.7	DisplayClearScreenButton	46
2.1.5.6.8	ExportRemoveFields	46
2.1.5.6.9	ExportWithCsvProfile	47
2.1.5.6.10	HoldsToPullStartDate	47
2.1.5.6.11	itemBarcodeFallbackSearch	47
2.1.5.6.12	itemBarcodeInputFilter	48
2.1.5.6.13	NoticeCSS	48
2.1.5.6.14	numReturnedItemsToShow	49
2.1.5.6.15	previousIssuesDefaultSortOrder	49

2.1.5.6.16	RecordLocalUseOnReturn	49
2.1.5.6.17	soundon	49
2.1.5.6.18	SpecifyDueDate	49
2.1.5.6.19	todaysIssuesDefaultSortOrder	50
2.1.5.6.20	UpdateTotalIssuesOnCirc	50
2.1.5.6.21	UseTablesortForCirc	50
2.1.5.6.22	WaitingNotifyAtCheckin	51
2.1.5.7	Self Checkout	51
2.1.5.7.1	AllowSelfCheckReturns	51
2.1.5.7.2	AutoSelfCheckAllowed, AutoSelfCheckID & AutoSelfCheckPass	51
2.1.5.7.3	SCOUserCSS	52
2.1.5.7.4	SCOUserJS	52
2.1.5.7.5	SelfCheckHelpMessage	52
2.1.5.7.6	SelfCheckoutByLogin	52
2.1.5.7.7	SelfCheckReceiptPrompt	53
2.1.5.7.8	SelfCheckTimeout	53
2.1.5.7.9	ShowPatronImageInWebBasedSelfCheck	53
2.1.5.7.10	WebBasedSelfCheck	53
2.1.6	Creators	53
2.1.6.1	Patron Cards	53
2.1.6.1.1	ImageLimit	53
2.1.7	Enhanced Content	53
2.1.7.1	All	54
2.1.7.1.1	FRBRizeEditions	54
2.1.7.1.2	OPACFRBRizeEditions	54
2.1.7.2	Amazon	55
2.1.7.2.1	AmazonAssocTag	55
2.1.7.2.2	AmazonCoverImages	56
2.1.7.2.3	AmazonLocale	56
2.1.7.2.4	OPACAmazonCoverImages	56
2.1.7.3	Babelthèque	57
2.1.7.3.1	Babeltheque	57
2.1.7.3.2	Babeltheque_url_js	57
2.1.7.3.3	Babeltheque_url_update	57
2.1.7.4	Baker & Taylor	58
2.1.7.4.1	BakerTaylorEnabled	58
2.1.7.4.2	BakerTaylorBookstoreURL	58
2.1.7.4.3	BakerTaylorUsername & BakerTaylorPassword	59
2.1.7.5	Google	59
2.1.7.5.1	GoogleJackets	59
2.1.7.6	HTML5 Media	59
2.1.7.6.1	HTML5MediaEnabled	59
2.1.7.6.2	HTML5MediaExtensions	60
2.1.7.7	IDreamLibraries	61
2.1.7.7.1	IDreamBooksReadometer	61
2.1.7.7.2	IDreamBooksResults	61
2.1.7.7.3	IDreamBooksReviews	62
2.1.7.8	LibraryThing	62
2.1.7.8.1	LibraryThingForLibrariesEnabled	62
2.1.7.8.2	LibraryThingForLibrariesID	62
2.1.7.8.3	LibraryThingForLibrariesTabbedView	63
2.1.7.8.4	ThingISBN	63
2.1.7.9	Local Cover Images	63
2.1.7.9.1	AllowMultipleCovers	63
2.1.7.9.2	LocalCoverImages	64
2.1.7.9.3	OPACLocalCoverImages	64
2.1.7.10	Novelist Select	65
2.1.7.10.1	NovelistSelectEnabled	65
2.1.7.10.2	NovelistSelectProfile & NovelistSelectPassword	65

2.1.7.10.3	NovelistSelectView	65
2.1.7.11	OCLC	67
2.1.7.11.1	XISBN	67
2.1.7.11.2	OCLCAffiliateID	68
2.1.7.11.3	XISBNDailyLimit	68
2.1.7.12	Open Library	68
2.1.7.12.1	OpenLibraryCovers	68
2.1.7.13	Overdrive	68
2.1.7.13.1	OverDriveClientKey and OverDriveClientSecret	69
2.1.7.13.2	OverDriveLibraryID	69
2.1.7.14	Plugins	69
2.1.7.14.1	UseKohaPlugins	69
2.1.7.15	Syndetics	69
2.1.7.15.1	SyndeticsEnabled	70
2.1.7.15.2	SyndeticsClientCode	70
2.1.7.15.3	SyndeticsCoverImages & SyndeticsCoverImageSize	70
2.1.7.15.4	SyndeticsAuthorNotes	71
2.1.7.15.5	SyndeticsAwards	71
2.1.7.15.6	SyndeticsEditions	71
2.1.7.15.7	SyndeticsExcerpt	72
2.1.7.15.8	SyndeticsReviews	72
2.1.7.15.9	SyndeticsSeries	72
2.1.7.15.10	SyndeticsSummary	72
2.1.7.15.11	SyndeticsTOC	73
2.1.7.16	Tagging	73
2.1.7.16.1	TagsEnabled	73
2.1.7.16.2	TagsModeration	73
2.1.7.16.3	TagsShowOnList	73
2.1.7.16.4	TagsInputOnList	74
2.1.7.16.5	TagsShowOnDetail	74
2.1.7.16.6	TagsInputOnDetail	74
2.1.7.16.7	TagsExternalDictionary	74
2.1.8	I18N/L10N	74
2.1.8.1	alphabet	74
2.1.8.2	CalendarFirstDayOfWeek	75
2.1.8.3	dateformat	75
2.1.8.4	language	75
2.1.8.5	opaclanguages	76
2.1.8.6	opaclanguagesdisplay	76
2.1.8.7	TimeFormat	76
2.1.9	Local Use	76
2.1.10	Logs	76
2.1.10.1	AuthoritiesLog	76
2.1.10.2	BorrowersLog	77
2.1.10.3	CataloguingLog	77
2.1.10.4	FinesLog	77
2.1.10.5	IssueLog	77
2.1.10.6	LetterLog	77
2.1.10.7	ReturnLog	78
2.1.10.8	SubscriptionLog	78
2.1.11	OPAC	78
2.1.11.1	Appearance	78
2.1.11.1.1	AuthorisedValueImages	78
2.1.11.1.2	BiblioDefaultView	78
2.1.11.1.3	COinSinOPACResults	79
2.1.11.1.4	DisplayOPACiconsXSLT	79
2.1.11.1.5	hidelistitems	79
2.1.11.1.6	HighlightOwnItemsOnOPAC & HighlightOwnItemsOnOPACWhich	80
2.1.11.1.7	LibraryName	80

2.1.11.1.8	OpacAddMastheadLibraryPulldown	80
2.1.11.1.9	OPACBaseURL	81
2.1.11.1.10	opaccolorstylesheet	81
2.1.11.1.11	opaccredits	82
2.1.11.1.12	OPACDisplay856uAsImage	83
2.1.11.1.13	OpacExportOptions	85
2.1.11.1.14	OpacFavicon	85
2.1.11.1.15	opacheader	85
2.1.11.1.16	OpacHighlightedWords	86
2.1.11.1.17	OpacKohaUrl	86
2.1.11.1.18	opaclayoutstylesheet	86
2.1.11.1.19	OpacMaintenance	87
2.1.11.1.20	OpacMainUserBlock	87
2.1.11.1.21	OpacMainUserBlockMobile	88
2.1.11.1.22	OPACMobileUserCSS	88
2.1.11.1.23	OPACMySummaryHTML	89
2.1.11.1.24	OpacNav	89
2.1.11.1.25	OpacNavBottom	89
2.1.11.1.26	OpacNavRight	90
2.1.11.1.27	OPACNoResultsFound	91
2.1.11.1.28	OpacPublic	91
2.1.11.1.29	OPACResultsSidebar	92
2.1.11.1.30	OPACSearchForTitleIn	92
2.1.11.1.31	OpacSeparateHoldings & OpacSeparateHoldingsBranch	92
2.1.11.1.32	OPACShowBarcode	93
2.1.11.1.33	OPACShowCheckoutName	93
2.1.11.1.34	OpacShowFiltersPulldownMobile	93
2.1.11.1.35	OPACShowHoldQueueDetails	93
2.1.11.1.36	OpacShowLibrariesPulldownMobile	94
2.1.11.1.37	OpacShowRecentComments	94
2.1.11.1.38	OPACShowUnusedAuthorities	95
2.1.11.1.39	opacsmallimage	95
2.1.11.1.40	OpacStarRatings	96
2.1.11.1.41	opacthemes	97
2.1.11.1.42	OPACURLOpenInNewWindow	98
2.1.11.1.43	OPACUserCSS	99
2.1.11.1.44	opacuserjs	99
2.1.11.1.45	OPACXSLTDetailsDisplay	100
2.1.11.1.46	OPACXSLTResultsDisplay	100
2.1.11.2	Features	101
2.1.11.2.1	numSearchRSSResults	101
2.1.11.2.2	OpacAuthorities	101
2.1.11.2.3	opacbookbag	102
2.1.11.2.4	OpacBrowser	102
2.1.11.2.5	OpacBrowseResults	103
2.1.11.2.6	OpacCloud	103
2.1.11.2.7	OPACFinesTab	103
2.1.11.2.8	OpacHoldNotes	104
2.1.11.2.9	OpacItemLocation	104
2.1.11.2.10	OpacPasswordChange	104
2.1.11.2.11	OPACPatronDetails	105
2.1.11.2.12	OPACpatronimage	106
2.1.11.2.13	OPACPopupAuthorsSearch	106
2.1.11.2.14	OpacTopissue	107
2.1.11.2.15	opacuserlogin	108
2.1.11.2.16	QuoteOfTheDay	108
2.1.11.2.17	RequestOnOpac	108
2.1.11.2.18	reviewson	108
2.1.11.2.19	ShowReviewer	108

2.1.11.2.20	ShowReviewerPhoto	109
2.1.11.2.21	SocialNetworks	109
2.1.11.2.22	suggestion	110
2.1.11.3	Policy	110
2.1.11.3.1	AllowPurchaseSuggestionBranchChoice	110
2.1.11.3.2	OpacAllowPublicListCreation	111
2.1.11.3.3	OpacAllowSharingPrivateLists	111
2.1.11.3.4	OPACFineNoRenewals	111
2.1.11.3.5	OpacHiddenItems	112
2.1.11.3.6	OPACItemHolds	112
2.1.11.3.7	OpacRenewalAllowed	112
2.1.11.3.8	OpacRenewalBranch	113
2.1.11.3.9	OPACViewOthersSuggestions	113
2.1.11.3.10	SearchMyLibraryFirst	113
2.1.11.3.11	singleBranchMode	113
2.1.11.4	Privacy	114
2.1.11.4.1	AnonSuggestions	114
2.1.11.4.2	AnonymousPatron	114
2.1.11.4.3	EnableOpacSearchHistory	114
2.1.11.4.4	OPACPrivacy	114
2.1.11.4.5	opacreadinghistory	114
2.1.11.4.6	TrackClicks	115
2.1.11.5	Self Registration	115
2.1.11.5.1	PatronSelfRegistration	115
2.1.11.5.2	PatronSelfRegistrationAdditionalInstructions	116
2.1.11.5.3	PatronSelfRegistrationBorrowerMandatoryField	116
2.1.11.5.4	PatronSelfRegistrationBorrowerUnwantedField	117
2.1.11.5.5	PatronSelfRegistrationDefaultCategory	117
2.1.11.5.6	PatronSelfRegistrationExpireTemporaryAccountsDelay	118
2.1.11.5.7	PatronSelfRegistrationVerifyByEmail	118
2.1.11.6	Shelf Browser	118
2.1.11.6.1	OPACShelfBrowser	118
2.1.11.6.2	ShelfBrowserUsesCcode	119
2.1.11.6.3	ShelfBrowserUsesHomeBranch	119
2.1.11.6.4	ShelfBrowserUsesLocation	120
2.1.12	Patrons	120
2.1.12.1	AddPatronLists	120
2.1.12.2	AutoEmailOpacUser	121
2.1.12.3	AutoEmailPrimaryAddress	121
2.1.12.4	autoMemberNum	122
2.1.12.5	BorrowerMandatoryField	122
2.1.12.6	borrowerRelationship	123
2.1.12.7	BorrowerRenewalPeriodBase	123
2.1.12.8	BorrowersTitles	123
2.1.12.9	BorrowerUnwantedField	123
2.1.12.10	checkdigit	124
2.1.12.11	EnableBorrowerFiles	124
2.1.12.12	EnhancedMessagingPreferences	124
2.1.12.13	ExtendedPatronAttributes	125
2.1.12.14	intranetreadinghistory	125
2.1.12.15	MaxFine	126
2.1.12.16	memberofinstitution	126
2.1.12.17	minPasswordLength	126
2.1.12.18	NotifyBorrowerDeparture	126
2.1.12.19	patronimages	127
2.1.12.20	PatronsPerPage	127
2.1.12.21	SMSSendDriver	127
2.1.12.22	StatisticsFields	128
2.1.12.23	TalkingTechItivaPhoneNotification	128

2.1.12.24	uppercasesurnames	129
2.1.13	Searching	129
2.1.13.1	Features	129
2.1.13.1.1	IncludeSeeFromInSearches	129
2.1.13.1.2	OpacGroupResults	130
2.1.13.1.3	QueryAutoTruncate	130
2.1.13.1.4	QueryFuzzy	130
2.1.13.1.5	QueryStemming	131
2.1.13.1.6	QueryWeightFields	131
2.1.13.1.7	TraceCompleteSubfields	131
2.1.13.1.8	TraceSubjectSubdivisions	131
2.1.13.1.9	UseICU	132
2.1.13.1.10	UseQueryParser	132
2.1.13.2	Results Display	133
2.1.13.2.1	defaultSortField & defaultSortOrder	133
2.1.13.2.2	displayFacetCount	133
2.1.13.2.3	FacetLabelTruncationLength	134
2.1.13.2.4	maxItemsInSearchResults	134
2.1.13.2.5	maxRecordsForFacets	134
2.1.13.2.6	numSearchResults	134
2.1.13.2.7	OPACdefaultSortField & OPACdefaultSortOrder	134
2.1.13.2.8	OPACItemsResultsDisplay	135
2.1.13.2.9	OPACnumSearchResults	135
2.1.13.3	Search Form	135
2.1.13.3.1	AdvancedSearchTypes	135
2.1.13.3.2	expandedSearchOption	135
2.1.13.3.3	IntranetNumbersPreferPhrase	136
2.1.13.3.4	OPACNumbersPreferPhrase	136
2.1.14	Serials	136
2.1.14.1	opacSerialDefaultTab	136
2.1.14.2	OPACSerialIssueDisplayCount	137
2.1.14.3	RenewSerialAddsSuggestion	137
2.1.14.4	RoutingListAddReserves	137
2.1.14.5	RoutingListNote	138
2.1.14.6	RoutingSerials	138
2.1.14.7	StaffSerialIssueDisplayCount	138
2.1.14.8	SubscriptionDuplicateDroppedInput	138
2.1.14.9	SubscriptionHistory	138
2.1.15	Staff Client	139
2.1.15.1	Appearance	139
2.1.15.1.1	Display856uAsImage	139
2.1.15.1.2	DisplayIconsXSLT	140
2.1.15.1.3	intranet_includes	141
2.1.15.1.4	intranetcolorstylesheet	141
2.1.15.1.5	IntranetFavicon	141
2.1.15.1.6	IntranetmainUserblock	142
2.1.15.1.7	IntranetNav	143
2.1.15.1.8	IntranetSlipPrinterJS	143
2.1.15.1.9	intranetstylesheet	143
2.1.15.1.10	IntranetUserCSS	143
2.1.15.1.11	intranetuserjs	144
2.1.15.1.12	SlipCSS	144
2.1.15.1.13	StaffAuthorisedValueImages	144
2.1.15.1.14	staffClientBaseURL	144
2.1.15.1.15	template	144
2.1.15.1.16	XSLTDetailsDisplay	144
2.1.15.1.17	XSLTResultsDisplay	146
2.1.15.1.18	yuipath	146
2.1.15.2	Options	147

2.1.15.2.1	HidePatronName	147
2.1.15.2.2	intranetbookbag	147
2.1.15.2.3	StaffDetailItemSelection	147
2.1.15.2.4	viewISBD	147
2.1.15.2.5	viewLabeledMARC	148
2.1.15.2.6	viewMARC	148
2.1.16	Web Services	148
2.1.16.1	ILS-DI	148
2.1.16.1.1	ILS-DI	148
2.1.16.1.2	ILS-DI:AuthorizedIPs	148
2.1.16.2	OAI-PMH	148
2.1.16.2.1	OAI-PMH	148
2.1.16.2.2	OAI-PMH:archiveID	148
2.1.16.2.3	OAI-PMH:AutoUpdateSets	149
2.1.16.2.4	OAI-PMH:ConfFile	149
2.1.16.2.5	OAI-PMH:MaxCount	149
2.1.16.3	Reporting	149
2.1.16.3.1	SvcMaxReportRows	149
2.2	Basic Parameters	149
2.2.1	Libraries & Groups	149
2.2.1.1	Adding a Library	150
2.2.1.2	Editing/Deleting a Library	152
2.2.1.3	Adding a group	153
2.2.1.3.1	Search Domain Groups	153
2.2.1.3.2	Library Property Groups	153
2.2.2	Item Types	154
2.2.2.1	Adding Item Types	154
2.2.2.2	Editing Item Types	157
2.2.2.3	Deleting Item Types	157
2.2.3	Authorized Values	158
2.2.3.1	Existing Values	158
2.2.3.2	Add new Authorized Value Category	161
2.2.3.3	Add new Authorized Value	162
2.3	Patrons & Circulation	164
2.3.1	Patron Categories	164
2.3.1.1	Adding a patron category	164
2.3.2	Circulation and Fine Rules	169
2.3.2.1	Default Circulation Rules	170
2.3.2.2	Default Checkouts and Hold Policy	172
2.3.2.3	Checkouts Per Patron	173
2.3.2.4	Item Hold Policies	173
2.3.3	Patron Attribute Types	174
2.3.3.1	Adding Patron Attributes	175
2.3.3.2	Editing/Deleting Patron Attributes	179
2.3.4	Library Transfer Limits	179
2.3.5	Transport cost matrix	181
2.3.6	Item Circulation Alerts	182
2.3.7	Cities and Towns	184
2.3.7.1	Adding a City	184
2.3.7.2	Viewing Cities on Patron Add Form	184
2.4	Catalog Administration	185
2.4.1	MARC Bibliographic Frameworks	185
2.4.1.1	Add New Framework	186
2.4.1.2	Edit Existing Frameworks	186
2.4.1.3	Add subfields to Frameworks	187
2.4.1.4	Edit Framework Subfields	187
2.4.1.5	Import/Export Frameworks	191
2.4.1.5.1	Export Framework	191
2.4.1.5.2	Import Framework	191

2.4.2	Koha to MARC Mapping	192
2.4.3	Keywords to MARC Mapping	194
2.4.4	MARC Bibliographic Framework Test	195
2.4.5	Authority Types	196
2.4.6	Classification Sources	196
2.4.6.1	Adding/Editing Classification Sources	197
2.4.6.2	Classification Filing Rules	197
2.4.7	Record Matching Rules	197
2.4.7.1	Adding Matching Rules	198
2.4.7.2	Sample Record Matching Rule: Control Number	201
2.4.8	OAI Sets Configuration	203
2.4.8.1	Create a set	203
2.4.8.2	Modify/Delete a set	203
2.4.8.3	Define mappings	203
2.4.8.4	Build sets	203
2.5	Acquisitions	203
2.5.1	Currencies and Exchange Rates	204
2.5.2	Budgets	204
2.5.2.1	Add a budget	205
2.5.3	Funds	207
2.5.3.1	Add a Fund	207
2.5.3.2	Budget Planning	209
2.6	Additional Parameters	211
2.6.1	Z39.50 Servers	211
2.6.1.1	Add a Z39.50 Target	211
2.6.1.2	Suggested Bibliographic Z39.50 Targets	213
2.6.1.3	Suggested Authority Z39.50 Targets	213
2.6.2	Did you mean?	213
3	Tools	217
3.1	Patrons and Circulation	217
3.1.1	Patron lists	217
3.1.2	Comments	219
3.1.3	Patron Import	220
3.1.3.1	Creating Patron File	220
3.1.3.2	Importing Patrons	221
3.1.4	Notices & Slips	222
3.1.4.1	Adding Notices & Slips	223
3.1.4.1.1	Overdue Notice Markup	225
3.1.4.2	Existing Notices & Slips	226
3.1.5	Overdue Notice/Status Triggers	227
3.1.6	Patron Card Creator	228
3.1.6.1	Templates	229
3.1.6.1.1	Add a Template	229
3.1.6.2	Profiles	230
3.1.6.2.1	Add a Profile	230
3.1.6.3	Layouts	232
3.1.6.3.1	Add a Layout	232
3.1.6.4	Batches	234
3.1.6.4.1	Add a Batch	234
3.1.6.5	Manage Images	234
3.1.7	Patrons (anonymize, bulk-delete)	235
3.1.8	Batch patron modification	237
3.1.9	Tag Moderation	239
3.1.10	Upload Patron Images	242
3.2	Catalog	244
3.2.1	Batch item modification	244
3.2.2	Batch item deletion	247
3.2.3	Export Data (MARC & Authorities)	249

3.2.3.1	Export Bibliographic Records	249
3.2.3.2	Export Authority Records	251
3.2.4	Inventory/Stocktaking	252
3.2.5	Label Creator	253
3.2.5.1	Templates	254
3.2.5.1.1	Add a Template	254
3.2.5.2	Profiles	256
3.2.5.2.1	Add a Profile	256
3.2.5.3	Layouts	258
3.2.5.3.1	Add a Layout	258
3.2.5.4	Batches	260
3.2.5.4.1	Add a Batch	260
3.2.6	Quick Spine Label Creator	263
3.2.7	MARC modification templates	263
3.2.8	Stage MARC Records for Import	267
3.2.9	Staged MARC Record Management	270
3.2.10	Upload Local Cover Image	273
3.3	Additional Tools	277
3.3.1	Calendar	277
3.3.1.1	Adding Events	278
3.3.1.2	Editing Events	280
3.3.1.3	Additional Help	282
3.3.2	CSV Profiles	283
3.3.2.1	Add CSV Profiles	283
3.3.2.2	Modify CSV Profiles	285
3.3.2.3	Using CSV Profiles	286
3.3.3	Log Viewer	287
3.3.4	News	288
3.3.5	Task Scheduler	291
3.3.5.1	Troubleshooting	293
3.3.6	Quote of the Day (QOTD) Editor	293
3.3.6.1	Add a Quote	293
3.3.6.2	Edit/Delete a Quote	294
3.3.6.3	Import Quotes	294
4	Patrons	297
4.1	Add a new patron	297
4.2	Add a Staff Patron	303
4.3	Add a Statistical Patron	303
4.4	Duplicate a Patron	304
4.5	Add Patron Images	305
4.6	Editing Patrons	307
4.7	Manging Patron Self Edits	310
4.8	Patron Permissions	311
4.8.1	Setting Patron Permissions	311
4.8.2	Patron Permissions Defined	312
4.8.2.1	Granular Circulate Permissions	314
4.8.2.2	Granular Parameters Permissions	314
4.8.2.3	Granular Holds Permissions	315
4.8.2.4	Granular Cataloging Permissions	315
4.8.2.5	Granular Acquisitions Permissions	315
4.8.2.6	Granular Serials Permissions	316
4.8.2.7	Granular Tools Permissions	317
4.8.2.8	Granular Reports Permissions	318
4.8.2.9	Granular Plugins Permissions	319
4.9	Patron Information	319
4.9.1	Check Out	319
4.9.2	Details	319
4.9.2.1	Circulation Summary	320

4.9.3	Fines	322
4.9.3.1	Charging Fines/Fees	322
4.9.3.2	Pay/Reverse Fines	322
4.9.3.3	Creating Manual Invoices	325
4.9.3.4	Creating Manual Credits	326
4.9.3.5	Printing Invoices	327
4.9.4	Routing Lists	327
4.9.5	Circulation History	328
4.9.6	Modification Log	329
4.9.7	Notices	330
4.9.8	Statistics	331
4.9.9	Files	331
4.10	Patron Search	333
5	Circulation	337
5.1	Check Out (Issuing)	337
5.1.1	Checking Items Out	338
5.1.1.1	Printing Receipts	341
5.1.1.2	Clear Patron Information	341
5.1.2	Check Out Messages	342
5.1.3	Check Out Warnings	343
5.2	Renewing	345
5.3	Check In (Returning)	347
5.3.1	Checking Items In	348
5.3.2	Check In Messages	348
5.4	Circulation Messages	351
5.4.1	Setting up Messages	351
5.4.2	Adding a Message	352
5.4.3	Viewing Messages	352
5.5	Holds	353
5.5.1	Placing Holds in Staff Client	353
5.5.2	Managing Holds	356
5.5.3	Receiving Holds	359
5.6	Transfers	361
5.7	Set Library	363
5.8	Fast Add Cataloging	363
5.9	Circulation Reports	366
5.9.1	Holds Queue	367
5.9.2	Holds to pull	367
5.9.3	Holds awaiting pickup	368
5.9.4	Hold ratios	369
5.9.5	Transfers to receive	370
5.9.6	Overdues	370
5.9.7	Overdues with fines	371
5.10	Tracking In house Use	372
5.11	In Processing / Book Cart Locations	372
5.12	Self Checkout	374
5.13	Offline Circulation Utilities	376
5.13.1	Offline Circulation in Koha	376
5.13.1.1	Setup	376
5.13.1.2	Circulating	378
5.13.1.3	Koha Offline Uploading	380
5.13.2	Firefox Plugin	382
5.13.3	Offline Circ Tool for Windows	388
5.13.3.1	Upload Offline Circ File	389

6	Cataloging	391
6.1	Bibliographic Records	391
6.1.1	Adding Records	391
6.1.2	Adding Analytic Records	398
6.1.2.1	Easy Analytics	398
6.1.2.2	Analytics Enhanced Workflow	400
6.1.2.3	Editing Analytics	401
6.1.3	Editing Records	402
6.1.4	Duplicating Records	404
6.1.5	Merging Records	406
6.1.6	Deleting Records	406
6.2	Item Records	407
6.2.1	Adding Items	407
6.2.2	Editing Items	409
6.2.2.1	Quick Item Status Updates	412
6.2.3	Item Information	414
6.2.4	Moving Items	415
6.2.5	Deleting Items	416
6.2.6	Item Specific Circulation History	417
6.3	Authorities	419
6.3.1	Adding Authorities	419
6.3.2	Searching Authorities	422
6.3.3	Editing Authorities	424
6.3.4	Merging Authorities	425
6.4	Cataloging Guides	427
6.4.1	Bibliographic Record Cataloging Cheat Sheet	427
6.4.2	Item/Holdings Record Cataloging Guide	436
6.4.3	Handling On Order Items and Holds	439
7	Course Reserves	445
7.1	Course Reserves Setup	445
7.2	Adding Courses	445
7.3	Adding Reserve Materials	447
7.4	Course Reserves in the OPAC	449
8	Serials	451
8.1	Manage Serial Frequencies	451
8.2	Manage Serial Numbering Patterns	452
8.3	Add a subscription	454
8.4	Receive Issues	460
8.5	Create a Routing List	463
8.6	Subscriptions in Staff Client	466
8.7	Subscriptions in OPAC	467
8.8	Claim Late Serials	470
8.9	Check Serial Expiration	471
8.10	Renewing Serials	472
8.11	Searching Serials	473
9	Acquisitions	475
9.1	Setup	475
9.2	Vendors	476
9.2.1	Add a Vendor	476
9.2.2	View/Edit a Vendor	478
9.2.3	Vendor Contracts	480
9.2.3.1	Add a Contract	480
9.3	Managing Suggestions	482
9.4	Placing Orders	488
9.4.1	Create a basket	488
9.4.2	Create a basket group	504

9.4.3	Printing baskets	504
9.5	Receiving Orders	505
9.6	Invoices	508
9.7	Claims & Late Orders	511
9.8	Acquisition Searches	513
9.9	Budget/Fund Tracking	514
10	Lists & Cart	517
10.1	Lists	517
10.1.1	Create a List	517
10.1.2	Add to a List	519
10.1.3	Viewing Lists	521
10.1.4	Merging Bibliographic Records Via Lists	523
10.2	Cart	525
11	Reports	527
11.1	Custom Reports	527
11.1.1	Add Custom Report	527
11.1.1.1	Guided Report Wizard	527
11.1.1.2	Report from SQL	530
11.1.1.3	Duplicate Report	534
11.1.2	Edit Custom Reports	534
11.1.3	Running Custom Reports	535
11.2	Statistics Reports	536
11.2.1	Acquisitions Statistics	536
11.2.2	Patron Statistics	538
11.2.3	Catalog Statistics	540
11.2.4	Circulation Statistics	541
11.2.4.1	Tracking in house use	543
11.2.5	Serials Statistics	543
11.2.6	Holds Statistics	544
11.2.7	Patrons with the most checkouts	546
11.2.8	Most Circulated Items	547
11.2.9	Patrons with no checkouts	548
11.2.10	Items with no checkouts	549
11.2.11	Catalog by Item Type	551
11.2.12	Lost Items	552
11.2.13	Average Loan Time	552
11.3	Report Dictionary	553
12	OPAC	559
12.1	Search Results	560
12.1.1	Results Overview	560
12.1.2	Filters	563
12.1.3	Search RSS Feeds	564
12.2	Bibliographic Record	565
12.3	Lists & Cart	574
12.3.1	Lists	574
12.3.1.1	Creating Lists	574
12.3.1.2	Adding titles to Lists	575
12.3.1.3	Viewing Lists Contents	576
12.3.1.4	Managing Lists	578
12.3.2	Cart	579
12.3.2.1	Adding titles to the Cart	579
12.3.2.2	Managing the Cart	581
12.4	Placing Holds	584
12.5	Enhanced Content	587
12.5.1	Tagging	587
12.5.2	Comments	588

12.5.3	Zotero	591
12.5.4	Custom RSS Feeds	592
12.6	OPAC Self Registration	593
12.7	My Account	595
12.7.1	My Summary	595
12.7.2	Patron Flags	600
12.7.3	My Fines	600
12.7.4	My Details	601
12.7.5	My Tags	603
12.7.6	Change My Password	604
12.7.7	My Search History	605
12.7.8	My Reading History	606
12.7.9	My Privacy	606
12.7.10	My Purchase Suggestions	607
12.7.11	My Messaging	607
12.7.12	My Lists	608
12.8	Purchase Suggestions	609
12.9	Mobile OPAC	610
13	Searching	625
13.1	Advanced Search Prefixes	625
13.2	Guide to Searching	625
13.2.1	Indexing and Searching Description	625
13.2.2	Indexing Configuration	626
13.2.3	Basic Searching	627
13.2.4	Advanced Searching	628
13.2.5	Common Command Language Searching	630
13.2.5.1	Indexes	630
13.2.5.1.1	Audience Examples	631
13.2.5.1.2	Contents Examples	631
13.2.5.2	Search Syntax	631
13.3	Koha Search Indexes	634
14	Plugin System	639
14.1	Set up	639
15	About Koha	641
15.1	Server Information	641
15.2	Perl Modules	642
15.3	System Information	642
16	Implementation Checklist	643
16.1	Data Migration	643
16.2	Admin Configuration	644
16.3	Localization Configuration	644
16.4	Circulation Configuration	644
16.5	Patron Configuration	646
16.6	Cataloging Configuration	647
16.7	Authorities Configuration	647
16.8	Searching Configuration	648
16.9	OPAC Configuration	648
16.9.1	Editable OPAC Regions	650
16.10	Enhanced Content Configuration	650
16.11	Acquisitions Configuration	651
16.12	Serials Configuration	651
16.13	Planning for Go-Live	652

17 SOPAC2 Installation	653
17.1 Introduction	653
17.2 Installation of Locum and Insurge	653
17.2.1 Dependencies	653
17.2.2 Download	653
17.2.3 Creation of the Database	653
17.2.4 Sync DSN	653
17.2.5 Installation of Insurge	654
17.2.6 Installation of Locum	654
17.3 Installation of Koha Connector	655
17.4 Harvest Records	655
17.5 Installation of Sphinx	655
17.5.1 Dependencies	655
17.5.2 Download and Compile	655
17.5.3 Creation of User and Group	655
17.5.4 The Sphinx daemon	656
17.5.5 Configuration	656
17.5.6 Indexing documents	656
17.6 Installation of SOPAC2	656
17.6.1 Download	656
17.6.2 Installation	657
17.6.3 Configuration	657
18 Cron Jobs	659
18.1 Cron Jobs	659
18.1.1 Search	659
18.1.1.1 Rebuild Index	659
18.1.2 Circulation	659
18.1.2.1 Holds Queue	659
18.1.2.1.1 Perl Documentation	660
18.1.2.2 Expired Holds	661
18.1.2.3 Unsuspend Holds	661
18.1.2.4 Fines	661
18.1.2.5 Long Overdues	661
18.1.2.5.1 Perl Documentation	661
18.1.2.6 Track total checkouts	661
18.1.2.6.1 Perl Documentation	661
18.1.2.7 Generate Patron File for Offline Circulation	662
18.1.3 Patrons	662
18.1.3.1 Unverified Registrations	662
18.1.3.2 Unconfirmed Registrations	662
18.1.3.3 Anonymize Patron Data	662
18.1.3.4 Update Child to Adult Patron Type	663
18.1.3.4.1 Perl Documentation	663
18.1.4 Notices	663
18.1.4.1 Message Queue	663
18.1.4.2 Advanced Notice	664
18.1.4.2.1 Perl Documentation	664
18.1.4.3 Overdue Notice	664
18.1.4.3.1 Perl Documentation	664
18.1.4.4 Print Hold Notices	666
18.1.4.5 Talking Tech	666
18.1.4.5.1 Sending Notices File	666
18.1.4.5.1.1 Perl Documentation	667
18.1.4.5.2 Receiving Notices File	667
18.1.4.5.2.1 Perl Documentation	667
18.1.5 In Processing/Book Cart	667
18.1.5.1 Perl Documentation	667
18.1.6 Catalog	668

18.1.6.1	Check URLs	668
18.1.6.1.1	Perl Documentation	668
18.1.6.2	Merge Authorities	669
18.1.6.3	Serials Update	669
18.1.7	OPAC	669
18.1.7.1	RSS Feeds	669
18.1.7.2	Authorities Browser	669
18.1.7.3	Subject/Author Clouds	669
18.1.7.3.1	Perl Documentation	669
18.1.8	System Administration	670
18.1.8.1	Clean up Database	670
18.1.9	Acquisitions	670
18.1.9.1	Clean up old suggestions	670
18.1.10	Deprecated scripts	671
19	Web Services	673
19.1	OAI-PMH	673
19.1.1	Sample OAI Conf File	673
19.2	REST services	673
20	Using the SRU server	675
20.1	Using the SRU server	675
20.1.1	Explain	675
20.1.2	Search	676
20.1.2.1	More details about Search	676
20.1.3	Retrieve	677
A	System Preference Defaults	679
A.1	ISBD Defaults	679
A.1.1	MARC Default	679
A.1.2	UNIMARC Default	681
B	Configuring Receipt Printers	683
B.1	For Epson TM-T88III (3) & TM-T88IV (4) Printers	683
B.1.1	In the Print Driver	683
B.1.2	In Firefox	683
B.2	For Epson TM-T88II (2) Printers	684
B.2.1	In Firefox	684
B.3	For Star SP542 Printers	685
B.3.1	Installing the Printer	685
B.4	Configuring Firefox to Print to Receipt Printer	685
C	Example Notice	687
D	Sample Serials	689
D.1	Reader's Digest (0034-0375)	689
D.2	People Weekly (1076-0091)	689
D.3	Et-Mol	690
D.4	Backpacker (0277-867X)	691
D.5	Keats-Shelley Journal (0453-4387)	691
D.6	Computers in Libraries (1041-7915)	692
E	Sample List & Cart Emails	695
E.1	Example Email from List	695
E.2	Example Email from Cart	695

F Using Koha as a Content Management System (CMS)	697
F.1 Setup	697
F.1.1 Troubleshooting	698
F.1.2 Bonus Points	698
F.2 Usage	698
F.2.1 Adding Pages	698
F.2.2 Viewing your page	699
F.2.3 Example	699
F.2.4 Live Examples	701
G Resetting the Koha Database	703
G.1 Truncate Tables	703
G.2 Reset the Zebra Index	703
H Important Links	705
H.1 Koha Related	705
H.2 Cataloging Related	705
H.3 Enhanced Content Related	705
H.4 Design Related	706
H.5 Reports Related	706
H.6 Installation Guides	706
H.7 Misc	706
I Koha XSLT Item Types	707
J MarcEdit	709
J.1 Adding a prefix to call numbers	709
J.2 Importing Excel data into Koha	711
J.2.1 Converting from Excel format into .mrk format	711
J.2.2 Convert .mrk file to .mrc	717
J.2.3 Import .mrc into Koha	720
K Talking Tech	725
K.1 Installation and Setup Instructions	725
K.2 Sending Notices File	725
K.3 Receiving Results File	725
L OCLC Connexion Gateway	727
L.1 Setting up OCLC service on Koha	727
L.2 Setting up your OCLC desktop client	728
L.3 Using the OCLC Connexion Gateway	730
L.3.1 Exporting records one by one	730
L.3.2 Exporting records in a batch	732
M FAQs	735
M.1 Display	735
M.1.1 Custom Item Type/Authorized Value Icons	735
M.1.2 Customizing Koha Images	735
M.1.3 OPAC Display Fields	735
M.1.4 Subtitle Display on Bib Records	736
M.1.5 Customize Logo on Staff Client	736
M.1.6 Show patrons the barcodes of items they have checked out	738
M.2 Circulation/Notices	739
M.2.1 Book drop Date	739
M.2.2 Holds to Pull and Holds Queue	740
M.2.3 Duplicate Overdue Notices	740
M.2.4 Printing Overdue Notices	740
M.2.5 Unable to Renew Items	740
M.2.6 Unable to Place Holds	741
M.2.7 Keyboard Shortcuts	741

M.2.8	SMS Notices/Messages	741
M.3	Cataloging	741
M.3.1	Authority Fields	741
M.3.2	Koha to MARC Mapping	742
M.3.3	Number of Items Per Bib Record	742
M.3.4	Analytics	742
M.4	Acquisitions	742
M.4.1	Planning Categories	742
M.5	Serials	743
M.5.1	Advanced Patterns	743
M.6	Reports	743
M.6.1	Define Codes Stored in DB	743
M.6.1.1	Fines Table	743
M.6.1.2	Statistics Table	744
M.6.1.3	Reserves Table	744
M.6.1.4	Reports Dictionary Table	744
M.6.1.5	Messages Table	744
M.6.1.6	Serial Table	745
M.6.1.7	Borrowers Table	745
M.6.2	Runtime Parameters	745
M.6.3	Results Limited	746
M.7	Searching	746
M.7.1	Advanced Search	746
M.7.1.1	Scan Indexes	746
M.7.1.2	Searching for Terms that Start With a Character	746
M.7.2	Wildcard Searching	747
M.7.3	Title Searching	747
M.8	Enhanced Content	747
M.8.1	FRBRizing Content	747
M.8.2	Amazon	747
M.8.2.1	All Amazon Content	747
M.9	System Administration	748
M.9.1	Errors in Zebra Cron	748
M.9.2	Making Z39.50 Target Public	748
M.9.3	Shelving Location Authorized Values	748
M.9.4	Why do I need Authorized Values?	748
M.9.5	How do I clean up the sessions table?	749
M.10	Hardware	749
M.10.1	Barcode Scanners	749
M.10.2	Printers	749
M.10.2.1	Printers used by Koha libraries	749
M.10.2.2	Braille Support	750
M.10.2.3	Additional Support	750
N	Extending Koha	751
N.1	Amazon lookup script for Koha libraries	751
N.2	Keyword Clouds	751
N.3	Newest Titles Pulldown	752
N.4	Cataloging and Searching by Color	752
O	Koha and Your Website	755
O.1	Koha search on your site	755
P	GNU General Public License version 3	757

List of Tables

6	Cataloging	
6.1	Cataloging Guide	427
6.2	Koha Embedded Holdings Data	436
13	Searching	
13.1	Attributes	630
13.2	Indexes	634

Chapter 1

Introduction

1.1 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 Recommendations

Full system recommendations can be found on the official Koha wiki along with the developer documentation: <http://wiki.koha-community.org>

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.

Chapter 2

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.

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 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 <input type="button" value="v"/> that tag
TagsShowOnDetail	Show <input type="text" value="10"/> tags on
TagsShowOnList	Show <input type="text" value="6"/> tags on

[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 sources

Saved preference FRBRizeEditions

Saved preference TagsModeration

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 AcqItemSetSubfieldsWhenReceived Asks: ___ Set subfields for item when items are created when receiving (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.

2.1.1.1.3 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.

2.1.1.1.4 AcqWarnOnDuplicateInvoice Default: Do not warn

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

Values:

- Do not warn
- Warn

2.1.1.1.5 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.

2.1.1.1.6 CurrencyFormat Default: 360,000.00 (US)

Asks: Display currencies using the following format ___

Values:

- 360,000.00 (US)
- 360 000,00 (FR)

2.1.1.1.7 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.

TIP

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

2.1.1.1.8 UniqueItemFields Default: barcode

Asks:___ (space-separated list of fields that should be unique for items, must be valid SQL fields of **items** 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.

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 Interface options

These preference are related to your Koha interface

2.1.2.2.1 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.

2.1.2.2.2 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.

2.1.2.2.3 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.

2.1.2.2.4 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.

2.1.2.2.5 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.

2.1.2.3 Login options

These preferences are related to logging into your Koha system

2.1.2.3.1 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.

2.1.2.3.2 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

2.1.2.3.3 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.

2.1.2.3.4 timeout Default: 12000000

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

Description:

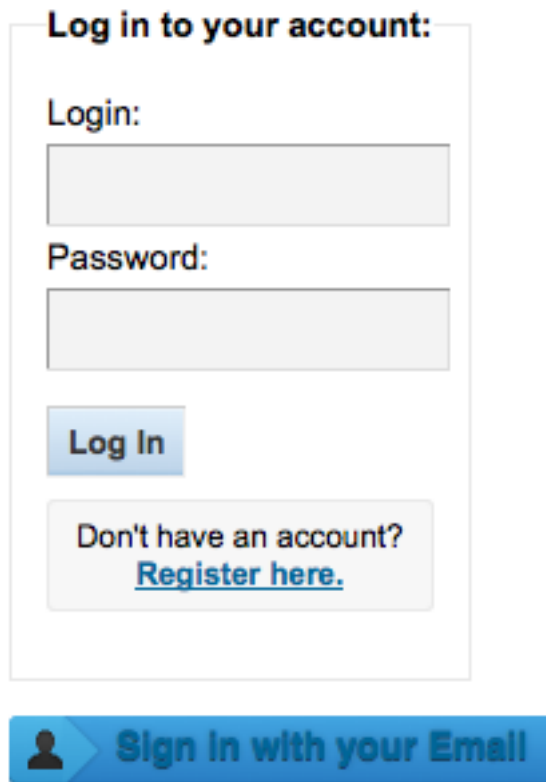
- This preference sets the length of time the Staff Client or OPAC accounts can be left inactive before re-logging in is necessary. The value of this preference is in seconds. At this time, the amount of time before a session times out must be the same for both the Staff Client and the OPAC.

2.1.2.4 Mozilla Persona**2.1.2.4.1 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](#).


IMPORTANT

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

2.1.2.5 Search Engine

2.1.2.5.1 SearchEngine

IMPORTANT

 This preference is highly experimental and should not be changed from the default value in a production environment.

Default: Zebra

Asks: ___ is the search engine used.

Values:

- Solr
- Zebra

Description:

- This preference will be used to control which search engine Koha uses for catalog searches in the OPAC and the staff client.

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

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 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.

IMPORTANT



If this is set to merge you will need to ask your administrator to enable the [merge_authorities.pl cronjob](#).

2.1.3.1.5 **MARCAuthorityControlField008** Default: || aca || aabn | a | a d

Asks: Use the following text for the contents of MARC 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 authoritysep** Default: --

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

2.1.4.1.2 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

The screenshot shows a MARC cataloging interface with a tabbed menu at the top containing tabs labeled 0, 1, 2, and 3. The '0' tab is selected. Below the tabs, the following tags and their descriptions are listed:

- 000** - LEADER
- 005** - DATE AND TIME OF LA'
- 006** - FIXED-LENGTH DATA E
- 007** - PHYSICAL DESCRIPTIC
- 008** - FIXED-LENGTH DATA E
- 020** - ISBN + -
- 024** - OTHER STAND/

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

2.1.4.1.3 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.

2.1.4.1.4 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. 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.

2.1.4.1.5 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

0 2 3 5 6 7 9 Item(s)

SUBJECT ADDED ENTRY--TOPICAL TERM
Topical term or geographic name as entry element Mashups (World Wide Web)
General subdivision Library applications.
Topical term or geographic name as entry element Libraries and the Internet.
Topical term or geographic name as entry element Library Web sites
General subdivision Design.
Topical term or geographic name as entry element Web site development.

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

0 2 3 5 6 7 9 Item(s)

SUBJECT ADDED ENTRY--TOPICAL TERM
Topical term or geographic name as entry element Mashups (World Wide Web)
General subdivision Library applications.
SUBJECT ADDED ENTRY--TOPICAL TERM
Topical term or geographic name as entry element Libraries and the Internet.
SUBJECT ADDED ENTRY--TOPICAL TERM
Topical term or geographic name as entry element Library Web sites
General subdivision Design.
SUBJECT ADDED ENTRY--TOPICAL TERM
Topical term or geographic name as entry element Web site development.

2.1.4.1.6 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.

2.1.4.1.7 OpacSuppression and OpacSuppressionByIPRange OpacSuppression Default: Don't hide
 Asks: ___ items marked as suppressed from OPAC search results. Restrict the suppression to IP addresses outside of the IP range ___

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

Description:

- These preferences control hiding of bibliographic records from display in the OPAC. Each bibliographic 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.

TIP



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).

2.1.4.1.8 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.

Nicole's Library holdings		Other holdings
Item type	Current location	Home Library
 7-DAY BOOK Books	Nicole's Library	Nicole's Library

2.1.4.1.9 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 online.' If you would like the field to say something else enter that in this field.

2.1.4.1.10 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 Society.$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 Interface

2.1.4.2.1 advancedMARCeditor Default: Don't display

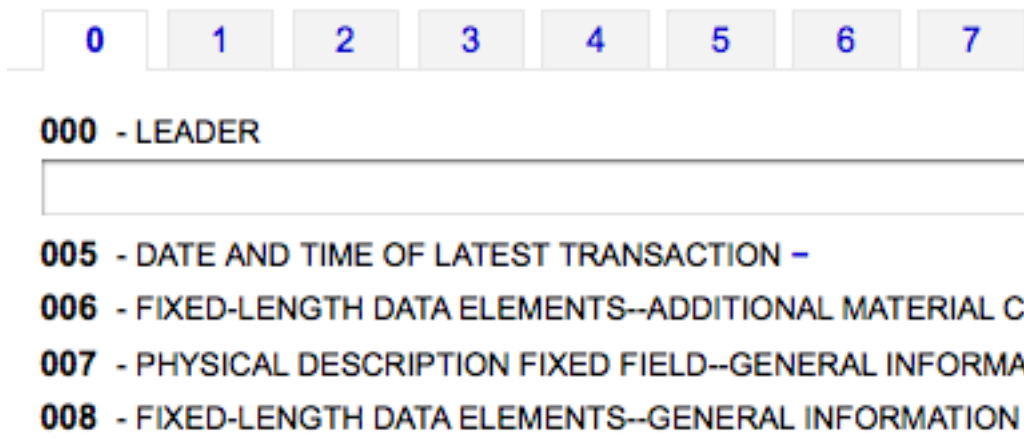
Asks: ___ descriptions of fields and subfields in the MARC editor.

Description:

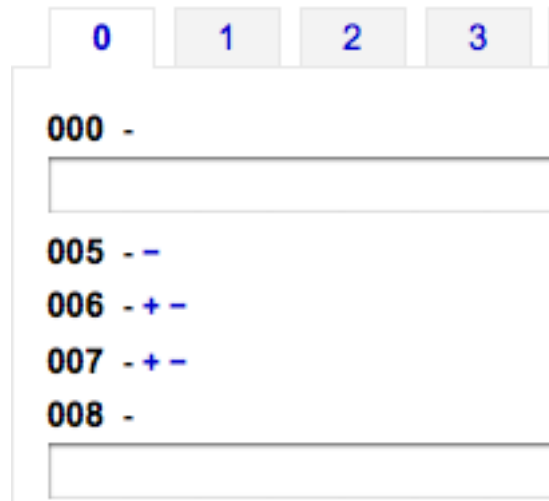
- This preference determines whether or not MARC field names will be present when editing or creating MARC records.

Values:

- Display



- Don't display



2.1.4.2.2 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

2.1.4.2.3 EasyAnalyticalRecords 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.

2.1.4.3 Record Structure

2.1.4.3.1 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:



2.1.4.3.2 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.

2.1.4.3.3 DefaultLanguageField008 Asks: Fill in the default language for field 008 Range 35-37 ____.

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](#) for additional values for this preference.

TIP



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

2.1.4.3.4 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 also 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.

Select All Clear All Highlight Add to: Save Place Hold Relevance

1.  **The Tale of Peter Rabbit [electronic resource]**
by Potter, Beatrix . -- Project Gutenberg

Type:  Book; Format: available online 

Publisher: Salt Lake City : Project Gutenberg Literary Archive Foundation, 2005.

Online Access: [Click here to access a downloadable ebook.](#)

Availability: No copies available

Log in to add tags.

Actions:  Add to Cart

2.  **Harry Potter and the goblet of fire [sound recording]**
by Rowling, J. K ; Dale, Jim .

Type:  Sound; Literary form: fiction; Audience: Juvenile;

Publisher: New York : Listening Library, p2000.

Online Access: [Contributor biographical information](#) | [Publisher description](#)

Availability: **Copies available for loan: Nicole's Library [SDB 62002] (1).**

Tags: [magic](#) (11) [wizards](#) (11)

Actions:  Place Hold  Add to Cart



No cover image available

2.1.4.3.5 itemcallnumber Default: 082ab

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

TIP



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) 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

2.1.4.3.6 marcfavour 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 an other.

2.1.4.3.7 MARCOrgCode Default: OSt

Asks: Fill in the MARC organization code ___ by default in new MARC 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](#) or in Canada on the [Canadian Symbols Directory](#).

TIP



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

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

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

Asks: When a new item is added ___

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 [SubfieldsToUseWhenPrefill](#) you can control specifically which fields are prefilled.

2.1.4.3.10 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.

2.1.4.3.11 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.

2.1.4.4 Spine Labels**2.1.4.4.1 SpineLabelAutoPrint** Default: don't

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

Values:

- do
- don't

2.1.4.4.2 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 >.)

2.1.4.4.3 SpineLabelShowPrintOnBibDetails Default: Don't display

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

Values:

- Display

Holdings Descriptions Subscriptions								
Item type	Location	Collection	Call Number	Status	Last seen	Barcode	Publication Details	Spine Label
Books	Centerville General Stacks	Non Fiction	020.285/4678	Available	12/28/2009	898739894		Print Label

- Don't display

2.1.5 Circulation

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

2.1.5.1 Checkin Policy**2.1.5.1.1 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.

2.1.5.1.2 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 **finer cron job** is off then Koha will calculate fines only when items are returned. If you have the finer 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 finer cron job is running.

IMPORTANT



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

2.1.5.2 Checkout Policy

2.1.5.2.1 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 followed 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



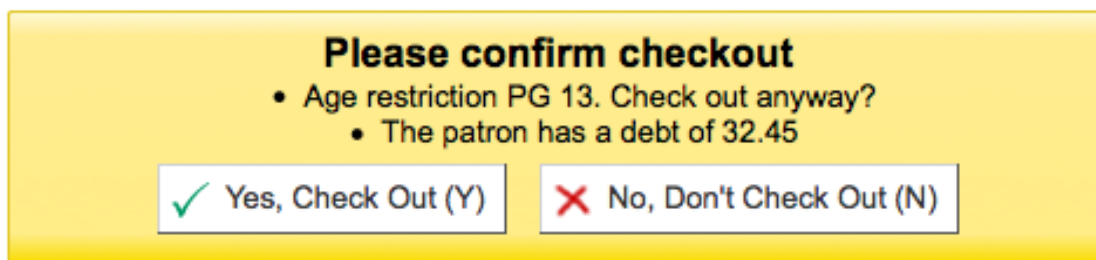
You must map the word **agerestriction** in the **biblioitems** table to the MARC field where this information will appear via the **Koha to MARC Mapping** administration area.

2.1.5.2.2 AgeRestrictionOverride Default: Don't allow

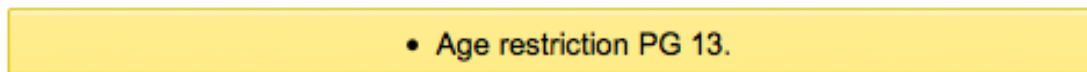
Asks: ___ staff to check out an item with age restriction.

Values:

- Allow



- Don't allow



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.

2.1.5.2.3 AllFinesNeedOverride Default: Require

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

Values:

- Don't require
- Require

Description:

- This preference lets 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.

2.1.5.2.4 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 your 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 patron owes money, but it won't stop the staff from checking out to the patron.

2.1.5.2.5 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."

2.1.5.2.6 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.

2.1.5.2.7 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 overridden, 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.

2.1.5.2.8 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:

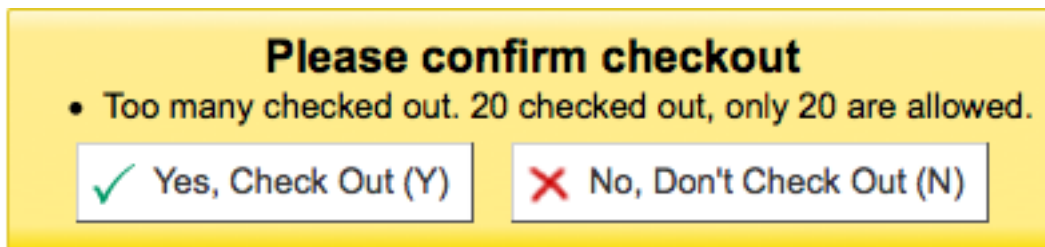
- This preference lets the library system decide how they will accept returns. Some systems allow for items to be returned to any library in the system (the default value of this preference) others want to limit item returns to only specific branches. This preference will allow you to limit item returns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

2.1.5.2.9 AllowTooManyOverride Default: Allow

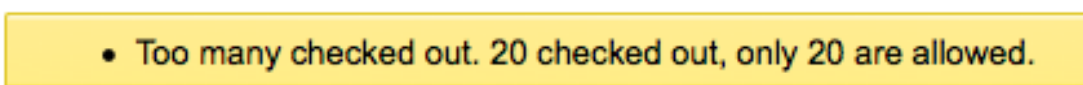
Asks: ___ staff to override and check out items when the patron has reached the maximum number of allowed checkouts.

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.

2.1.5.2.10 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.

2.1.5.2.11 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.

2.1.5.2.12 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 library that owns the item
- 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

2.1.5.2.13 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
- the library the item was checked out from

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.

Description:

- If **IndependentBranches** is set to 'Prevent' and **CircControl** is set to 'the library the item is from' this preference decides whether the library holding the item (holding library on the item record) may check the item out to its own patron or if it must immediately send the item back to the owning location (home library on the item record).

IMPORTANT

This preference does nothing unless the **IndependentBranches** preference is set to 'Prevent'.

2.1.5.2.14 HomeOrHoldingBranchReturn Default: the library the item is from

Asks: On checkin route the returned item to ____

Values:

- the library the item is from
- the library item was checked out from

Description:

- This preference will control where Koha prompts you to return the checked in item to. The value in this preference is overridden by any values you have related to item returns and floating collections in the **Circulation and Fine Rules**.

2.1.5.2.15 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

2.1.5.2.16 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.

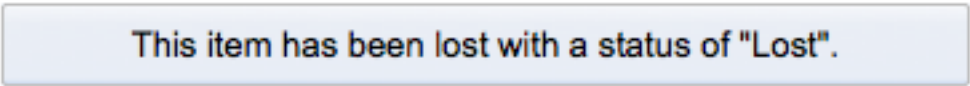
Example: Your library has a \$5 limit set for 'fines' (ie, after incurring \$5 in fines, a patron can no longer check out items). A patron comes to the desk with 5 items to check out (4 books and a video) The patron has \$4 in charges already on their account. One of the videos has a rental charge of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

2.1.5.2.17 IssueLostItem Default: display a message

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

Values:

- display a message





This item has been lost with a status of "Lost".

- do nothing
 - This option will just check the item out without notifying you that the item was marked lost.
- require confirmation

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)

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.'

2.1.5.2.18 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.

2.1.5.2.19 maxoutstanding Default: 5

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

2.1.5.2.20 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.

2.1.5.2.21 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

2.1.5.2.22 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.

TIP



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

TIP



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

2.1.5.2.23 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.

TIP



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.

2.1.5.2.24 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

2.1.5.2.25 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'

2.1.5.2.26 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.

2.1.5.2.27 **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.

2.1.5.2.28 **ReturnToShelvingCart** Default: Don't move

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

Values:

- Don't move
- Move

2.1.5.2.29 **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.

2.1.5.2.30 **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.

2.1.5.2.31 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.

2.1.5.2.32 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. This behaviour will be overruled if the **AutomaticItem-Return** system preference is enabled.

2.1.5.3 Course Reserves**2.1.5.3.1 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.

2.1.5.4 Fines Policy

2.1.5.4.1 **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.

2.1.5.4.2 **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.

2.1.5.4.3 **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)

2.1.5.4.4 **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.

2.1.5.4.5 **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.

2.1.5.4.6 **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.

2.1.5.5 **Holds Policy**

2.1.5.5.1 **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

2.1.5.5.2 **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.

2.1.5.5.3 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.

2.1.5.5.4 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.

2.1.5.5.5 AllowOnShelfHolds Default: Allow

Asks: ___ hold requests to be placed on items that are not checked out.

Values:

- Allow
- Don't Allow

Description:

- This preference is a binary setting which controls the ability of patrons to place holds on items that are not currently checked out. Setting it to "Don't allow" allows borrowers to place holds on items that are checked out but not on items that are on the shelf (or assumed available in the library), setting it to "Allow" allows borrowers to place holds on any item that is available for loan whether it is checked out or not. This setting might be set to "Allow" if the library system is a multi branch system and patrons used the hold system to request items from other libraries, or if the library wanted to allow users to place holds on items from home through the OPAC. Setting it to "Don't allow" would enforce a first come, first served standard.

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'.

2.1.5.5.6 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 unsuspending. If you have this preference set to 'Allow' you will also need the **Unsuspend Holds** cron job running.

IMPORTANT

The holds will become unsuspending the date after that entered by the patron.

2.1.5.5.7 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**)

2.1.5.5.8 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 **AllowHoldDateInFuture** or **OPACAllowHoldDateInFuture**

2.1.5.5.9 decreaseLoanHighHolds, decreaseLoanHighHoldsDuration and decreaseLoanHighHoldsValue

Asks: ___ the reduction of loan period to ___ days for items with more than ___ holds.

decreaseLoanHighHolds default: Don't enable

decreaseLoanHighHolds values: Don't enable

- Enable

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.

**2.1.5.5.10 DisplayMultiPlaceHold** Default: Don't enable

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

Values:

- Don't enable
- Enable

2.1.5.5.11 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 HOLD-PLACED

IMPORTANT

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

2.1.5.5.12 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 running.

2.1.5.5.13 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.

2.1.5.5.14 maxreserves Default: 50

Asks: Patrons can only have ___ holds at once.

2.1.5.5.15 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

2.1.5.5.16 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.

2.1.5.5.17 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.

2.1.5.5.18 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.

2.1.5.5.19 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.

2.1.5.5.20 StaticHoldsQueueWeight & RandomizeHoldsQueueWeight StaticHoldsQueueWeight Default: 0

RandomizeHoldsQueueWeight Default: in that order

Asks: Satisfy holds from the libraries ___ (as branchcodes, separated by commas; if empty, uses all libraries) ___

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 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.

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'

2.1.5.5.21 `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.

2.1.5.5.22 `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 Interface

2.1.5.6.1 `AllowAllMessageDeletion` Default: Don't allow

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

Values:

- Allow
- Don't allow

2.1.5.6.2 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.

2.1.5.6.3 CircAutocompl Default: Try

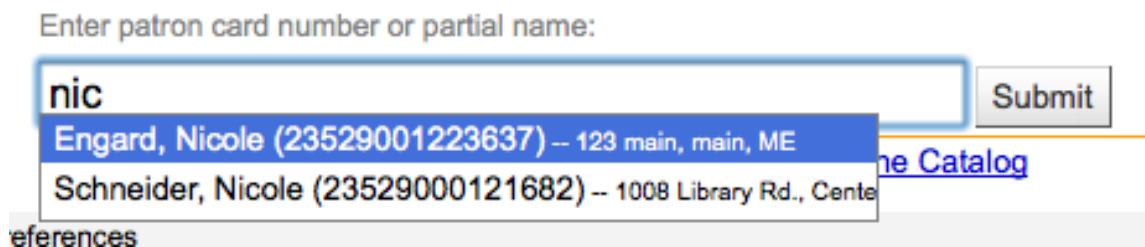
Asks: ___ to automatically fill in the member when entering a patron search on the circulation screen.

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

**2.1.5.6.4 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.

2.1.5.6.5 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.

Filter On:
Date due:
From:
 
To:
 
Name or cardnumber:

Patron category:

Patron flags:

Driver's License:

Home Branch:

Item type:

Library of the patron:

Sort By:

Show any items currently checked out:

Values:

- Don't require
- Require

2.1.5.6.6 FineNotifyAtCheckin Default: Don't notify

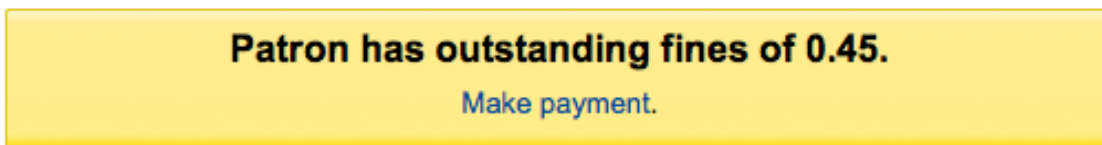
Asks: ___ librarians of overdue fines on the items they are checking in.

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 be 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.

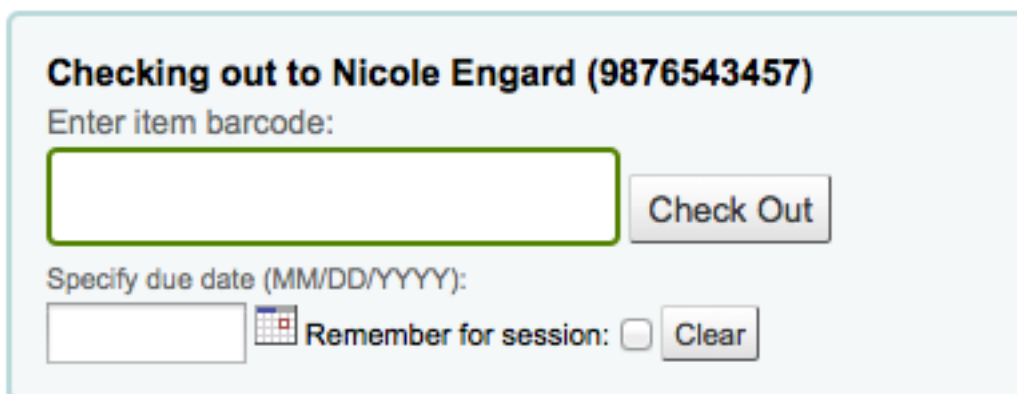


2.1.5.6.7 DisplayClearScreenButton Default: Show

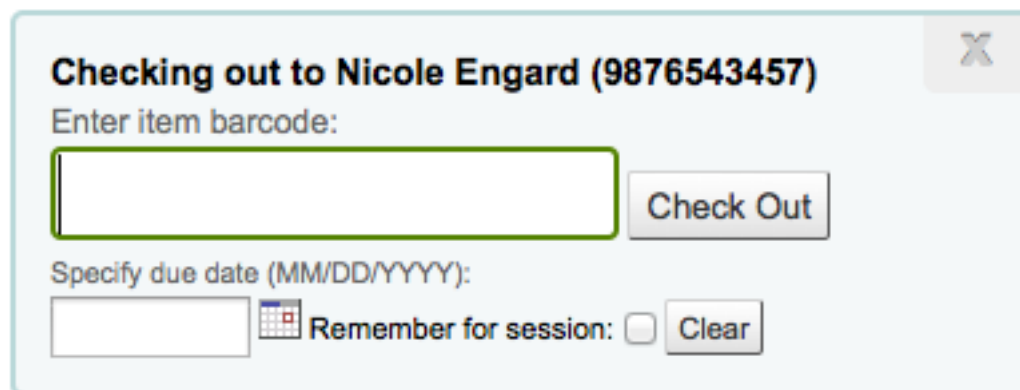
Asks: ___ a button to clear the current patron from the screen on the circulation screen.

Values:

- Don't show



- Show



2.1.5.6.8 ExportRemoveFields Asks: The following fields should be excluded from the patron check-out 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.

Due date	Title	Item type	Checked out on	Checked out from	Call no	Charge	Price	Renew select all none	Check in select all none	Export select all none	
Previous checkouts											
09/12/2012 23:59	Harry Potter and the deathly hallows, by Rowling, J. K. 2345043236	Book on CD	08/23/2012 11:37	Nicole's Library	PZ7.R79835 Hajd 2007b	0.00		1 <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Totals:							89.00	0.00	Renewal due date: <input type="text"/>		
Forgive fines on return: <input type="checkbox"/>											

Override renewal limit: Renew or Return checked items Renew all

Don't export fields : 100a Export checkouts ▾

2.1.5.6.9 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.

Override renewal limit: Renew or Return checked items

Don't export fields : 100a Export checkouts ▾

ISO2709 with items
ISO2709 without items
CSV

2.1.5.6.10 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.

2.1.5.6.11 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

- The barcode was not found outside the book **Fast cataloging**
The following items were found by searching:

Check out 32404323: Thinking outside the book :

Checking out to Coda Engard (987654345) ✕

Enter item barcode:

outside the book

Specify due date (MM/DD/YYYY) :

Remember for session:

Attention:

> **Fees & Charges:** Patron has Outstanding fees & charges of 6.40. [Make Payment](#)

Messages:

[Add a new message](#)

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.

2.1.5.6.12 `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

2.1.5.6.13 `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.

2.1.5.6.14 numReturnedItemsToShow Default: 20

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

2.1.5.6.15 previousIssuesDefaultSortOrder Default: earliest to latest

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

Values:

- earliest to latest
- latest to earliest

2.1.5.6.16 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.

2.1.5.6.17 soundon Default: Don't enable

Asks: ___ circulation sounds during checkin and checkout in the staff interface.

Values:

- Don't enable
- Enable

IMPORTANT

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

2.1.5.6.18 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

Checking out to Nicole Engard (9876543457)
 Enter item barcode:

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

- Don't allow

Checking out to Nicole Engard (9876543457)
 Enter item barcode:


2.1.5.6.19 todaysIssuesDefaultSortOrder Default: latest to earliest
 Asks: Sort today's checkouts on the circulation page from ___ due date.
 Values:

- earliest to latest
- latest to earliest

2.1.5.6.20 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.

2.1.5.6.21 UseTablesortForCirc Default: Don't enable
 Asks: ___ the sorting of current patron checkouts on the circulation screen.
 Values:

- Don't enable

- Enable

IMPORTANT



Enabling this function may slow down circulation time for patrons with many checkouts.

2.1.5.6.22 WaitingNotifyAtCheckin Default: Don't notify

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

Values:

- Don't notify
- Notify

Dorothy Gale has 1 hold(s) waiting for pickup.

[Check out to this patron.](#)

Checked-In items

Due Date	Title	Author	Barcode	Shelving Location	Call Number	Type	Patron	Note
08/06/2011	All through the night /	Bunn, T. Davis,	3100000013110	Processing Center	AF Bunn	CIRC AF	Gale, Dorothy (J)	

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.

2.1.5.7 Self Checkout

2.1.5.7.1 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.

2.1.5.7.2 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 username 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**.

2.1.5.7.3 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.

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

Description:

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

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

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.

2.1.5.7.6 SelfCheckoutByLogin Default: Barcode

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

Values:

- Barcode

Nicole's Library Self Checkout System

Self Checkout

Please enter your card number:

© Nicole C. Engard
[Home](#) | [Contact](#) | [Privacy](#)

- Username and password

Nicole's Library Self Checkout System

Self Checkout

Please login with your username and password

Username: 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.

2.1.5.7.7 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.

2.1.5.7.8 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.

2.1.5.7.9 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

2.1.5.7.10 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 Creators

These preferences have to do with creating content.

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

2.1.6.1 Patron Cards

These preferences are in reference to the **Patron Card Creator** tool.

2.1.6.1.1 ImageLimit Asks: Limit the number of creator images stored in the database to ___ images.

2.1.7 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.

TIP



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.

2.1.7.1 All

2.1.7.1.1 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**)

2.1.7.1.2 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


Holdings (3)
Title Notes
Comments
Related
Editions
Amazon Reviews

Other Editions of this Work




[Harry Potter and the goblet of fire /](#) by Rowling, J. K. ©2000

Circulating Arthur A. Levine Books, (New York :), 2000 xi, 734 p. : ill. ; 24 cm.



[Harry Potter and the goblet of fire /](#) by Rowling, J. K. ©2002

Scholastic, (New York :) xi, 734 p. : ill. ; 20 cm.



[Harry Potter and the goblet of fire /](#) by Rowling, J. K. ©2000

Circulating Thorndike Press, (Thorndike, ME :), 2000 936 p. : ill. ; 23 cm.

No cover
image
available

[Harry Potter and the goblet of fire](#) by Rowling, J. K. ©2000

Circulating Listening Library, (New York :) 17 sound discs (ca. 20 hrs.) : digital ; 4 3/4 in.

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**)

2.1.7.2 Amazon

2.1.7.2.1 AmazonAssocTag Asks: Put the associate tag ____ on links to Amazon.

TIP



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/>

2.1.7.2.2 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.

2.1.7.2.3 AmazonLocale Default: American

Asks: Use Amazon data from its ___ website.

Value:

- American
- British
- Canadian
- French
- German
- Japanese

2.1.7.2.4 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.

2.1.7.3 Babelthèque

2.1.7.3.1 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](http://www.babelio.com), a French service similar to LibraryThing for Libraries. More information about Babeltheque is available through its website, <http://www.babeltheque.com>. 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

Exemplaires (1) Notes commentaires Les commentaires des lecteurs d'Amazon : **Babelthèque**

Note moyenne des lecteurs
 ★★★★★
 4.19/5 (sur 254 notes)

Critiques sur ce livre
 30 critiques sur ce livre ([tout lire](#))
[Ajouter une critique](#)

Citations de ce livre
 5 citations de ce livre ([tout lire](#))
[Ajouter une citation](#)

Étiquettes sur ce livre
[adapté](#) [adapté au cinéma](#) [amitié](#) [amour](#)
[auteur français](#) [collocation](#) [cuisine](#)
[france](#) [français](#) [gavalda](#)
[littérature contemporaine](#)
[littérature francophone](#)
[littérature française](#)

- Don't

2.1.7.3.2 **Babeltheque_url_js** Asks: ___ Defined the url for the Babeltheque javascript file (eg. <http://www.babeltheque.com>).

2.1.7.3.3 **Babeltheque_url_update** Asks: ___ Defined the url for the Babeltheque update periodically (eg. <http://www.babeltheque.com/.../file.csv.bz2>).

2.1.7.4 Baker & Taylor

IMPORTANT



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

2.1.7.4.1 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

2.1.7.4.2 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=1

TIP



Leave it blank to disable these links.

IMPORTANT



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

2.1.7.4.3 BakerTaylorUsername & BakerTaylorPassword Asks: Access Baker and Taylor using username ___ and password ___

Descriptions:

- This setting is 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.

2.1.7.5 Google

2.1.7.5.1 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.

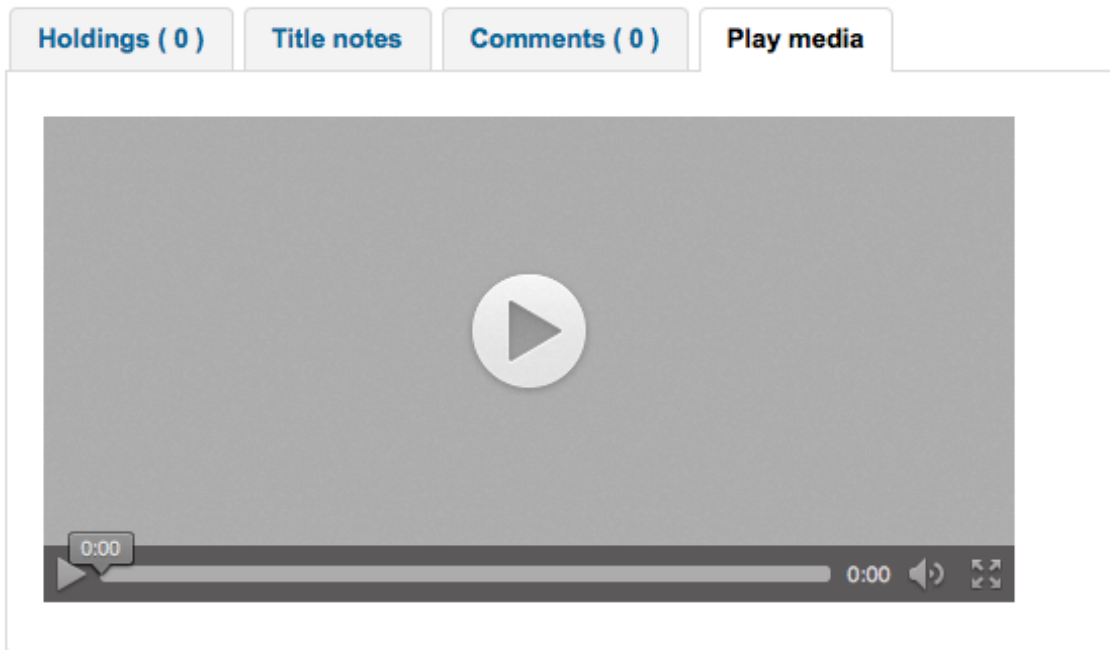
2.1.7.6 HTML5 Media

2.1.7.6.1 HTML5MediaEnabled Default: not at all

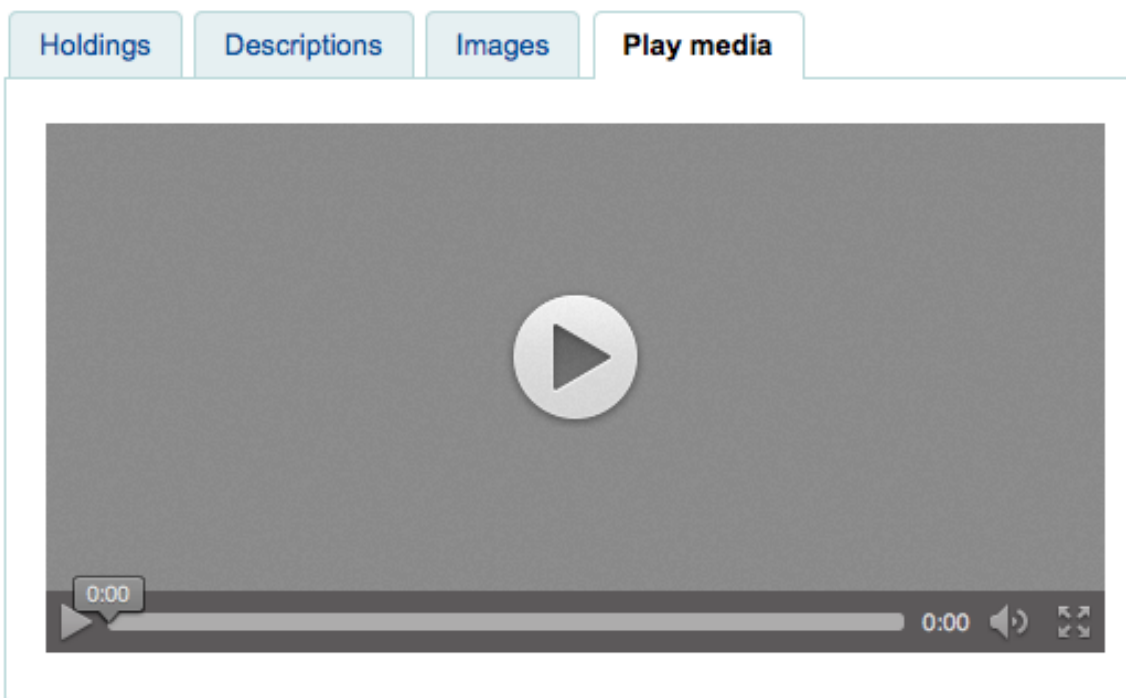
Asks: Show a tab with a HTML5 media player for files catalogued in field 856 ___

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.

2.1.7.6.2 HTML5MediaExtensions Default: webm|ogg|ogv|oga|vtt

Asks: Media file extensions ____


Description:

- Enter in file extensions separated with bar (|)

2.1.7.7 IDreamLibraries

IDreamBooks.com 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 in to your Koha OPAC.

TIP



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.

2.1.7.7.1 IDreamBooksReadometer Default: Don’t add

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

Values:

- Add



Normal view | MARC view | ISBD view

Bossypants /
by Fey, Tina

Type: Book
 Publisher: New York : Back Bay Books/Little, Brown, 2012
 Edition: 1st Reagan Arthur/Back Bay pbk. ed.
 Description: xiv, 275, 9 p. : ill. (chiefly col.) ; 21 cm.
 ISBN: 9780316056878 (pbk.).
 Other Title: Bossy pants.

Readometer
 **73%**
 Critic Reivews: 19
 Rating based on critic reviews for Bossypants by Tina Fey

- Don’t add

2.1.7.7.2 IDreamBooksResults Default: Don’t add

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


Values:


- Add

Bossypants
by Fey, Tina.

Edition: 1st Reagan Arthur/Back Bay pbk. ed.

Type: Book; Format: print ; Nature of contents: ; Literary form: not fiction
 Publisher: New York : Back Bay Books/Little, Brown, 2012
 Other title: Bossy pants.
 Availability: **Copies available for loan:** Nicole's Library [PN2287.F4255 A3 2012] (1).
 Actions: Place hold | Add to cart



 **73%**


- Don’t add

2.1.7.7.3 IDreamBooksReviews Default: Don't add


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


Values:

- Add

 73% rating based on reviews at iDreamBooks.com

Nicole's Library holdings (1) Other holdings (0) Title notes Comments (0) **Book reviews by critics (19)**

New York Times
 "...Ms. Fey, like Ms. Ephron, is at her most hilariously self-deprecating when it comes to her attractiveness and vanity..."
 Review date: 2011-04-03
 Review result: Positive 

Los Angeles Times
 "...Fey has a great sense of pace and timing . . . and a love of language that echoes early Nora Ephron and, before that, the marvelous Jean Kerr..."
 Review date: 2011-04-04
 Review result: Positive 

- Don't add

2.1.7.8 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 configuration instructions please see the LibraryThing Wiki: <http://www.librarything.com/wiki/-index.php/Koha>

2.1.7.8.1 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.

2.1.7.8.2 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.

2.1.7.8.3 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.

2.1.7.8.4 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.

2.1.7.9 Local Cover Images**2.1.7.9.1 AllowMultipleCovers** Default: Don't allow

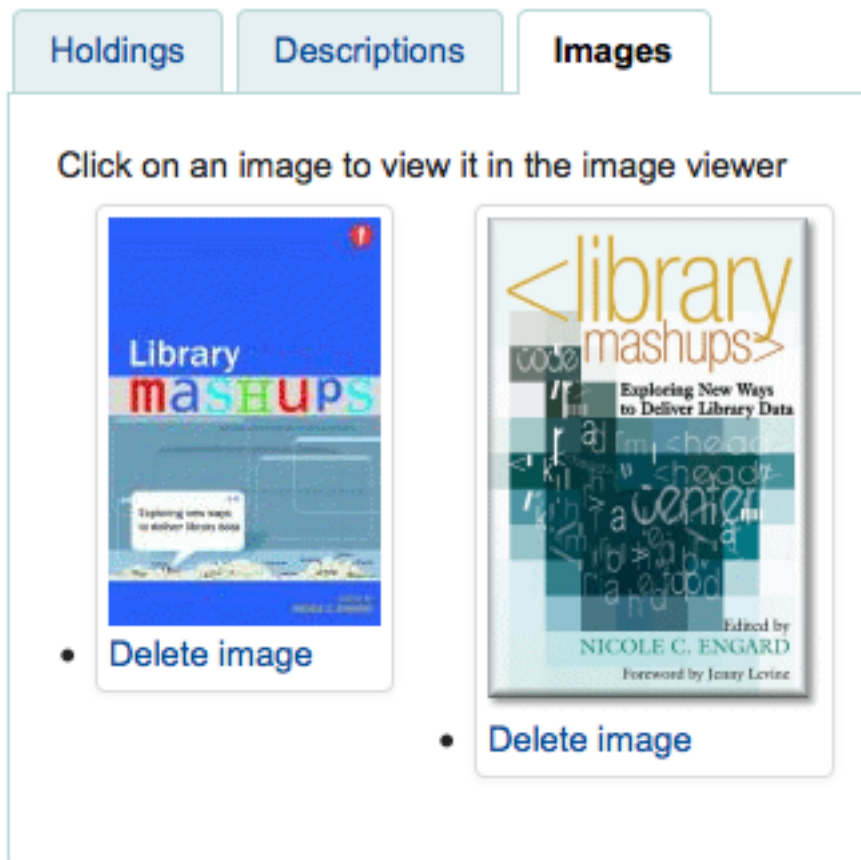
Asks: ____ multiple images to be attached to each bibliographic record.

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.'



2.1.7.9.2 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.

2.1.7.9.3 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.

2.1.7.10 Novelist Select

Novelist Select is not a free service. Contact your Ebsco representative 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.

2.1.7.10.1 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 **NovelistSelectProfile & NovelistSelectPassword** preferences

Description:

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

2.1.7.10.2 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.

2.1.7.10.3 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.

Holdings (2)	Title Notes	Comments (0)	Novelist Select
----------------	-------------	----------------	-----------------





Series Information from NoveList

Harry Potter series
[\[View In NoveList\]](#)

					
1. Harry Potter and the sorcerer's stone [View In NoveList]	2. Harry Potter and the Chamber of Secrets [View In NoveList]	3. Harry Potter and the prisoner of Azkaban [View In NoveList]	4. Harry Potter and the goblet of fire [View In NoveList]	5. Harry Potter and the Order of the Phoenix [View In NoveList]	6. Harry Potter and the half-blood prince [View In NoveList]

[Show the Rest...](#)

Similar Titles from NoveList

	The amulet of Samarkand. Stroud, Jonathan Although The Amulet of Samarkand is set in an alternate version of modern-day England, both of these fast-paced, suspenseful fantasies feature the intricate details of spell-working and a young man caught up in a conflict between magicians. -- Lesley James		Bones of Faerie. Simner, Janni Lee Although Bones of Faerie is set in a dystopian future, both of these atmospheric fantasies depict the intrusion of magic on our world and the quest of a teen who finds that magic abilities can be as much a burden as a blessing. -- Lesley James		Un lun dun. Mieville, China Both of these fantasies build elaborate worlds layered over familiar places in which a young person must contend with the question of good and evil, as well as the problem of playing the starring role in a prophecy. -- Lesley James		City of bones. Clare, Cassandra The twisting plots in both of these richly-detailed fantasies follow teens as they uncover secrets about those close to them, fight monsters, and save the mortal/Muggle/mundie world, mixing emotional intensity with comic moments. -- Lesley James
---	--	---	--	---	---	---	---

[Show the Rest...](#)

Reader Ratings and Reviews

Goodreads is the largest social network for readers. Members provide ratings and reviews of books to express their personal opinions and to help others determine if they would enjoy a book. Goodreads respects the right of individuals to express themselves, but does not tolerate abusive behavior.

Reader Rating: **★★★★☆ (28401 reviews)**
[Read reviews on goodreads](#)

Similar Authors from NoveList

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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.

[Place Hold](#)
[Print](#)
[Add to Your Cart](#)
[More searches ▾](#)







Save Record:

-- Choose Format -- ▾
Go

Novelist Select

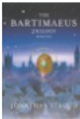



Series Information from Novelist

Harry Potter series
[\[View In Novelist\]](#)

					
1. Harry Potter and the sorcerer's stone [View In Novelist]	2. Harry Potter and the Chamber of Secrets [View In Novelist]	3. Harry Potter and the prisoner of Azkaban [View In Novelist]	4. Harry Potter and the goblet of fire [View In Novelist]	5. Harry Potter and the Order of the Phoenix [View In Novelist]	6. Harry Potter and the half-blood prince [View In Novelist]

[Show the Rest...](#)

Similar Titles from Novelist

			
The amulet of Samarkand , Stroud, Jonathan	Bones of Faerie , Simner, Janni Lee Although Bones	Un lun dun , Mieville, China Both of these fantasies build elaborate worlds	City of bones , Clare, Cassandra The twisting

Values:

- above the holdings table
- below the holdings table
- in an OPAC tab
- under the Save Record dropdown on the right

2.1.7.11 OCLC

2.1.7.11.1 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'

2.1.7.11.2 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>

2.1.7.11.3 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>

2.1.7.12 Open Library**2.1.7.12.1 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.

2.1.7.13 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.

Home > Search > Your search returned 2160 results.  Found 29 results in OverDrive collection

Refine your search

Availability
Limit to [currently available items.](#)




Authors
[Abbott, Eleanor Hall...](#)
[Coppinger, Lorna.](#)
[Graham, Bob.](#)
[Hazelaar, Cor.](#)
[O'Neill, Amanda.](#)
[Show more](#)

Libraries
[East Branch](#)
[Main Library](#)

Did you mean: [Dogs Fiction.](#) [Dogs.](#) [Dogs Juvenile fiction.](#) [Dogs Fiction.](#)

Select all Clear all Unhighlight Add to: Save Place hold

1.

Dogs
by Gravett, Emily.
Edition: 1st U.S. ed.;
Type:  Book; Format: print ; Literary form: fiction ; Audience: Primary;
Publisher: New York : Simon & Schuster Books for Young Readers, 2010
Availability: No copies available **Checked out (1).**
★★★★★
Actions:  Place hold  Log in to add tags.  Add to cart

2.1.7.13.1 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](#) 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.

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

Description:

- OverDrive customers can get this information by visiting the [OverDrive Developer Portal](#) 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.

2.1.7.14 Plugins

2.1.7.14.1 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](#).

2.1.7.15 Syndetics

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

2.1.7.15.1 SyndeticsEnabled Default: Don't use

Asks: ___ content from Syndetics.

Values:

- Don't use
- Use

Description:

- 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.

2.1.7.15.2 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.

2.1.7.15.3 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

2.1.7.15.4 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 than 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.

2.1.7.15.5 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.

2.1.7.15.6 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'

2.1.7.15.7 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/>).

2.1.7.15.8 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/>).

2.1.7.15.9 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/>).

2.1.7.15.10 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/>).

2.1.7.15.11 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/>).

2.1.7.16 Tagging**2.1.7.16.1 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.

2.1.7.16.2 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**

2.1.7.16.3 TagsShowOnList Default: 6

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

TIP

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

2.1.7.16.4 TagsInputOnList Default: Allow

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

Values:

- Allow

Tags: [library](#) (9) [data](#) (3) [libraries](#) (5) [mashups](#) (2) New tag:

- Don't allow

2.1.7.16.5 TagsShowOnDetail Default: 10

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

TIP

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

2.1.7.16.6 TagsInputOnDetail Default: Allow

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

Values:

- Allow

Tags from this library: [library](#) (9) [data](#) (3) [libraries](#) (5) [mashups](#) (2) New: [Cancel](#)

- Don't allow

2.1.7.16.7 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.

2.1.8 I18N/L10N

These preferences control your Internationalization and Localization settings.

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

2.1.8.1 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.



2.1.8.2 CalendarFirstDayOfWeek

Default: Sunday

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

Values:

- Monday
- Sunday

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.

2.1.8.3 dateformat

Default: mm/dd/yyyy

Asks: Format dates like ___

Values:

- 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.

2.1.8.4 language

Default: English

Asks: Enable the following languages on the staff interface

Values:

- English

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.

2.1.8.5 opalanguages

Default: English

Asks: Enable the following languages on the OPAC

Values:

- English

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.

2.1.8.6 opalanguagesdisplay

Default: Don't allow

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

Values:

- Allow

Languages: English | Français | Deutsch | Español

- Don't allow

2.1.8.7 TimeFormat

Default: 24 hour format

Asks: Format times in ___

Values:

- 12 hour format (eg 02:18PM)
- 24 hour format (eg 14:18)

2.1.9 Local Use

These preferences are defined locally.

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

TIP



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.

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

2.1.10.1 AuthoritiesLog

Default: Don't log

Asks: ___ changes to authority records.

Values:

- Don't log
- Log

2.1.10.2 BorrowersLog

Default: Log

Asks: ___ changes to patron records.

Values:

- Don't log
- Log

2.1.10.3 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.

2.1.10.4 FinesLog

Default: Log

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

Values:

- Don't log
- Log

2.1.10.5 IssueLog

Default: Log

Asks: ___ when items are checked out.

Values:

- Don't log
- Log

2.1.10.6 LetterLog

Default: Log

Asks: ___ when an automatic claim notice is sent.

Values:

- Don't log
- Log

TIP

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

2.1.10.7 ReturnLog

Default: Log

Asks: ___ when items are returned.

Values:

- Don't log
- Log

2.1.10.8 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 Appearance

These preferences control how things appear in the OPAC.

2.1.11.1.1 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**

2.1.11.1.2 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.

2.1.11.1.3 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.

2.1.11.1.4 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

TIP

See the [XSLT Icon Guide](#) for more information on these icons.

2.1.11.1.5 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

 Books	Fairview General Stacks	Non Fiction	Z674.75.W68 L52 2009(Browse Shelf)	Item lost
---	-------------------------	-------------	---	-----------

2.1.11.1.6 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.

2.1.11.1.7 LibraryName

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

TIP




This value will appear in the title bar of the browser

TIP



Edit `'opacheader'` if you'd like to add a library name above your search box on the OPAC

Nicole's Library Catalog

 <http://localhost:8081/>

2.1.11.1.8 OpacAddMastheadLibraryPulldown

Default: Don't add

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

Values:

- Add

- Don't Add

2.1.11.1.9 OPACBaseURL Asks: The OPAC is located at http:// ___

Description:

- This preference is looking for the URL of your public catalog (OPAC) without the http:// in front of it (enter www.mycatalog.com instead of <http://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: www.google.com not 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:

Practical open source software for libraries /

Author(s): Engard, Nicole C.

Material type:  Book

Series: Chandos information professional series.

Publisher: Oxford : Chandos Publishing, 2010

Description: xxv, 242 p.: ill. ; 24 cm.

ISBN: 9781843345855; 1843345854.

Subject(s): [Open source software](#) -- [Library applications](#) | [Bibliothek](#) | [Open Source](#) | [Software](#)

[Introduction](#) -- [What is open source?](#) -- [Community and open source](#) -- [Debunking the myths](#) -- [Open source and libraries](#) -- [Open source for day to day operations](#) -- [Open source web access](#) -- [Open source media applications](#) -- [Open source on the web](#) -- [Open sourcing collections](#) -- [Open source research tools](#) -- [Open source library automation](#)

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

MARC Preview: [Show](#)

2.1.11.1.10 opaccolorstylesheet 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://

TIP

Leave this field blank to disable it

NOTE

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

IMPORTANT

If using the **CCSR theme**, this preference must be set to color.css and any user generated CSS must be appended to the default color.css file.

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

TIP

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

<p>opaccredits</p>	<p>Include the following HTML in the footer of all pages in the OPAC:</p> <pre><center>© Nicole C. Engard
Home Contact Privacy</center></pre>
--------------------	---

© Nicole C. Engard
[Home](#) | [Contact](#) | [Privacy](#)

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.

2.1.11.1.12 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](#)

Holdings (1)
Title Notes
Comments
Amazon Reviews

Item type	Location	Call Number	Status
 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](#).

856 ? - URL/ELECTRONIC LOCATION AND ACCESS +-

▲ q	Electronic format type	img
▲ u	Uniform Resource Identifier	http://farm3.static.flickr.com/2428/3679388149_efc2fc9b5a.jpg

2.1.11.1.13 OpacExportOptions Default: bibtex | dc | marcxml | marc8 | utf8 | marcstd | mods | ris

Asks: List export options that should be available from OPAC detail page separated by |: ____

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).

2.1.11.1.14 OpacFavicon Asks: Use the image at ____ for the OPAC's favicon.

IMPORTANT



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

TIP



Turn your logo into a favicon with the [Favicon Generator](#).

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.



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

opacheader

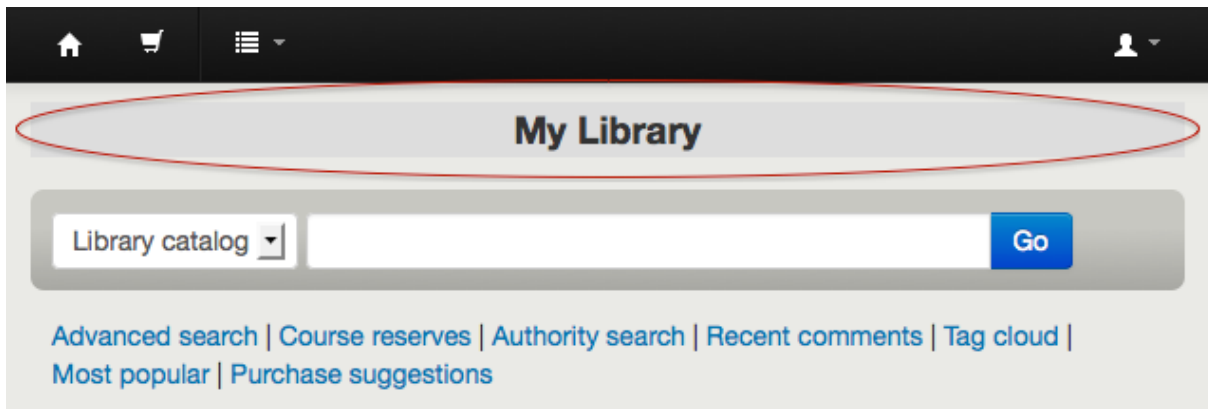
Include the following HTML in the header of all pages in the OPAC:

```
<center><h1>My Library</h1></center>
```

TIP



This value will appear above the main content of your page



TIP



Edit '**LibraryName**' if you'd like to edit the contents of the <title> tag

Learn more in the [OPAC Editable Regions](#) section.

2.1.11.1.16 OpacHighlightedWords Default: Don't highlight
Asks: ___ words the patron searched for in their search results.
Values:

- Don't highlight
- Highlight

2.1.11.1.17 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.

Powered by Koha

2.1.11.1.18 opacstylesheet 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 formatted 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 opacstylesheet preference are held on the Koha server.

TIP



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.

2.1.11.1.19 **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

Nicole's Koha Library**System Maintenance**

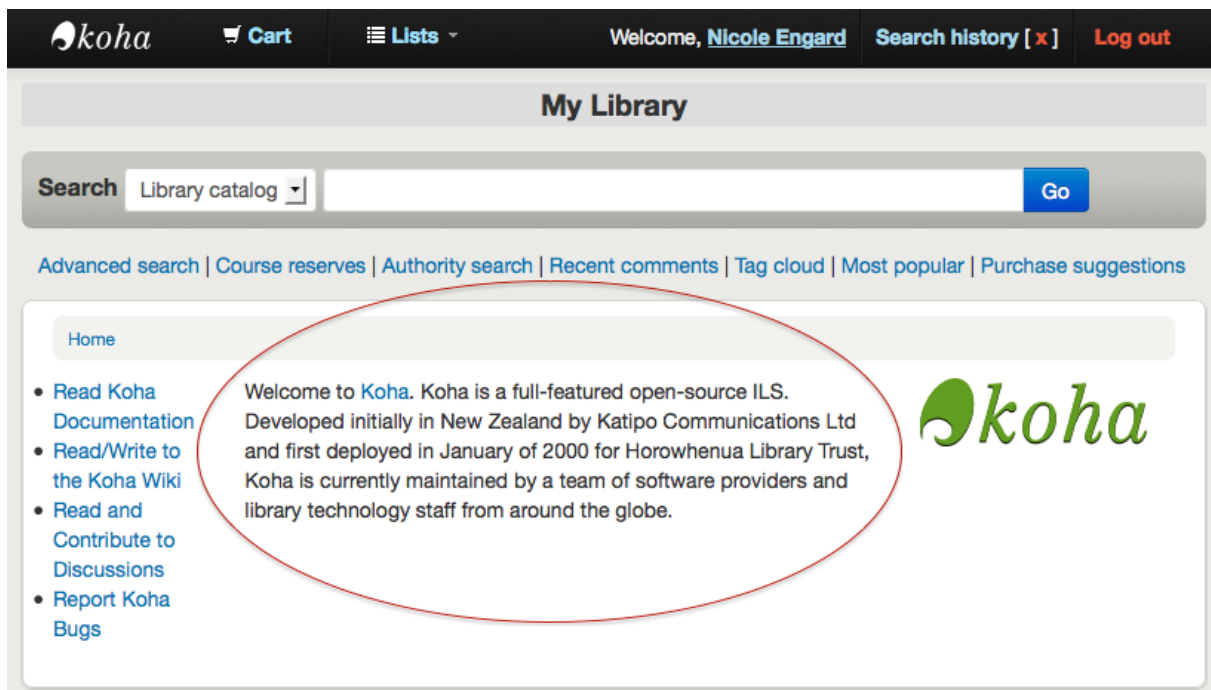
The Nicole's Library Catalog is offline for system maintenance. We'll be back soon! If you have any questions, please contact the [Site Administrator](#)

2.1.11.1.20 **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.

2.1.11.1.21 OpacMainUserBlockMobile Asks: Show the following HTML in its own column on the main page of the OPAC (mobile version)

Description:

- This content will display below the search boxes when viewing the OPAC on a mobile device as long as the **theme** you're using has a mobile version.

IMPORTANT




This preference is only used with the CCSR theme.

2.1.11.1.22 OPACMobileUserCSS Asks: Include the following CSS for the mobile view on all pages in the OPAC

Description:

- This CSS will be used when your OPAC is viewed on a mobile device as long as the **theme** you're using has a mobile version.

IMPORTANT









This preference is only used with the CCSR theme.

2.1.11.1.23 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.

5 Item(s) checked out ✓ Renew selected ✕ Renew all

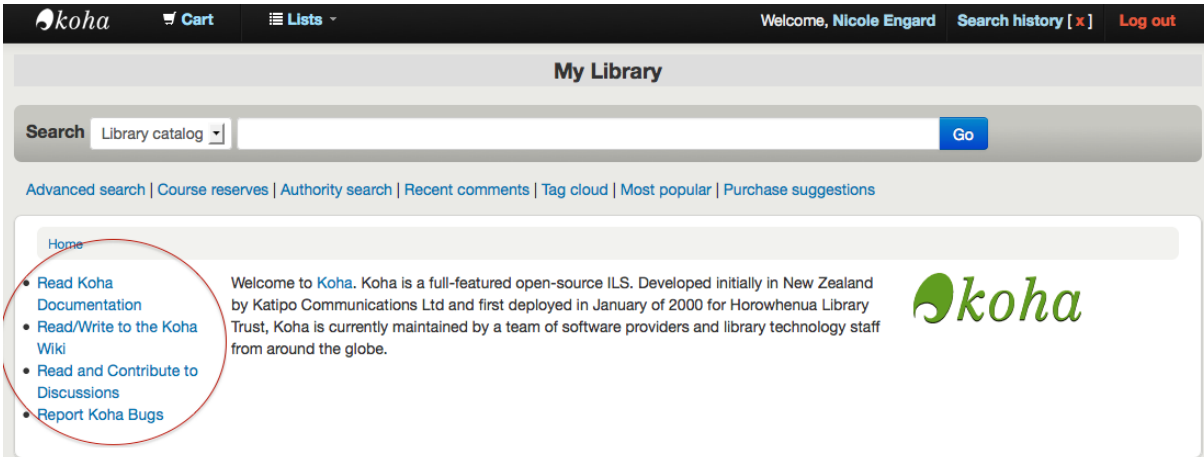
	Title	Due	Call No.	Renew	Fines	Links
	Harry Potter	03/30/2014		<input type="checkbox"/> Renew (1 of 4 renewals remaining)	Yes	 
	My sister's keeper : Picoult, Jodi,	03/30/2014	PS3566.I372 M9 2005	<input type="checkbox"/> Renew (3 of 4 renewals remaining)	Yes	 

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>
```

2.1.11.1.24 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)



The screenshot shows the Koha OPAC interface. At the top, there is a navigation bar with the Koha logo, a Cart icon, a Lists dropdown, and a user welcome message: "Welcome, Nicole Engard". There are also links for "Search history [x]" and "Log out". Below this is the "My Library" section, which includes a search bar with "Library catalog" selected and a "Go" button. Underneath the search bar are several links: "Advanced search", "Course reserves", "Authority search", "Recent comments", "Tag cloud", "Most popular", and "Purchase suggestions". The main content area features a "Home" link and a list of navigation links circled in red: "Read Koha", "Documentation", "Read/Write to the Koha Wiki", "Read and Contribute to Discussions", and "Report Koha Bugs". To the right of this list is a welcome message: "Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Katipo Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe." and the Koha logo.

Learn more in the [OPAC Editable Regions](#) section.

2.1.11.1.25 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](#)

2.1.11.1.26 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.

Log in to your account:

Login:

Password:

Log in


Don't have an account? [Register here.](#)



2.1.11.1.27 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.

[Home](#) > [Search](#) > No results found!
No results found for that in Nicole's Library catalog. 

NOTE



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

2.1.11.1.28 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.

2.1.11.1.29 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.

2.1.11.1.30 OPACSearchForTitleIn Default: `Other Libraries (WorldCat) 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.

2.1.11.1.31 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.

Nicole's Library holdings (1)
Other holdings (4)

Item type ▾	Location ⚡	Call number
Books	Nicole's Library	Z678.9 .E54 2010 (Brow


Total holds: 0

2.1.11.1.32 OPACShowBarcode Default: Don't show


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

Values:

- Don't show

Item type ▾	Location ⇅	Collection ⇅	Call number ⇅	Status ⇅	Date due ⇅
 Books	Nicole's Library	Library & Information Science	Z678 .G668 2004 (Browse shelf)	Available	

- Show

Item type ▾	Location ⇅	Collection ⇅	Call number ⇅	Status ⇅	Date due ⇅	Barcode ⇅
 Books	Nicole's Library	Library & Information Science	Z678 .G668 2004 (Browse shelf)	Available		18236167

Description:

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

2.1.11.1.33 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 helpful 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.

2.1.11.1.34 OpacShowFiltersPulldownMobile Default: Show

Asks: ___ the search filters pulldown on the mobile version of the OPAC.

Values:

- Don't show
- Show

Description:

- This preference controls whether patrons can choose a search type when viewing the OPAC on mobile devices. If this is set to 'Don't show' then all searches will be keyword searches. This preference assumes that you're using a **theme** with a mobile version.

2.1.11.1.35 OPACShowHoldQueueDetails Default: Don't show any hold details

Asks: ___ to patrons in the OPAC.

Values:

- Don't show any hold details

- Show holds

Holdings (2)		Title notes	Comments (0)			
Item type	Current location	Collection	Call number	Status	Date due	Item holds
 Books	Centerville	Computer Programming	QA76.73.S67 M42 2005 (Browse shelf)	Available		
 Books	Nicole's Library Living Room	Computer Programming	QA76.73.S67 M42 2005 (Browse shelf)	Available		1

Total holds: 4 (priority 3)

- 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	<input type="checkbox"/> Suspend	<input type="button" value="Cancel"/>
Practical open source software for libraries / Engard, Nicole C.,	03/17/2014	Never expires	Nicole's Library	1	Pending	<input type="checkbox"/> Suspend	<input type="button" value="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'

2.1.11.136 OpacShowLibrariesPulldownMobile Default: Show

Asks: ___ the libraries pulldown on the mobile version of the OPAC.

Values:

- Don't show
- Show

Description:

- This preference controls whether the library selector pull down shows when viewing the OPAC on a mobile device as long as the `theme` you're using has a mobile version.

2.1.11.137 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.



2.1.11.1.38 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.

2.1.11.1.39 opacsmallimage Asks: Use the image at ___ in the OPAC header, instead of the Koha logo. If this image is a different size than the Koha logo, you will need to customize the CSS.

Description:

- The opacsmallimage system pref is a little tricky to deal with because you really have to tweak some CSS at the same time. The default CSS defines a region just large enough to display the Koha logo, and if your logo doesn't match the Koha logo's dimensions (120 pixels wide by 38 pixels high), it won't display correctly.

IMPORTANT



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

IMPORTANT



This preference is only used in the prog and ccsr themes.

2.1.11.140 OpacStarRatings Default: no

Asks: Show star-ratings on ___ pages.


Values:

- no

- only details

Home > Details for: PHP cookbook /

Normal view
 MARC view
 ISBD view



PHP cookbook /

by Sklar, David ; Trachtenberg, Adam .

Material type: Book

Publisher: Sebastopol, Calif. ; Farnham : O'Reilly, c2003

Edition: 1st ed.

Description: xxi, 608 p. : ill. ; 24 cm.

ISBN: 1565926811.

Subject(s): [PHP \(Computer program language\)](#) | [Internet programming](#) | [Web sites -- Design](#)

Online resources: [Contributor biographical information](#) | [Publisher description](#) | [Table of contents only](#)

List(s) this item appears in: [Web Development](#) | [O'Reilly](#)

Tags from this library: [php](#) (5) , [web development](#) (7) [Add tag\(s\)](#)

★★★★★
 your rating: 5, average rating: 5.0 (1 votes)

- results and details

PHP cookbook
by Sklar, David; Trachtenberg, Adam.

Edition: 1st ed.

Material type: Book; Format: print bibliography ; Literary form: not fiction

Publisher: Sebastopol, Calif. ; Farnham : O'Reilly, c2003

Online Access: [Contributor biographical information](#) | [Publisher description](#) | [Table of contents only](#)

Availability: **Items available for loan:** Fairfield [QA76.73.P224 S56 2003] (1), Nicole's Library [QA76.73.P224 S56 2003] (1).

Tags: [php](#) (5) [web development](#) (7)

★★★★★ (1 votes)

[Place hold](#) [Add tag](#) [Save to Lists](#) [Add to cart](#)

Web database applications with PHP and MySQL
by Williams, Hugh E; Lane, David (David John).

Edition: 2nd ed.

Material type: Book; Format: print bibliography ; Literary form: not fiction

Publisher: Sebastopol : O'Reilly, c2004

Online Access: [Publisher description](#) | [Contributor biographical information](#) | [Table of contents only](#)

Availability: **Items available for loan:** Nicole's Library [QA76.73.P224 W55 2004] (1). In transit (1).

Tags: [database](#) (4) [mysql](#) (4) [php](#) (5) [web development](#) (7)

★★★★★

[Place hold](#) [Add tag](#) [Save to Lists](#) [Add to cart](#)

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.

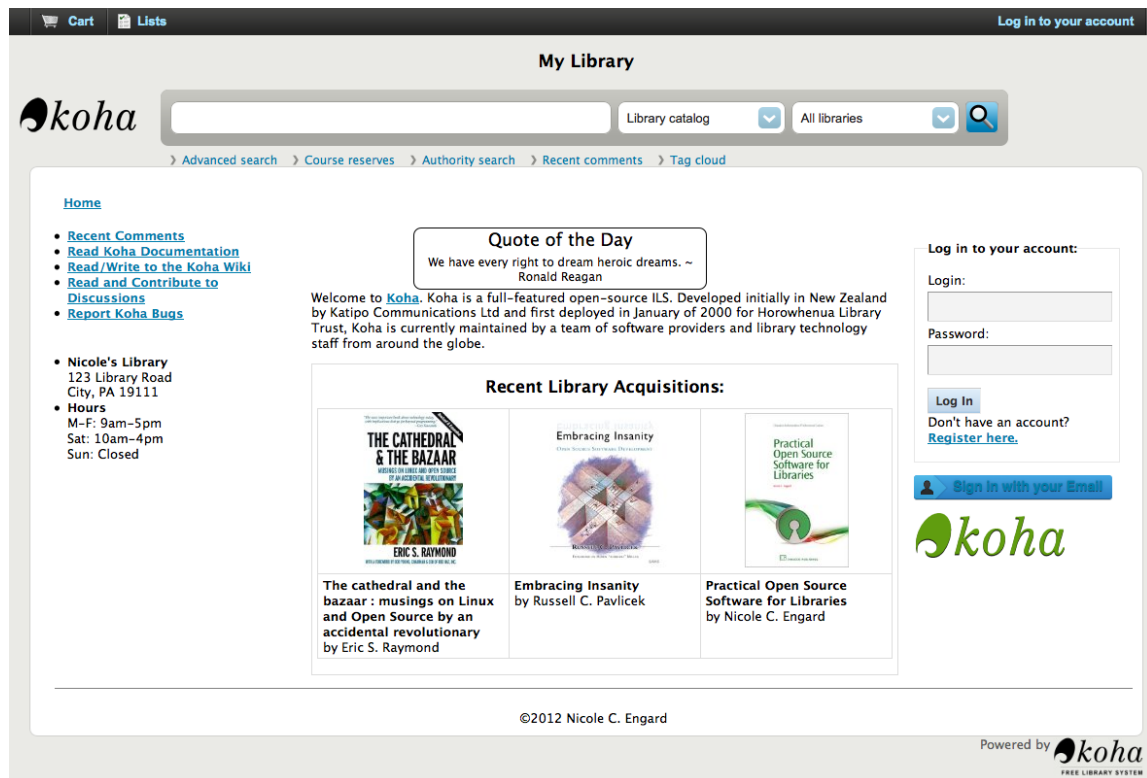
2.1.11.1.41 `opacthemes` Default: prog
Asks: Use the ___ theme on the OPAC.
Values:

- bootstrap

The screenshot shows the Koha library OPAC interface. At the top, there is a navigation bar with the Koha logo, a cart icon, a lists icon, and a 'Log in to your account' link. Below this is a search bar with a dropdown menu set to 'Library catalog' and a 'Go' button. A secondary search bar is set to 'All libraries'. Below the search bar, there are links for 'Advanced search', 'Course reserves', 'Authority search', 'Recent comments', and 'Tag cloud'. The main content area is titled 'My Library' and contains several sections: a 'Quote of the Day' by Ronald Reagan, a 'Welcome to Koha' message, a 'Recent Library Acquisitions' section featuring three book covers ('The Cathedral and the Bazaar', 'Embracing Insanity', and 'Practical Open Source Software for Libraries'), and a 'Log in to your account' section with fields for login and password, a 'Log in' button, and a 'Sign in with your email' button. A footer at the bottom indicates '©2012 Nicole C. Engard' and 'Powered by Koha'.

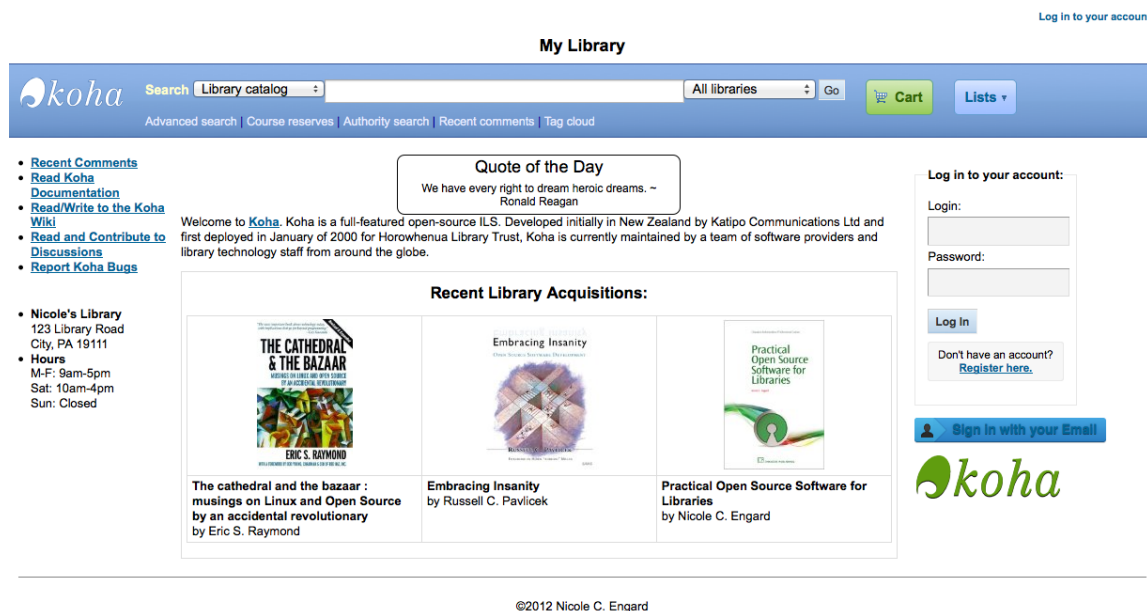
This theme is completely responsive

- ccsr



This theme comes with a mobile version.

- prog



This is the original Koha 3.x theme and does not come with a mobile version.

2.1.11.1.42 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.

2.1.11.1.43 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/templates/prog/en/css/opac.css. Unlike [opaccolorstylesheet](#) and [opaclayoutstylesheet](#) this preference will embed the CSS directly on your OPAC pages.

2.1.11.1.44 opacuserjs Asks: Include the following JavaScript on all pages in the OPAC

Log in to Your Account:

Login:

Password:

Log In

<p>opacuserjs</p>	<p>Include the following JavaScript on all pages in the OPAC:</p> <pre>\$(document).ready(function(){ \$("label[for='userid']").html("Card Number:"); \$("label[for='password']").html("PIN:"); });</pre>
-------------------	---

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.

2.1.11.145 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.xml
 - 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/prog/{langcode}/xslt/OpacDetail.xml
 - * ex. <http://mykohaopac.org/{langcode}/stylesheet.xml>
- put an URL for an external specific stylesheet
 - ex: <http://mykohaopac.org/stylesheet.xml>

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.

2.1.11.146 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/stylesheets.xml

 - 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/program/{langcode}/xslt/OpacDetail.xml
 - * ex. http://mykohaopac.org/{langcode}/stylesheet.xml

- put an URL for an external specific stylesheet
 - ex: http://mykohaopac.org/stylesheet.xml

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.

2.1.11.2 Features

2.1.11.2.1 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.

2.1.11.2.2 OpacAuthorities Default: Allow

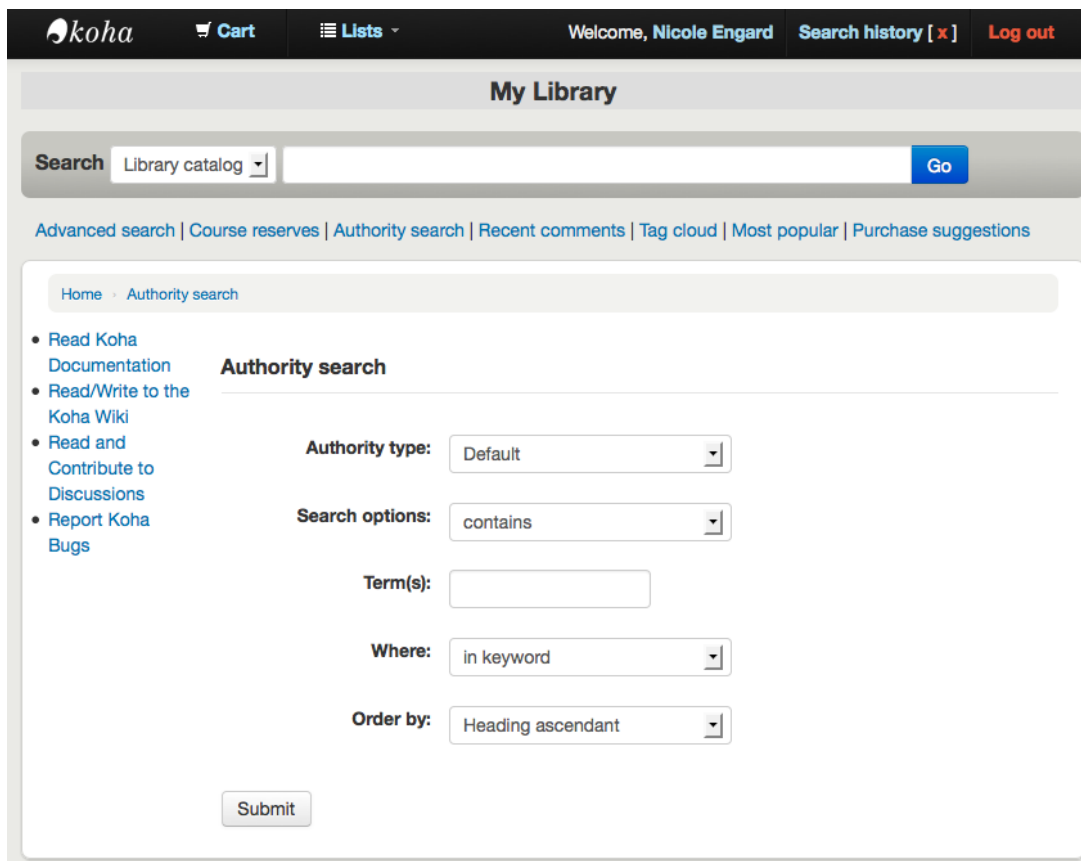
Asks: ___ patrons to search your authority records.

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

2.1.11.2.3 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.

2.1.11.2.4 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



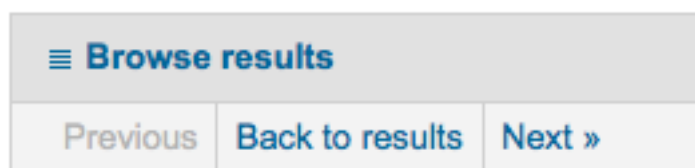
run the **Authorities Browser Cron Job** to create the browser list

2.1.11.2.5 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.

2.1.11.2.6 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

2.1.11.2.7 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

2.1.11.2.8 OpacHoldNotes Default: Do not allow

Asks: ___ users to add a note when placing a hold.

Values:

- Allow

Confirm holds for: Nicole Engard (9876543457)

Place a hold on **Beginning PHP and Oracle from novice to professional /** , by Gilmore, W. J.

Holds and priority: 1 out of 1

Pick up location:

Hide options

Hold starts on

Hold not needed after:

Hold notes:

Next available item A specific item

- Do not allow

2.1.11.2.9 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.

2.1.11.2.10 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.

2.1.11.2.11 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 dashboard 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

TIP



You can control what fields patrons see and can modify via the OPAC by setting the **PatronSelfRegistrationBorrowerMandatoryField** **PatronSelfRegistrationBorrowerUnwantedField** preferences.

2.1.11.2.12 OPACpatronimage Default: Don't show

Asks: ___ patron images on the patron information page in the OPAC.

Values:

- Don't show
- Show

Description:

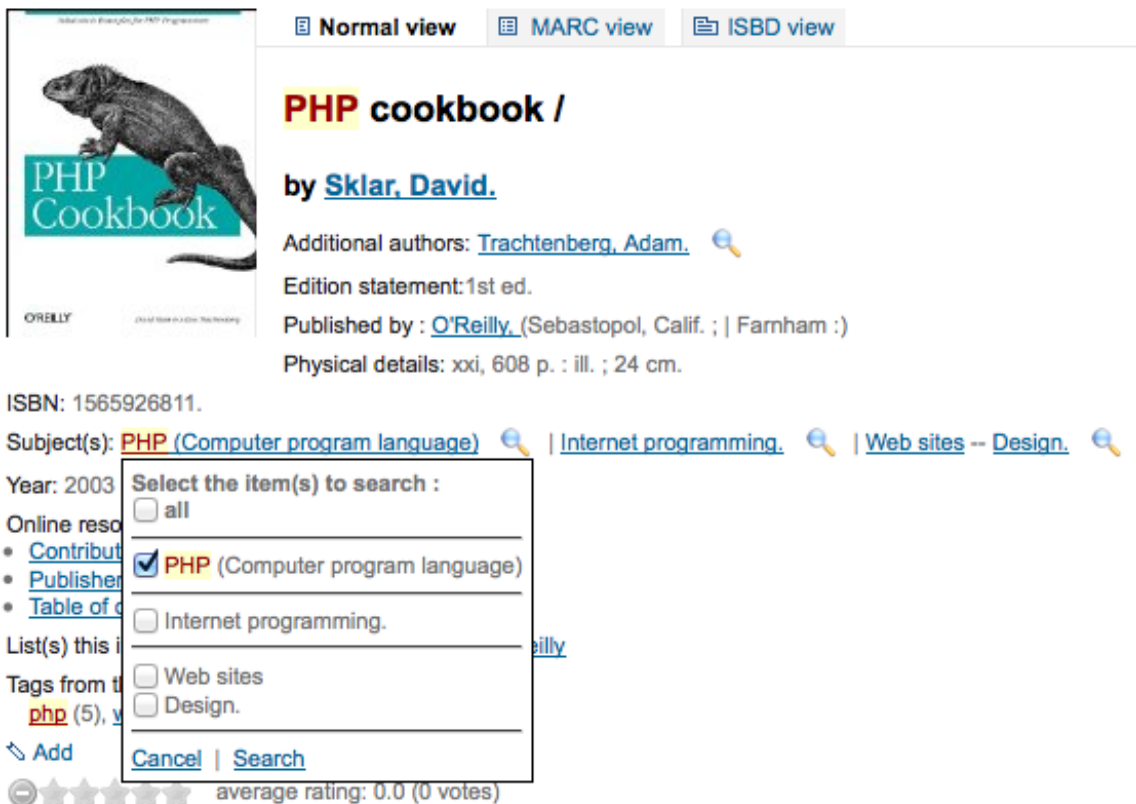
- If **patronimages** is set to allow the upload of patron images via the staff client, then setting this preference to 'show' will show the patron what image you have on file for them when they view their personal information on their account in the OPAC.

2.1.11.2.13 OPACPopupAuthorsSearch Default: Don't display

Asks: ___ the list of authors/subjects in a popup for a combined search on OPAC detail pages.

Values:

- Display



Normal view | MARC view | ISBD view

PHP cookbook /
by **Sklar, David.**

Additional authors: [Trachtenberg, Adam.](#)

Edition statement: 1st ed.

Published by : [O'Reilly.](#) (Sebastopol, Calif. ; | Farnham :)

Physical details: xxi, 608 p. : ill. ; 24 cm.

ISBN: 1565926811.

Subject(s): [PHP \(Computer program language\)](#) | [Internet programming.](#) | [Web sites -- Design.](#)

Year: 2003

Online resources:

- [Contributors](#)
- [Publisher](#)
- [Table of contents](#)

List(s) this item is part of:

Tags from this item:

[php](#) (5), [y](#)

[Add](#)

average rating: 0.0 (0 votes)

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:

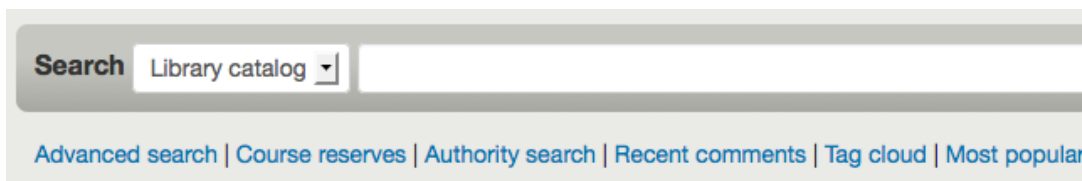
- If this preference is set to 'Display' then clicking a subject or author from the details page in the OPAC will present the searcher with a pop up box. From this box you can check off any of the subjects or authors listed and search them all at once by clicking 'Search' at the bottom of the pop up. The default behavior is for Koha to search just the clicked author or subject.

2.1.11.2.14 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



- 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.

Refine your search

Show the top
10 titles

From:
All branches

Limit to:
All item types

Acquired in the last:
12 months

Submit

The 10 most checked-out item types at all locations in the past 12 months

Title	Itemtype	Checkouts
Library mashups : - Information Today, Inc.,	Books	13
The thriving library : Block, Marylaine, - Information Today,	Books	12
Computers in libraries. - Meckler,	Books	2
Harry Potter and the chamber of secrets. - Scholastic,	Books	2

2.1.11.2.15 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

2.1.11.2.16 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.

2.1.11.2.17 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

2.1.11.2.18 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.

2.1.11.2.19 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

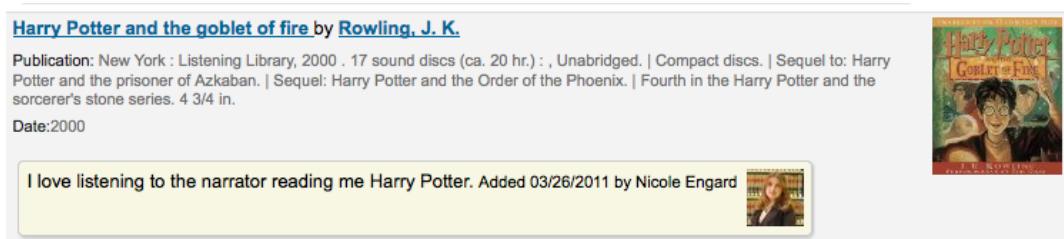
2.1.11.2.20 ShowReviewerPhoto Default: Show

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:

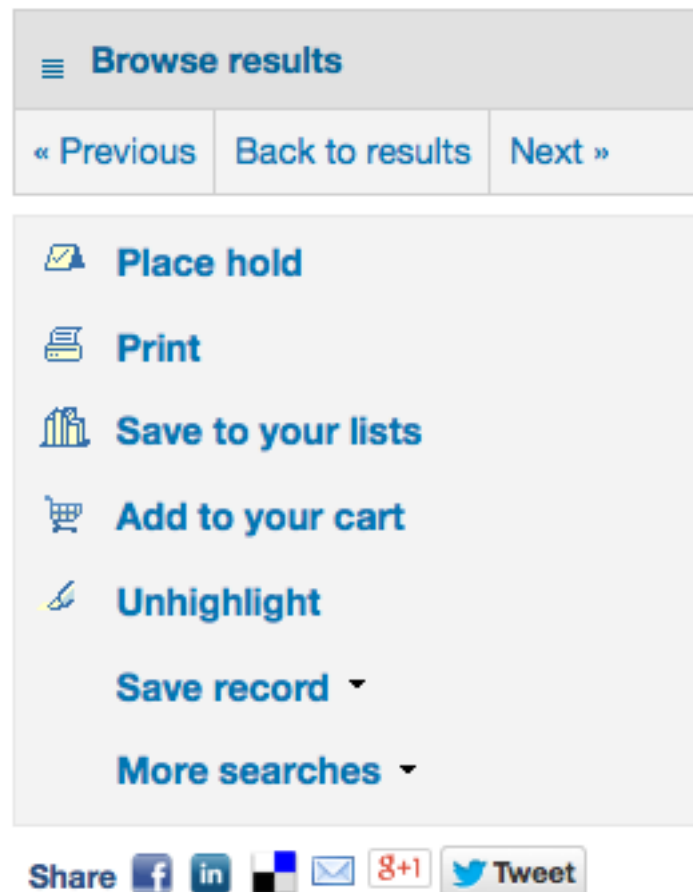
- This system preference allows libraries to show avatars next to patron's comments in the OPAC. These avatars are pulled from the **Libravatar** library, an open source powered product that allows Internet users to choose a small icon to display next to their name on various different websites. The library has no control over the images the patron chooses to display.

2.1.11.2.21 SocialNetworks Default: Disable

Asks: ___ social network links in opac detail pages

Values:

- Disable
- Enable



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.

2.1.11.2.22 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

2.1.11.3 Policy

2.1.11.3.1 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.

2.1.11.3.2 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'

2.1.11.3.3 OpacAllowSharingPrivateLists

IMPORTANT



This feature is not active yet but will be released soon

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.

2.1.11.3.4 OPACFineNoRenewals Default: 99999

Asks: Only allow patrons to renew their own books on the OPAC if they have less than ___ USD in fines

TIP



Leave this field blank to disable

IMPORTANT

To allow renewals in the OPAC, `opacuserlogin` needs to be set to 'allow'

2.1.11.3.5 OpacHiddenItems Asks: Allows to define custom rules for hiding specific items at opac.**TIP**

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.

2.1.11.3.6 OPACItemHolds Default: Allow

Asks: ___ patrons to place holds on specific items in the OPAC.

Values:

- Allow
 - Patrons can place holds on specific items as well as the next available item.
 - `opacuserlogin` needs to be set to 'allow'
- Don't allow
 - If this is disabled, users can only put a hold on the next available item.

2.1.11.3.7 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.

2.1.11.3.8 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.

2.1.11.3.9 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'

2.1.11.3.10 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'

2.1.11.3.11 singleBranchMode Default: Don't allow

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

Values:

- Allow
 - **opacuserlogin** needs to be set to 'allow'
- Don't allow

Description:

- This preference is for libraries that have branches but do not want to share their items among other branches within their system. If the preference is set to "Don't allow" then holdings will be shown for all branches within a system. On the "Home" screen of the OPAC users have the choice of narrowing down results by item location. Setting this preference to "Allow" will display only one branch's holdings.

2.1.11.4 Privacy

2.1.11.4.1 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

2.1.11.4.2 AnonymousPatron Default: 0

Asks: Use borrowernumber ___ as the Anonymous Patron (for anonymous suggestions and reading history)

TIP



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).

2.1.11.4.3 EnableOpacSearchHistory Default: Keep

Asks: ___ patron search history in the OPAC.

Values:

- Don't keep
- Keep

2.1.11.4.4 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

2.1.11.4.5 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.

2.1.11.4.6 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.

TIP



Remember to update your local privacy policies and link to them from the OPAC to notify your users that you are tracking their information.

2.1.11.5 Self Registration**2.1.11.5.1 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:

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 identity the library staff can change the category to one with permissions to check items out and place holds.

2.1.11.5.2 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.

2.1.11.5.3 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 registration form. If any of the required fields are blank Koha will not let the patron register.

IMPORTANT



Separate columns with |

TIP



For help with field names, ask your system administrator or [view the database structure](#) associated with the borrowers table.

TIP



If you're going to require that patrons verify their accounts via email with the **Patron-SelfRegistrationVerifyByEmail** preference the email field will automatically be marked as required.

2.1.11.5.4 PatronSelfRegistrationBorrowerUnwantedField Asks: The following database columns will not appear on the patron entry screen: ____

Description:

- Using this preference you can hide fields from the patron registration and update form in the OPAC.

IMPORTANT



Separate columns with |

TIP



For help with field names, ask your system administrator or [view the database structure](#) associated with the borrowers table.

2.1.11.5.5 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 identity 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.

2.1.11.5.6 PatronSelfRegistrationExpireTemporaryAccountsDelay Default: 0

Asks: Delete patrons registered via the OPAC, but not yet verified after ___ days.

Description:

- This preference 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.

2.1.11.5.7 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.

TIP

If you're going to require that patrons verify their accounts via email then the email field will automatically be marked as required.

2.1.11.6 Shelf Browser**2.1.11.6.1 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


Item type	Location	Collection	Call Number	Status	Date Due
Books	Fairview General Stacks	Fiction	Ref LB 2337.2 .C36 2000(Browse Shelf)	Checked out	06/26/2010
Books	Main General Stacks	Fiction	Ref LB 2337.2 .C36 2000(Browse Shelf)	In transit from Fairview to Main since 09/09/2010	
Books	Fairview General Stacks	Fiction	Ref LB 2337.2 .C36 2000(Browse Shelf)	Available	



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.

2.1.11.6.2 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.

2.1.11.6.3 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.

2.1.11.6.4 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

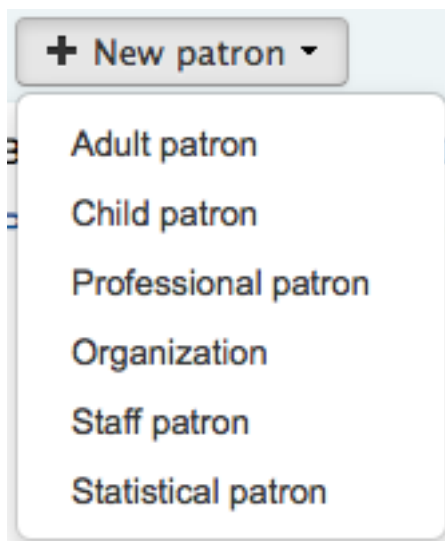
2.1.12.1 AddPatronLists

Default: specific categories

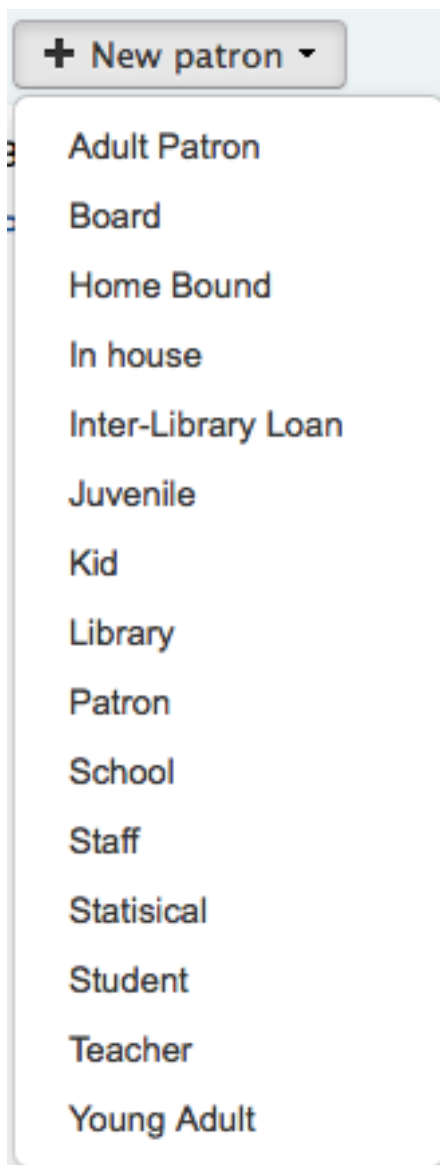
Asks: List ___ under the new patron menu.

Values:

- general patron types



- specific categories



2.1.12.2 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](#) notice.

Values:

- Don't send
- Send

2.1.12.3 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.

2.1.12.4 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.

2.1.12.5 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 |

TIP



For help with field names, ask your system administrator or [view the database structure](#) associated with the borrowers table.

2.1.12.6 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 |

2.1.12.7 BorrowerRenewalPeriodBase

Default: current date

Asks: When renewing borrowers, base the new expiry date on ____

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.

2.1.12.8 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 |

2.1.12.9 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 |

TIP

For help with field names, ask your system administrator or [view the database structure](#) associated with the borrowers table.

2.1.12.10 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.

2.1.12.11 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.

2.1.12.12 EnhancedMessagingPreferences

Default: Allow

Asks: ___ patrons to choose which notices they receive and when they 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.

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)

2.1.12.13 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.

TIP

Use custom attributes for fields that the default patron record does not support such as driver's license number or student ID number.

2.1.12.14 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

 This data is stored in the system regardless of your choice.

2.1.12.15 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](#).

2.1.12.16 memberofinstitution


Default: Don't

Asks: ___ allow patrons to be linked to institutions

Values:

- Do
- Don't

IMPORTANT


 In order to allow this, the library must have Institution patrons to link members to

2.1.12.17 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.

2.1.12.18 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.

2.1.12.19 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.

2.1.12.20 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.

2.1.12.21 SMSSendDriver

Asks: Use the SMS::Send:: ___ driver to send SMS messages.

Some examples of values are:

- SMS::Send::Us::Ipipi
- SMS::Send::US::TMobile
- SMS::Send::US::Verizon

Additional values can be found here: <http://search.cpan.org/search?query=sms%3A%3Asend&mode=all>

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

Patron messaging preferences

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

SMS number:

IMPORTANT

You must allow **EnhancedMessagingPreferences** for this to work.

2.1.12.22 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: ___

Statistics

location ^	itype ^	ccode ^	Total checkouts as of yesterday ^	Today's checkouts ^	Today's checkins ^	Total checkouts ^
	BK		2	0	0	2
LIV	BK	LIS	1	1	0	2
TOTAL			3	1	0	4

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.

2.1.12.23 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.

2.1.12.24 `uppercasesurnames`

Default: Don't

Asks: ___ store and display surnames (last names) in upper case.

Values:

- Do
- Don't

2.1.13 Searching

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

2.1.13.1 Features

2.1.13.1.1 `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.

2.1.13.1.2 OpacGroupResults Default: Don't use

Asks: ___ PazPar2 to group similar results on the OPAC.

Values:

- Don't use
- Use

IMPORTANT

This requires that **PazPar2** is set up and running.

2.1.13.1.3 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 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.

2.1.13.1.4 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.

IMPORTANT

Requires that **UseICU** set to 'Not using'

2.1.13.1.5 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).

2.1.13.1.6 QueryWeightFields Default: Enable

Asks: ___ ranking of search results by relevance

Values:

- Disable
- Enable

2.1.13.1.7 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%20)

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 **OPACXSLDe-tailsDisplay** preference.

2.1.13.1.8 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%22subfield:%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.

2.1.13.1.9 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.

2.1.13.1.10 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 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.

2.1.13.2.4 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.

2.1.13.2.5 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.

2.1.13.2.6 numSearchResults Default: 20

Asks: By default, show ___ results per page in the staff client.

2.1.13.2.7 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

2.1.13.2.8 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.

2.1.13.2.9 OPACNumSearchResults Default: 20

Asks: By default, show ___ results per page in the OPAC.

2.1.13.3 Search Form**2.1.13.3.1 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.

The screenshot displays the 'Advanced Search Types' configuration interface. At the top, there are two tabs: 'Item Type' (which is selected and highlighted in blue) and 'Shelving Location'. Below the tabs, there is a section titled 'Limit to any of the following:' which contains a grid of 15 items, each with a checkbox and an icon. The items are: Book, Book on CD, Books, CD, Computer Files, Continuing Resources, DVD, E-Book, Maps, Mixed Materials, Music, Nicole's special type, and Reference.

2.1.13.3.2 expandedSearchOption Default: don't show

Asks: By default, ___ "More options" on the OPAC and staff advanced search pages.

Values:

- don't show
- show

2.1.13.3.3 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.

2.1.13.3.4 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 UNIMARC standard.

Holdings (47)	Title notes	Comments (0)	Serial collection
Library	Serial collection		Item callnumber
Bibliothèque Lettres et Sciences Humaines - Aix	vol. 43 no. 1 (1939) - vol. 43 no. 3 (1939) ; vol. 50 no. 1 (1946) - vol. 111 no. 4 (2007)		Wp 15269

- Subscriptions tab

Holdings (14)
Title notes
Subscriptions
Comments (0)

This is a serial

There are 6 subscription(s) associated with this title.

At library: Fairfield

This subscription is closed.

Combined issues in Jan/Feb and Jul/Aug.

Subscription from: to: 01/01/2013

The 4 latest issues for this subscription:

Issue #	Date	Status	Note
V. 32, N. 3	02/23/2012	Arrived	
V. 32, N. 2	02/23/2012	Arrived	
V. 32, N. 1	02/23/2012	Arrived	
V. 31, N. 10	08/28/2012	Arrived	

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](#) 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

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


–



- Detail page only


–

IMPORTANT



XSLTDetailsDisplay needs to be on for this preference to work.


IPod Touch

Type:  Visual Material
 Description: 1 IPod .



Online Resources:
 OPAC view: [Open in new window](#).

Holdings | **Descriptions**

Item type	Current Location	Home Library	Call Number	Status	Last seen	Barcode	Spine Label
 KIT	Fairview	Fairview		Available	04/01/2011	316190004778978	Print Label

- 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**.

856 ? - URL/ELECTRONIC LOCATION AND ACCESS + -

▲ q Electronic format type

▲ u Uniform Resource Identifier  

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;

TIP



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 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.

2.1.15.1.5 IntranetFavicon Asks: Use the image at ___ for the Staff Client's favicon.

IMPORTANT



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

TIP



Turn your logo into a favicon with the [Favicon Generator](#).

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.



2.1.15.1.6 IntranetmainUserblock Asks: Show the following HTML in its own column on the main page of the staff client

▼ Appearance

Preference	
IntranetmainUserblock (modified)	Show the following HTML in its own column on the main page of the staff client: <pre data-bbox="754 1727 1345 1765"><p>Remind patrons we're closed on Friday</p></pre>

The screenshot displays a grid of system preference categories, each with an icon and a title:

- Circulation** (Icon: double arrows)
- Serials** (Icon: document with lines)
- Patrons** (Icon: person)
- Acquisitions** (Icon: gift box)
- Advanced search** (Icon: magnifying glass)
- Reports** (Icon: pie chart)
- Lists** (Icon: folder)
- Tools** (Icon: wrench)
- Course reserves** (Icon: books)
- Koha administration** (Icon: gears)
- Cataloging** (Icon: tag)
- About Koha** (Icon: Koha logo)
- Authorities** (Icon: circular arrow)

Below the grid, there are two notification boxes:

- A box with blue text: Suggestions pending approval: 1, Comments pending approval: 1, Tags pending approval: 2, Patrons requesting modifications: 1.
- A box with black text: Remind patrons we're closed on Friday.

2.1.15.1.7 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)

2.1.15.1.8 IntranetSlipPrinterJS Asks: Use the following JavaScript for printing slips.

Description:

- The most logical use of this preference is in conjunction with the [jsPrintSetup](#) 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.

2.1.15.1.9 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.

2.1.15.1.10 IntranetUserCSS Asks: Include the following CSS on all pages in the staff client

2.1.15.1.11 intranetuserjs Asks: Include the following JavaScript on all pages in the staff interface
Description:

- 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.

2.1.15.1.12 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.

2.1.15.1.13 StaffAuthorisedValueImages Default: Show

Asks: ___ images for authorized values (such as lost statuses and locations) in search results.

Values:

- Don't show
- Show

2.1.15.1.14 staffClientBaseURL Asks: The staff client is located at http:// ___

2.1.15.1.15 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/)

2.1.15.1.16 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'

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

- **Additional Authors:**
 - [Engard, Nicole C.,--1979-](#)
- **Published by:** [Information Today, Inc.,](#)(Medford, N.J. :)
- **Description:** 334 p. cm.
- **Online Resources:**
 - <http://mashups.weblearning.net>
- **OPAC View:** [Open in new window](#)

- **ISBN:** 9781573873727
- **Subjects:**
 - [Mashups \(World Wide Web\) -- Library applications.](#)
 - [Libraries and the Internet.](#)
 - [Library Web sites -- Design.](#)
 - [Web site development.](#)
- **Copyright:** 2009

- 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 .

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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.xml
 - 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.

2.1.15.1.17 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.

2.1.15.1.18 yuipath Default: included with Koha

Asks: Use the Yahoo UI libraries ____

Values:

- from Yahoo's servers

- With this option there is less demand on your servers, but if the Internet goes down there will be issues

- included with Koha

- With this option calls are made faster, and they will still work if the Internet goes down

Description:

- The yuipath preference allows for the user to define a local path or web URL to the Yahoo User Interface Library (<http://developer.yahoo.com/yui/2/>). This library is a resource of developer tools including JavaScript and style sheets.

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

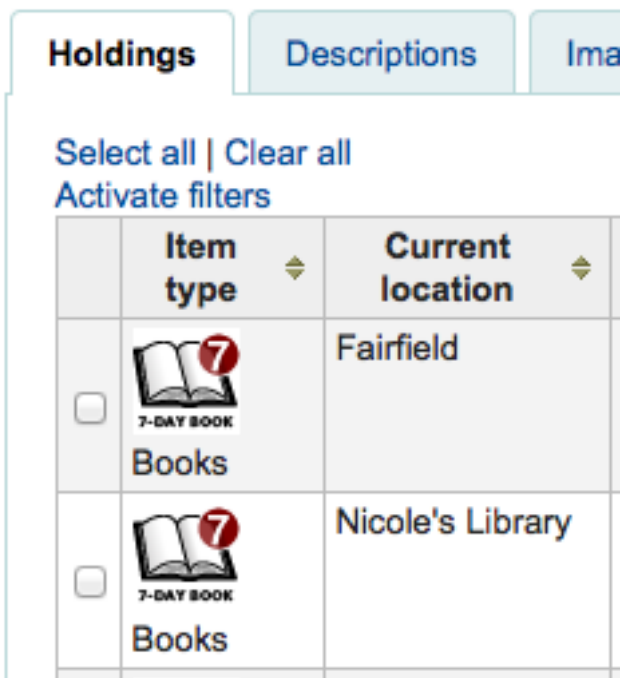
Asks: ___ item selection in record detail page.

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 viewISBD Default: Allow

Asks: ___ staff to view records in ISBD form on the staff client.

Values:

- Allow
- Don't allow

2.1.15.2.5 viewLabeledMARC Default: Allow

Asks: ___ staff to view records in labeled MARC form on the staff client.

Values:

- Allow
- Don't allow

2.1.15.2.6 viewMARC Default: Allow

Asks: ___ staff to view records in plain MARC form on the staff client.

Values:

- Allow
- Don't allow

2.1.16 Web Services

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

2.1.16.1 ILS-DI**2.1.16.1.1 ILS-DI** Default: Disable

Asks: ___ ILS-DI services for OPAC users

Values:

- Disable
- Enable

2.1.16.1.2 ILS-DI:AuthorizedIPs Asks: ___ allowed IPs to use the ILS-DI services**2.1.16.2 OAI-PMH****2.1.16.2.1 OAI-PMH** Default: Disable

Asks: ___ Koha's OAI-PMH server.

Values:

- Disable
- Enable

Description:

- 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/>

2.1.16.2.2 OAI-PMH:archiveID Default: KOHA-OAI-TEST

Asks: Identify records at this site with the prefix ___ :

2.1.16.2.3 OAI-PMH:AutoUpdateSets Default: Disable

Asks: ___ automatic update of OAI-PMH sets when a bibliographic record is created or updated.

Values:

- Disable
- Enable

2.1.16.2.4 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.

2.1.16.2.5 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.

2.1.16.3 Reporting**2.1.16.3.1 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.

[New Library](#)

[New Group](#)

Libraries

Name ▾	Code ◆	Address ◆	Properties	IP	
Centerville	CPL	Jefferson Summit			Edit Delete

Group(s): Search Domain

Name	Code	Description		
Smith County Libraries	SMITH		Edit	Delete

Group(s): Properties

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

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

New library

Library code

Name

Group(s):

Main Libraries

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

- Next you can enter basic contact info about the branch

Address line 1
 Address line 2
 Address line 3
 City
 State
 Zip/Postal code
 Country
 Phone
 Fax
 Email
 URL

OPAC info

Path:

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

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

*

IMPORTANT

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

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

	Fairfield	DVD
	Nicole's Library	Library & Information Science


- 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

 Books	Nicole's Library	Library & Information Science	Z674 Shelf	
 Books	Franklin	<div style="border: 1px solid black; padding: 5px;"> 123 Library Street Philadelphia, PA 19001 Ph: 215.555.1234 nengard@bywatersolutions.com http://web2learning.net </div>		
 Books	Midway			
 Books	Nicole's Library			Z674 Shelf
 Books				

- IP Address does not have to 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

TIP

 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:

Show in search pulldown:

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:

OR

Groups of Libraries:

-- 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

Group(s): Properties

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

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

Modify library

Library code FFL

Name

Group(s):

Main Libraries

2.2.2 Item Types


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

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

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

New Item Type

Item Types Administration

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

2.2.2.1 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:

Description:

Choose an icon:

None liblime-kids crystal-clear bridge Seshat npl **carredart** colors vokal Remote image



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:

Checkin message:

Checkin message 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

- In the 'Item Type' field, enter a short code for your item type
- The description is the plain text definition of the item type
- 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 noltem-
TypeImages to 'Show'


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

- 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:

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

This is a book

Check In

Enter item barcode:

Options

Forgive overdue charges

Book drop mode

Checked-in items

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

and an Alert is yellow.

This is a book

Check In

Enter item barcode:

Options

Forgive overdue charges


Book drop mode

Checked-in items

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


- When finished, click 'Save Changes'

TIP



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


- Your new item type will now appear on the list

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

2.2.2.2 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.

Cannot Delete Item Type

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

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



2.2.3 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.

Show category:

Values for custom patron notes

Authorized values for category BOR_NOTES:

Page(s): Entries/page:

Authorized value	Description	Description (OPAC)	Icon	Branches limitations	Edit	Delete
UMB	An umbrella was left in the library			No limitation	Edit	Delete
COAT	Your coat was found			No limitation	Edit	Delete

- 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)
- HINGS_AS
 - General Holdings: Acquisition Status Designator :: This data element specifies acquisition status for the unit at the time of the holdings report.a
- 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

-

TIP



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

- PROC

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

- REPORT_GROUP

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

Show category:

Authorized values for category REPORT_GROUP:

Page(s): 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:

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
- 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'

New category

The screenshot shows the 'New category' form with the following elements:

- Category:** A text input field.
- Authorized value:** A text input field.
- Description:** A text input field.
- Description (OPAC):** A text input field.
- Branches limitation:** A dropdown menu with the following options: All branches, Centerville, Fairfield, Fairview, Franklin, Goleta Public Library, Liberty, Midway, Nicole's Library, Pleasant Valley.
- Instruction:** "Select All if this authorised value must be displayed all the time. Otherwise select libraries you want to associate with this value."
- Choose an icon:** A row of buttons: None, liblime-kids, crystal-clear, sudoc, bridge, Seshat, npl, carredart, colors, vokal.
- No image:** A radio button.
- Buttons:** Save, Cancel.

- 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

Show category:

Authorized

Page(s):

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

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

2.2.3.3 Add new Authorized Value

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

- Click 'New authorized value for ...'

New authorized value

Category: MARC504

Authorized value:

Description:

Description (OPAC):

Branches limitation:

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


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

Choose an icon:

No image:

- 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

Show category:

Authorized values for category MARC504:

Page(s): Entries/page:

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

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

New category

Patron category administration

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

Code	Category name	Type	Enrollment period	Age required	Upper age limit	Enrollment fee	Overdue	Lost items	Hold fee	Messaging	Branches limitations	
ADPT	Adult Patron	Adult	12 months	17 years	0 years	0.00	Yes	Shown	0.00	Advance notice : email Hold filled : email	No limitation	Edit Delete
B	Board	Prof.	99 months	5 years	17 years	0.00	Yes	Shown	0.00	Item checkout : email Hold filled : sms Item due : email	3 branches limitations	Edit Delete
HB	Home Bound	Adult	99 months	18 years	999 years	0.00	Yes	Shown	0.00	Advance notice : email Hold filled : email	No limitation	Edit Delete

Patrons are assigned to one of six main categories:

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

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:

Description:

Enrollment period:

Choose one

In months: months

Until date: 

Age required: years

Upperage limit: years

Enrollment fee:

Overdue notice required:

Lost items in staff client:

Hold fee:

Category type:

Branches limitation:

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

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


Default messaging preferences for this patron category

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

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

-

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 date-ofbirth 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 date-ofbirth as a required field on the patron record

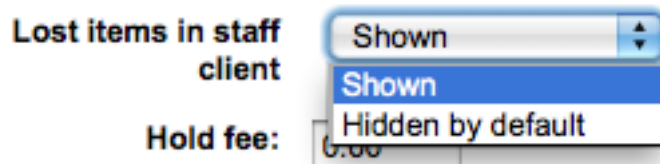
- If you charge a membership fee for your patrons (such as those who live in another region) you can enter that in the 'Enrollment fee' field.

-

IMPORTANT


 Only enter numbers and decimals in this field

- 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



-


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

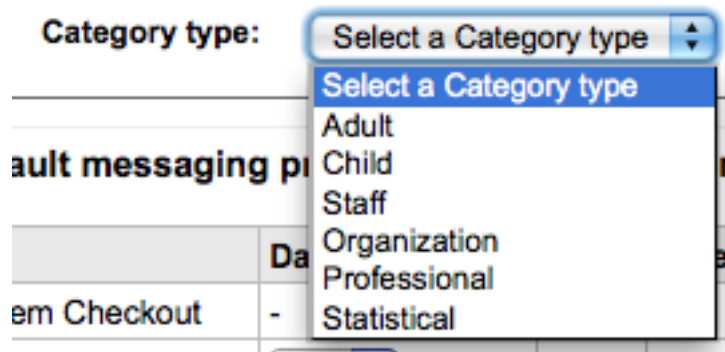
- If you charge patrons for placing holds on items, enter the fee amount in the 'Hold fee' field.

-

IMPORTANT

 Only enter numbers and decimals in this field

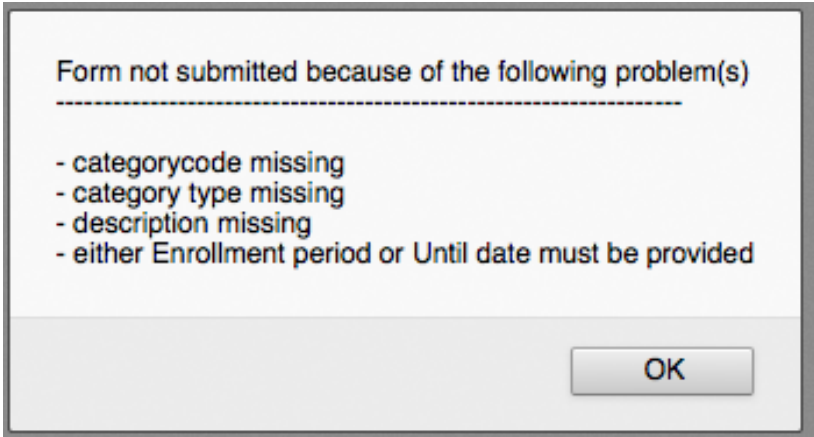
- In the 'Category type' field choose one of the six main parent categories




-

IMPORTANT

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



 Form not submitted because of the following problem(s)


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

OK

- The Branch Limitations let you limit this patron category to only some branches in your library system. Select 'All branches' if you would like any library to be able to use this category.
- 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.

*

TIP

 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/maintenance* 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

TIP



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)

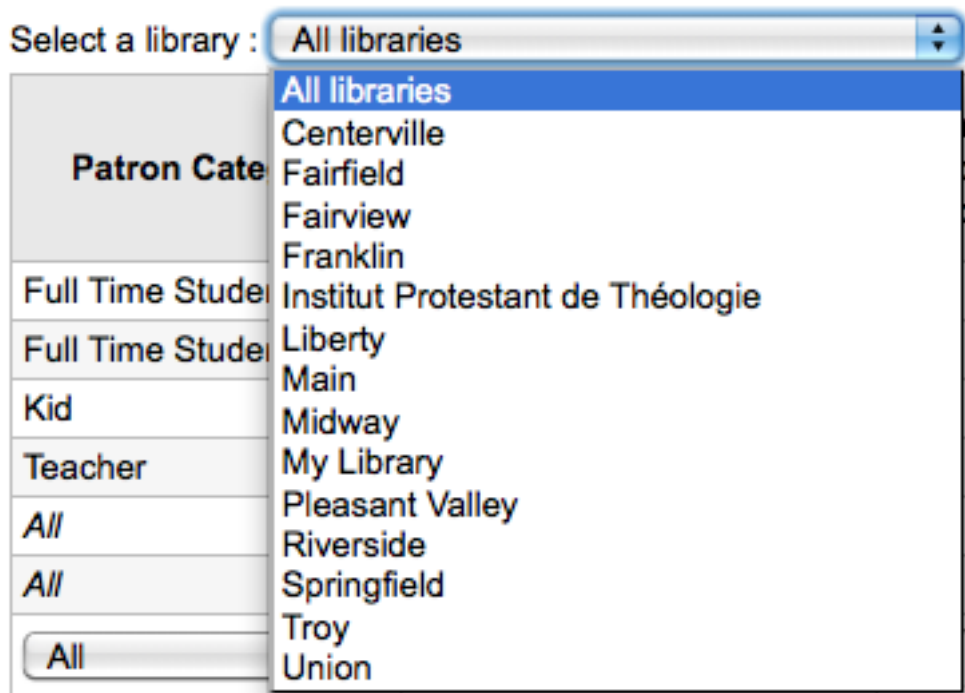
IMPORTANT



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

Select a library: Fairview Clone these rules to: Centerville Clone

Patron category	Item type	Current checkouts allowed	Loan period	Unit	Hard due date	Fine amount	Fine charging interval	Fine grace period (day)	Overdue Fines Cap (\$)	Suspension in days (day)	Renewals allowed (count)	Renewal period	Holds allowed (count)	Rental discount (%)	
All	All	12	12	days	None defined	0.00	0	0		0	12	12	32	0.000000	Edit Delete
All	All	<input type="text"/>	<input type="text"/>	Days	Before	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Save Clear

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


IMPORTANT



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

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


IMPORTANT



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

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

IMPORTANT




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

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

-

IMPORTANT



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

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

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

All	Nicole's special type	1	1	days	on 07/27/2012	0.00	0	0	0	0	0	1	0	0.000000	Edit	Delete
All	Reference	0	0	days	None defined	0.00	0	0	0	0	0	0	0	0.000000	Edit	Delete
All	All	55	5	days	None defined	0.10	1	2	3	4	5	5	5	0.000000	Edit	Delete

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

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

Select a library : Clone these rules to:

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

Cloning issuing rules to "Centerville"

The rules have been cloned.

[Return to Issuing rules](#)

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.

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

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

- In 'Total Current Checkouts Allowed' enter the total number of items patrons can have checked out at one time

- Control where patrons can place holds from using the 'Hold Policy' menu
 - From Any Library: Patrons from any library may put this item on hold. (default if none is defined)
 - From Home Library: Only patrons from the item's home library may put this book on hold.
 - No Holds Allowed: No patron may put this book on hold.
- Control where the item returns to once it is checked in
 - Item returns home
 - Item returns to issuing branch
 - Item floats
 - * When an item floats it stays where it was checked in and does not ever return 'home'
- Once your policy is set, you can unset it by clicking the 'Unset' link to the right of the rule

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.

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

TIP



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.

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

The various Hold Policies have the following effects:

- From Any Library: Patrons from any library may put this item on hold. (default if none is defined)
- From Home Library: Only patrons from the item's home library may put this book on hold.
- No Holds Allowed: No patron may put this book on hold.

IMPORTANT

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

IMPORTANT

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

The various Return Policies have the following effects:

- Item returns home: The item will prompt the librarian to transfer the item to its home library

–

IMPORTANT

If the **AutomaticItemReturn** preference is set to automatically transfer the items home, then a prompt will not appear

- Item returns to issuing branch: The item will prompt the librarian to transfer the item back to the library where it was checked out

–

IMPORTANT

If the **AutomaticItemReturn** preference is set to automatically transfer the items home, then a prompt will not appear

- Item floats: The item will not be transferred from the branch it was checked in at, instead it will remain there until transferred manually or checked in at another branch

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

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.

New patron attribute type

Patron attribute types

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

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

Patron attribute type code:

Description:

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

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

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

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

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

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

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

Branches limitation:

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

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


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

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

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


—

IMPORTANT

 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.

-

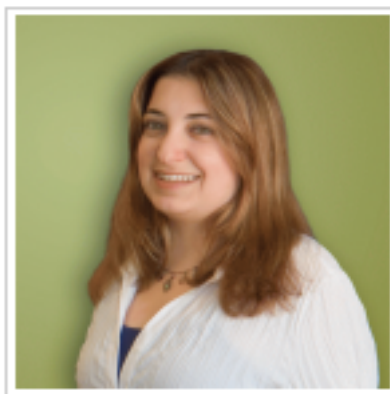
IMPORTANT



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

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

Additional attributes and identifiers

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

Students

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

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 :

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

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

Show category:

Values for collection codes

Authorized values for category CCODE:

Page(s): 1/2 Entries/page:

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

Collection codes will appear as tabs above the checkboxes:

FIC
REF
NFIC
REF-BK
YMAR

Policy for Collection Code: FIC

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

Select a library :

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

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

FIC | REF | NFIC | REF-BK | YMAR

Policy for Collection Code: FIC

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

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


[Cancel](#)

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

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'

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

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


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



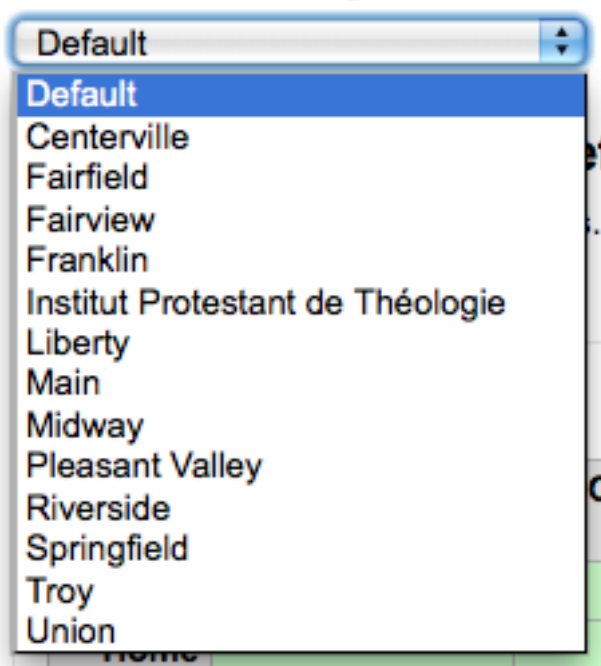
These preference can be overridden by changes in the individual patron's messaging preferences.

To set up circulation alerts:

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

Item Circulation Alerts

Select a library:



- 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:

[Cancel](#)

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

Cities

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

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

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.

Main address

Street number:
Address:
Address 2:
City: or choose
State:
Zip/Postal code:
Country:

Atlantic City NJ 08401
 Philadelphia PA 19030

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

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



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	

2.4.1.1 Add New Framework

To add a new framework

- Click 'New Framework'

Add framework

Framework code

Description

- 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

- You will be asked to choose a Framework to base your new Framework off of, this will make it easier than starting from scratch

- Once your Framework appears on the screen you can edit or delete each field by following the instructions for [editing subfields](#)

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

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

New tag

MARC Framework for Books, Booklets, Workbooks (BKS)

Search for tag: In framework: Search

Display only used tags/subfields

Page(s): Entries/page:

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

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

MARC Framework for Books, Booklets, Workbooks (BKS)

Add tag

Tag:

Label for lib:

Label for opac:

Repeatable:

Mandatory:

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

Save Changes Cancel

Enter the information about your new tag:

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

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

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

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

MARC Framework for Books, Booklets, Workbooks (BKS)

Modify tag 022

Tag:

Label for lib:

Label for opac:

Repeatable:

Mandatory:

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

Save Changes
Cancel

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

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

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

Tag 952 Subfield constraints

0123456789abcdefgh

jlmnopqrstuvwxyzNew

▼ **Basic constraints**

Subfield code:

Text for librarian:

Text for OPAC:

Repeatable:

Mandatory:

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

▶ **Advanced constraints**

▶ **Other options (choose one)**

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

Tag 952 Subfield constraints

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

▸ **Basic constraints**

▾ **Advanced constraints**

Default value:

Max length: (see online help)

Visibility: OPAC Intranet Editor Collapsed Flagged

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

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


Koha link:

▸ **Other options (choose one)**

- Default value
 - * defines what you want to appear in the field by default, this will be editable, but it saves time if you use the same note over and over or the same value in a field often.
 - Visibility
 - * allows you to select from where this subfield is visible/hidden, simply check the boxes where you would like the field to show and uncheck the boxes where you would like it hidden.
- Visibility:** OPAC Intranet Editor Collapsed Flagged
- Is a URL
 - * if checked, it means that the subfield is a URL and can be clicked
 - Link

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

WARNING



This value should not change after data has been added to your catalog. If you need to change this value you must ask your system administrator to run misc/batchRebuildBiblioTables.pl.

– Koha link

- * Koha is multi-MARC compliant. So, it does not know what the 245\$a means, neither what 200\$f (those 2 fields being both the title in MARC21 and UNIMARC). So, in this list you can "map" a MARC subfield to its meaning. Koha constantly maintains consistency between a subfield and its meaning. When the user want to search on "title", this link is used to find what is searched (245 if you're MARC21, 200 if you're UNIMARC).
- For each subfield you can set the following Other option values

Tag 952 Subfield constraints

0123456789abcdefgh

jlmnopqrstuvwxyzNew

▸ **Basic constraints**

▸ **Advanced constraints**

▾ **Other options (choose one)**

Authorized value:

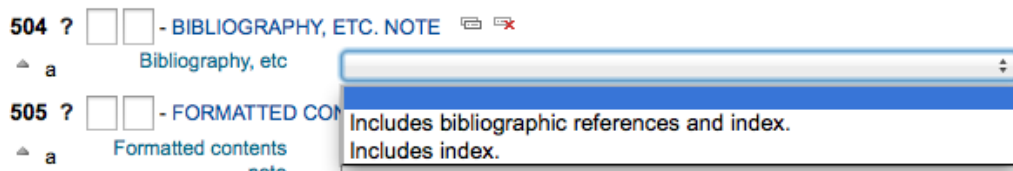
Thesaurus:

Plugin:

Save changes
Cancel

– Authorized value

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



- Thesaurus
 - * means that the value is not free text, but must be searched in the authority/thesaurus of the selected category
 - Plugin
 - * means the value is calculated or managed by a plugin. Plugins can do almost anything.
 - * For example, in UNIMARC there are plugins for every 1xx fields that are coded fields. The plugin is a huge help for cataloger ! There are also two plugins (unimarc_plugin_210c and unimarc_plugin_225a that can "magically" find the editor from an ISBN, and the collection list for the editor)
- To save your changes simply click the 'Save Changes' button at the top of the screen

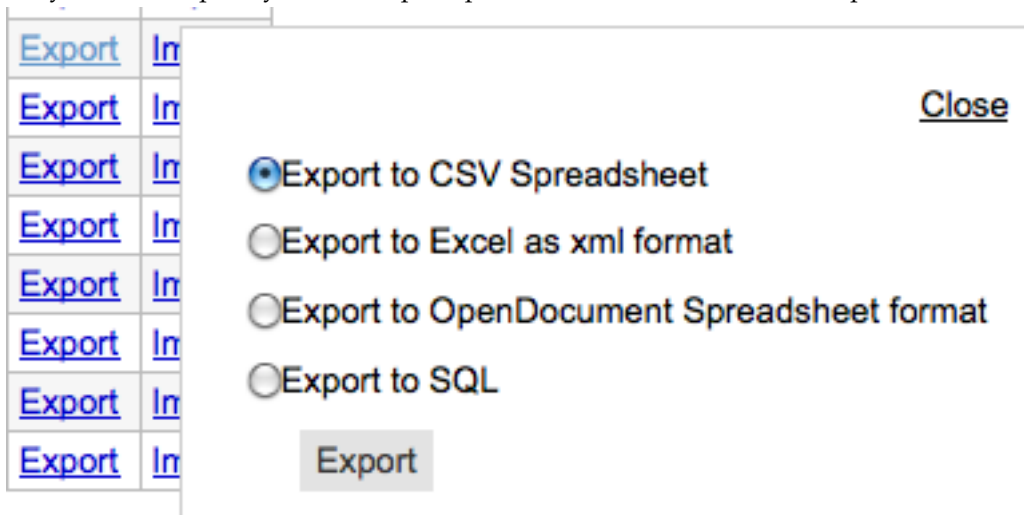
2.4.1.5 Import/Export Frameworks

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.



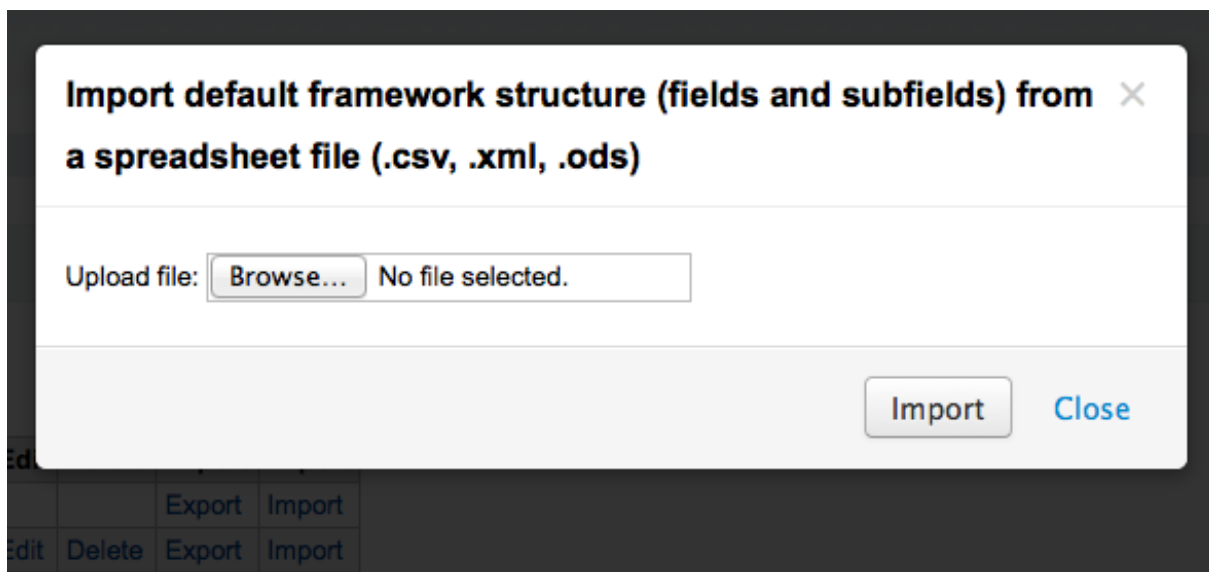
A framework exported this way can be imported into any other Koha installation using the import framework option.

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.

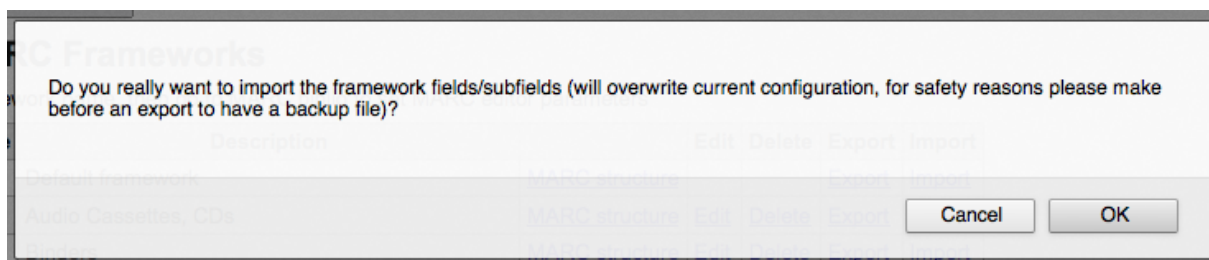
To import a framework you first need to create **a new framework**. Once you have that framework, click 'Import' to the right of the new framework.

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

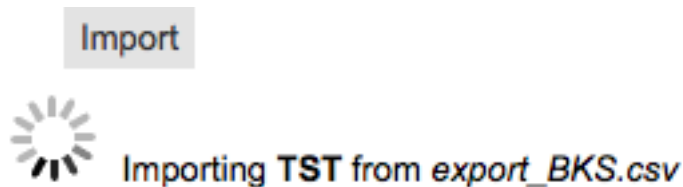
You will be prompted to find a file on your computer to import into the framework.



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.

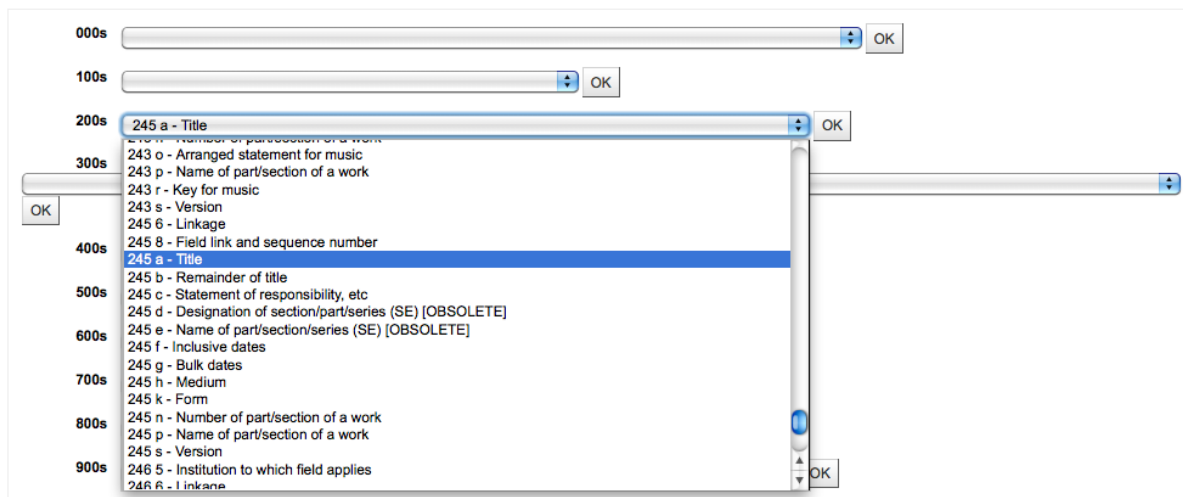
Koha to MARC Mapping

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

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

Connect biblio.title to a MARC subfield

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



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.

Framework:

Add a mapping

Field name:

MARC field:

MARC subfield:

However the subtitle for DVDs appears in 245\$p

Framework:

Add a mapping

Field name:

MARC field:

MARC subfield:

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



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

[Normal View](#)
[MARC View](#)
[ISBD View](#)

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

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

Physical details: 334 p. cm.

ISBN: 9781573873727

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

TIP



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

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

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

[New Classification Source](#)

[New Filing Rules](#)

Classification Sources

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

Classification Filing Rules

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

Commonly used values of this field are:

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

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

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

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.

Add classification source

The screenshot shows a web form for adding a classification source. The fields are as follows:

- Classification source code:** Text input containing "NLM".
- Description:** Text input containing "National Library of Medicine".
- Source in use?:** A checked checkbox.
- Filing Rule:** A dropdown menu with the following options:
 - Default filing rules for LCC (lcc) (selected)
 - Default filing rules for DDC (dewey)
 - Generic call number filing rules (generic)
 - Default filing rules for LCC (lcc)

At the bottom left, there are two buttons: "Save" and "Cancel".

When creating or editing:

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

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

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.

Match Points and Match Checks are powerful tools in the import process. Harness the power of these two matching criteria and make your data behave for you!

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*

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:

Target (database) 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' - The total number of 'points' a biblio must earn to be considered a 'match'

- Match points are set up to determine what fields to match on

- 'Search index' can be found by looking at the ccl.properties file on your system which tells the zebra indexing what data to search for in the MARC data".

- 'Score' - The number of 'points' a match on this field is worth. If the sum of each score is greater than the match threshold, the incoming record is a match to the existing record

- Enter the MARC tag you want to match on in the 'Tag' field

- Enter the MARC tag subfield you want to match on in the 'Subfields' field

- 'Offset' - For use with control fields, 001-009

- 'Length' - For use with control fields, 001-009

- Koha only has one 'Normalization rule' that removes extra characters such as commas and semicolons. The value you enter in this field is irrelevant to the normalization process.

- 'Required match checks' - ??

2.4.7.2 Sample Record Matching Rule: Control Number

Add record matching rule

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

Match points

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


Search index:	<input type="text" value="Control-number"/>
Score:	<input type="text" value="101"/>
Matchpoint components	
Tag:	<input type="text" value="001"/>
Subfields:	<input type="text" value="a"/>
Offset:	<input type="text" value="0"/>
Length:	<input type="text" value="0"/>
Normalization rule:	<input type="text" value="Control-number"/>

Required match checks[Add match check](#)

- Match threshold: 100
- 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)

Required match checks
[Add match check](#)

Match check 1 | Remove this match check

Source (incoming) record check field

Tag:

Subfields:

Offset:

Length:

Normalization rule:

Target (database) record check field

Tag:

Subfields:

Offset:

Length:

Normalization rule:

[Cancel](#)

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.

2.5 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

New Currency

Currencies and Exchange Rates

Currency	Rate	Symbol	Last Updated	Active	Actions	
CAD	1.02207	\$	02/02/2010		Edit	Delete
EUR	0.87400	€	02/02/2010		Edit	Delete
GBP	1.99290	£	02/02/2010		Edit	Delete
USD	1.00000	\$	02/02/2010	✓	Edit	Delete

TIP



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

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. 2012) and then break that into **Funds** for different areas of the library (ex. Books, Audio, etc).

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

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

[+ New budget](#)

Budgets administration

Currency = USD

Active Budgets [Inactive Budgets](#)

Budget name	Start date	End date	Locked	Total	Actions
2012	01/01/2012	12/31/2012		10,000.00	Edit Delete Add Fund

2.5.2.1 Add a budget

Budgets can either be created from scratch or by duplicating the previous year’s budget.

To duplicate a budget from a previous year, click on the link for the budget name from the list of budgets

[+ New budget](#)

Budgets administration

Currency = USD

Active Budgets [Inactive Budgets](#)

Budget name	Start date	End date	Locked	Total	Actions
2012	01/01/2012	12/31/2012		10,000.00	Edit Delete Add Fund

On the screen listing the budget breakdown click the Edit button at the top and choose to Duplicate budget

[+ New](#) [Edit](#) [Planning](#)

Funds for

Currency = USD

Fund code	Fund name	Total allocated	Base-level allocated	Base-level spent
Books	Books	1,000.00	1,000.00	0.00

You will be presented with a form where you simply need to enter the new start and end date and save the budget.

Start date
(MM/DD/YYYY)

End date
(MM/DD/YYYY)

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.

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.

Add budget

Start date
(MM/DD/YYYY)

End date
(MM/DD/YYYY)

Description

Total amount

Make budget active

Lock budget

- 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 placed 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.

Budgets administration

Currency = \$

Budget Name ▾	Start Date ◆	End Date ◆	Active ◆	Locked ◆	Total ◆	Actions
Fiscal Year 2010	01/01/2010	12/31/2010	Active		60,000.00	Edit Delete Add Fund

2.5.3 Funds

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

2.5.3.1 Add a Fund

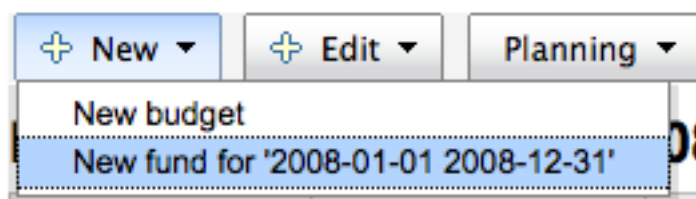
A fund is added to a budget.

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.

+ New ▾
✎ Edit ▾
✎ Planning ▾

Add Fund for Budget '2013 Budget'

Fund code:

Fund name:

Amount:

Warning at (%): 0 to disable

Warning at (amount): 0 to disable

Owner: Edit owner Remove owner

Users: Add users

Library:

Restrict access to:

Notes:

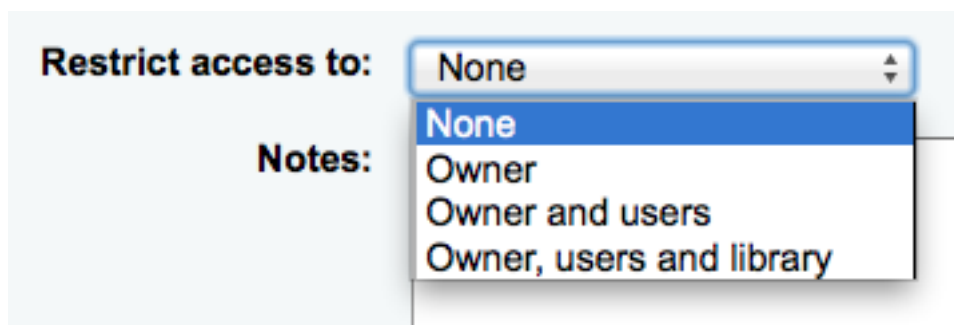
Statistic 1 done on:

Statistic 2 done on:


Submit
Cancel

The three first fields are required, the rest are optional

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



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.

Funds for '2012'

Currency = USD

Fund code	Fund name	Total allocated	Base-level allocated	Base-level spent	Total sublevels spent	Base-level remaining	Actions
Books	Books	1,000.00	1,000.00	0.00		1,000.00	Edit Delete Add child fund
FIC	Fiction	5,000.00	5,000.00	0.00		5,000.00	Edit Delete Add child fund
HB	Hardback	400.00	400.00	0.00		400.00	Edit Delete Add child fund
NFIC	Non Fiction	2,500.00	2,500.00	0.00		2,500.00	Edit Delete Add child fund
STAFF	Staff Collection	500.00	500.00	0.00		500.00	Edit Delete Add child fund
TST	Test	500.00	500.00	0.00		500.00	Edit Delete Add child fund
Period allocated 10,000.00		9,900.00		0	0		

To the right of each fund 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.

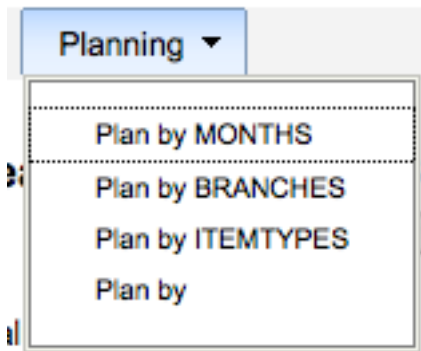
Funds for '2012 Annual Budget'

Currency = USD

Fund code	Fund name	Total allocated	Base-level allocated	Base-level spent	Total sublevels spent	Base-level remaining	Actions
BK	Book	300,000.00	300,000.00	0.00	0.00	300,000.00	Edit Delete Add child fund
STAFF	Professional Development	5,000.00	5,000.00	0.00	0.00	5,000.00	Edit Delete Add child fund
▼ AV	Audio Visual	150,000.00	150,000.00	0.00	0.00	150,000.00	Edit Delete Add child fund
CAM	Camera	1,000.00	1,000.00	0.00	0.00	1,000.00	Edit Delete Add child fund
Movie	Movie	1,000.00	1,000.00	0.00	0.00	1,000.00	Edit Delete Add child fund
▼ REF	Reference	45,000.00	45,000.00	0.00	0.00	45,000.00	Edit Delete Add child fund
▼ ENC	Encyclopedias	500.00	500.00	0.00	0.00	500.00	Edit Delete Add child fund
Brit	Britannica	100.00	100.00	0.00	0.00	100.00	Edit Delete Add child fund

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:

Planning for 2012 by MONTHS

Currency = USD. Cells contain estimated values only.

Fund name	Fund total	2012-01	2012-02	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09	2012-10	2012-11	2012-12	Fund remaining	
		[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[show a column]	
Fiction	5,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5000.00	Auto-fill row
Non Fiction	2,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2500.00	Auto-fill row
Staff Collection	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00	Auto-fill row
Test	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00	Auto-fill row
Books	1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1000.00	Auto-fill row
Hardback	400.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	400.00	Auto-fill row

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

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

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.

Currency = USD. Cells contain estimated values only.

Fund name	Fund total	2012-01	2012-02	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09	2012-10	2012-11	2012-12	Fund remaining	
		[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[hide]	[show a column]	
Fiction	5,000.00	416.6	416.6	416.6	416.6	416.6	416.6	416.6	416.6	416.6	416.6	416.6	416.6	0.00	Auto-fill row
Non Fiction	2,500.00	208.3	208.3	208.3	208.3	208.3	208.3	208.3	208.3	208.3	208.3	208.3	208.3	0.00	Auto-fill row

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

Output to a file named: Into an application

2.6 Additional Parameters

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

2.6.1 Z39.50 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. Using Koha you can connect to any Z39.50 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 Servers

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

Z39.50 servers administration

Showing 1 to 20 of 20 Show entries Search:

Target	Hostname/Port	Database	Userid	Password	Checked	Rank	Syntax	Encoding	Timeout	Record type		
AMICUS	amicus.collectionscanada.ca:210	ANY			No	0	USMARC	utf8	0	biblio	Edit	Delete
AUSTRALIA AUTHORITIES	z3950-test.librariesaustralia.nla.gov.au:210	AuthTraining	ANLEZ	#####	No	0	USMARC	utf8	0	authority	Edit	Delete
BRITISH LIBRARY	z3950cat.bl.uk:9909	BLAC			No	0	USMARC	MARC-8	0	biblio	Edit	Delete
BROWN UNIVERSITY	josiah.brown.edu:210	innopac			No	0	USMARC	utf8	0	biblio	Edit	Delete
CAMBRIDGE	newton.lib.cam.ac.uk:7090	VOYAGER			No	0	USMARC	utf8	0	biblio	Edit	Delete

To find additional targets you use IndexData's IRSpy: <http://irspy.indexdata.com>

2.6.1.1 Add a Z39.50 Target

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

New Z39.50 server

Z39.50 server:

Hostname:

Port:

Database:

Userid:

Password:

Checked (searched by default):

Rank (display order):

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

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

Timeout (0 its like not set): seconds

Record type:

- '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 'Checked' 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.

2.6.1.2 Suggested Bibliographic Z39.50 Targets

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 wecat.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

2.6.2 Did you mean?

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

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

IMPORTANT



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

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

Did you mean?

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

OPAC

ExplodedTerms
 Suggest that patrons expand their searches to include broader/narrower /related terms.

AuthorityFile
 Suggest authorities which are relevant to the term the user searched for.

Intranet

ExplodedTerms
 Suggest that patrons expand their searches to include broader/narrower /related terms.

AuthorityFile
 Suggest authorities which are relevant to the term the user searched for.

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

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


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


OPAC

ExplodedTerms
 Suggest that patrons expand their searches to include broader/narrower /related terms

AuthorityFile
 Suggest authorities which are relevant to the term the user searched for.

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

 Search library
[Advanced search](#) | [Browse by author or subject](#) | [Recent comments](#) | [Tag cloud](#)


Your search returned 331 results. 


Refine your search
Limit to [currently available](#)

Did you mean: [Search also for broader subjects](#) [Search also for narrower subjects](#) [Search also for related subjects](#) [Library Web sites Design.](#)

1 2 3 4 5 6 7 8 9 10 Next >>

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

 Search library
[Advanced search](#) | [Browse by author or subject](#) | [Recent comments](#) | [Tag cloud](#)

Your search returned 331 results. 

Refine your search
Limit to [currently available](#)

Did you mean: [Library Web sites Design.](#) [Library Science.](#) [Mashups \(World Wide Web\) Library applications.](#) [Library planning.](#)

1 2 3 4 5 6 7 8 9 10 Next >>

Chapter 3

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.

Your patron lists

+ New patron list

Showing 1 to 1 of 1 Show 10 entries Previous Next Search:

Name ▲	Patrons in list ◆			
My Patrons	0	<input type="button" value="Add patrons"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Showing 1 to 1 of 1 Previous Next

To create a new list of patrons click the 'New patron list' button

New patron list

Create a new patron list

Name:

Owner: nce

Enter a list name and save the list.

My Patrons

Add patrons

Patron search:

No entries to show Show 10 entries Previous Next Search:

	Card	Firstname	Surname	Address	Category	Library	Expires on	Circ notes
No data available in table								

No entries to show Previous Next

To add patrons to the list click the 'Add patron's button to the right of the list name.

My Patrons

Add patrons

Patron search:

Patrons

Beau Engard

- Engard, Beau (9876543456) 123 My Street Philadelphia, PA 19101
- Engard, Brian (9876543453) 123 My Street Philadelphia 19101
- Engard, Coda (9876543452) 123 My Street Philadelphia, PA 19101
- Engard, Nicole (9876543457) 123 My Street Philadelphia 19101
- Engard, Unnamed Puppy (23529001223643) 123 My Street Philadelphia 19101

Enter the patron's name or cardnumber in the search box and click on the right result to add the patron.

My Patrons

Add patrons

Patron search:

Patrons to be added

Beau Engard ([Remove](#))
 Nicole Engard ([Remove](#))

 [Cancel](#)

Once you have all of the patrons you would like to add you can click the 'Update' button to save them to the list.

Showing 1 to 2 of 2 Show entries [« Previous](#) [Next »](#) Search:

<input type="checkbox"/>	Card	Firstname	Surname	Address	Category	Library	Expires on	Circ notes
<input type="checkbox"/>	9876543456	Beau	Engard	123 My Street Philadelphia, PA	Juvenile (J)	Fairfield	05/18/2019	
<input type="checkbox"/>	9876543457	Nicole	Engard	123 My Street Philadelphia PA	Staff (S)	Nicole's Library	05/18/2019	

Showing 1 to 2 of 2 [« Previous](#) [Next »](#)

 [Cancel](#)

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 staff dashboard under the Tools label:

Tools

- [Comments pending approval:](#) 1

To moderate comments click on the notification on the main dashboard or go directly to the Comments Tool and click 'Approve' or 'Delete' to the right of the comments awaiting moderation.

Comments

[Approved comments](#)
[Comments awaiting moderation](#)

Commenter	On Title	Comment	
Engard, Nicole	Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5).	These books just get better and better!	Approve Delete

If there are no comments to moderate you will see a message saying just that

Comments

[Approved comments](#)
[Comments awaiting moderation](#)

No comments to moderate.

You can also review and unapprove comments you have approved in the past by choosing the 'Approved comments' tab

Comments

[Approved comments](#)
[Comments awaiting moderation](#)

Commenter	On Title	Comment	
Engard, Nicole	Blood Rites (The Dresden Files, Book 6).	This is an awesome book series.	Unapprove Delete
Engard, Nicole	Fool Moon (The Dresden Files, Book 2).	This was a great title, I highly recommend it.	Unapprove Delete
Engard, Nicole	Learning Perl /	A very handy guide for getting started with the language Koha is written in ... Perl.	Unapprove Delete
Engard, Nicole	Harry Potter and the goblet of fire	I love listening to the narrator reading me Harry Potter.	Unapprove Delete

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:

borrowernumber, cardnumber, surname, firstname, title, othernames, initials, streetnumber, streettype, address, address2, city, zipcode, country, email, phone, mobile, fax, emailpro, phonepro, B_streetnumber, B_streettype, B_address, B_address2, B_city, B_zipcode, B_country, B_email, B_phone, dateofbirth, branchcode, categorycode, dateenrolled, dateexpiry, gonenoaddress, lost, debarred, contactname, contactfirstname, contacttitle, guarantorid, borrowernotes, relationship, ethnicity, ethnoses, sex, password, flags,

userid, opacnote, contactnote, sort1, sort2, altcontactfirstname, altcontactsurname, altcontactaddress1, altcontactaddress2, altcontactaddress3, altcontactzipcode, altcontactcountry, altcontactphone, smsalert-number, patron_attributes

IMPORTANT



The 'password' value should be stored in plain text, and will be converted to a md5 hash (which is an encrypted version of the password).

- 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' and 'categorycode' are required and must match valid entries in your database.

TIP

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,LANG:fr** or **STARTDATE:January 1 2010,TRACK:Day**
 - If an input record has more than one attribute, the fields should either be entered as an unquoted string (previous examples), or with each field wrapped in separate double quotes and delimited by a comma:
 - * **"STARTDATE:January 1, 2010","TRACK:Day"**
 - * This syntax would be required if the data might have a comma in it, like a date string.



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.

Import into the borrowers table

Select the file to import:

Field to use for record matching

- Choose your CSV file and choose to match on 'Cardnumber' 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.

If matching record is already in the borrowers table:

Ignore this one, keep the existing one

Overwrite the existing one with this

Extended Attributes

Replace all Extended Attributes

Replace only included Extended Attributes

- 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.

Select a library :

Library	Module	Code	Name			
(All libraries)	circulation	CHECKIN	Item Check-in (Digest)	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	circulation	CHECKOUT	Item Check-out (Digest)	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	circulation	DUE	Item Due Reminder	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	circulation	DUEDGST	Item Due Reminder (Digest)	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	circulation	ISSUEQSLIP	Issue Quick Slip	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	circulation	ISSUESLIP	Issue Slip	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	circulation	ODUE	Overdue Notice	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	circulation	PREDUE	Advance Notice of Item Due	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	circulation	PREDUEDGST	Advance Notice of Item Due (Digest)	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	circulation	RESERVESLIP	Reserve Slip	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	circulation	TRANSFERSLIP	Transfer Slip	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	claimacquisition	ACQCLAIM	Acquisition Claim	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	claimissues	SERCL	Serial Claim	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	members	ACCTDETAILS	Account Details Template - DEFAULT	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	reserves	HOLD	Hold Available for Pickup	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/>
(All libraries)	reserves	HOLDPLACED	Hold Placed on Item	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	reserves	HOLD_PRINT	Hold Available for Pickup (print notice)	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	serial	RLIST	Routing List	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	suggestions	ACCEPTED	Suggestion accepted	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	suggestions	AVAILABLE	Suggestion available	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	suggestions	ORDERED	Suggestion ordered	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
(All libraries)	suggestions	REJECTED	Suggestion rejected	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete
Centerville	circulation	ODUE	Overdue Notice	Edit	<input type="text" value="Centerville"/>	<input type="button" value="Copy"/> Delete

Each notice can be edited, but only a few can be deleted, this is to prevent system errors should a message try to send without a template. Each notice and slip can be edited on a per library basis, by default you will see the notices for all libraries.

If you have a style you'd like applied to all slips you can point the **SlipCSS** preference to a stylesheet. The same is true for notices, using the **NoticeCSS** preference to define a stylesheet.

3.1.4.1 Adding Notices & Slips

To add a new notice or slip

- Click 'New Notice'

Add notice

Library:

Koha module:

Code:

Name:

HTML Message:

Message Subject:

Message Body:

<pre>---BRANCHES--- branches.branchcode branches.branchname branches.branchaddress1 branches.branchaddress2 branches.branchaddress3 branches.branchzip branches.branchcity branches.branchstate</pre>	>>	
---	----	--

[Cancel](#)

- Choose which library this notice or slip is for
- 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

-

TIP

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**.

- 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.

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>>`

TIP



To add today's date you can use the `<<today>>` syntax

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.

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. 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
- 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.
- HOLD_PRINT (Printed notice when hold available for pickup)
 - This notice is used for hold confirmation notices that are sent out in print format. This will not effect what the email notice looks like.
 - When this notice references the branches table it is referring to the pickup branch information.
- ODUE (Overdue Notice)
 - This notice is used to send Overdue Notices to Patrons
 - See a [Sample Overdue Notice](#)
 - Requires that you set [Overdue Notice/Status Triggers](#)
- 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).

TIP



Notice also that if you'd like to notify patrons of new serial issues, you can click on 'define a notice' which will take you to the 'Notices' tool

There are also a set of predefined slips (or receipts) listed on this page. All of these slips can be customized by altering their text via the Notices & Slips tool and their style using the [SlipCSS](#) preference to define a stylesheet. Here is what those slips are used for:

- ISSUEQSLIP
 - Used to print the quick slip in circulation
 - The quick slip only includes items that were checked out today
- ISSUESLIP
 - Used to print a full slip in circulation
 - The slip or receipt will show items checked out today as well as items that are still checked out
- RESERVESLIP
 - Used to print a holds slip
 - The holds slip is generated when a hold is confirmed
- TRANSFERSLIP
 - Used to print a transfer slip
 - The transfer slip is printed when you confirm a transfer from one branch to another in your system

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.

The Overdue Notice/Status Triggers tool gives the librarian the power to send up to three notices to each patron type notifying them of overdue items

Select a library:


Rules for overdue actions: default library

	Delay	First Letter	Restrict
Board	<input type="text" value="4"/>	<input type="text" value="Overdue Notice"/>	<input type="checkbox"/>
Home Bound	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>
Inter-Library Loan	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>
Juvenile	<input type="text" value="1"/>	<input type="text" value="Overdue Notice"/>	<input type="checkbox"/>
Kid	<input type="text" value="1"/>	<input type="text" value="Overdue Notice"/>	<input type="checkbox"/>
Library	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>
Patron	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>
School	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>
Student	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>
Young Adult	<input type="text"/>	<input type="text" value="No notice"/>	<input type="checkbox"/>

- 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.
- See a [Sample Overdue Notice](#)

3.1.6 Patron Card Creator

- *Get there:* More > Tools > Patrons and Circulation > Patron Card Creator

The Patron Card Creator allow you to use layouts and templates which you design to print a nearly unlimited variety of patron cards including barcodes. Here are some of the features of the Patron Card Creator module:

- Customize patron card layouts
- Design custom card templates for printed patron cards
- Build and manage batches of patron cards
- Export single or multiple batches
- Export single or multiple patron cards from within a batch
- Export card data as a PDF readable by any standard PDF reader, making patron cards printable directly on a printer

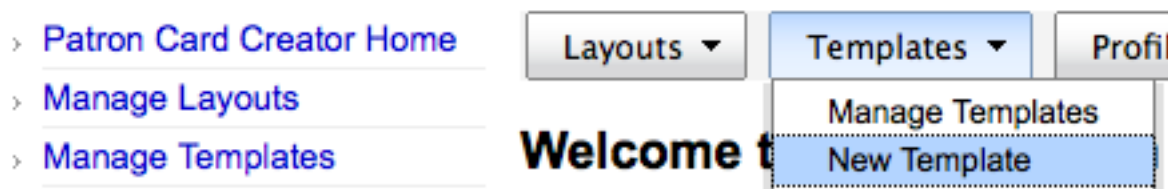
At the top of each screen within the Patron Card Creator, you will see a toolbar allowing quick access to relevant functions. The menu to the left of each screen also allows easy access to the different sections of the Patron Card Creator. The bread crumb trail near the top of each screen will give specific indication as to where you are within the Patron Card Creator module and allow quick navigation to previously traversed sections. And finally, you can find more detailed information on each section of the Patron Card Creator by clicking the online help link at the upper left-hand corner of every page.

3.1.6.1 Templates

- *Get there:* More > Tools > Patron Card Creator > Templates

A template is 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.

3.1.6.1.1 Add a Template To add a new template, you want to click on the 'Templates' button at the top of your page and choose 'New Template'

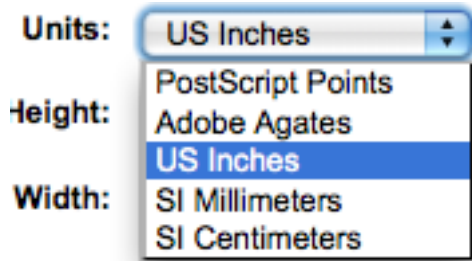


Using the form that appears you can define the template for your sheet of labels or cards.

Edit patron card template

<p>Template ID: 23</p> <p>Template code: <input type="text" value="HB-PC0001"/></p> <p>Template description: <input type="text" value="A template for home brewed patron card forms"/></p> <p>Units: <input type="text" value="US Inches"/></p> <p>Page height: <input type="text" value="11"/> in</p> <p>Page width: <input type="text" value="8.5"/> in</p> <p>Card width: <input type="text" value="3.1875"/> in</p> <p>Card height: <input type="text" value="1.9375"/> in</p>	<p>Top page margin: <input type="text" value="0.6875"/> in</p> <p>Left page margin: <input type="text" value="0.875"/> in</p> <p>Number of columns: <input type="text" value="2"/></p> <p>Number of rows: <input type="text" value="4"/></p> <p>Gap between columns: <input type="text" value="0.4375"/> in</p> <p>Gap between rows: <input type="text" value="0.1875"/> in</p> <p>Profile: <input type="text" value="Test Printer 01/Test Bin"/></p>
<p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>	

- 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 can be found on the vendor product packaging or website.
- 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 cards so that you can easily define a profile that is right for your printer/template combination.
 - After finding any anomalies in the printed document, **create a profile** and assign it to the template.

After saving, your templates will appear on the 'Manage Templates' page.

Current Branch: Fairview

Currently Available Templates

Template ID	Template Name	Description	Select
23	HB-PC0001	A template for home brewed patron card forms	<input type="checkbox"/>



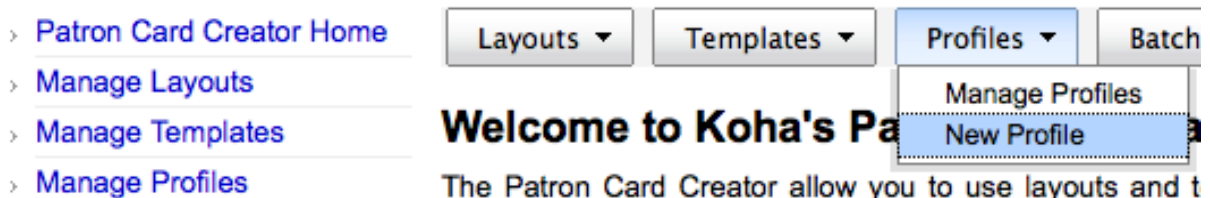
3.1.6.2 Profiles

- *Get there:* More > Tools > Patron Card Creator > Profiles

A profile is a set of "adjustments" applied to a given **template** just prior to printing which compensates for anomalies unique and peculiar to a given printer (to which the profile is assigned). This means if you set a template up and then print a sample set of data and find that the items are not all aligned the same on each card, 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 cards are printing just the way you want, you will not need a profile.

3.1.6.2.1 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'



Using the form that appears you can create a profile to fix any problems with your template.

Edit printer profile

Profile settings

Printer name:

Paper bin:

Template name: Profile unassigned

Units:

Offset:

Horizontal: pt

Vertical: pt

Creep:

Horizontal: pt

Vertical: pt

- The Printer Name and Paper Bin do not have to match your printer exactly, they are for your reference so you can remember what printer you have set the profile for. So if you want to use the Printer model number in printer name or you can call it 'the printer on my desk'
- Template will be filled in once you have chosen which template to apply the profile to on the [template edit form](#)
- The Units pull down is used to define what measurement scale you're going to be using for your profile.

Units:

Height:

Width:

US Inches

PostScript Points

Adobe Agates

US Inches

SI Millimeters

SI Centimeters

- Offset describes what happens when the entire image is off center either vertically or horizontally and creep describes a condition where the distance between the labels changes across the page or up and down the page
 - For these values, negative numbers move the error up and to the left and positive numbers move the error down and to the right
 - Example: the text is .25" from the left edge of the first label, .28" from the left edge of the second label and .31" from the left edge of the third label. This means the horizontal creep should be set to .03" to make up for this difference.

After saving, your profiles will appear on the 'Manage Profiles' page.

Current Branch: Fairview

Currently Available Profiles

Profile ID	Printer Name	Paper Bin	Template Name	Select
16	Test Printer 01	Test Bin	HB-PC0001	<input type="checkbox"/>



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.

3.1.6.3 Layouts

- *Get there:* More > Tools > Patron Card Creator > Layouts

A layout defines the text and images that will be printed on to the card and where it will appear.

3.1.6.3.1 Add a Layout To add a new layout, you want to click on the 'Layouts' button at the top of your page and choose 'New Layout'



Using the form that appears you can create a profile to fix any problems with your template.

Edit Patron card text layout

General settings

Layout name:

Units:

Page side: Front Back

Guide box: On Off

Text fields

Field 1

Text:

Font:

Font size: pt

Text alignment:

Lower left X coordinate: pt

Lower left Y coordinate: pt

Field 2

Field 3

Edit Patron card graphic layout

Barcode

Print card number as barcode:

Lower left X coordinate:

Lower left Y coordinate:

Barcode type:

Print card number as text under barcode:

Images

Image 1

Image source:

Display height: pt

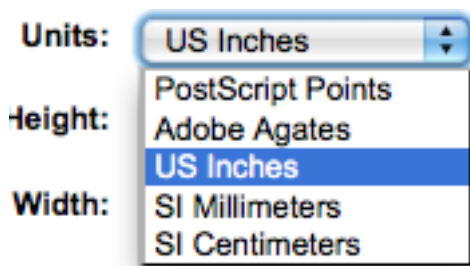
Lower left X coordinate: pt

Lower left Y coordinate: pt

Image 2

Image source:

- The name you assign to the layout is for your benefit, name it something that will be easy to identify at a later date
- The Units pull down is used to define what measurement scale you’re going to be using for your layout.



- Next note if this layout is for the front or the back of the patron card
 - You will need a layout for both the front and back of your card if you have 2-sided library cards
- 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>
- 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.

After saving, your layouts will appear on the 'Manage Layouts' page.

Current Branch: Fairview

Currently Available Layouts

Layout ID	Layout	Select
20	Student Cards	<input type="checkbox"/>

3.1.6.4 Batches

- *Get there:* More > Tools > Patron Card Creator > 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 'Batches' button at the top of your page and choose 'New Batch'

The screenshot shows the top navigation bar with buttons for 'Layouts', 'Templates', 'Profiles', and 'Batches'. The 'Batches' button is highlighted, and a dropdown menu is open showing 'Manage Batches' and 'New Batch'. On the left, there is a sidebar with links: 'Patron Card Creator Home', 'Manage Layouts', 'Manage Templates', 'Manage Profiles', and 'Manage Batches'. Below the navigation, the main heading reads 'Welcome to Koha's Patron Card' followed by a brief description of the tool's purpose.

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.

TIP

Pictures uploaded with this tool should be at least 300dpi which is the minimum quality for a printable image.

In the center of the screen is a simple upload form, simply browse for the file on your computer and give it a name you'll recognize later.

Upload Images

NOTE: Only PNG, GIF, JPEG, XPM formats are supported. Images must be less than 500KB.

Select the file to upload:

Image name:
This will be the name by which you will refer to this image in the patron card layout editor.

Delete Images

No images are currently available.

Once the file is uploaded you will be presented with a confirmation message.

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.

ID	Name	Select
3	Koha Logo	<input type="checkbox"/>
1	nicole	<input type="checkbox"/>

To delete one or multiple of these images, click the checkbox to the right of each image you want to delete and click the 'Delete' button.

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: 

Anonymize checkout history

Verify you want to anonymize patron checkout history

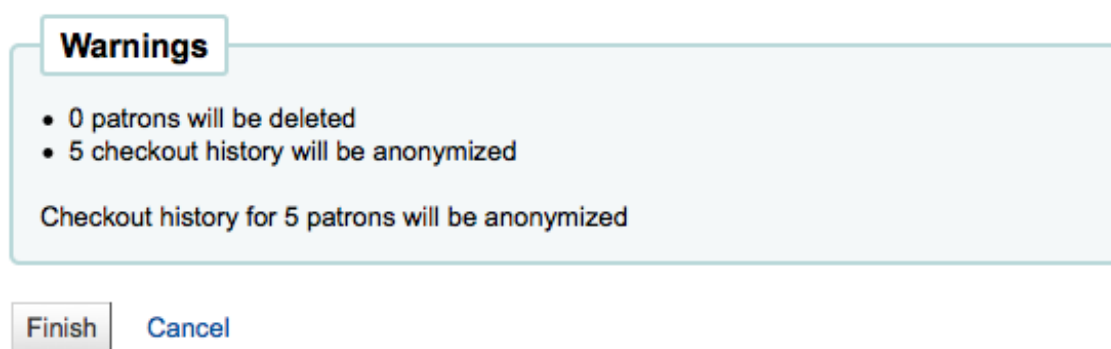
- Permanently delete checkout history older than  (MM/DD/YYYY)

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 with a specific expiration date or category
- Click 'Next'
- A confirmation will appear asking if you're sure this is what you want to happen



- Clicking 'Finish' will delete or anonymize your data

No patron records have been removed
All patrons with checkouts older than 2012-01-01 have been anonymized

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: No file selected.

Or use a patron list

Patron list:

Or list cardnumbers one by one

Card number list
(one cardnumber
per line):

9876543456
9876543457

Once you have the file loaded or the barcodes scanned click 'Continue.' You will be presented with a list of the patrons and the changes you can make.

Batch patrons modification

Select All | Clear All

<input type="checkbox"/>	Surname	Firstname	Branchname	Categorycode	Cardnumber	dateenrolled	dateexpiry	debarred
<input checked="" type="checkbox"/>	Acosta	Edna	Midway	PT	23529001000463	11/23/1990	12/31/2020	
<input checked="" type="checkbox"/>	Acevedo	Henry	Midway	S	23529000035676	09/23/1990	12/31/2020	

Edit Patrons

Checking the box right next the label will disable the entry and delete the values of that field on all selected patrons

Surname

Firstname

Branchname

Category

Sort 1

Sort 2

Date enrolled

Date expiry

Debarred


Debarred comment

Borrower Notes

Attribute

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.

Attribute

Attribute

Student ID

Driver's License

Show Barcode in OPAC

Resident


Home Branch


Once you have made the changes you want, you can click 'Save' and Koha will present you with the changed patron records.

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:


Authorities


About Koha

Suggestions pending approval: **1**

Comments pending approval: **1**

Tags pending approval: **3**

To moderate the tags visit the Tags tool. When first visiting the tool, you will be presented with a list of tags that are pending approval or rejection by a librarian

Tags

Displaying Pending Terms

Select: [All](#) [Pending](#) [None](#)

Showing 1 to 1 of 1 Show entries

 << First << Previous Next >> Last >> Search:

		Status	Term	Weight	Actions	Date
1	<input type="checkbox"/>		"open source"	2	Approve Reject	12/23/2011

Showing 1 to 1 of 1 << First << Previous Next >> Last >>

- To see all of the titles this tag was added to simply click on the term

Home > Tools > Tags > Results for tag *wizards*

- [Approved tags](#)
- [Rejected tags](#)
- [Pending tags](#)
- [All tags](#)

Titles tagged with the term *wizards*

Showing 1 to 11 of 11 Show entries

Search:

Title	
Harry Potter and the Chamber of Secrets - Arthur A. Levine Books, New York : - vii, 288 p. : ill. (black and white) ; 21 cm. -- Year 2"--Spine. Sequel to: Harry Potter and the Sorcerer's Stone. Sequel: Harry Potter and the prisoner of Azkaban.	Tagged with: wizards (11)
Harry Potter and the deathly hallows - Arthur A. Levine Books, New York, NY : Scholastic, 2007. -- Sequel to: Harry Potter and the Half-Blood Prince.	Tagged with: magic (10), wizards (11)

– From this list of titles you can remove a tag without outright rejecting it from being used in the future by clicking the 'Remove tag' button to the right of the title.

- To approve a tag, you can either click the 'Approve' button in line with the term, or check all terms you want to approve and click 'Approve' below the table.
- To reject a tag, you can either click the 'Reject' button in line with the term, or check all terms you want to approve and click 'Reject' below the table.

Once a tag has been approved or rejected it will be moved to the appropriate list of tags. A summary of all tags will appear on the right of the screen.

Terms summary

Approved: 26
 Rejected: 1
 Pending: 1
 Total: 28

Even though a tag is approved or rejected, it can still be moved to another list. When viewing approved tags each tag has the option to reject:

Tags

Displaying Approved Terms

Select: [All](#) [Pending](#) [None](#)

Showing 1 to 20 of 26		Show <input type="text" value="20"/> entries	<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>	Search: <input type="text"/>		
	Status	Term	Weight	Actions	Reviewer	Date
1	<input type="checkbox"/> ✓	wizards	11	<input type="button" value="Approved"/> <input type="button" value="Reject"/>	Engard, Nicole	02/26/2011
2	<input type="checkbox"/> ✓	magic	10	<input type="button" value="Approved"/> <input type="button" value="Reject"/>	Engard, Nicole	02/26/2011
3	<input type="checkbox"/> ✓	open	7	<input type="button" value="Approved"/> <input type="button" value="Reject"/>	Engard, Nicole	12/05/2011
4	<input type="checkbox"/> ✓	web development	7	<input type="button" value="Approved"/> <input type="button" value="Reject"/>	Engard, Nicole	02/19/2011
5	<input type="checkbox"/> ✓	wizard	6	<input type="button" value="Approved"/> <input type="button" value="Reject"/>	Engard, Nicole	09/06/2011
6	<input type="checkbox"/> ✓	dictionary	5	<input type="button" value="Approved"/> <input type="button" value="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

Check lists

Enter a word or phrase to check against approved/rejected lists:

crap is neither permitted nor prohibited!

Finally you can find tags by using the filters on the left.

Filters

Term

Status

Reviewer

Date: from

(MM/DD/YYYY)

...to

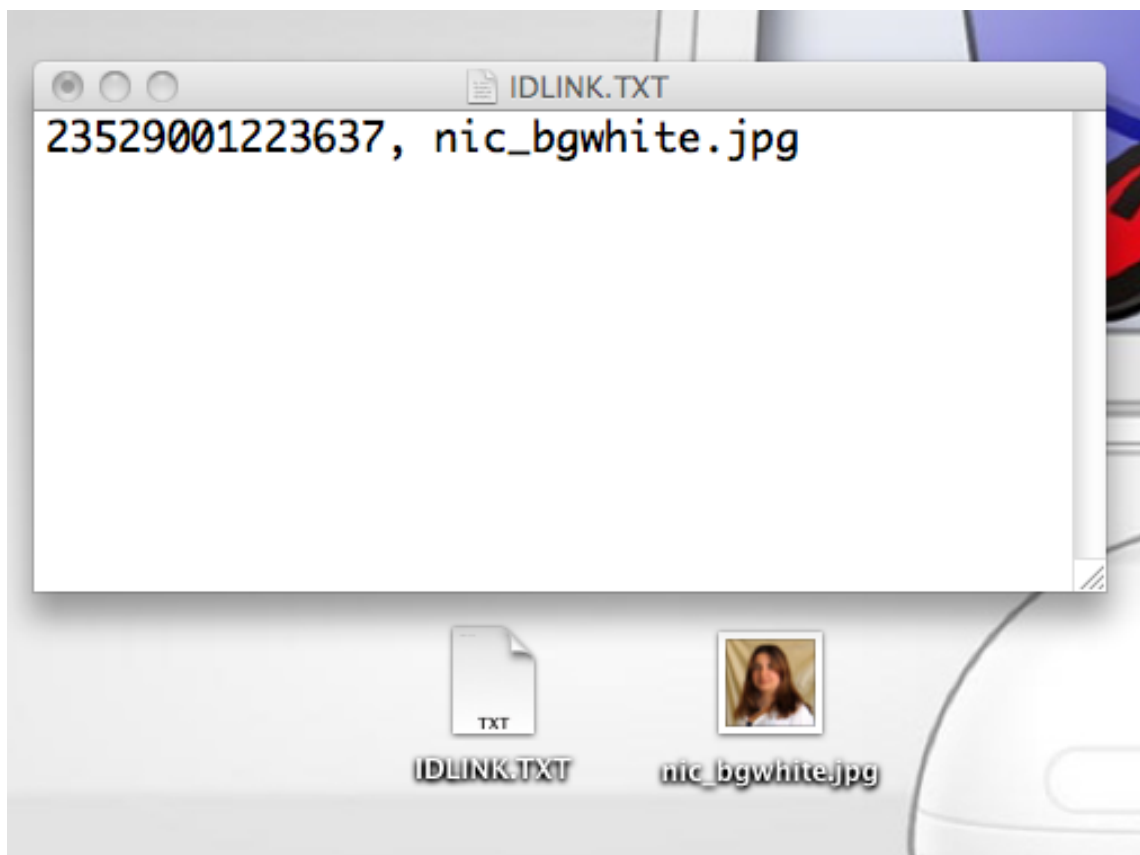
(MM/DD/YYYY)

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

Upload Patron Images

NOTE: Only PNG, GIF, JPEG, XPM formats are supported.

zip file

image file

Select the file to upload:

Enter patron cardnumber:

[Cancel](#)

- For a single image, simply point to the image file and enter the patron card number
- For multiple images, choose to upload a zip file
- After uploading you will be presented with a confirmation

Patron Image(s) Successfully Uploaded

- Unpacking completed
- 1 directorie(s) scanned.
- 1 directorie(s) processed.
- 1 image(s) moved into the database:
- nic_bgwhite.jpg - Cardnumber:
23529001223637 imported successfully.

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.

3.2 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.

Batch item modification

Use a file

Barcode file:

Item number file:

File: No file selected.

Or scan items one by one

Barcode list (one barcode per line):

100001

100004

100005

Use default values

Populate fields with default values from default framework

From the tool you can choose to upload a file of barcodes or item ids, or you can scan items one by one into the box below the upload tool. You can also decide the items edited should be populated with the default values you have defined in your **default framework**.

Once you have your file uploaded or the barcodes listed you can click 'Continue.'

Batch item modification


Select all | Clear all | Clear on loan

Showhide columns: Show all columns Hide all columns Withdrawn status Source of classification or shelving scheme Damaged status Not for loan Collection code Permanent location Current location Shelving location Date acquired Total Checkouts Total Renewals Full call number Barcode Date last seen Date last checked out Cost, replacement price Price effective from Koha item type

	Title	Withdrawn status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Total Checkouts	Total Renewals	Full call number	Barcode	Date last seen	Date last checked out	Cost, replacement price	Price effective from	Koha item type
<input checked="" type="checkbox"/>	The tenth circle /, by Picoult, Jodi,		lcc			Fiction	Nicole's Library	Nicole's Library	Living Room	2011-02-18	5	7	PS3566.I372 T46 2006b	100001	2013-07-22	2012-06-19	15.00	2011-02-18	Books
<input checked="" type="checkbox"/>	Handle with care ., by Picoult, Jodi,		lcc				Nicole's Library	Nicole's Library		2011-02-18	4	3	PS3566.I372 H36 2009	100004	2013-11-14	2013-11-14	27.95	2011-02-18	Books
<input checked="" type="checkbox"/>	House rules ., by Picoult, Jodi,		lcc				Nicole's Library	Nicole's Library		2011-02-18	2		PS3566.I372 H68 2010	100005	0000-00-00	2013-08-13	28.00	2011-02-18	Books

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.

TIP



To uncheck all items that are currently checked out you can click the 'Clear on loan' link at the top of the form.

Using the edit form you can choose which fields to make edits to. By checking the checkbox to the right of each field you can clear the values in that field for the records you are modifying.

Edit Items

Checking the box right next the subfield label will disable the entry and delete the subfield on all selected items. Leave fields blank to make no change.

0 - Withdrawn status

2 - Source of classification or shelving scheme

3 - Materials specified (bound volume or other part)

4 - Damaged status

5 - Use restrictions

7 - Not for loan

8 - Collection code

a - Permanent location

b - Current location

c - Shelving location

d - Date acquired ...

e - Source of acquisition

f - Coded location qualifier

g - Cost, normal purchase price

h - Serial Enumeration / chronology

j - Shelving control number

o - Full call number

t - Copy number

u - Uniform Resource Identifier

v - Cost, replacement price

w - Price effective from

x - Non-public note

y - Koha item type *Required*

z - Public note

Once you have made you changes you will be presented with the resulting items.

Batch item modification results

2 item(s) modified (with 2 fields modified)

Show/hide columns: Show all columns Hide all columns Withdrawn status Source of classification or shelving scheme Damaged status Not for loan Collection code Permanent location Current location Shelving location Date acquired Total Checkouts Total Renewals Full call number Barcode Date last seen Date last checked out Cost, replacement price Price effective from Koha item type

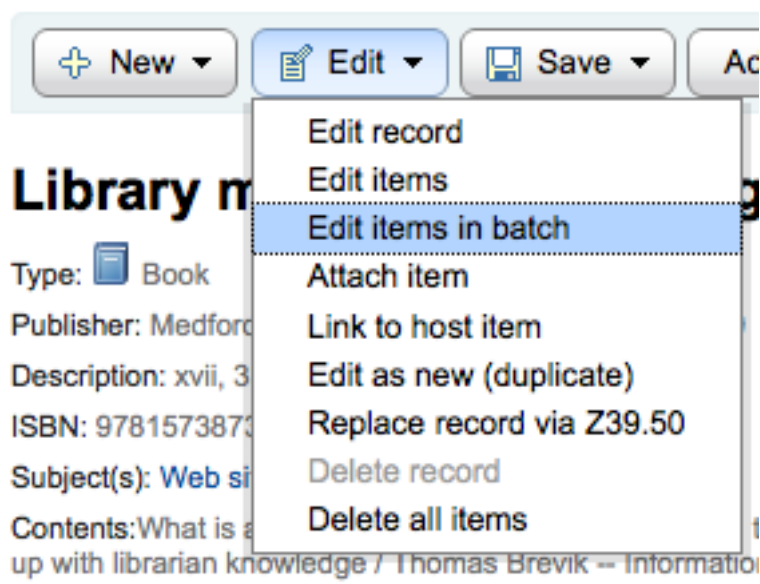
Title	Withdrawn status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Total Checkouts	Total Renewals	Full call number	Barcode	Date last seen	Date last checked out	Cost, replacement price	Price effective from	Koha item type
The tenth circle /, by Picout, Jodi,		lcc			Fiction	Nicole's Library	Nicole's Library	Living Room	2011-02-18	5	7	PS3566.I372 T46 2006b	100001	2013-07-22	2012-06-19	15.00	2011-02-18	Books
Handle with care /, by Picout, Jodi,		lcc			Fiction	Nicole's Library	Nicole's Library		2011-02-18	4	3	PS3566.I372 H36 2009	100004	2013-11-14	2013-11-14	27.95	2011-02-18	Books
House rules /, by Picout, Jodi,		lcc			Fiction	Nicole's Library	Nicole's Library		2011-02-18	2		PS3566.I372 H68 2010	100005	0000-00-00	2013-08-13	28.00	2011-02-18	Books

Done

TIP



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: 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

Once you have your file uploaded or the barcodes scanned you can click 'Continue.'

You will be presented with a confirmation screen. From here you can uncheck the items you don't want to delete and decide if Koha should delete the bib record if the last item is being deleted before clicking 'Delete selected items.' If you'd like you can delete the bibliographic record if you're deleting the last item by clicking the checkbox next to 'Delete records if no items remain'.

Batch item deletion

Select All | Clear All

Show/hide columns: Show all columns Hide all columns Withdrawn status Source of classification or shelving scheme Damaged status Not for loan Collection code Permanent location Current location Shelving location Date acquired Total Checkouts Full call number

Barcode Date last seen Date last checked out Cost, replacement price Price effective from Koha item type

Title	Withdrawn status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Total Checkouts	Full call number	Barcode	Date last seen	Date last checked out	Cost, replacement price	Price effective from	Koha item type
<input checked="" type="checkbox"/> Library mashups :		lcc			Library & Information Science	Nicole's Library	Nicole's Library		2011-09-27		2674.75.W67 L52 2009	2345043243	2011-09-27			2011-09-27	Books
<input checked="" type="checkbox"/> Library mashups :	Withdrawn	lcc			Library & Information Science	Nicole's Library	Nicole's Library	Office	2011-04-30	1	2674.75.W67 L52 2009	47627257	2012-05-05	2012-05-05	39.95	2011-04-30	Books

This will delete the selected items.

Delete records if no items remain.

If your file (or list of scanned barcodes) has more than 1000 barcodes, Koha will be unable to present you with a list of the items. You will still be able to delete them, but not able to choose which items

specifically to delete or delete the biblio records.

Batch item deletion

Too many items (1500) to display individually.

This will delete all the items.



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.

Batch item deletion results

0 item(s) deleted.

1 item(s) could not be deleted:

Itemnumber	Barcode	Reason
5502	323122	Item is checked out

[Return to batch item deletion](#)

If the items can be deleted they will be and you will be presented with a confirmation of your deletion.

Batch item deletion results

2 item(s) deleted.

[Return to batch item deletion](#)

3.2.3 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.

3.2.3.1 Export Bibliographic Records

At the top of the screen you need to pick what data you're exporting. If you're exporting bibliographic records with or without the holdings information you want to click the 'Export bibliographic records' tab.

- Fill in the form in order to limit your export to a specific range (all fields are optional)

Export bibliographic records
Export authority records

Note : The items are exported by this tool unless specified.

Select records to export

From biblio number:

To biblio number:


Item type:


Library:

From item call number:

To item call number:

Accession date (inclusive):

Start date: 

End date: 

- Choose to limit your export by any one or more of the following options
 - * Limit to a bib number range
 - * Limit to a specific item type

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
- * Limit to a call number range
- * Limit to an acquisition date range
- Next choose what to skip when exporting

Options

Don't export items

Remove non-local items

Don't export fields separate by a blank. (e.g., 100a 200 606)

- * By default items will be exported, if you would like to only export bibliographic data, check the 'Don't export items' box

- * To limit your export only to items from the library you're logged in as (if you leave the 'Library' field set to 'All') or to the library you selected above check the 'Remove non-local items' box
 - * You can also choose what fields you don't want to export. This can be handy if you're sharing your data, you can remove all local fields before sending your data to another library
- Finally choose the file type and file name

Output format

File format:

File name:

- * Choose to export your data in marc or marcxml format
 - * Choose the name you want your file to save as
- Click 'Export bibliographic records'

3.2.3.2 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)

Select records to export

From authid:

To authid:

Authority type:

- Next choose fields that you would like to exclude from the export separated by a space (no commas)

Options

Don't export fields separate by a blank. (e.g., 100a 200 606)

- If you'd like to exclude all subfields of the 200 for example just enter 200
 - If you'd like to exclude a specific subfield enter it beside the field value 100a will exclude just the subfield 'a' of the 100
- Finally choose the file type and file name

Output format

File format: marc ▾

File name: marc
xml

Export authority records

- Choose to export your data in marc or marcxml format
- Choose the name you want your file to save as
- Click 'Export authority records'

3.2.4 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 First Previous 1 2 3 4 5 Next Last Search:

Seen	Barcode	Library	Title	Status	Lost	Damaged	Unseen since	Problems
<input type="checkbox"/>		NIC [AC]	A Budget of Paradoxes, Volume I De Morgan, Augustus, 1806-1871				08/02/2012	
<input type="checkbox"/>		NIC [AC]	A Budget of Paradoxes, Volume II De Morgan, Augustus, 1806-1871				08/02/2012	
<input type="checkbox"/>		NIC [AC]	An Account of Egypt Herodotus, 480? BC-420? BC				08/02/2012	
<input type="checkbox"/>		NIC [AC]	Atlantic Classics				08/02/2012	
<input type="checkbox"/>		[AC]	Complete Project Gutenberg John Galsworthy Works Galsworthy, John, 1867-1933				08/02/2012	
<input type="checkbox"/>		[AC]	Complete Project Gutenberg Oliver Wendell Holmes, Sr. Works Holmes, Oliver Wendell, 1809-1894				08/02/2012	
<input type="checkbox"/>		NIC [AC]	Critical Miscellanies (Vol. 3 of 3) Essay 1: On Popular Culture Morley, John, 1838-1923				08/02/2012	
<input type="checkbox"/>		NIC [AC]	Essays on Education and Kindred Subjects Everyman's Library Spencer, Herbert, 1820-1903				08/02/2012	
<input type="checkbox"/>		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:

Set inventory date to:
(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.'

3.2.5 Label Creator

- *Get there:* More > Tools > Catalog > Label Creator

The Label Creator allow you to use layouts and templates which you design to print a nearly unlimited variety of labels including barcodes. Here are some of the features of the Label Creator module:

- Customize label layouts

- Design custom label templates for printed labels
- Build and manage batches of labels
- Export single or multiple batches
- Export single or multiple labels from within a batch
- Export label data in one of three formats:
 - PDF - Readable by any standard PDF reader, making labels printable directly on a printer
 - CSV - Export label data after your chosen layout is applied allowing labels to be imported in to a variety of applications
 - XML - Included as an alternate export format

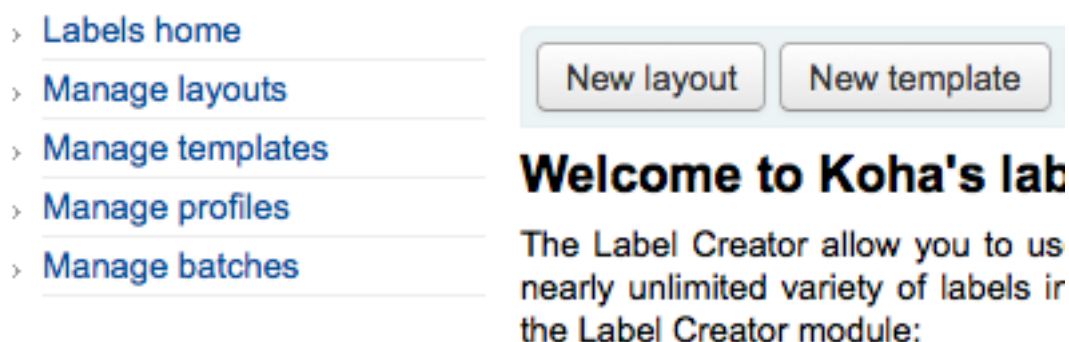
At the top of each screen within the Label Creator, you will see a toolbar allowing quick access to relevant functions. The menu to the left of each screen also allows easy access to the different sections of the Label Creator. The bread crumb trail near the top of each screen will give specific indication as to where you are within the Label Creator module and allow quick navigation to previously traversed sections. And finally, you can find more detailed information on each section of the Label Creator by clicking the online help link at the upper left-hand corner of every page.

3.2.5.1 Templates

- *Get there:* More > Tools > Label Creator > 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.

3.2.5.1.1 Add a Template To add a new template, you want to click on the 'New template' button at the top of the Label Creator.

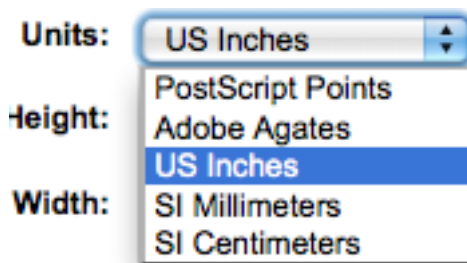


Using the form that appears you can define the template for your sheet of labels or cards.

Edit label template


<p>Template ID: 7</p> <p>Template code: <input type="text" value="Demco WS14942260"/></p> <p>Template description: <input 1.5"="" for="" four="" label="" lines="" of="" setup="" spine="" text"="" to="" type="text" up="" value="1" x="" =""/></p> <p>Units: <input type="text" value="US Inches"/></p> <p>Page height: <input type="text" value="11"/> in</p> <p>Page width: <input type="text" value="8.5"/> in</p> <p>Label width: <input type="text" value="1.5"/> in</p> <p>Label height: <input type="text" value="1"/> in</p>	<p>Top page margin: <input type="text" value="0.5"/> in</p> <p>Left page margin: <input type="text" value="0.25"/> in</p> <p>Top text margin: <input type="text" value="0.236"/> in</p> <p>Left text margin: <input type="text" value="0"/> in</p> <p>Number of columns: <input type="text" value="5"/></p> <p>Number of rows: <input type="text" value="10"/></p> <p>Gap between columns: <input type="text" value="0.0625"/> in</p> <p>Gap between rows: <input type="text" value="0"/> in</p> <p>Profile: <input type="text" value="No Profile/N/A"/></p>
---	---

- Template ID will be automatically generated after saving your template, this is simply a system generated unique id
- Template Code should be something you can use to identify your template on a list of templates
- You can use the Template Description to add additional information about the template
- The Units pull down is used to define what measurement scale you’re going to be using for the template. This should probably match the unit of measurement used on the template description provided by the product vendor.



- The measurements, number of columns and number of rows can be found on the vendor product packaging or website.

IMPORTANT

 If you do not supply a left text margin in the template, a 3/16" (13.5 point) left text margin will apply by default.

- A profile is a set of "adjustments" applied to a given template just prior to printing which compensates for anomalies unique and peculiar to a given printer (to which the profile is assigned).
 - Before picking a profile try printing some sample labels so that you can easily define a profile that is right for your printer/template combination.
 - After finding any anomalies in the printed document, **create a profile** and assign it to the template.

After saving, your templates will appear on the 'Manage Templates' page.

Currently Available Templates

Template ID	Template Name	Description	Select
1	Avery 5160 1 x 2-5/8	3 columns, 10 rows of labels	<input type="checkbox"/>
7	Demco WS14942260	1" X 1.5" Spine Label Setup for up to four lines of text	<input type="checkbox"/>
12	Demco WS14942260	1" X 1.5" Spine Label Setup for five lines of text	<input type="checkbox"/>
22	DEFAULT TEMPLATE 01	Default description	<input type="checkbox"/>

Edit

Delete

3.2.5.2 Profiles

- *Get there:* More > Tools > Label Creator > Profiles

A profile is a set of "adjustments" applied to a given **template** just prior to printing which compensates for anomalies unique and peculiar to a given printer (to which the profile is assigned). This means if you set a template up and then print a sample set of data and find that the items are not all aligned the same on each label, you need to set up a profile for each printer to make up for the differences in printing styles, such as the shifting of text to the left, right, top or bottom.

If your labels are printing just the way you want, you will not need a profile.

3.2.5.2.1 Add a Profile To add a new profile, you want to click on the 'New profile' button at the top of the Label Creator tool.

› [Labels home](#)

› [Manage layouts](#)

› [Manage templates](#)

› [Manage profiles](#)

› [Manage batches](#)

New layout

New template

New profile

Welcome to Koha's label creator

The Label Creator allow you to use layouts and to create nearly unlimited variety of labels including barcode

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: pt

Vertical: pt

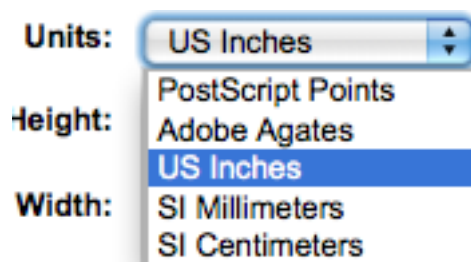
Creep:

Horizontal: pt

Vertical: 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 Profiles' page.

Currently Available Profiles

Profile ID	Printer Name	Paper Bin	Template Name	Select
1	Library Laser	Bypass	Avery 5160 1 x 2-5/8	<input type="checkbox"/>
11	Library Laser	Tray 1	Avery 5160 1 x 2-5/8	<input type="checkbox"/>
17	HP 450	1		<input type="checkbox"/>

Once you have saved your new profile, you can return to the list of templates and choose to edit the template that this profile is for.

3.2.5.3 Layouts

- *Get there:* More > Tools > Label Creator > Layouts

A layout is used to define the fields you want to appear on your labels.

3.2.5.3.1 Add a Layout To add a new layout, you want to click on the 'New layout' button at the top of the Label Creator tool.

The screenshot shows a navigation menu on the left with the following items:

- > Labels home
- > Manage layouts
- > Manage templates
- > Manage profiles
- > Manage batches

 To the right of the menu is a button labeled 'New layout'. Below the button, the text 'Welcome to' and 'The Label Creat' is visible, followed by 'nearly unlimited'.

Using the form that appears you can create a profile to fix any problems with your template.

Create Label layout

Layout name

Choose barcode type (encoding)

Choose layout type

Bibliographic data to print

Choose order of text fields to print

1 title 2 author 3 isbn 4 issn 5 itemtype 6 barcode 7 itemcallnumber

List Fields

Draw guide boxes

Split call numbers

Text justification

Font

Font size

- The name of your layout can be anything you’d like to help you identify it later.
- If this is a barcode label you’ll want to choose the encoding (Code 39 is the most common)
- The layout type can be any combination of bibliographic information and/or barcode. For example a spine label would just be Biblio whereas a label for your circulation staff to use to checkout the book would probably be Biblio/Barcode.
- The Bibliographic Data to Print includes any of the data fields that may be mapped to your MARC frameworks. You can choose from the preset list of fields or you can click on ‘List Fields’ and enter your own data. In ‘List Fields’, you can specify MARC subfields as a 4-character tag-subfield string: (ie. 254a for the title field), You can also enclose a whitespace-separated list of fields to concatenate on one line in double quotes. (ie. "099a 099b" or "itemcallnumber barcode"). The fields available are from the database tables list below. Finally you could add in static text strings in single-quote (ie. ‘Some static text here.’)
 - You can use the schema viewer (<http://schema.koha-community.org>) with the following tables to find field names to use:
 - * Currently all fields in the following tables are used: items, biblioitems, biblio, branches

Bibliographic data to print

Choose order of text fields to print

List Fields

Data fields

Enter a comma separated list of fields to print. You may include any Koha field or MARC subfield.
See online help for advanced options
ex: barcode, itemcallnumber, title, "050a 050b", 300a

- 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.

3.2.5.4 Batches

- *Get there:* More > Tools > Label Creator > Batches

Batches are made up of the barcodes you would like to print. Once in this tool you can search for the item records you would like to print out labels for.

3.2.5.4.1 Add a Batch Batches can be created in one of two ways. The first is to click the 'Create Label Batch' link on the '[Staged MARC Management](#)' page:

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
16	bib-1181.utf8		staged	2010-02-24 07:33:34	1	1 (Create Label Batch)	Clean
15	bib-1181.utf8		imported	2010-02-24 06:39:05	1	0	Clean
14	bib-16001.utf8		imported	2010-02-11 23:26:51	1	1 (Create Label Batch)	Clean
13	koha.mrc		cleaned	2010-02-05 03:55:12	198	394 (Create Label Batch)	
12	bib-1.mrc		imported	2009-12-15 14:30:53	1	8 (Create Label Batch)	Clean
11	bib-1.mrc		imported	2009-12-15 01:11:20	1	8 (Create Label Batch)	Clean

The other is to choose to create a new batch from the label creator tool

> [Labels home](#)

> [Manage layouts](#)

> [Manage templates](#)

> [Manage profiles](#)

> [Manage batches](#)

New layout

New template

New profile

New batch

Welcome to Koha's label creator module

The Label Creator allow you to use layouts and templates which nearly unlimited variety of labels including barcodes. Here are so the Label Creator module:

You will be brought to an empty batch with an 'Add item(s)' button at the top of the page and a box to scan barcodes in to.

Add item(s)

Current library: Nicole's Library

Add by barcode(s):
One barcode per line.
Leave empty to add
via item search.


**There are no items in
Batch 11 yet**


Add items by barcode using the
text area above or leave empty to
add via item search.

You can either scan barcodes in to the box provided and click the 'Add item(s)' button or you can click the 'Add item(s)' button with the barcodes box empty. Clicking 'Add item(s)' with nothing in the barcodes box will open a search window for you to find the items you want to add to the batch.

Search for items to add to Batch 11

Title

Added on or after date 
(MM/DD/YYYY)

Added on or before date 
(MM/DD/YYYY)

[Cancel](#)

From the search results, click the check box next to the items you want to add to the batch and click the 'Add checked' button. You can also add items one by one by clicking the 'Add' link to the left of each item.

Search results

Results through of 16

[Select All](#) [Clear All](#) |

The ancient library of Qumr^an and modern Biblical studies /

by Cross, Frank Moore. [], G. Duckworth, London : 1958, 196 p. :

Add Item	Call Number	Accession Date	Barcode	Select
Add	BM175.Q6 C7 1958	2010-02-12	CPL10022223	<input type="checkbox"/>

The slow learner.

by Abraham, Willard. [], Center for Applied Research in Education, New York : 1964, x, 113 p.

The Grolier library of women's biographies.

[], Grolier Educational, Danbury, Conn. : 1998, 10 v. :, ISBN: 0717291243, Includes index.

Add Item	Call Number	Accession Date	Barcode	Select
Add	NA	2009-12-27	2566543245678	<input type="checkbox"/>
Add	NA	2009-12-27	2566543245679	<input type="checkbox"/>
Add	NA	2009-12-27	2566543245680	<input type="checkbox"/>

Once you have added all of the items click the 'Done' button. The resulting page will list the items you have selected.

Current Branch: Fairview

Items in batch number 2

Label Number	Summary	Item Type	Barcode	Select
1	Cotton Mather Wendell, Barrett			<input type="checkbox"/>
2	The years Woolf, Virginia			<input type="checkbox"/>
3	The years Woolf, Virginia		33203000669201	<input type="checkbox"/>
4	The Grolier library of women's biographies N/A		2566543245678	<input type="checkbox"/>
5	The Grolier library of women's biographies N/A		2566543245679	<input type="checkbox"/>

To print your labels, click the 'Export Batch' button. To print only some of the labels, click the 'Export Item(s)' button. Either way you will be presented with a confirmation screen where you can choose your template and layout.

1 batch(es) to export.

Select a template to be applied: Avery 5160 | 1 x 2-5/8

Select a layout to be applied: Label Test

Enter starting label number: 1

Export
Cancel

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.

3.2.6 Quick Spine Label Creator

- *Get there:* More > Tools > Catalog > Quick Spine Label Creator

TIP

This tool does not use the label layouts or templates, it simply prints a spine label in the first spot on the label sheet.



- Define the fields you want to print on the spine label in the [SpineLabelFormat](#) system preference
- Format your label printing by editing `spinelabel.css` found in `koha-tmpl/intranet-tmpl/prog/en/css/`

To use this tool you simply need the barcode for the book you'd like to print the spine label for.

Quick spine label creator

Barcode:

View spine label

3.2.7 MARC modification templates

The MARC Modification Templates system gives Koha users the power to make alterations to MARC records automatically while staging MARC records for import.

This tool is useful for altering MARC records from various vendors/sources work with your MARC framework. The system essentially allows one to create a basic script using actions to Copy, Move, Add, Update and Delete fields.

Start by adding a new template (a template can be made up of one or more actions) by entering a name and clicking 'Create template'.

Next you can add actions to the template by filling in the Action box. For example if you're loading in a batch of files from your EBook vendor you might want to add the biblio item type of EBOOK to the

MARC modification templates

Template:

There are no defined actions for this template.

Add a new action

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 existence of another field. For example you might want to add the call number to the item record if it's not already there.

Add a new action

Copy 1st field(s) 090 a to field 952 o Regex

if field 952 o doesn't exist

Description: Move call number to item record if there isn't one there already

Add action

- Choose 'Copy'
- Decide if you want to copy the first occurrence or all occurrences of the field
- Enter the field 090 (or other biblio call number field) and subfield a to copy
- Enter the 952 field and o subfield to copy to
- Choose 'if'
- Enter the 952 field and o subfield
- Choose "doesn't exist"
- Provide a description so you can identify this action later
- Click 'Add action'

The Copy & Move actions also support Regular Expressions, which can be used to automatically modify field values during the copy/move. An example would be to strip out the '\$' character in field 020\$c.

Add a new action

Copy All field(s) 020 c to field 020 c Regex s/\\$/ / regex replacement / ig

if field 020 c matches m/\\$/ / Regex

Description: Remove the \$ (dollar sign) from the 020\$c field

Add action

- Choose 'Copy'
- Decide if you want to copy the first occurrence or all occurrences of the field
- Enter the field 020 and subfield c to copy
- Enter the 020 field and c subfield to copy to
- Check the 'Regex' box and enter your regular expression (in this case s/\\$/)
- Choose 'if'
- Enter the 020 field and c subfield
- Choose "matches"
- Check the 'Regex' box and enter your regular expression (in this case m/\\$/)

- Provide a description so you can identify this action later
- Click 'Add action'

TIP



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 `__CURRENT-DATE__` which is replaced with the current date in ISO format (YYYY-MM-DD).

Once your actions are saved you can view them at the top of the screen. Actions can be moved around using the arrows to the left of them.

MARC modification templates

Template:

Actions for this template

Change order	Order	Action	Description		
	1	Update field 942\$c with value <i>EBOOK</i>	Add the biblio item type	Edit	Delete

Add a new action

field(s)

Description:

Depending on your actions the order may be very important. For example you don't want to delete a field before you copy it to another field.

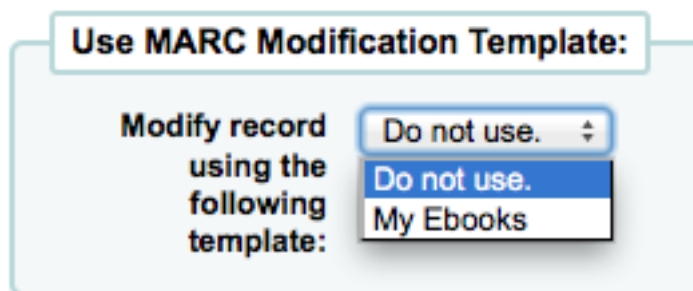
To add another template you can either start fresh or click the 'Duplicate current template' checkbox to create a copy of an existing template to start with.

Create a new template

Name:

 Duplicate current template

Once your template is saved you will be able to pick it when using the [Stage MARC Records for Import](#) tool.

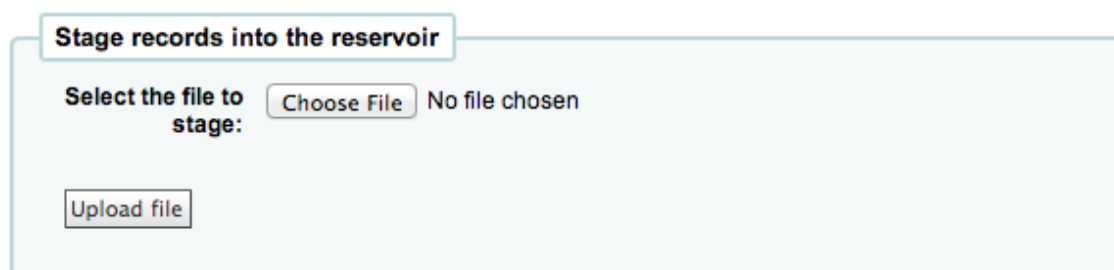


3.2.8 Stage MARC Records for Import

- *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

Stage records into the reservoir

Select the file to stage: No file chosen

Upload progress: 100%

Comments about this file:

Record type:

Character encoding:

Use MARC Modification Template:

Modify record using the following template:

Look for existing records in catalog?

Record matching rule:

Action if matching record found:

Action if no match is found:

Check for embedded item record data?

Yes
 No

How to process items:

- 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

Character encoding: UTF-8 (Default) ▾
 UTF-8 (Default)
 MARC 8
 ISO 5426
 ISO 6937
 ISO 8859-1
 EUC-KR

for existing record matching rule:

- Choose if you would like to use a **MARC Modification Template** to alter the data you're about to import

Use MARC Modification Template:

Modify record using the following template: Do not use. ▾
 Do not use.
 My Ebooks

- Choose whether or not you want to look for matching records

Look for existing records in catalog?

Record matching rule: Do not look for matching records ▾

Action if matching record found: Replace existing record with incoming record ▾

Action if no match is found: Add incoming record ▾

* You can set up **record matching rules** through the administration area

Record matching rule: Do not look for matching records ▾
 Do not look for matching records
 ISBN (020\$a)
 ISSN (022\$a)

Action if matching record found:

- 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)

Check for embedded item record data?

Yes
 No

How to process items: Always add items ▾
 Always add items
 Add items only if matching bib was found
 Add items only if no matching bib was found
 Replace items if matching bib was found (only for existing items)
 Ignore items

Stage for import

- * From here you can choose to always add items regardless of matching status, add them only if a matching bib was found, add items only if there was no matching bib record, replace items if a matching bib was found (The match will look at the itemnumbers and barcodes to match on for items. Itemnumbers take precedence over barcodes), or Ignore items and not add them.

- Click 'Stage for import'
- You will be presented with a confirmation of your MARC import

Stage MARC Records For Import

MARC Staging results :

- 200 records in file
 - 0 records not staged because of MARC error
 - 200 records staged
 - 116 records with at least one match in catalog per matching rule "ISBN"
 - 263 item records found and staged
 - [Manage staged records](#)
 - [Back](#)
- To complete the process continue to the [Managed Staged MARC Records Tool](#)

3.2.9 Staged MARC Record Management

- *Get there:* More > Tools > Catalog > Staged MARC Record Management

Once you have **staged** your records for import you can complete the import using this tool.

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
9	koha.mrc		staged	2009-11-24 08:40:48	200	263 (Create Label Batch)	<input type="button" value="Clean"/>
8	bib-684.marc8		imported	2009-10-20 13:16:17	1	1 (Create Label Batch)	<input type="button" value="Clean"/>
7	koha(3).mrc		cleaned	2009-08-18 16:18:26	94	125 (Create Label Batch)	
6	koha(2).mrc		cleaned	2009-08-18 16:15:57	43	43 (Create Label Batch)	
5	koha.mrc		cleaned	2009-08-18 16:14:33	1000	1113 (Create Label Batch)	

- From the list of staged records, click on the file name that you want to finish importing
 - You will note that records that have already been imported will say so under 'Status'
- A summary of your import will appear along with the option to change your matching rules

File name: bib-3.utf8

Comments:

Staged: 2011-03-17 21:21:55

Status: staged

Matching rule applied:

Action if matching record found:

Action if no match found:

Item processing:

- Below the summary is the option to import the batch of bib records using a specific framework

Add new bibliographic records into this framework:

#	Citation	Status	Match?
1	Korean-English Dictionary	staged	no_match

Default

Books, Booklets, Workbooks

Audio Cassettes, CDs

Kits

Fast Add Framework

Binders

Models

CD-ROMs, DVD-ROMs, General Online Resources

DVDs, VHS

Serials

- Choosing a framework other than 'Default' isn't necessary, but it's helpful for running reports and having the right bib level item type selected on import.

- Below the framework selection there will be a list of the records that will be imported

Page 1 2 3 4 5 6 7 8

#	Citation	Status	Match?	Bib
1	Library mashups : (9781573873727)	staged	auto_match	
	Matches biblio 2 (score = 1000): Library mashups :			
2	Library mashups : (9781573873727)	staged	auto_match	
	Matches biblio 2 (score = 1000): Library mashups :			
3	Winslow Homer watercolors, Hoopes, Donelson F.	staged	no_match	
4	The encyclopedia of the biological sciences, Gray, Peter.	staged	no_match	
5	Year of fear; Mechanicus, Philip.	staged	no_match	
6	A history of medical psychology Zilboorg, Gregory.	staged	no_match	
7	Understanding the Old Testament Anderson, Bernhard W.	staged	no_match	
8	Philo of Alexandria : Sandmel, Samuel. (0195025148)	staged	auto_match	
	Matches biblio 8 (score = 1000): Philo of Alexandria : Sandmel, Samuel.			
9	The changing metropolis, McKeown, James E. (0395112311)	staged	auto_match	
	Matches biblio 9 (score = 1000): The changing metropolis, McKeown, James E.			
10	Becoming partners; marriage and its alternatives, Rogers, Carl R.	staged	no_match	

- Review your summary before completing your import to make sure that your matching rule worked and that the records appear as you expect them to

- Click 'Import into catalog' to complete the import

Completed import of records

Number of records added	84
Number of records updated	0
Number of records ignored	116
Number of items added	260
Number of items ignored because of duplicate barcode	3

Page 1 2 3 4 5 6 7 8

#	Citation	Status	Match?	Bib
1	Library mashups : (9781573873727)	ignored	match_applied	2
	Matches biblio 2 (score = 1000): Library mashups :			
2	Library mashups : (9781573873727)	ignored	match_applied	2
	Matches biblio 2 (score = 1000): Library mashups :			
3	Winslow Homer watercolors, Hoopes, Donelson F.	imported	no_match	1272
4	The encyclopedia of the biological sciences, Gray, Peter.	imported	no_match	1273
5	Year of fear; Mechanicus, Philip.	imported	no_match	1274
6	A history of medical psychology Zilboorg, Gregory.	imported	no_match	1275
7	Understanding the Old Testament Anderson, Bernhard W.	imported	no_match	1276

- Once your import is complete a link to the new bib records will appear to the right of each title that was imported
- You can also undo your import by clicking the 'Undo import into catalog' button

Records imported using this tool remain in the 'reservoir' until they are cleaned. These items will appear when searching the catalog from the [Cataloging](#) tool:

+ New Record ▾

1 result(s) found in catalog, [3 result\(s\) found in reservoir](#)

Title	Location	preview		
Embracing insanity : Pavlicek, Russell C. - 0672319896 - SAMS, - 2000 ; Indianapolis, IN : - ix, 176 p. ; ; 23 cm.		MARC Card	Edit biblio	Add holdings

Biblios in reservoir

Title	ISBN	Date	Edition	coming from	preview	
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio

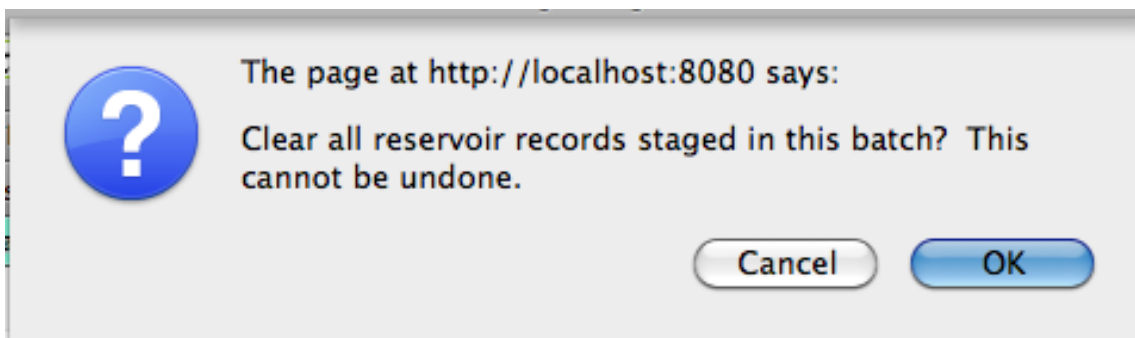
To clean items out of the 'reservoir':

- Visit the main screen of the Manage Staged MARC Records tool

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
9	koha.mrc		staged	2009-11-24 08:40:48	200	263 (Create Label Batch)	<input type="button" value="Clean"/>
8	bib-684.marc8		imported	2009-10-20 13:16:17	1	1 (Create Label Batch)	<input type="button" value="Clean"/>
7	koha(3).mrc		cleaned	2009-08-18 16:18:26	94	125 (Create Label Batch)	
6	koha(2).mrc		cleaned	2009-08-18 16:15:57	43	43 (Create Label Batch)	
5	koha.mrc		cleaned	2009-08-18 16:14:33	1000	1113 (Create Label Batch)	

- 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'

3.2.10 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.

TIP



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).

TIP

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.



The screenshot shows a library catalog record for "Pittsburgh marine finishes." by Pittsburgh Plate Glass Company Industrial Paint Division. The record includes a cover image, a title, author, type, description, content type, other title, subject(s), contents, summary, and tags. Below the record, there are tabs for "Holdings (1)", "Title notes", and "Images". The "Images" tab is active, showing a grid of four images: the book cover, a photograph of a ship, a collage of interior finishes, and a color chart titled "SEMI-GLOSS INTERIOR GRABBLE".

If uploading a single image:

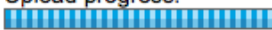
- Visit the tool and click the 'Browse' button to browse to the image on your local machine.

Upload Local Cover Image

- Select an image file or ZIP file to upload. The tool will accept images in GIF, JPEG, PNG, and XPM formats.

Upload images

Select the file to upload:

Upload progress:

 100%

File type

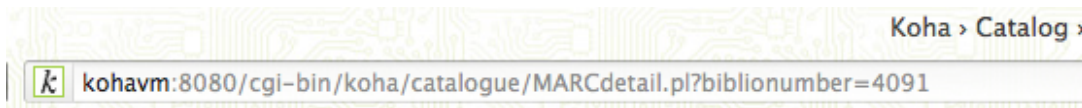
ZIP file
 Image file

Enter cover biblionumber:

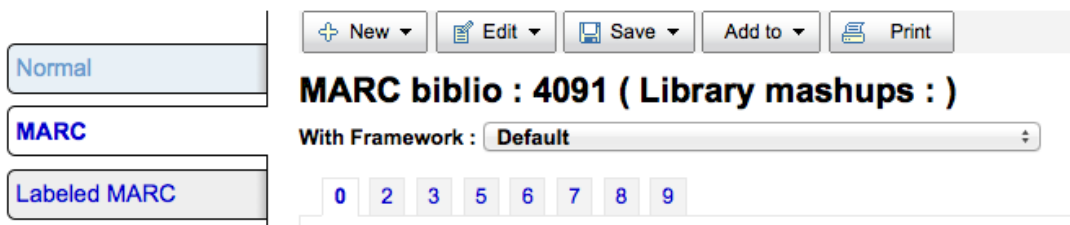
Options

Replace existing covers

- Click 'Upload file'
- Choose 'Image file' under the 'File type' section
- Enter the biblionumber for the record you're attaching this image to. This is not the same as the barcode, this is the system generated number assigned by Koha.
 - Find the biblionumber by looking at the end of the URL in the address bar when on the detail page



- or by clicking on the MARC tab on the detail page in the staff client

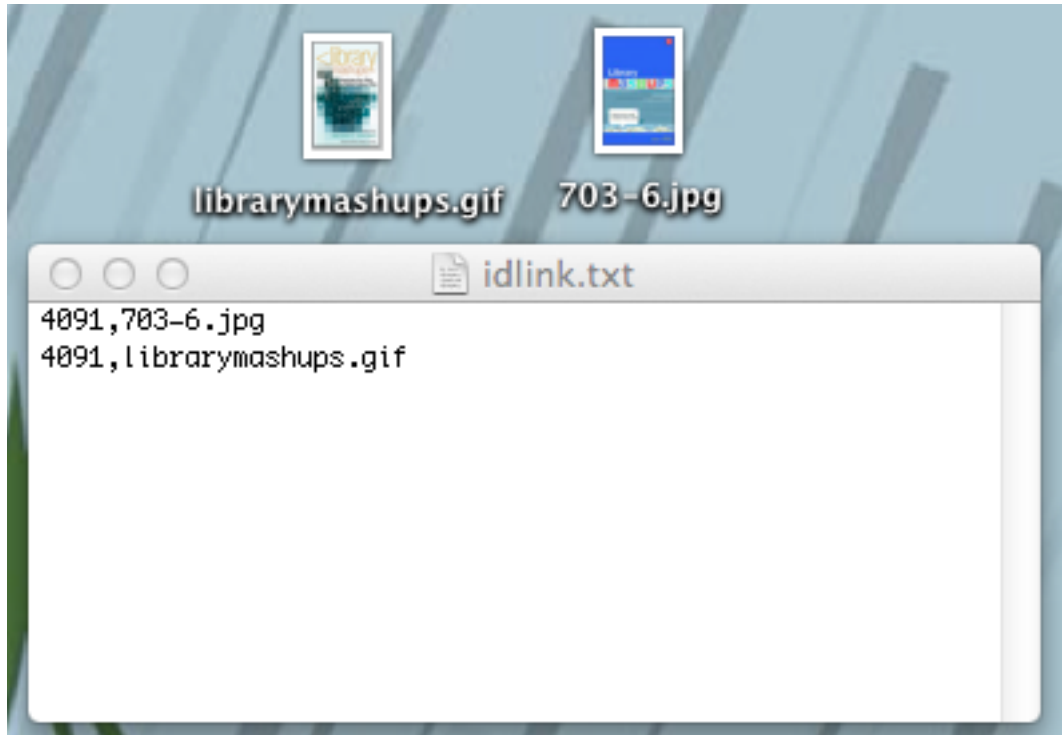


- If you would like to replace any other cover images you may have uploaded in the past, check the 'Replace existing covers' box under the 'Options' section
- Click 'Process images'
- You will be presented with a summary of the upload and a link to the record you have just added the image to

If uploading a batch of images at once you will need to prepare a ZIP file first.

- Enter in 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 :

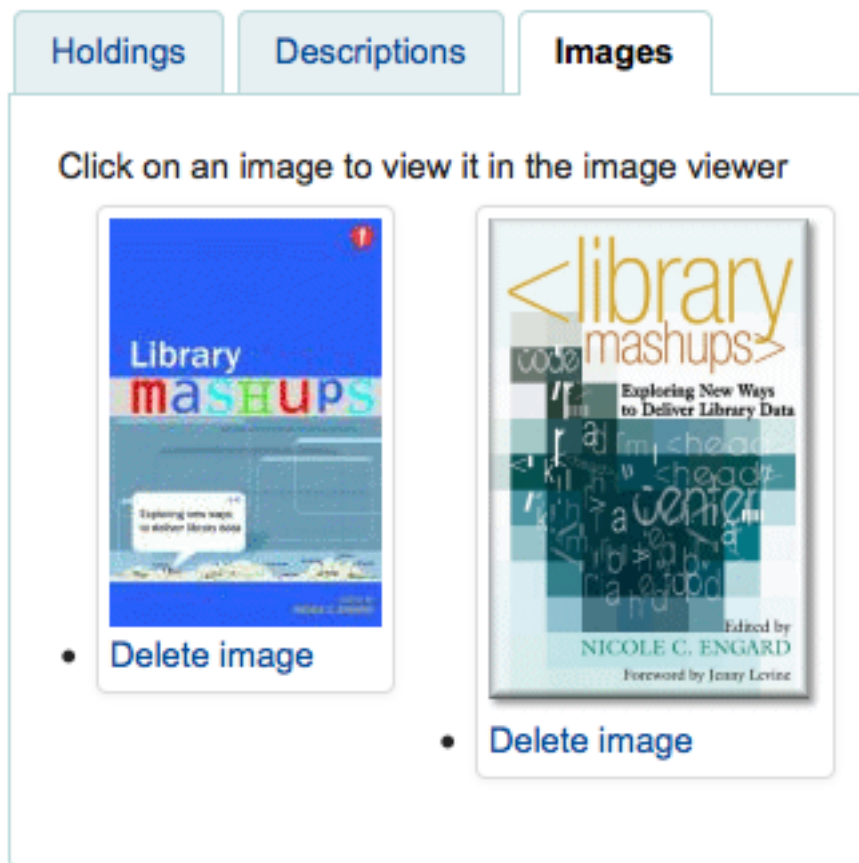
- 2 images found
- [View final record](#)
- [Back](#)

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:

Calendar information

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

Copy holidays to:

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. [?]

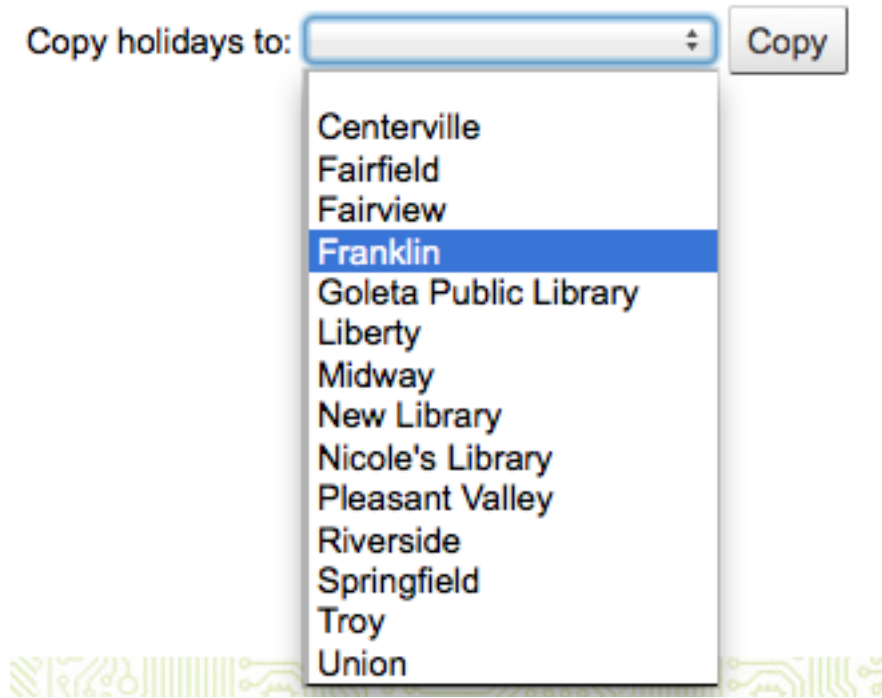
Holidays on a range. [?]

Holidays repeated yearly on a range. [?]

Copy to all libraries. [?]

- 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

Nicole's Library Calendar

Define the holidays for:

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

Hints

- Search in the calendar the day you want to set as holiday.
- Click the date to add or edit a holiday.
- Enter a title and description for the holiday.
- Specify how the holiday should repeat.
- Click Save to finish.

Key

Working day Unique holiday Holiday repeating weekly
 Holiday repeating yearly Holiday exception

Weekly - Repeatable Holidays

Day of week	Title	Description
Sundays	Sunday Closed	

Yearly - Repeatable Holidays

Month/Day	Title	Description
10/31	Halloween	

Unique Holidays

Date	Title	Description
12/31/2011		
01/01/2012		
01/02/2012		
11/22/2012	Thanksgiving	

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:

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 [?]

- 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:

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 [?]**

- In the form above you will note that there is now an option to 'Generate an exception for this repeated 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

- Delete this holiday. [?]**
 This will delete this holiday rule. If it is a repeatable holiday, this option checks for possible exceptions. If an exception exists, this option will remove the exception and set the date to a regular holiday.

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 tyou choose MARC then you will need to enter MARC fields

New profile
Edit existing profile

New CSV export profile

Profile name:

Profile type: MARC ▾

Profile description:

CSV separator: Comma (,) ▾

Field separator: Sharp (#) ▾

Subfield separator: Pipe (|) ▾

Encoding: ascii ▾

Profile MARC fields:

You have to define which fields or subfields you want to export, separated by pipes.

You can also use your own headers (instead of the ones from Koha) by prefixing the field number with an header, followed by the equal sign.

Example: Personal name=200|Entry element=210\$a|300|009

- If tyou choose SQL then you will need to enter SQL database fields

New profile **Edit existing profile**

New CSV export profile

Profile name:

Profile type:

Profile description:

CSV separator:

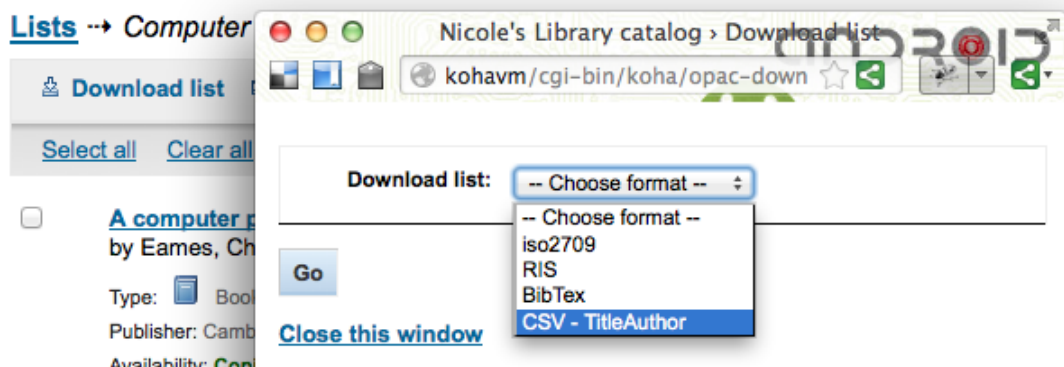
Profile SQL fields:

You have to define which fields you want to export, separated by pipes.

You can also use your own headers (instead of the ones from Koha) by prefixing the field name with a header, followed by the equal sign.

Example: Name=subscription.name|Title=subscription.title|Issue number=serial.serialseq

- The 'Profile name' will appear on the export pull down list when choosing 'Download' from your cart or list



- The 'Profile description' is for your own benefit, but will also appear in the OPAC when patrons download content, so make sure it's clear to your patrons as well
- The 'CSV separator' is the character used to separate values and value groups

TIP

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

A	B
Title	Subject
A computer perspective,	Computers Exhibitions.
Application of computer technology to library processes:	Libraries Automation Outlines, syllabi, etc.
Computer systems in the library;	Libraries Automation.
Computer use;	Electronic data processing Business.#Electronic data processing departments Management.
Digital magnetic tape recording for computer applications	Computer storage devices.#Magnetic recorders and recording.
Introduction to computers and computer science	Electronic data processing.#Electronic digital computers.
Man and the computer	Computers and civilization.#Electronic digital computers.
The computer from Pascal to von Neumann	Computers History.

- 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
 - *

TIP



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.

New profile
Edit existing profile

Modify or delete a CSV export profile

Profile name: -- Choose One --

Profile description: -- Choose One --
TitleAuthor

CSV separator: Colon (:)

Field separator: Colon (:)

Subfield separator: Colon (:)

Encoding: ascii

Profile MARC fields:

Delete selected profile ?

Submit
Cancel

- Choose the profile you would like to edit and alter the necessary fields.
- After submitting your changes you will be presented with a confirmation message at the top of the screen

The CSV profile has been successfully modified.

- To delete a profile, check the 'Delete selected profile' option before clicking 'Submit Query'

Profile MARC fields: Personal name=100|title=245\$a|300

Delete selected profile ?

Submit
Cancel

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

Contents of Compu

|

- iso2709
- RIS
- BibTex
- CSV - TitleAuthor**
- CSV - Subjects

	Title	Author	Date added	
<input type="checkbox"/>	A computer perspective,	Eames, Charles.	03/26/2012	Holds
<input type="checkbox"/>	Application of computer technology to library processes: a syllabus,	Becker, Joseph.	03/26/2012	Holds
<input type="checkbox"/>	Computer systems in the library; a handbook for managers and designers	Swihart, Stanley J.	03/26/2012	Holds

3.3.3 Log Viewer

- *Get there:* More > Tools > Additional Tools > Log Viewer

Actions within the Koha system are tracked in log files. Your **system preferences** can be changed to prevent the logging of different actions. These logs can be viewed using the Log Viewer Tool.

Browse system logs

Librarian:

Module:

- Catalog
- Authorities
- Patrons

Action:

Object:

Info:

Display from:
 (MM/DD/YYYY)

Display to:
 (MM/DD/YYYY)

Output

To screen in the browser:

To a file: **Named:**

Choosing different combinations of menu options will produce the log file for that query.

3 lines found.

Date	Librarian	Module	Action	Object	Info
2012-08-06 10:21:46	34	CIRCULATION	RETURN	34	Item TVSN500009826C
2012-08-06 10:22:08	34	CIRCULATION	RETURN	34	Item TVSN5000180321
2012-08-06 10:22:39	34	CIRCULATION	ISSUE	34	Item TVSN500017286B

You will note that real names do not appear on the log, only identifying numbers. You need to use the identifying numbers when searching the logs as well.

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.

+ New Entry

Display Location: All Filter

	Location	Number	Creation Date	Expiration Date	Title	News
<input type="checkbox"/>	Librarian interface	1	10/29/2007	01/10/2099	Welcome to Koha	Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Katipo Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe. Edit

To add news to either the OPAC, the Staff Client or a Circulation receipt:

- Click 'New Entry'

OPAC and Koha news

Display location: Librarian interface

Title: Librarian interface
Slip
OPAC (en)

Publication date: (MM/DD/YYYY)

Expiration date: (MM/DD/YYYY)

Appear in position:

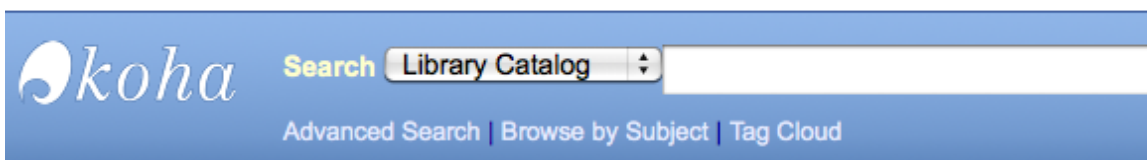
News

Path:

Submit Cancel

- Under 'Display Location' choose whether to put the news on the OPAC, Slip (circulation receipt) or the Librarian (Staff) Interface.
 - Choose a title for your entry
 - Using the publication and expiration date fields you can control how long your item appears
 - '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**

Nicole's Koha Library



Important links here.

Holiday Closing

Reminder – The library will be closed for the holiday this week.
(published on 11/22/2009)

- News in the Staff Client will appear on the far left of the screen

Circulation Patrons Search Cart More ▾

Enter patron card number or partial name:

Check out Check in Search patrons Search the catalog

Home

News

Welcome to Koha

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

Posted on 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

What's Next?

Now that you've installed Koha, what's next? Here are some suggestions:

- [Read Koha Documentation](#)
- [Read/Write to the Koha Wiki](#)
- [Read and Contribute to Discussions](#)
- [Report Koha Bugs](#)
- [Submit Patches to Koha using Git \(Version Control System\)](#)
- [Chat with Koha users and developers](#)

Posted on 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

Circulation

Patrons

Advanced search

Lists

Cataloging

Authorities

Suggestions pending approval: **5**
Comments pending approval: **1**
Tags pending approval: **3**

- News on the circulation receipts will appear below the items that are checked out

Fairview
Checked out to Coda ENGARD
(23529001223643)

Checked Out

Finding statistics online :
Barcode: 10044445
Date due: 12/22/2010

Overdues

Harry Potter and the chamber of secrets.
Barcode: CPL10054445
Date due: 10/02/2010

This book
Barcode: CPL10077667
Date due: 09/30/2010

Britannica book of the year.
Barcode: 10101000000415
Date due: 10/13/2010

News

The library will be closed over the upcoming holidays. Normal library hours will resume on the 2nd of January. Happy Holidays! *Posted on 12/12/2010*

3.3.5 Task Scheduler

- *Get there:* More > Tools > Additional Tools > Task Scheduler


The task scheduler is a way to schedule reports to run whenever you want.

To schedule a task, visit the Task Scheduler and fill in the form

Task Scheduler

Current server time is: Mon Dec 14 09:09:09 2009

Time:

Date: 

Report: isses per branch

Output Format:
 patrons
 bib w/ titles
 branch list
 email list
isses per branch
 zip codes
 non grouped zips
 patrons with fines
 active patrons
 previous month items created
 barcodes

Email:

Jobs already entered

Date/Time	Action	
Mon Dec 14 10:00	EXPORT KOHA_CONF="/home/nengard/koha-dev/etc/koha-conf.xml"; /home/nengard/kohaclone/tools/runreport.pl 5 text nengard@gmail.com	<input type="button" value="Delete"/>

- 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

Jobs already entered

Date/Time	Action	
Mon Dec 14 10:00	EXPORT KOHA_CONF="/home/nengard/koha-dev/etc/koha-conf.xml"; /home/nengard/kohaclone/tools/runreport.pl 5 text nengard@gmail.com	<input type="button" value="Delete"/>

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 [OpacMainUserBlock](#) 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.

Quote editor

IMPORTANT

Both the 'Source' and the 'Text' fields must be filled in in order to save the new quote.




Show entries Search:

ID	Source	Text	Last displayed
1	Indigo Girls	Sometimes I ask to sneak a closer look, skip to the final chapter of the book.	2012-09-20 13:13:50
NA	<input type="text"/>	<input type="text"/>	0000-00-00 00:00:00

Showing 1 to 2 of 2 entries

- 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.

TIP



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.

Show entries Search:

ID	Source	Text	Last displayed
1	<input type="text" value="Indigo Girls"/>	Sometimes I ask to sneak a closer look, skip to the final chapter of the book.	2012-09-20 13:13:50

Showing 1 to 1 of 1 entries

- 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

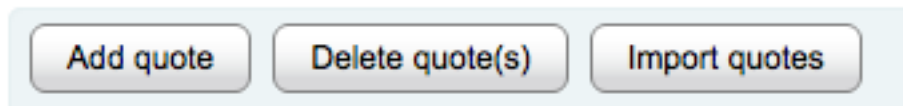
If you'd like you can import a batch of quotes as a CSV file. Your file must contain two columns in the form: "source","text" with no header row.

NOTE



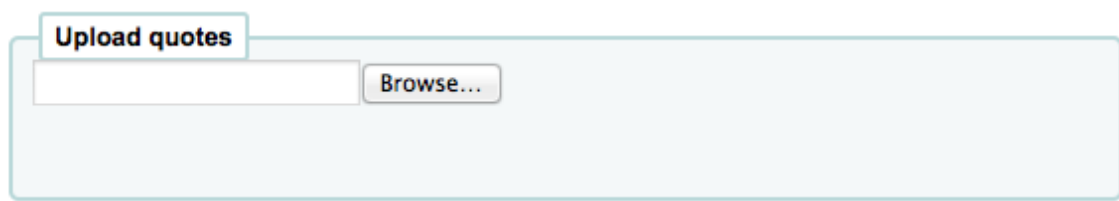
You will be prompted to confirm upload of files larger than 512KB.

- To start the import process click the 'Import quotes' button at the top of the screen



Quote editor

- Once on the import quotes screen you can browse your computer for the file you would like to import



- After selecting the CSV file, click the 'Open' button and the file will be uploaded into a temporary editing table.

Show entries Search:

Number	Source	Quote
1	George Washington	As Mankind becomes more liberal, they will be more apt to allow that all those who conduct themselves as worthy members of the community are equally entitled to the protections of civil government. I hope ever to see America among the foremost nations of justice and liberality.
2	George Washington	The time is now and near at hand which must probably determine whether Americans are to be freemen or slaves; whether they are to have property they can call their own; whether their houses and farms are to be pillaged and destroyed, and themselves consigned to a state of wretchedness from which no human efforts will deliver them. The fate of unborn millions will now depend, under God, on the courage and conduct of this army. Our cruel and unrelenting enemy leaves us no choice but a brave resistance, or the most abject submission. . . . We have, therefore, to resolve to conquer or to die.

- From the listing you can edit either the 'Source' or 'Text' fields by clicking on the desired field. When you are finished editing a field, press the <Enter> key on your keyboard to save the changes.

Show entries Search:

Number	Source	Quote
1	<input type="text" value="George Washingtn"/>	As Mankind becomes more liberal, they will be more apt to allow that all those who conduct themselves as worthy members of the community are equally entitled to the protections of civil government. I hope ever to see America among the foremost nations of justice and liberality.

- You can also delete quotes from this listing before completing the import.
 - Select the quote(s) you desire to delete by clicking on the corresponding quote id.

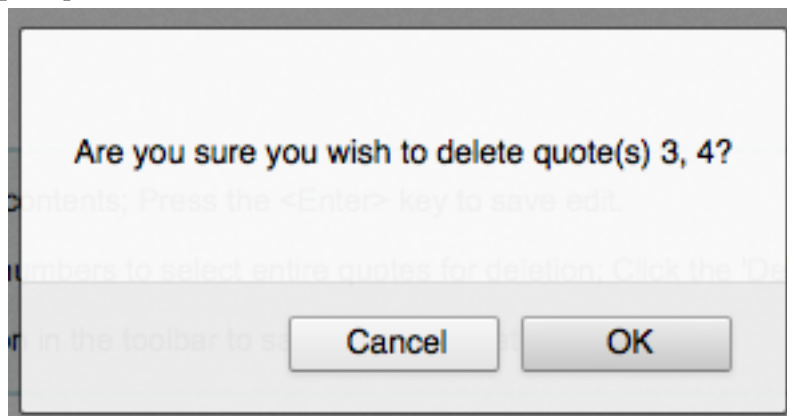
Show entries Search:

Number	Source	Quote
1	George Washington	As Mankind becomes more liberal, they will be more apt to allow that all those who conduct themselves as worthy members of the community are equally entitled to the protections of civil government. I hope ever to see America among the foremost nations of justice and liberality.
2	George Washington	The time is now and near at hand which must probably determine whether Americans are to be freemen or slaves; whether they are to have property they can call their own; whether their houses and farms are to be pillaged and destroyed, and themselves consigned to a state of wretchedness from which no human efforts will deliver them. The fate of unborn millions will now depend, under God, on the courage and conduct of this army. Our cruel and unrelenting enemy leaves us no choice but a brave resistance, or the most abject submission. . . . We have, therefore, to resolve to conquer or to die.
3	George Washington	I conceive that a knowledge of books is the basis on which all other knowledge rests.
4	George Washington	Precedents are dangerous things; let the reins of government then be braced and held with a steady hand, and every violation of the Constitution be reprehended: If defective let it be amended, but not suffered to be trampled upon whilst it has an existence.

- Once quote selection is finished, simply click the 'Delete quote(s)' key.



- You will be prompted to confirm the deletion.



- After confirming the deletion, the list will update and the quote(s) will no longer appear.
- Once you are satisfied with the quotes, click the 'Save quotes' button in the toolbar at the top and the quotes will be saved.



Chapter 4

Patrons

Before importing and/or adding patrons be sure to set up your [patron categories](#).

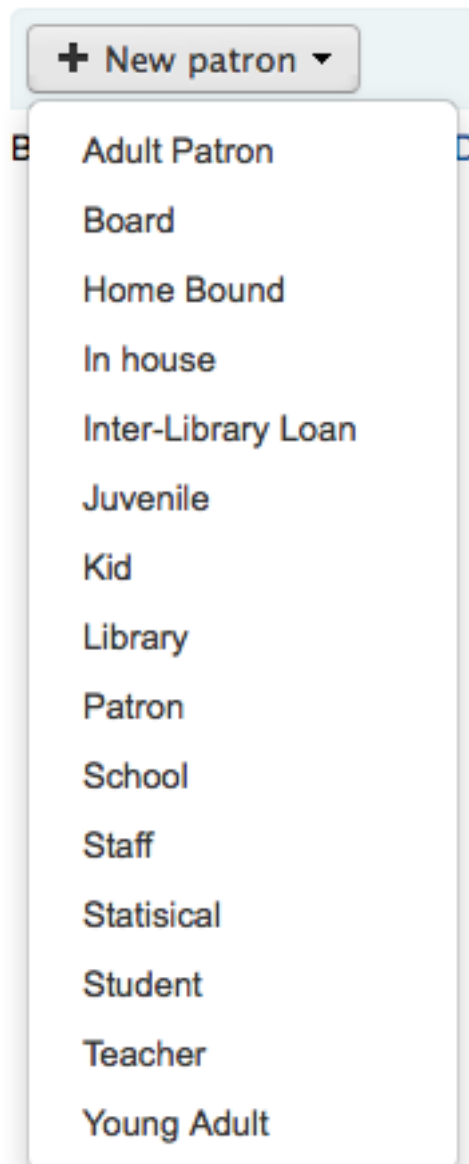
4.1 Add a new patron

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 **BorrowerUnwantedField** system preference.
- First enter the identifying information regarding your patron

Add Patron patron

Patron identity

Salutation:

Surname: *Required*

First name: *Required*

Date of birth:
 (MM/DD/YYYY)

Initials:

Other name:

Female Male N/A

- Required fields are defined in the **BorrowerMandatoryField** system preference

- Salutation is populated by the **BorrowersTitles** system preference
- Next enter the contact information

Main address

Address:

Address 2:

City: or choose

State:

Zip/Postal code:

Contact

Primary phone:
Shows on transit slips

Secondary phone:

Other phone:

Primary email:
Shows on transit slips

Secondary email:

Fax:

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

Guarantor information

Surname:

First name:

Relationship:

Search for guarantor

Ordered by

- 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

Guarantor information

Organization name:

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

Alternate address

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

Email:

Contact note:

Alternate contact

Surname:

First name:

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

– An alternate contact could be a parent or guardian. It can also be used in academic settings to store the patron’s home address.

- The library management section includes values that are used within the library

Library management

Card number: *Required*

Library:

Category:

Sort 1:

Sort 2:

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

*

NOTE



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

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

Library set-up

Registration date:
(MM/DD/YYYY)

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

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

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

OPAC/Staff login

Username:

Password:
Minimum password length: 4

Confirm password:

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

Checking out to Ronnie Ballard (23529000139858)

Enter item barcode:

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

Attention:**Notes:**

Has permission to check out books for students.

Messages:

[Add a new message](#)

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

- If you have set **additional patron attributes** up, these will appear next

Additional attributes and identifiers

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

- Finally, if you have **EnhancedMessagingPreferences** set to 'allow,' you can choose the messaging preferences for this patron.

Patron messaging preferences

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

[Save](#) [Cancel](#)

– 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 Checkin** : A notice that lists all the of the items the patron has just checked in

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

TIP



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



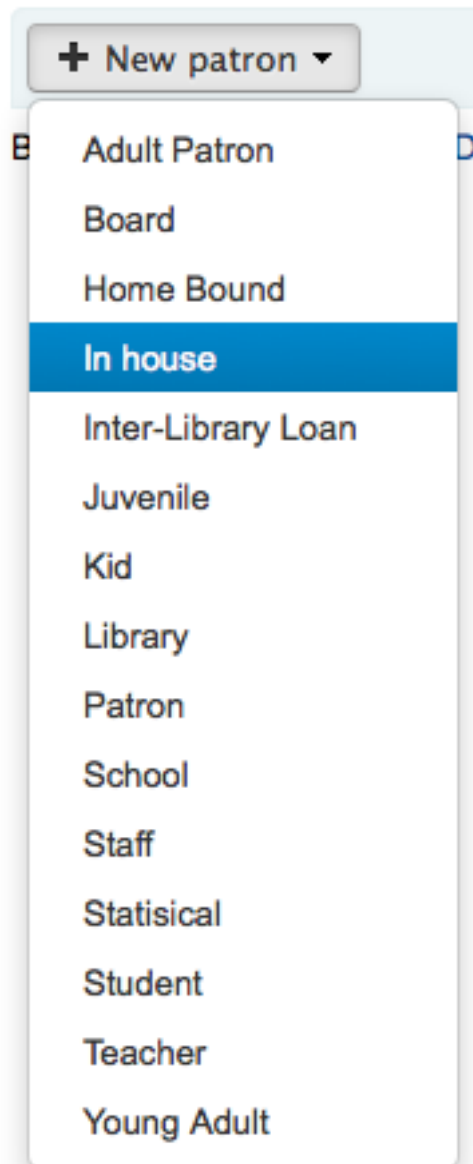
Remember to assign your staff secure usernames and passwords since these will be used to log into the staff client.

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



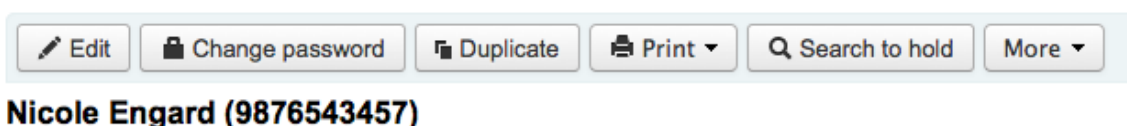
Next, follow the steps put forth in the '[Add a new Patron](#)' section of this manual. Since this patron is not a real person, simply fill in the required fields, the correct library and nothing else.

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



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


Duplicate Staff patron Nicole Engard

Patron identity


Salutation:

Surname: *Required*

First name: *Required*

Date of birth: 
(MM/DD/YYYY)

TIP



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.

Coda Engard
(2453500001955)



123 Library Street
Philadelphia, PA 19101
555.555.1232
coda@gmail.com ...
Category: Child (CH)
Home library: Main Library

Check out

Details

Fines

Routing lists

[Edit](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [More](#)

Coda Engard (2453500001955)

123 Library Street
Philadelphia PA 19101

Primary phone: 555.555.1232

Primary email: coda@gmail.com

Guarantor: [Engard, Nicole](#)

[Edit](#)

Upload Patron Image

Coda Engard does not currently have an image available. To import an image for Engard, enter the name of an image file to upload.

Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:

No file selected.

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.

Coda Engard
(9876543452)



123 My Street
Philadelphia, PA 19101
555.111.2345
engard@gmail.com ...
Category: Juvenile (J)
Home library: Fairfield

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.



Nicole Engard (9876543457)

- 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

Change username and/or password for Ronnie Ballard

New username:

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

Confirm new password:

- 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:

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

Patron account flags

Gone no address: Yes No

Lost card: Yes No

Patron restrictions

Patron is currently unrestricted.

[Add manual restriction](#)

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

Cannot Check Out!

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

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

Cannot Check Out!

› **Lost: Patron's card is lost**

- If you would like to bar a patron from the library you can add a manual restriction

Patron restrictions

Patron is currently unrestricted.

Add manual restriction

Comment:

Expiration: [Clear date](#)

[Cancel](#)

*

TIP

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

Cannot check out!

> **Restricted:** Patron's account is restricted until 12/31/2013 with the explanation: *Barred for a month*

[View restrictions](#)



- 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'

More ▼

- Renew patron
- Set permissions
- Delete
- Update child to adult patron
- Export today's checked in barcodes

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

Choose Adult category

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

[Cancel](#)

4.7 Manging 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**

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

Approve Deny Ignore


Field	From	To
Alternate address		123
Other names		NCE
State		PA
City	Philadelphia, PA	Philadelphia

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.

4.8 Patron Permissions

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

IMPORTANT

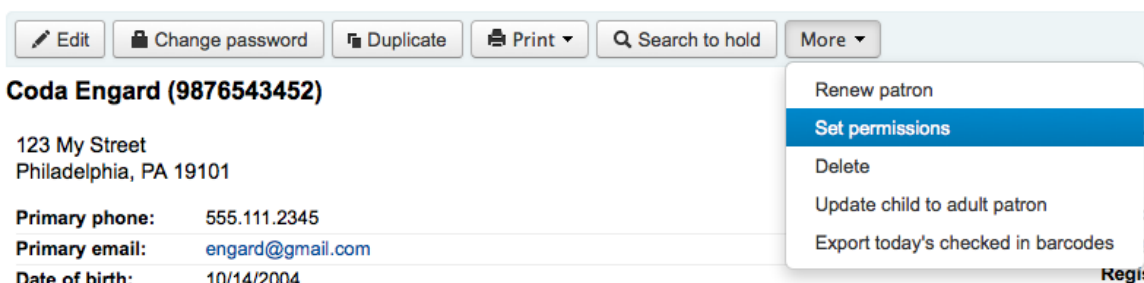


In order for a staff member to log into the staff interface they must have (at the very least) 'catalogue' permissions which allow them to view the staff interface.

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



Coda Engard (9876543452)

123 My Street
Philadelphia, PA 19101

Primary phone: 555.111.2345
Primary email: engard@gmail.com
Date of birth: 10/14/2004

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

Set permissions for Engard, Nicole


- (*superlibrarian*) Access to all librarian functions
- (+) (*circulate*) Check out and check in items
- (*catalogue*) **Required for staff login.** Staff access, allows viewing of catalogue in staff client.
- (+) (*parameters*) Manage Koha system settings (Administration panel)
- (*borrowers*) Add or modify patrons
- (*permissions*) Set user permissions
- (+) (*reserveforothers*) Place and modify holds for patrons
- (*borrow*) Borrow books
- (+) (*editcatalogue*) Edit Catalog (Modify bibliographic/holdings data)
- (*updatecharges*) Manage patrons fines and fees
- (+) (*acquisition*) Acquisition and/or suggestion management
- (*management*) Set library management parameters (deprecated)
- (+) (*tools*) Use all tools (expand for granular tools permissions)
- (*editauthorities*) Edit Authorities
- (+) (*serials*) Manage serial subscriptions
- (+) (*reports*) Allow access to the reports module
- (*staffaccess*) Allow staff members to modify permissions for other staff members
- (+) (*plugins*) Koha plugins

4.8.2 Patron Permissions Defined

- superlibrarian
 - Access to all librarian functions

*

TIP




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

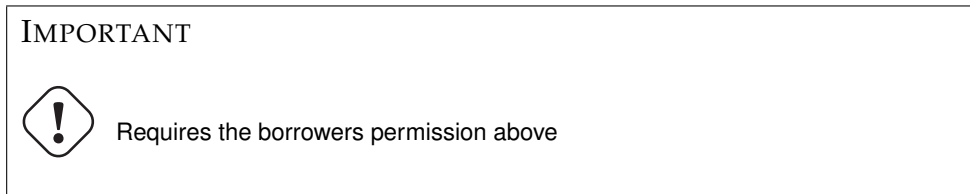
- parameters
 - Manage Koha system systems (Administration panel)
 - This section can be expanded ([Learn more](#))
- borrowers
 - Add or modify patrons
- permissions
 - Set user permissions
- reserveforothers
 - Place and modify holds for patrons
 - This section can be expanded ([Learn more](#))
- borrow
 - Borrow books
- editcatalogue
 - Edit Catalog (Modify bibliographic/hodings data)
 - This section can be expanded ([Learn more](#))
- updatecharges
 - Manage patrons fines and fees
- acquisition
 - Acquisition and/or suggestion management
 - This section can be expanded ([Learn more](#))
- management
 - Set library management paraments (deprecated)

*

<p>IMPORTANT</p>  <p>This permission level no longer controls anything.</p>
--

- 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
 -



- plugins
 - Koha plugins
 - 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 the ability to override renewals
- 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:

- 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
- fast_cataloging
 - Fast cataloging
 - The ability to catalog using only the [Fast Add Framework](#) found on the [Circulation](#) page

4.8.2.5 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 them)
- 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

4.8.2.6 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)

4.8.2.7 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**
- 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`
 - Managed staged MARC records, including completing and reversing imports
 - Access to the [Manage Staged MARC Records Tool](#)
- `moderate_comments`
 - Moderate patron comments
 - Access to the [Comments Tool](#)
- `moderate_tags`
 - Moderate patron tags
 - Access to the [Tags 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_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
- `view_system_logs`
 - Browse the system logs
 - Access to the [Log Viewer Tool](#)

4.8.2.8 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

4.8.2.9 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

4.9 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.

4.9.2 Details

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

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

- A child patron will list their Guarantor

Beau Engard (123454)

123 My Street
Philadelphia, PA 19101

Home: 555.111.2345

Email (home): beau@gmail.com

Initials:

Date of birth:

Gender: Male

Guarantor: [Engard, Brian](#)

[Edit](#)

- On the Guarantor's record, all children and/or professionals will be listed

Brian Engard (12345678675432)

123 My Street
Philadelphia, PA 19101

Home: 555.111.2345

Email (home): brian@gmail.com

Initials:

Date of birth:

Gender: Male

Guarantees:

[Coda Engard](#)

[Beau 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.

2 Checkout(s) Relatives' Checkouts Fines & Charges 7 Hold(s) Restrictions

Due date	Title	Item type	Checked out on	Checked out from	Call no.	Charge	Price	Renew select all none	Check in select all none	
12/27/2013 Long Overdue (Lost)	Audiovisual librarianship; the crusade for media unity (1946-1969)., by Shores, Louis, ; Libraries Unlimited, 31619000163907	Books	06/19/2012	Nicole's Library	Z717 .S47	0.00	15.00	1 <input type="checkbox"/>	<input type="checkbox"/>	
12/31/2013	Learning Perl I, by Schwartz, Randal L. ; O'Reilly, 3160778947	Books	12/17/2013	Nicole's Library	QA76.73.P22 S37 2008	0.00	34.95	0 On Hold	On hold	
Totals:							62.00	49.95	Renewal due date: <input type="text"/> Forgive fines on return: <input type="checkbox"/>	

Override renewal limit: Renew or return checked items Renew all

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

2 Checkout(s) Relatives' Checkouts Fines & Charges 7 Hold(s) Restrictions

Due date	Title	Item type	Checked out on	Checked out from	Call no.	Charge	Price	Patron
12/28/2012 Long Overdue (Lost)	Library mashups : exploring new ways to deliver library data / ; Information Today, Inc., 323122	Books	11/28/2012	Nicole's Library	Z674.75.W67 L52 2009	0.00		Brian Engard (9876543453)
11/02/2013	An education : the screenplay /, by Hornby, Nick. ; Riverhead Books, 72387022	Books	10/23/2013	Nicole's Library		0.00		Brian Engard (9876543453)

The Restrictions tab will show for all patrons. If the patron has no restrictions you will see that on the tab.

2 Checkout(s) Relatives' Checkouts Fines & Charges 7 Hold(s) Restrictions

Patron is currently unrestricted.
[Add manual restriction](#)

If the patron has restrictions on their account the tab will show the number and the description.

2 Checkout(s) Relatives' Checkouts Fines & Charges 7 Hold(s) 1 Restrictions

Type	Comment	Expiration	
Manual	always late with books	Indefinite	Remove

[Add manual restriction](#)

Using the 'Add manual restriction' button you can add a restriction to the patron record from here.

Add manual restriction

Comment:

Expiration: [Clear date](#)

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.

Account [Pay fines](#) [Create manual invoice](#) [Create manual credit](#)

Date	Description of charges	Note	Amount	Outstanding		Print
09/11/2012	Payment,thanks View item The academic library and the net gen student :		-5.40	0.00	Reverse	Print
09/10/2012	The academic library and the net gen student : 07/18/2012 23:59 View item The academic library and the net gen student :		5.40	0.00		Print
09/10/2012	100 questions every home seller should ask : 07/16/2012 23:59 View item 100 questions every home seller should ask :		5.60	5.60		Print
09/10/2012	UContent : 04/18/2012 23:59 View item UContent :		12.40	12.40		Print
09/10/2012	Harry Potter and the sorcerer's stone / 06/14/2012 23:59 View item Harry Potter and the sorcerer's stone /		8.80	8.80		Print

The table will show you the following columns:

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

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.

Account Pay fines Create manual invoice Create manual credit

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

Pay amount Write off all Pay selected [Cancel](#)

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

Account Pay fines Create manual invoice Create manual credit

Pay an individual fine

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

Collect from patron:

Confirm [Cancel](#)

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

Account Pay fines Create manual invoice Create manual credit

Pay an individual fine

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

Collect from patron:

Confirm Cancel

- Click "Confirm"
 - The fine will be updated to show the original Amount, and the current Amount Outstanding
- Pay an amount towards all fines
 - Click the "Pay Amount" button
 - Enter the amount you are collecting from the patron in "Collect from Patron." The sum of all fines is shown in "Total Amount Outstanding"

Account Pay fines Create manual invoice Create manual credit

Pay an amount toward all fines

Total amount outstanding: 2.75

Collect from patron:

Confirm Cancel

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

Account Pay fines Create manual invoice Create manual credit

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

Pay amount Write off all Pay selected Cancel

- Enter an amount to pay towards the fines.

Account Pay fines Create manual invoice Create manual credit

Pay an amount toward selected fines

Total amount outstanding: 1.40

Collect from patron:

Confirm Cancel

- Click "Confirm"

- The fine totals will be updated with the payment applied to the oldest selected fines first.

• Writeoff a single fine

- Click "Writeoff" next to the fine you wish to writeoff.

- The fine will be removed from outstanding fines, and displayed as written off.

• Writeoff All fines

- Click the "Writeoff All" button

- All fines will be removed from outstanding fines, and displayed as written off.

• If you accidentally mark and item as paid, you can reverse that line item by clicking 'Reverse' to the right of the line

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

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

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

4.9.3.3 Creating Manual Invoices

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

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

Manual Invoice

Type:

Barcode:


Description:

Amount: Example: 5.00

[Cancel](#)

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

IMPORTANT

 The value set as the Authorized Value for the MANUAL_INV authorized value category will appear as the Description and the Authorized Value Description will be used as the amount.

- If the fee is associated with an item you can enter its barcode so that the line item shows a link to that item
- The description field is where you will enter the description of the charge
- In the amount field, do not enter currency symbols, only numbers and decimals

4.9.3.4 Creating Manual Credits

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

Account
Pay fines
Create Manual Invoice
Create Manual Credit

Manual Credit

Credit Type: Credit

Barcode: Credit
Forgiven

Description:

Amount: Example: 5.00

Add Credit
Cancel

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

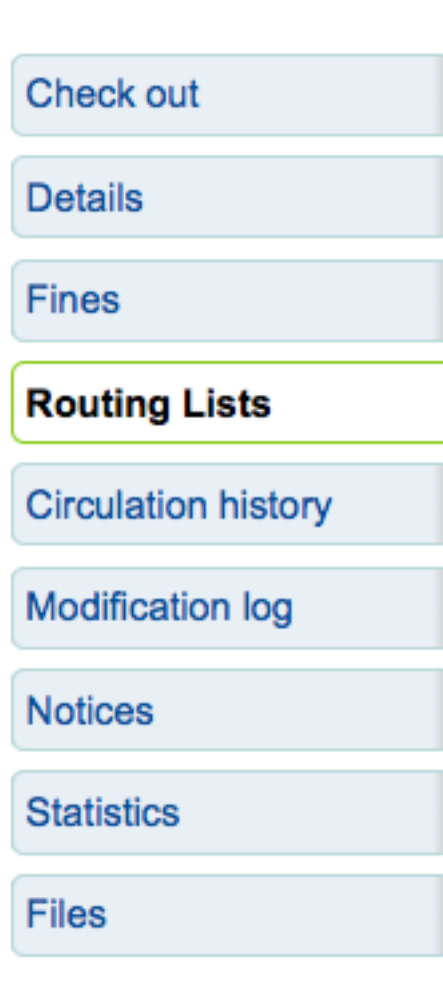
4.9.3.5 Printing Invoices

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.

<u>INVOICE</u>		
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.



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:

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): ⏪ ⏩ 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.

Edit
Change password
Duplicate
Print
Search to hold
More

Circulation history

Showing 1 to 8 of 8 Show 10 entries ⏪ ⏩ First Previous Next Last ⏩ Search:

Date	Title	Author	Call no.			
03/14/2012	Handle with care :	Picoult, Jodi,	PS3566.I372 H36 2009			
03/14/2012	Harry Potter and the sorcerer's stone	Rowling, J. K.	PZ7.R79835 Har 1999ab	100020	5	07/

- Renew patron
- Set permissions
- Delete
- Update child to adult patron
- Export today's checked in barcodes**

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.

7 lines found.

Date	Librarian	Module	Action	Object	Info
2010-09-25 22:54:55	0	MEMBERS	CREATE	34	
2010-09-25 22:56:27	0	MEMBERS	MODIFY	34	UPDATE (executed w/ arg: 34)
2012-08-06 10:21:14	34	MEMBERS	CHANGE PASS	34	
2012-08-06 10:21:46	34	CIRCULATION	RETURN	34	Item TVSN500009826C
2012-08-06 10:22:08	34	CIRCULATION	RETURN	34	Item TVSN5000180321
2012-08-06 10:22:39	34	CIRCULATION	ISSUE	34	Item TVSN500017286B
2012-08-06 10:22:54	34	MEMBERS	MODIFY	34	UPDATE (executed w/ arg: 34)

- 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** 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
<p>Purchase suggestion declined</p> <p>Dear Nicole Engard,</p> <p>You have suggested that the library acquire Book by Book.</p> <p>The library has reviewed your request today, and has decided not to accept the suggestion at this time.</p> <p>The reason given is:</p> <p>If you have any questions, please email us at nengard@bywatersolutions.com.</p> <p>Thank you,</p> <p>Nicole's Library</p>	email	pending	2011-04-01 12:44:21

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.

Nicole Engard
(9876543457)



123 My Street
Philadelphia, PA 19101
555.111.2345
nengard@gmail.com
Category: (S)
Home library:

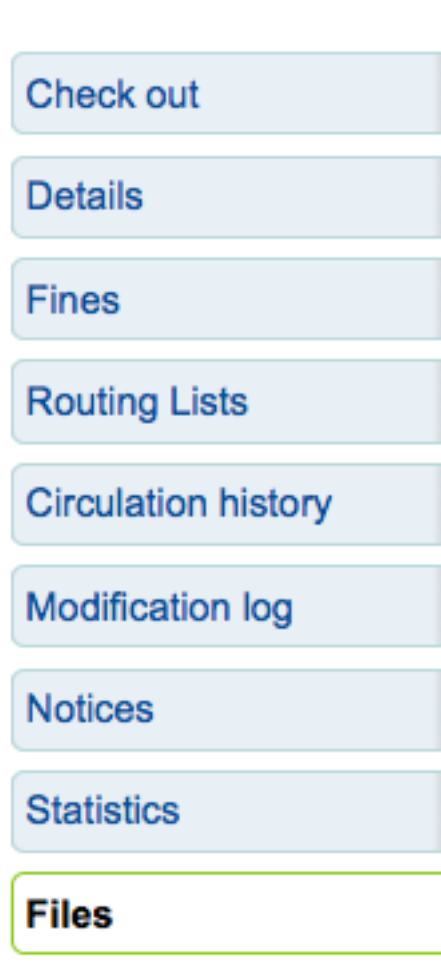
- Check out
- Details
- Fines
- Circulation history
- Modification log
- Notices
- Statistics

Statistics

location	itype	cocode	Total checkouts as of yesterday	Today's checkouts	Today's checkins	Total checkouts
	BK		2	0	0	2
LIV	BK	LIS	1	1	0	2
TOTAL			3	1	0	4

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.

Files

This patron has no files attached.

Upload New File

Description:

File:

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:

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.

Enter patron card number or partial name:

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

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.

Enter patron card number or partial name:

Search fields:

Search type:

Order by:

Library:

Category:

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

Depending on what you have chosen for the 'Search fields' you can search for patrons in various different ways.

Enter patron card number or partial name:

 [-] Search

Search fields: Standard

Search type: Standard

Order by: Su

Library: Any

Category: Any

Standard
Email
Borrower number
Phone number
Street Address
Date of birth

Search patrons Check out Check in Search the catalog

- 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
 - A tooltip will appear telling you how to enter the date of birth, most libraries will be entering MM/DD/YYYY for the birthday search

Enter patron card number or partial name:

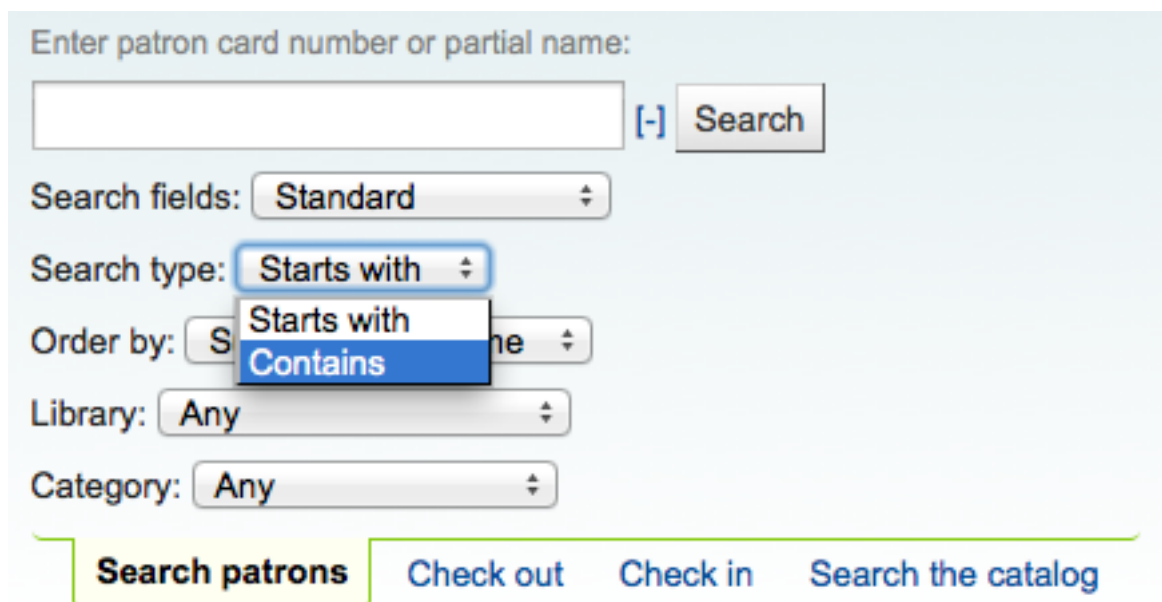
 [-] Search

Search fields: Date of birth

Search type: Starts with

Dates of birth should be entered in the format "MM/DD/YYYY"

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.



Enter patron card number or partial name:

Search fields: Standard

Search type: Starts with

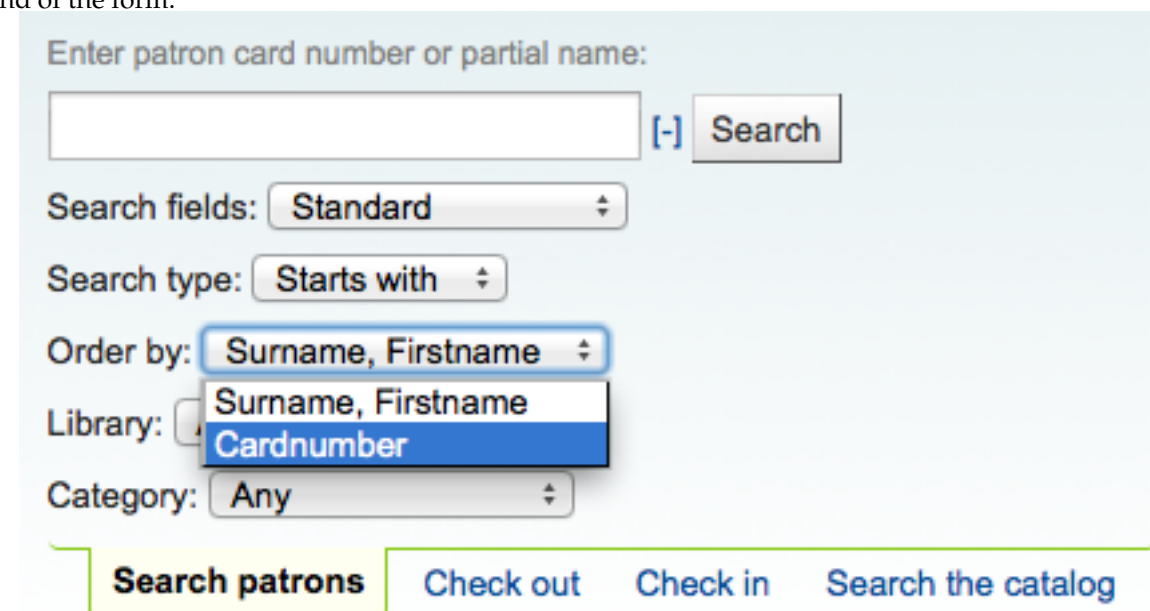
Order by: Starts with
Contains

Library: Any

Category: Any

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

You can also choose how your results will be sorted by using the 'Order by' pull down menu at the end of the form.



Enter patron card number or partial name:

Search fields: Standard

Search type: Starts with

Order by: Surname, Firstname

Library: Surname, Firstname
Cardnumber

Category: Any

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

You can also browse through the patron records by clicking on the linked letters across the top.

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Chapter 5

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

TIP



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

The screenshot shows the Koha staff client interface. On the left is the Koha logo. To the right is a search bar with the placeholder text "Enter patron card number or partial name:". Below the search bar are four navigation tabs: "Check out", "Check in", "Search patrons", and "Search the catalog". The "Check out" tab is highlighted with a green border.

- Check out option on the patron record

Nicole Engard
(23529001223637)
 123 main
 Philadelphia, PA 19001
 555-222-4444
nengard@gmail.com
 Category: Staff (S)
 Home Library: Fairview

Check Out

- Check out option on the quick search bar on the circulation page

The screenshot shows the Koha search interface. At the top left is the Koha logo. To its right is a search input field with the placeholder text "Enter patron card number or partial name:". Below the input field are three buttons: "Check out" (highlighted with a green border), "Check in", and "Search the catalog". A "Submit" button is located to the right of the search input field.

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.

Checking out to Beau Engard (9876543456) ✕

Enter item barcode:

Specify due date (MM/DD/YYYY):

Attention:

› **Fees & Charges:** Patron has Outstanding fees & charges of 62.00.
[Make payment](#)

Messages:

[Add a new message](#)

2 Checkout(s) Relatives' checkouts 7 Hold(s) Restrictions


Due date	Title	Item type	Checked out on	Checked out from	Call no	Charge	Price	Renew select all none	Check in select all none	Export select all none
12/31/2013 23:59	Learning Perl I , by Schwartz, Randal L. 3160778947	Books	12/17/2013	Nicole's Library	QA76.73.P22 S37 2008	0.00	34.95	0 On hold	On hold	<input type="checkbox"/>
Previous checkouts										
12/27/2013 23:59 Long Overdue (Lost)	Audiovisual librarianship; the crusade for media unity (1946-1969) ., by Shores, Louis, 31619000163907	Books	06/19/2012 18:11	Nicole's Library	Z717 .S47	0.00	15.00	1 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Totals:							62.00	49.95	Renewal due date: <input style="width: 100px;" type="text"/>	
Forgive fines on return: <input type="checkbox"/>										

Override renewal limit:

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).

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

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


At the bottom of the page there is a summary of the patron's current checked out items along with the due date (and time if the item is an hourly loan), items checked out today will appear at the top.

TIP



If the checked out time is listed as 00:00 then the item is a daily loan item. The due time for daily checkouts will show 23:59 which is the last minute of the day.

2 Checkout(s) Relatives' checkouts 7 Hold(s) Restrictions

Due date	Title	Item type	Checked out on	Checked out from	Call no	Charge	Price	Renew select all none	Check in select all none	Export select all none
12/31/2013 23:59	Learning Perl / , by Schwartz, Randal L. 3160778947	 Books	12/17/2013	Nicole's Library	QA76.73.P22 S37 2008	0.00	34.95	0 On hold	On hold	<input type="checkbox"/>
Previous checkouts										
12/27/2013 23:59 Long Overdue (Lost)	Audiovisual librarianship; the crusade for media unity (1946-1969) ., by Shores, Louis, 31619000163907	Books	06/19/2012 18:11	Nicole's Library	Z717 .S47	0.00	15.00	1 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Override renewal limit: Renew or Return c

Don't export fields :

ISO2709 with items

ISO2709 without items

CSV

Export checkouts ▼

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

2 Checkout(s) Relatives' checkouts **7 Hold(s)** Restrictions

Hold date	Title	Call number	Barcode	Expiration	Priority	Delete?	
07/05/2011	Computers in libraries.				6	No ▾	Suspended
08/21/2011	Computers in libraries 2010.				2	No ▾	Suspended
09/28/2011	SQL / , by McGrath, Mike.				2	No ▾	Suspended
12/05/2011	Learning Perl / , by Schwartz, Randal L.	QA76.73.P22 S37 2008	<i>Item 3160778947</i>		1	No ▾	Suspended
03/02/2012	About a boy / , by Hornby, Nick.				1	No ▾	Suspended
05/04/2012	Storm front / bk. 1 , by Butcher, Jim,				1	No ▾	Suspended
06/25/2012	Death Masks: A Novel of the Dresden Files, Book 5. , by Butcher, Jim.		<i>Item 60479696 in transit from Centerville since 06/25/2012</i>			No ▾	


Cancel marked holds

Suspend all holds until Specify date on which to resume (MM/DD/YYYY) :

Resume all suspended holds

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

Checking out to Nicole (NCE) Engard (9876543457) ✕

Enter item barcode:

Specify due date (MM/DD/YYYY) :

Attention:

- > **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items below
- > **Fees & Charges:** Patron has Outstanding fees & charges of 54.04. [Make payment](#)

Messages:

- > 11/18/2011 MPL "Your umbrella was found in the library, see a librarian for more info." [Add a new message](#)

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

Checking out to Nicole (NCE) Engard (98765434) X

Enter item barcode:

Specify due date (MM/DD/YYYY):

 Remember for session:

Attention:

- > **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- > **Fees & Charges:** Patron has [Outstanding fees & charges of 54.04](#). [Make payment](#)

Holds waiting:

- > [Blood Rites \(The Dresden Files, Book 6\)](#). (Books), by Butcher, Jim. Hold placed on 03/29/2012.
Waiting at Nicole's Library

Messages:

- > 11/18/2011 MPL "Your umbrella was found in the library, see a librarian for more info."
- [Add a new message](#)

5 Checkout(s)	9 Hold(s)	Restrictions
---------------	-----------	--------------

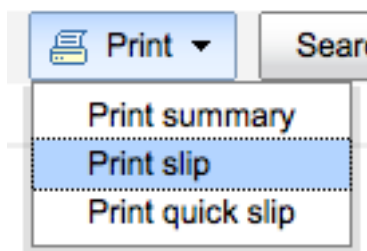
Hold date	Title	Call number	Barcode	Expiration	Priority	Delete?
03/16/2011	SQL I , by McGrath, Mike.				3	No <input type="button" value="v"/>
10/02/2011	10 classic mystery and suspense plays of the modern theatre. , by Richards, Stanley,				1	No <input type="button" value="v"/>
03/29/2012	Blood Rites (The Dresden Files, Book 6) ., by Butcher, Jim.		<i>Item 67022150 waiting at Nicole's Library</i>			No <input type="button" value="v"/>

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.

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.

Checking out to Nicole Engard (9876543457) ✕

Enter item barcode:

Check Out

Specify due date (MM/DD/YYYY):

📅

Remember for session: Clear

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 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	<input type="checkbox"/>
Totals:						22.50	25.00	Renewal due date: <input type="text"/> 📅 Forgive fines on return: <input type="checkbox"/>

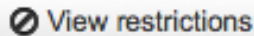
Override Renewal Limit: Renew or Return checked items Renew all

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

- Patron has been barred from the library

Cannot check out!

- › **Restricted:** Patron's account is restricted until 12/31/2013 with the explanation: *Barred for a month*

 View restrictions

- This can be set by the librarian editing a patron record and adding a **restriction** or by the **Overdue/Notice Status Triggers**
- Patron needs to confirm their address

Checking out to Armando Mejia (23529000662701)

Cannot Check Out!

- › **Address:** Patron's address in doubt

- This can be set by the librarian editing a patron record and adding a **flag**
- Patrons has lost their library card

Checking out to Armando Mejia (23529000662701)

Cannot Check Out!

- › **Lost:** Patron's card is lost

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

5.1.3 Check Out Warnings

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

- Patron has outstanding fines

Please Confirm Checkout

- The patron has a debt of 1.00

✓ Yes, Check Out (Y)

✗ No, Don't Check Out (N)

- Item on hold for someone else

Please Confirm Checkout

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

Cancel hold

✓ Yes, Check Out (Y)

✗ No, Don't Check Out (N)

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

Please confirm checkout

- The patron has a debt of 159.00
- Item *PDR for nonprescription drugs, dietary supplements, and herbs, 29th edition, 2008.* (50000162) has been waiting for **training training** (training) at Henderson since

Cancel hold

Revert waiting status

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

- Item already checked out to this patron

Please Confirm Checkout

- The patron has a debt of 10.00
- Item *Harry Potter and the sorcerer's stone* (100020) is currently checked out to this patron. Renew?

Yes, Renew (Y) No, Don't Renew (N)

- Item checked out to another patron

Please Confirm Checkout

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

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

- Item not for loan

Please Confirm Checkout

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

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

- Patron has too many things checked out and **AllowTooManyOverride** is set to 'Allow'

Please Confirm Checkout

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

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

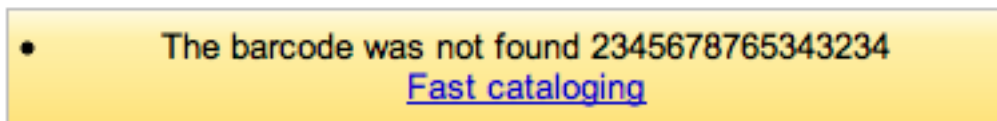
- Patron has too many things checked out and **AllowTooManyOverride** is set to "Don't allow"

• Too many checked out. 20 checked out, only 20 are allowed.

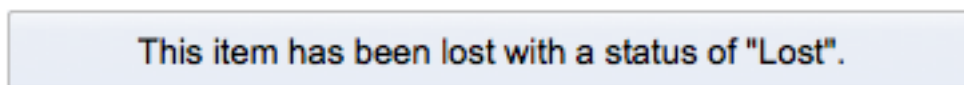
- Item cannot be renewed

• No more renewals possible

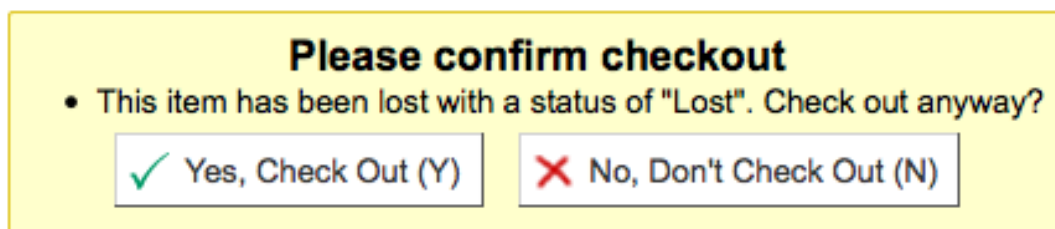
- This can be overridden with the `AllowRenewalLimitOverride` system preference
- Barcode not found



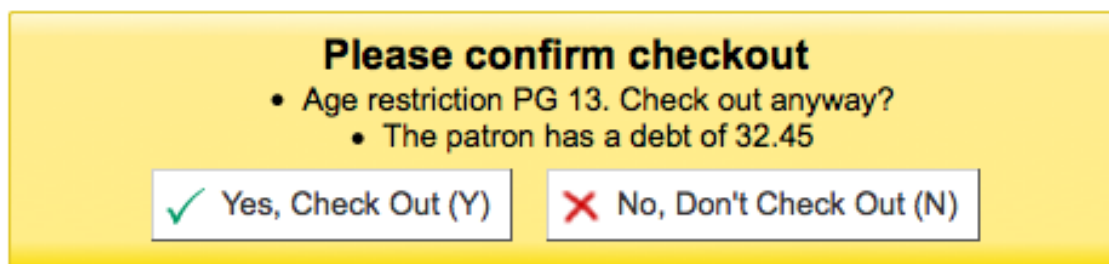
- Learn more about `fast cataloging` later in this manual.
- Item being checked out is marked as 'lost'
 - Depending on the value in your `IssueLostItem` preference, you may just see a warning



or a confirmation box



- Item being checked out is not recommended for a patron of this age



- Item being checked out meets the `decreaseLoanHighHolds` system preference criteria



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.

3 Checkout(s) Relatives' Checkouts 7 Hold(s)

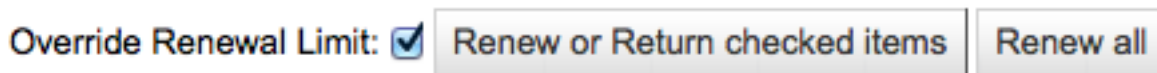
Due date	Title	Item Type	Checked out on	Checked out from	Call no	Charge	Price	Renew <small>select all none</small>	Check in <small>select all none</small>	
Previous checkouts										
09/22/2011	Handle with care . , by Picoult, Jodi, 100004	Books	07/14/2011	Nicole's Library	PS3566.I372 H36 2009	0.00	27.95	1 <input checked="" type="checkbox"/>	<input type="checkbox"/>	
09/22/2011	Harry Potter and the sorcerer's stone , by Rowling, J. K. - 7 disks 100020	Book on CD	07/22/2011		PZ7.R79835 Har 1999ab	0.00	49.95	2 Not Renewable	<input type="checkbox"/>	
09/22/2011	Fool Moon , by Butcher, Jim 2345678765343234		09/08/2011	Nicole's Library		0.00		0 <input checked="" type="checkbox"/>	<input type="checkbox"/>	
Totals:							0.00	220.84	Renewal due date: <input type="text"/>	
									Forgive fines on return: <input type="checkbox"/>	

Override Renewal Limit:

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.

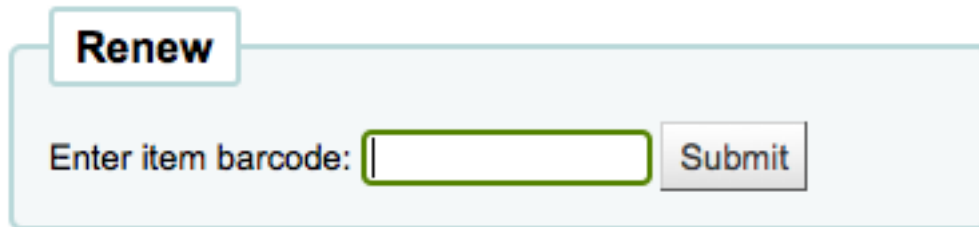
Circulation

- [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](#)

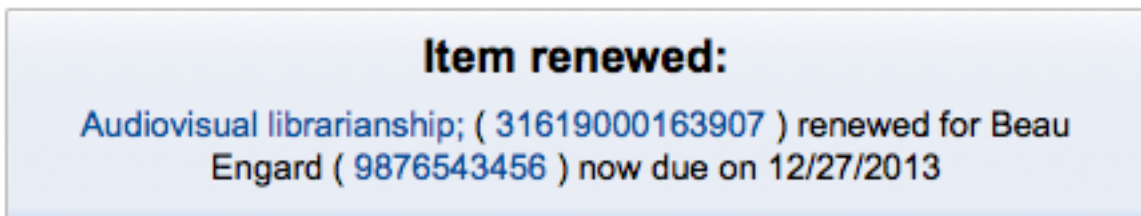
And scan the barcodes of the items you would like to renew.



Renew

Enter item barcode:

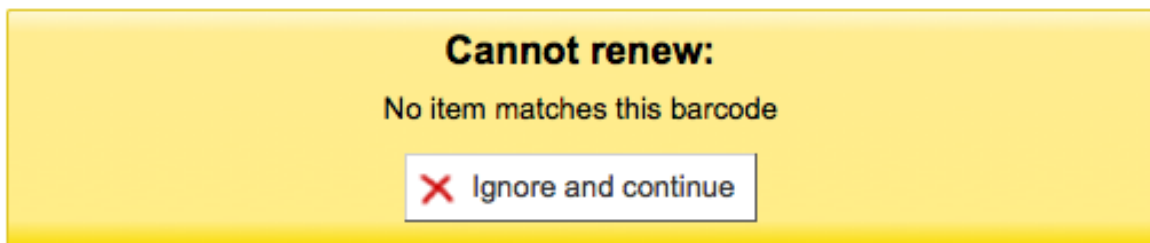
If the item is renewed you will receive a confirmation message.



Item renewed:

Audiovisual librarianship; (31619000163907) renewed for Beau Engard (9876543456) now due on 12/27/2013

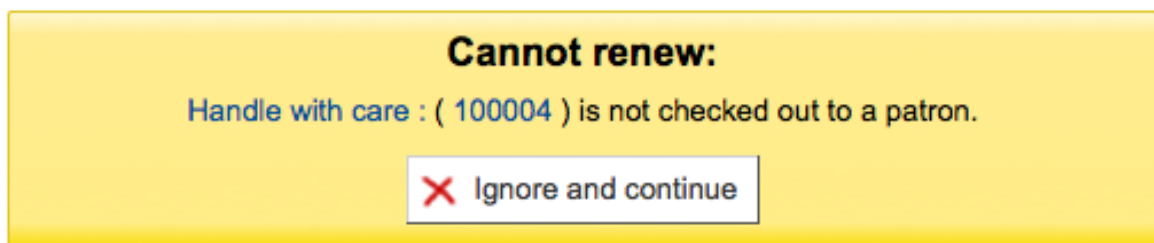
If the barcode is not found you will be presented with an error.



Cannot renew:

No item matches this barcode

If the item is not actually checked out you will also receive an error.



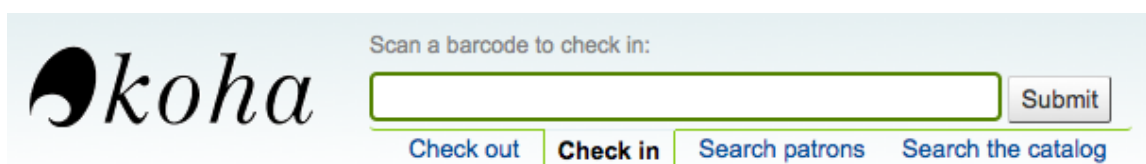
Cannot renew:

Handle with care : (100004) is not checked out to a patron.

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

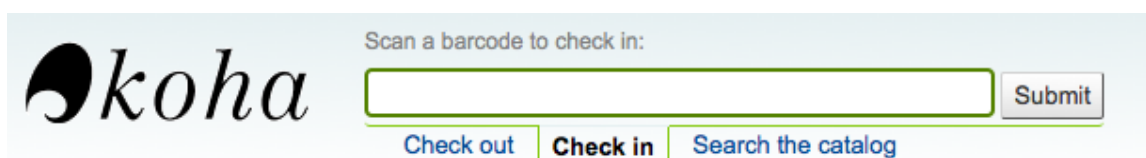


koha

Scan a barcode to check in:

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

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



koha

Scan a barcode to check in:

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

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

1 Checkout(s)		2 Holds(s)					
Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
12/25/2009	The Baltimore book , by	BK	975.26B	10101000000414		On Hold	Check In

- The Check in page under the Circulation menu

Circulation

- [Check Out](#)
- [Check In](#)

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

Check In

Enter item barcode:

Options

Forgive overdue charges

Book drop mode

Checked-in items

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
10/25/2013 23:59	Storm Front	Butcher, Jim	849837178272189	NIC	NIC			BK	Engard, Nicole (S)	user
08/23/2013 23:59 (overdue)	Handle with care :	Picoult, Jodi,	100004	NIC	NIC		PS3566.I372 H36 2009	BK	Burns, Sal (ADPT)	

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.

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

This item needs to be transferred to Union
Transfer now?

<p>Check In</p> <p>Enter item barcode: <input style="width: 100px;" type="text"/> <input type="button" value="Submit"/></p>	<p>Options</p> <ul style="list-style-type: none"> <input type="checkbox"/> Forgive overdue charges <input type="checkbox"/> Dropbox mode
--	---

Checked-in items

Due date	Title	Author	Barcode	Shelving location	Call number	Type	Patron	Note
Not checked out	Using Moodle :	Cole, Jason R.	65459165		LB1028.68 .C65 2008	BK PROG	Not checked out	

– After this item is checked in the status of the item will be changed in the catalog to ‘in transit’

Item type	Location	Collection	Call Number	Status	Last seen	Barcode
	Midway Fiction	Fiction		In transit from Fairview, to Midway, since 12/01/2009	12/01/2009	5645423243567976543

– To mark an item as back at the home branch, check the item in at the home branch

Not checked out.

<p>Check In</p> <p>Enter item barcode: <input style="width: 100px;" type="text"/> <input type="button" value="Submit"/></p>	<p>Options</p> <ul style="list-style-type: none"> <input type="checkbox"/> Forgive overdue charges <input type="checkbox"/> Dropbox mode
--	---

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note
Not checked out	Dr. Seuss preschool		5645423243567976543	MU FIC	Not checked out	

* 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

**Note about the accompanying materials:
17 Disks**

- If you’re checking an item in that has a hold on it, you will be prompted to confirm the hold


Hold Found: The skeptical business searcher :

Hold for:

- [Walker, Andrea](#) (23529000991266)
- 4992 Library Rd.
Portland, OR 44240
- (212) 555-1212

Hold at Fairview

- 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	1010100000414

- 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

Hold Found: The Baltimore book:

Hold for:

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

Transfer to: Fairview

- 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:

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.

Attention:

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

Messages:

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

[Add a new message](#)

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

Leave a message

Add a message for:

Edna

Predefined notes:

UMBOPAC

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

Save

[Cancel](#)

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.

Attention:

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

Messages:

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

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

Messages For You

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

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

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.

+ New ▾
📄 Edit ▾
💾 Save ▾
➕ Add to ▾
🖨️ Print
📄 Place Hold
🔍 z39.50 Search

Library mashups :

- **Additional Authors:**
 - [Engard, Nicole C.--1979-](#)
- **ISBN:** 9781573873727
- **Subjects:**
 - [Mashups \(World Wide Web\) -- Library applications.](#)

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

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

Results

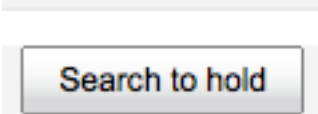
1. [Library mashups :](#)
 Information Today, Inc., Description: ; Medford, N.J. : , 2009 : p. cm. ISBN: 9781573873727 Books
[Holds](#)

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

Place a hold on Library mashups :

Patron:
 Enter patron card number or partial name:

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.'

	<input type="checkbox"/> <p>2. HTML programmer's reference / Powell, Thomas A., Description: Berkeley, Calif. : Osborne/McGraw-Hill, 1998 : xiii, 396 p. : ; 22 cm. ISBN: 0078825598 Books</p> <p>Holds Hold for Beau Engard (123454) Edit record Edit items</p>
	<input type="checkbox"/> <p>3. jQuery cookbook / Description: Beijing ; Cambridge : O'Reilly, 2010 : xxii, 451 p. : ; 24 cm. ISBN: 0596159773 Books</p> <p>Holds Hold for Beau Engard (123454) Edit record Edit items</p>

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.

Select All | Clear All | Unhighlight | Add to: Save | Place hold

Results		Location
<input type="checkbox"/> 	<p>1. HTML programmer's reference / Powell, Thomas A., Description: Berkeley, Calif. : Osborne/McGraw-Hill, 1998 : xiii, 396 p. : ; 22 cm. ISBN: 0078825598 Books</p> <p>Holds Hold for Beau Engard (9876543456) Edit record Edit items</p>	<p>2 available: 2 available:  Centerville [QA76.76.H94 P495 1998] (1)  Nicole's Library Living Room [QA76.76.H94 P495 1998] (1)</p>

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.

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

• Pickup library is different than [Coda Engard's](#) home library (Franklin / FRL)

Hold details

Patron: [Coda Engard \(23529001223638\)](#)
 Priority: 2
 Notes:

Pickup at:

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

Place a hold on the next available copy

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Last Location	Call no.	Copy no.	Information
<input type="radio"/>	BOOK Books	316190004778977	Nicole's Library		Z674.75.W67 L52 2009		Not on hold
<input type="radio"/>	BOOK Books	45108216	Nicole's Library				Waiting at Nicole's Library since 06/02/2011. Cancel hold
<input type="radio"/>	BOOK Books	47627107	Nicole's Library		Z674.75.W67 L52 2009		Not for loan (Staff Collection) Not on hold
<input type="radio"/>	BOOK Books	47627257	Nicole's Library		Z674.75.W67 L52 2009		Not on hold
<input type="radio"/>	BOOK Books	50671988	Nicole's Library	Pleasant Valley			In transit from Nicole's Library, to Pleasant Valley, since 06/02/2011 Can't be cancelled when item is in transit

- Enter any notes that might apply to this hold
- Choose the library where the patron will pick up the item
- If the patron wants the hold to start on a date other than today, enter that in the 'Hold starts on date' field
 - This option will only appear if the **AllowHoldDateInFuture** system preference is set to 'Allow'
- If the patron has specified that they don't want the item after a certain date, or if you have limits on hold lengths, you can enter an expiration date for the hold in the 'Hold expires on date'
 - To have expired holds canceled automatically you will need to have the **Expired Holds** cron job set to run on a regular basis.
- Next choose if you want to place a hold on the next available item or a specific item by clicking the radio button next to an individual item.

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

Confirm Holds

• Pickup library is different than [Coda Engard's](#) home library (Franklin / FRL)

Hold details

Patron: [Coda Engard \(23529001223638\)](#)

Notes:

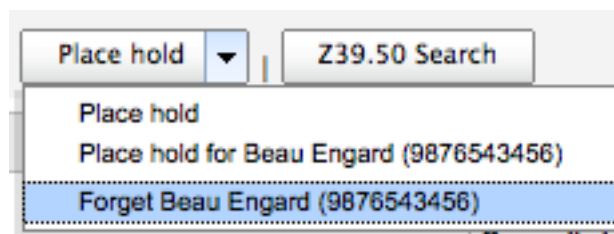
Pickup at:

Hold starts on date:

Hold expires on date:

Title	Priority	Information
Introduction to cataloging	1	No copies are available to be placed on hold
The Changing environment of libraries;	1	
The school teacher in England and the United States;	1	

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.

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

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

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

Priority		Patron	Notes	Date	Expiration	Pick up library	Details		
Waiting	↑ ↓	Henry Acevedo		03/02/2012		Item waiting at Nicole's Library	100034	↓	×
1	↑ ↓	Jordan Alford		03/02/2012		Nicole's Library	Next available	↓	×
2	↑ ↓	Brian Engard		03/02/2012		Nicole's Library	Next available	↓	×
3	↑ ↓	Nicole Schneider		11/28/2012		Franklin	Only item 100034	↓	×
4	↑ ↓	Beau Engard		03/02/2012		Fairview	Next available	↓	×
5	↑ ↓	Nicole Engard		11/28/2012		Centerville	Only item 100034	↓	×

Update hold(s)

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.

Existing holds

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

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.

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

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.

Unsuspend	on	03/31/2012		Clear Date
Suspend	until	<input type="text"/>		Clear Date
Suspend	until	<input type="text"/>		Clear Date
Suspend	until	<input type="text"/>		Clear Date
Suspend	until	<input type="text"/>		Clear Date
Suspend	until	<input type="text"/>		Clear Date
Unsuspend	on	<input type="text"/>		Clear Date

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.

1		Brian Engard	09/06/2011	Nicole's Library	Next available		
2		Sam Hawkins	09/06/2011	Pleasant Valley	Next available		
3		Coda Engard	09/07/2011	Nicole's Library	Next available		
4		Lester Hatfield	09/27/2011	Nicole's Library	Next available		
5		Lauren Morris	09/27/2011	Springfield	Next available		
6		Olga Rivera	06/02/2011	Pleasant Valley	Next available		
7		Joann Duffy	10/02/2011	Midway	Next available		
8		Sal Acosta	10/19/2011	Nicole's Library	Next available		

Update hold(s)

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



Hold Found: The Baltimore book:

Hold for:

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

Transfer to: Fairview

 Confirm hold and Transfer

 Print slip, Transfer, and Confirm  Ignore

or just confirm the hold

Hold Found: Library mashups :

Hold for:

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

Hold at Centerville

 Confirm hold  Print Slip and Confirm  Ignore

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

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

1 Checkout(s) 1 Hold(s)

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

Cancel Marked Requests

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

Item type	Location	Collection	Call Number	Status	Last seen	Barcode	Publication Details
Books	Centerville General Stacks	Non Fiction	020.285/4678	Waiting for 23529001000463 at Centerville since 12/28/2009	12/28/2009	898739894	

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

presented with a warning message.

Please confirm checkout

- The patron has a debt of 34.95
- Item *About a boy* / (100034) has been waiting for [Henry Acevedo](#) (23529000035676) at Nicole's Library since 08/23/2012

Cancel hold

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

From here you can check the item out to the patron at the desk and cancel the hold for the 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

Transfer

Destination library:

Centerville

Enter barcode:

887369820192012

Submit

- Enter the library you would like to transfer the item to
 - Scan or type the barcode on the item you would like to transfer
- Click 'Submit'

Transfer


Destination library:

Enter barcode:

Transferred Items

Bar Code	Title	To
887369820192012	Library mashups : ()	Centerville

- The item will now say that it is in transit

	Centerville	020.285/4678	In transit from Midway, to Centerville, since 12/07/2009	12/07/2009	887369820192012
---	-------------	--------------	--	------------	---------------------------------

- When the item arrives at the other branch the librarian must check the item in to acknowledge that it is no longer in transit
- The item will not be permanently moved to the new library

Barcode 887369820192012

Item Information [\[Edit Items\]](#)

Home Library:	Midway
Item type:	Books
Item Callnumber:	020.285/4678
Replacement Price:	0.00

Statuses

Current Location:	Centerville
Checkout Status:	Not Checked out
Lost Status:	<input type="text"/> <input type="button" value="Set Status"/>
Damaged Status:	<input type="text"/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

- The item shows the same 'Home Library' but has updated the 'Current Location' to note where it resides at this time

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.

Fairview ([Set](#)) | nce ([Log Out](#)) | [[?](#)]

This is the library that all circulation transactions will take place at. If you are at another library (or on a bookmobile) you will want to set your library before you start circulating items. To do this you can click 'Set' at the top right or on the Circulation page.

Set Library

Choose library:

- Centerville
- Fairfield
- Fairview
- Franklin
- Institut Protestant de Théologie
- Liberty
- Main
- Midway
- Pleasant Valley
- Riverside
- Springfield
- Troy
- Union

Once you have saved your changes your new library will appear in the top right.

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](#) 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 your catalog you can go to the Circulation module and click 'Fast cataloging.'

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](#)

The cataloging interface will open up with the short cataloging record:

Add MARC Record

Show MARC tag documentation links

Change framework:

0

LEADER
fixed length control field *

INTERNATIONAL STANDARD BOOK NUMBER
International Standard Book Number

INTERNATIONAL STANDARD SERIAL NUMBER

DEWEY DECIMAL CLASSIFICATION NUMBER

LOCALLY ASSIGNED LC-TYPE CALL NUMBER
Local Dewey

MAIN ENTRY--PERSONAL NAME
Personal name

TITLE STATEMENT
Title *
Remainder of title
Statement of responsibility, etc

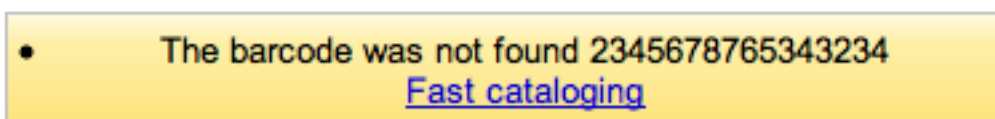
EDITION STATEMENT

PUBLICATION, DISTRIBUTION, ETC. (IMPRINT)

GENERAL NOTE

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

Add MARC Record

Show MARC tag documentation links

Change framework:

0

LEADER

fixed length control field *

nam a22 7a 4500

INTERNATIONAL STANDARD BOOK NUMBER

International Standard Book Number

0451458125

INTERNATIONAL STANDARD SERIAL NUMBER

DEWEY DECIMAL CLASSIFICATION NUMBER

LOCALLY ASSIGNED LC-TYPE CALL NUMBER

Local Dewey

MAIN ENTRY--PERSONAL NAME

Personal name

Butcher, Jim

TITLE STATEMENT

Title *

Fool Moon

Remainder of title

Statement of responsibility, etc

EDITION STATEMENT

PUBLICATION, DISTRIBUTION, ETC. (IMPRINT)

GENERAL NOTE

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	<input type="text"/>
1 - Lost status	<input type="text"/>
2 - Source of classification or shelving scheme	Library of Congress Classification
3 - Materials specified (bound volume or other part)	<input type="text"/>
4 - Damaged status	<input type="text"/>
5 - Use restrictions	<input type="text"/>
6 - Koha normalized classification for sorting	<input type="text"/>
7 - Not for loan	<input type="text"/>
8 - Koha collection	<input type="text"/>
a - Location (home branch)	Nicole's Library
b - Sublocation or collection (holding branch)	Nicole's Library
c - Shelving location	<input type="text"/>
d - Date acquired	<input type="text"/>
e - Source of acquisition	<input type="text"/>
f - Coded location qualifier	<input type="text"/>
g - Cost, normal purchase price	<input type="text"/>
h - Serial Enumeration / chronology	<input type="text"/>
j - Shelving control number	<input type="text"/>
l - Koha issues (times borrowed)	<input type="text"/>
m - Koha renewals	<input type="text"/>
n - Koha reserves (requests)	<input type="text"/>
o - Koha full call number	<input type="text"/>
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	<input type="checkbox"/>	<input type="checkbox"/>
------------	---	------------	------	--	---	--------------------------	--------------------------

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 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.

Hold(s) 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

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:

End date:

(Inclusive, default is two days ago to today, set other date ranges as needed.)

5.9.3 Holds awaiting pickup

This report will show all of the holds that are waiting for patrons to pick them up.

Holds awaiting pickup for your library on: 08/23/2012 [View all libraries](#)

1 Hold(s) waiting 3 Hold(s) over

Available since	Title	Patron	Location	Copy number	Enumeration	Action
08/23/2012	About a boy / (Books) Barcode: 100034	Acevedo, Henry (212) 555-1212	NIC PR6058.O689 A64 1998			<input type="button" value="Cancel hold"/>

Items that have been on the hold shelf longer than you normally allow (based on the [Reserves-MaxPickUpDelay](#) 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.

Holds awaiting pickup for your library on: 05/22/2012 [View all libraries](#)

Hold(s) waiting **6 Hold(s) over**

Holds listed here have been awaiting pickup for more than 7 days.

Only items that need not be transferred will be cancelled (TransferWhenCancelAllWaitingHolds sypref)

Available since	Title	Patron	Location	Copy number	Enumeration	Action
09/28/2011	Web database applications with PHP and MySQL / Barcode: 19944672	Engard, Brian 555.111.2345	FFL QA76.73.P224 W55 2004			<input type="button" value="Cancel hold and return to : Fairfield"/>
10/02/2011	Library mashups : Barcode: 316190004778983	Schneider, Nicole (212) 555-1212	FFL Z674.75.W67 L52 2009			<input type="button" value="Cancel hold and return to : Fairfield"/>
03/02/2012	About a boy / Barcode: 100034	Engard, Nicole 555.111.2345	NIC PR6058.O689 A64 1998			<input type="button" value="Cancel hold"/>
09/28/2011	Web database applications with PHP and MySQL / Barcode: 316190004778936	Engard, Nicole 555.111.2345	NIC QA76.73.P224 W55 2004			<input type="button" value="Cancel hold"/>

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 **TransfersMaxDaysWarning** 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.

TIP



Large libraries can choose to filter the report before it runs by setting the **FilterBeforeOverdueReport** system preference to 'Require'.

This report will list all items that are overdue at your library.

Filter on:

Date due:

From:

To:

Name or cardnumber:

Patron category:

Patron flags:

Driver's License:

Home Branch:

Item type:

Library of the patron:

Sort by:

Show any items currently checked out:


14 Items overdue as of 11/28/2012 03:15 (Filtered. [Reset filter](#))

[Download file of displayed overdues](#)

Due date	Patron	Library	Title	Barcode	Call number
09/28/2011 00:00	Charles Lisa ((212) 555-1212)	MPL	Fool Moon (The Dresden Files, Book 2) , by Butcher, Jim.	60479690	
03/30/2012 23:59	Engard Coda [email] (555.111.2345)	FFL	My sister's keeper : , by Picoult, Jodi,	100002	PS3566.I372 M9 2005
05/25/2012 23:59	Alford Jordan ((212) 555-1212)	MPL	Harry Potter and the deathly hallows / , by Rowling, J. K.	100021	PZ7.R79835 Hajd 2007b
05/25/2012 23:59	Alford Jordan ((212) 555-1212)	MPL	Harry Potter and the prisoner of Azkaban / , by Rowling, J. K.	100027	PZ7.R79835 Ham 1999
06/29/2012 23:59	Engard Brian [email] (555.111.2345)	NIC	An education : , by Hornby, Nick.	72387022	
06/30/2012 23:59	Edwards Casey ((212) 555-1818)	MPL	Harry Potter and the deathly hallows / , by Rowling, J. K.	19924654	PZ7.R79835 Hak 2007
07/02/2012 23:59	Edwards Casey ((212) 555-1818)	MPL	Harry Potter and the deathly hallows / , by Rowling, J. K.	100024	PZ7.R79835 Hak 2007
07/03/2012 23:59	Engard Beau [email] (555.111.2345)	FFL	Audiovisual librarianship ; , by Shores, Louis,	31619000163907	Z717 .S47
07/09/2012 23:59	Engard Brian [email] (555.111.2345)	NIC	The tenth circle / , by Picoult, Jodi,	100001	PS3566.I372 T46 2006b
08/12/2012 23:59	Burns Sal	NIC	Harry Potter and the prisoner of Azkaban , by Rowling, J. K.	100019	PZ7.R79835 Ham 2000
08/24/2012 23:59	Cherry Lillie ((212) 555-1212)	MPL	The tenth circle / , by Picoult, Jodi,	323212	PS3566.I372 T46 2006b
09/12/2012 23:59	Engard Nicole [email] (555.111.2345)	NIC	Harry Potter and the deathly hallows , by Rowling, J. K.	2345043236	PZ7.R79835 Hajd 2007b
10/13/2012 00:00	Schneider Nicole ((212) 555-1212)	FRL	Library mashups :	3160778983	Z674.75.W67 L52 2009
10/24/2012 23:59	Engard Nicole [email] (555.111.2345)	NIC	The pact : , by Picoult, Jodi,	100010	PS3566.I372 P3 2006

The report can be filtered using the menu options found on the left of the report.

TIP



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.

Circulation: Overdues at Nicole's Library

Shelving location selected:

Date due	Title	Patron	Location	Overdue status	Notified by
10/18/2011 00:00	Library mashups : exploring new ways to deliver library data / Barcode : 316190004778987	Acosta, Edna (212) 555-1212 test@gmail.com	Nicole's Library Z674.75.W67 L52 2009		
05/25/2012 23:59	Harry Potter and the deathly hallows 7. by Rowling, J. K. Barcode : 100021	Alford, Jordan (212) 555-1212	Nicole's Library PZ7.R79835 Hajd 2007b		
05/25/2012 23:59	Harry Potter and the prisoner of Azkaban / by Rowling, J. K. Barcode : 100027	Alford, Jordan (212) 555-1212	Nicole's Library PZ7.R79835 Ham 1999		
09/28/2011 00:00	Fool Moon (The Dresden Files, Book 2). by Butcher, Jim. Barcode : 60479690	Charles, Lisa (212) 555-1212	Nicole's Library		
07/02/2012 23:59	Harry Potter and the deathly hallows / by Rowling, J. K. Barcode : 100024	Edwards, Casey (212) 555-1818	Nicole's Library PZ7.R79835 Hak 2007		
06/05/2012 23:59	Harry Potter and the prisoner of Azkaban by Rowling, J. K. Barcode : 100019	Engard, Beau 555.111.2345 beau@gmail.com	Nicole's Library PZ7.R79835 Ham 2000		

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 **finer cron job** running you will see no data on this report.

5.10 Tracking In house Use

Many libraries track the use of items within the library. This 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:

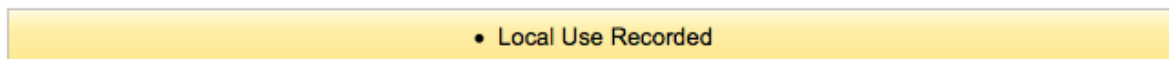
Checking out to In House (23529001223640)

Enter item barcode:

Specify due date (MM/DD/YYYY):

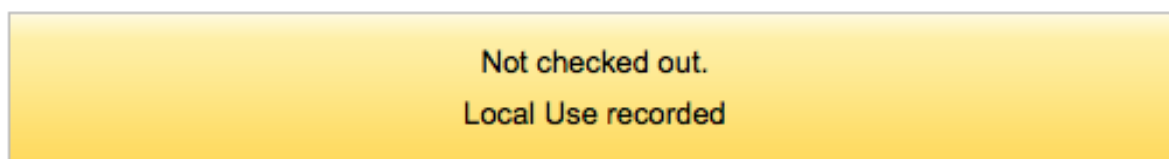
Remember for session:

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.



TIP




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).

Show Category: 

Authorized values for category LOC :

Authorized value	Description	Description (OPAC)	Icon	Edit	Delete
AV	Audio Visual			Edit	Delete
CART	Circ Cart			Edit	Delete
CHILD	Children's Area			Edit	Delete
DISPLAY	On Display			Edit	Delete
FIC	Fiction			Edit	Delete
GEN	General Stacks			Edit	Delete
NEW	New Materials Shelf			Edit	Delete
PROC	Processing Dept			Edit	Delete
REF	Reference			Edit	Delete
STAFF	Staff Office			Edit	Delete

Next you need to set the **NewItemsDefaultLocation** system preference to PROC. This will set the new items to the Processing Center as their default location.

Create items with their desired final shelving location.

- These newly cataloged items will be temporarily set to the PROC location and will display with whatever description PROC has. The original location code entered at item creation is stored in the new items column 'permanent_location', for future use. Items will stay in the PROC location until they are checked in. To have those items then move to the shelving cart:

1. Turn on the **InProcessingToShelvingCart** system preference
2. Check in those newly-created items and they will be moved to the location code of CART and display with whatever description CART has.
3. A **cron job** runs at specified intervals to age items from CART to the permanent shelving location. (For example, an hourly cron entry of `cart_to_shelf.pl --hours 3` where `--hours` is the amount of time an item should spend on the cart before aging to its permanent location.)

TIP



If the **ReturnToShelvingCart** system preference is turned on, any newly checked-in item is also automatically put into the shelving cart, to be covered by the same script run.

IMPORTANT



Checkins with confirmed holds will not go into the shelving cart. If items on the shelving cart are checked out, the cart location will be cleared.

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**.

TIP



Create a **staff patron** specifically for this action so that you don't leave a real staff client logged into a computer all day

There is no link to the Self Checkout module, but a simple addition to the **intranetuserjs** system preference can add one.

```
$(document).ready(function(){ $("#login
#submit").parent().after("<p><a
href=\"http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl\"
target=\"_blank\">Self-Checkout</a></p>"); });
```

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:

Username:

Password:

Library:

Login »

[Self-Checkout](#)

You can also access this module by going to : http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl

When on the self checkout page depending on your value in the **SelfCheckoutByLogin** preference you will be asked to enter you cardnumber

Nicole's Library Self Checkout System

Self Checkout

Please enter your card number:

© Nicole C. Engard
[Home](#) | [Contact](#) | [Privacy](#)

or your username and password:

Nicole's Library Self Checkout System

Self Checkout

Please login with your username and password

Username: Password:

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:

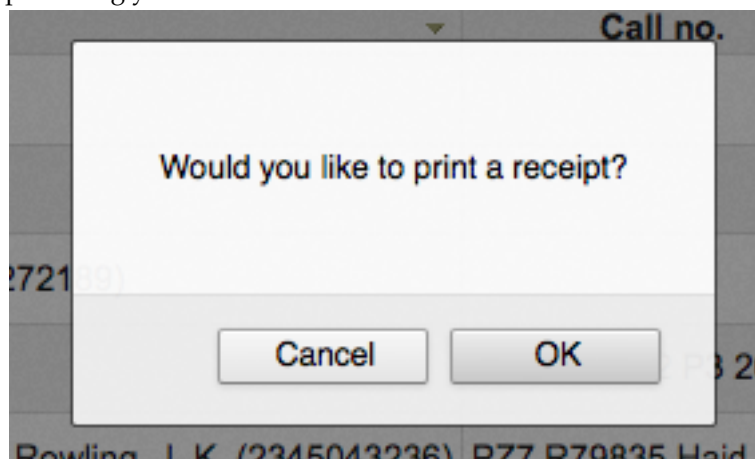
Scan a new item or enter its barcode:

As you scan items they will appear below the barcode box

Issues for Nicole Engard (1 total)

Title	Call No.	Due	Renew
Blue book, dolls & values. (10101000000409)	688.722B	01/01/2010	<input type="button" value="Return Item"/>

When you are finished scanning items it is important to click the '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.

Item cannot be checked out.

Sorry, This item cannot be checked out at this station.

MESSAGE 6: You owe the library and cannot borrow. Please see a member of the library staff.

 **Return to Account Summary**

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'



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 synchronize your data on every circulation computer by clicking the 'Synchronize' link on the right of the screen.

Offline circulation

- [Check out](#)
- [Check in](#)

Note: You must be online to use these options.

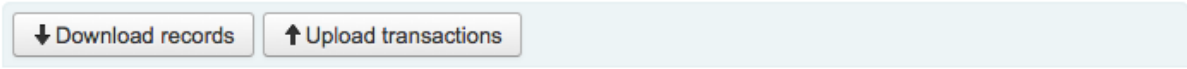
- [Synchronize](#)
- [Pending offline circulation actions](#)

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.


 ↓ Download records

↑ Upload transactions

Offline circulation

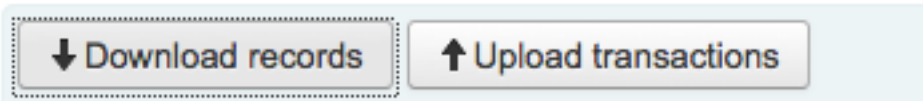
In order for offline circulation to work on this computer, your library's records must be up-to-date on this computer:

- Patron records were last synced on: (never)
- Item records were last synced on: (never)
- Circulation records were last synced on: (never)

You have transactions in the offline circulation database on this computer that have not been uploaded.

View [pending offline circulation actions](#)

Once your data is downloaded you will see the dates your data was last synced to the right of each


 ↓ Download records

↑ Upload transactions

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)

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.

koha Enter patron card number:

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

[Home](#) > [Offline circulation](#)

Coda Engard (9876543452)
123 My Street
Philadelphia, PA 19101
555.111.2345
engard@gmail.com
Category: J
Home library: FFL

Check out message
Patron has outstanding fines: 6.400000

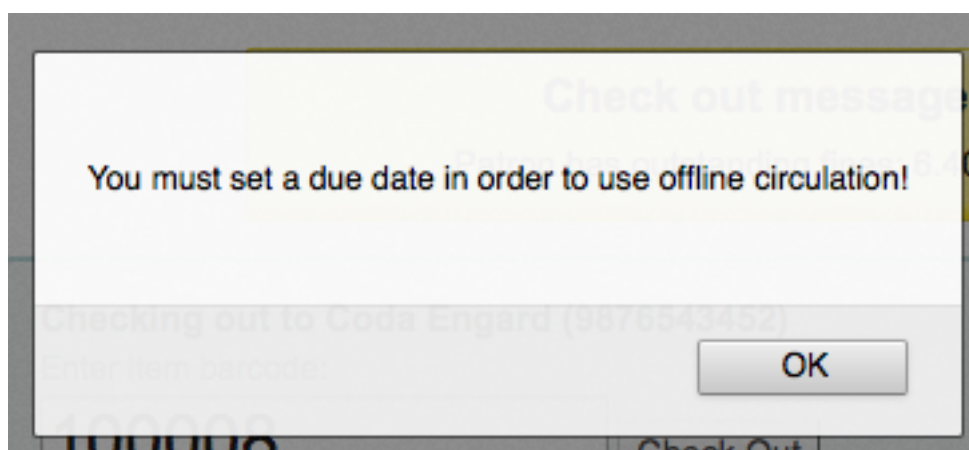
Checking out to Coda Engard (9876543452)

Enter item barcode:

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

0 Checkouts **6.400000 in fines**

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.

Checking out to Coda Engard (9876543452) ✕

Enter item barcode:

Specify due date (MM/DD/YYYY) :

Remember for session:

1 Checkouts

6.400000 in fines

Due date	Title	Barcode	Item type	Checked out on	Checked out from	Call no	Charge
2013-10-30 23:59:00 GMT-0500 (CDT)	Mercy /	100008	BK	2013-10-24	undefined	PS3566.I372 M47 2001	

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'

↓ Download records

↑ Upload transactions

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
offli
View

After the files are uploaded you can click 'View pending offline circulation actions' on the right.

↓ Download records ↑ Upload transactions

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.

Offline circulation

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

	Date	Action	Barcode	Card number
<input type="checkbox"/>	2012-05-15 13:13:26	issue	100021	23529000050113
<input type="checkbox"/>	2012-05-15 13:13:34	issue	100023	23529000050113
<input type="checkbox"/>	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	

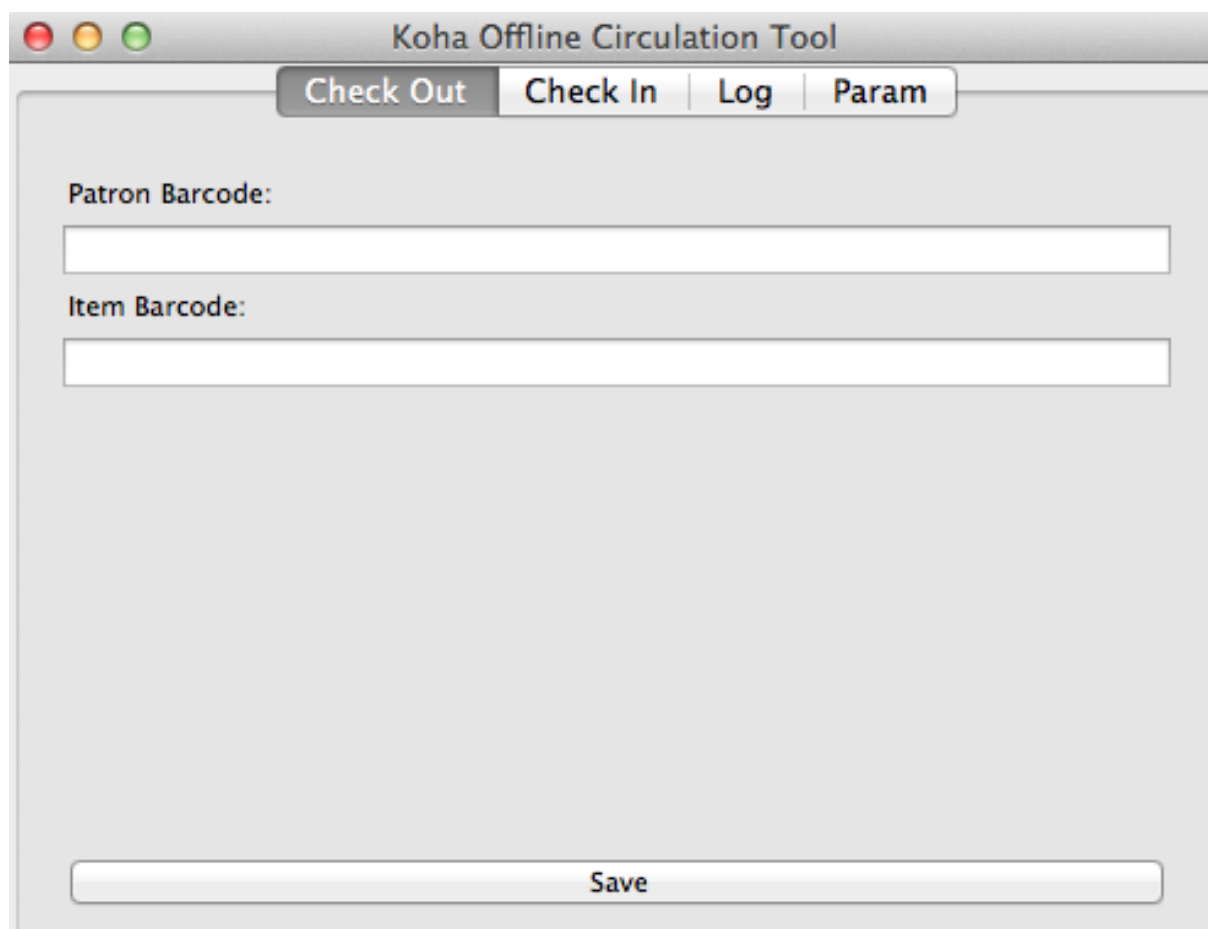
5.13.2 Firefox Plugin

There is an offline circulation tool that you can add to your Firefox browser as a plugin/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 plugin and restarted Firefox, you will see the Koha logo in the add-on bar at the bottom right of Firefox.

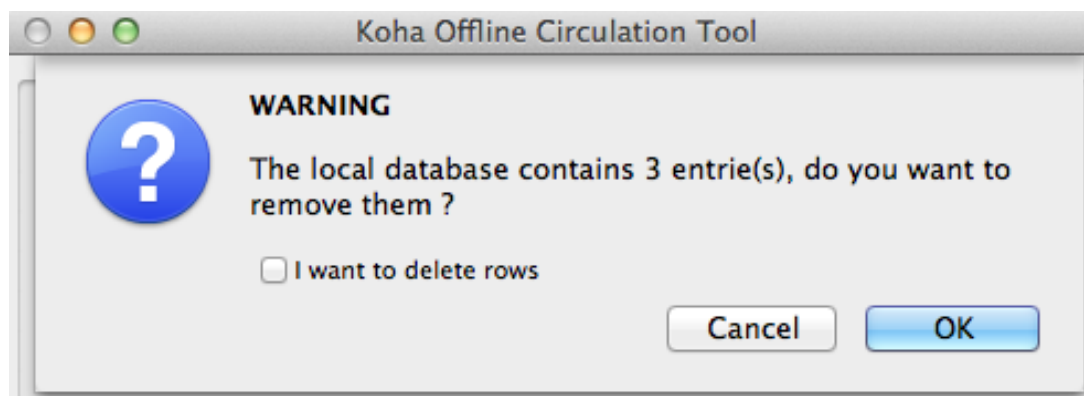


A click on the logo will open the tool in its own window.



The plugin consists of four tabs:

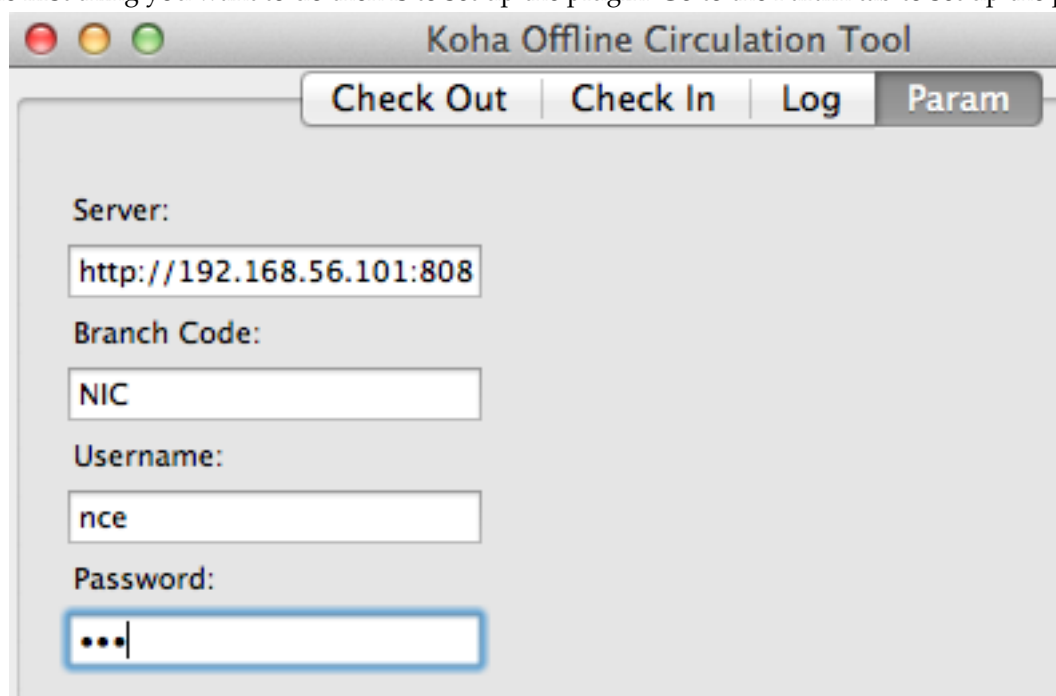
- The Check Out tab is where you check out items
- The Check In tab is where you check in items
- The Log tab keeps track of every transaction done while in offline mode
 - The log will keep information until you empty it. Each time you open the plugin and it contains data in the log it will warn you



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.

TIP

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.

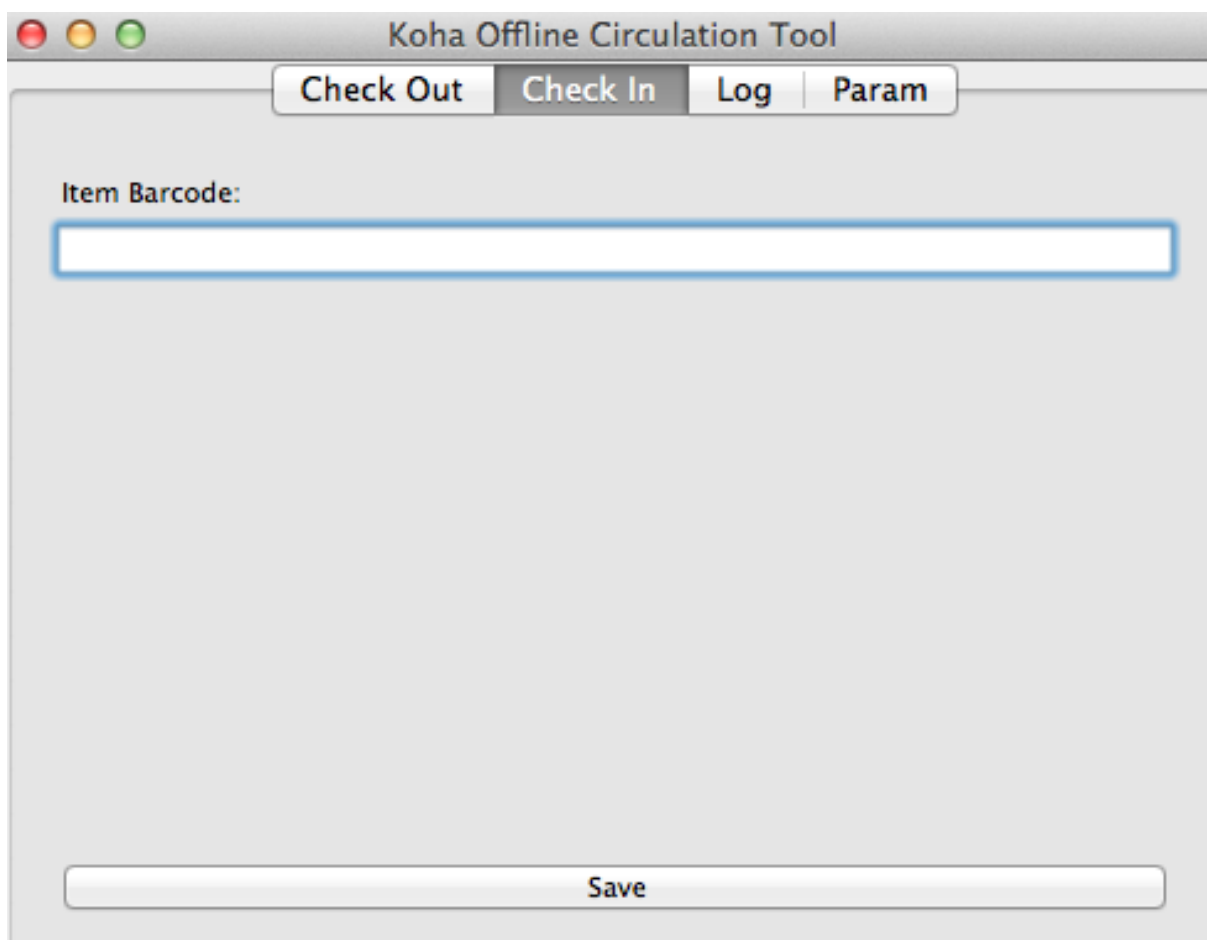
Once you have everything set up you can start checking items in and out.

Checking out:

The screenshot shows a web application window titled "Koha Offline Circulation Tool". At the top, there are four tabs: "Check Out", "Check In", "Log", and "Param". The "Check Out" tab is currently selected. Below the tabs, there are two input fields: "Patron Barcode:" and "Item Barcode:". At the bottom of the window, there is a "Save" button.

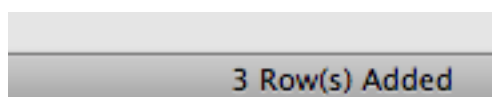
- Go to the Check Out tab
- Scan the patron barcode
- Scan the item barcode
- Click 'Save'

Checking in:

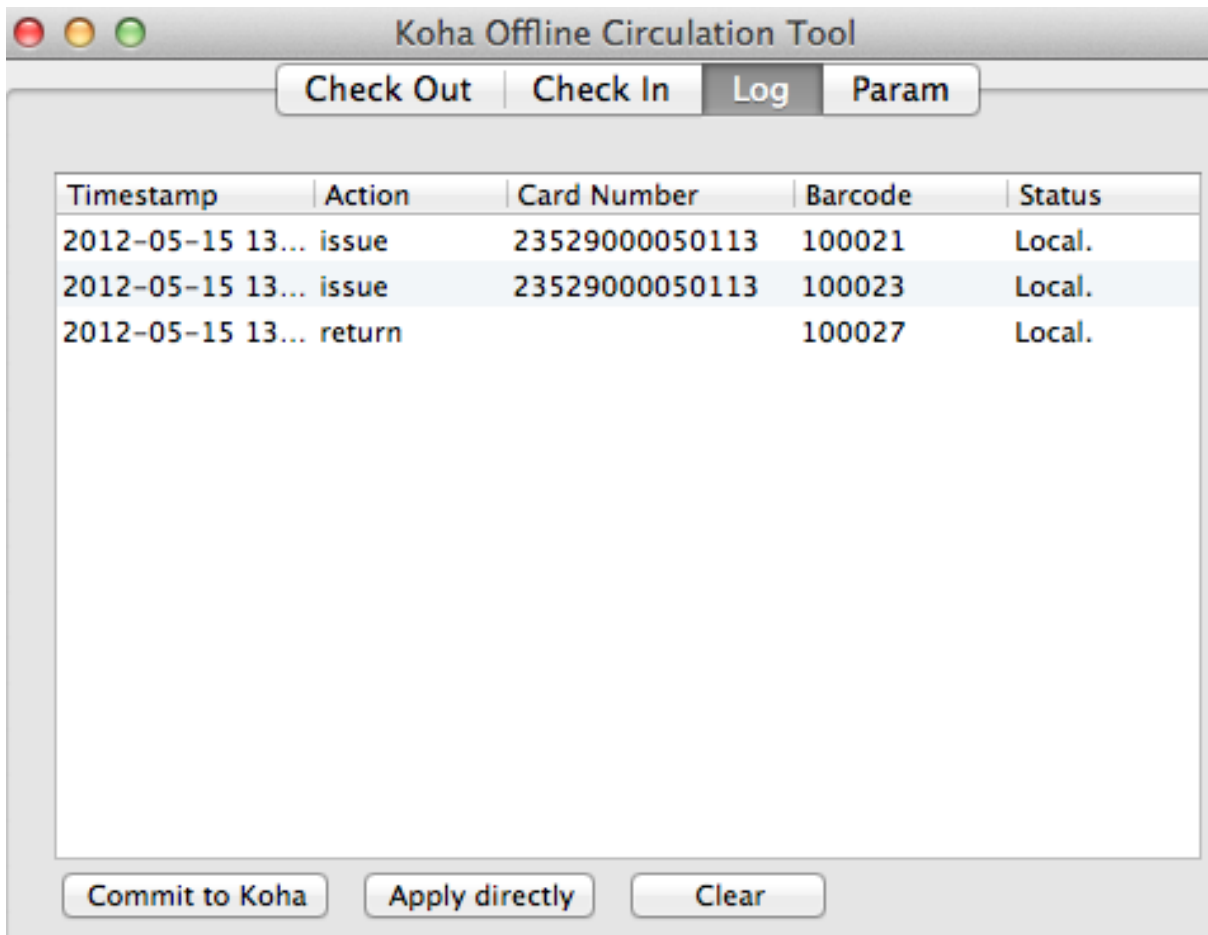


- Go to the Check In tab
- Scan the item barcode
- Click Save

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

**TIP**

The status will be "Local." as long as you are offline and don't process the transactions into Koha.

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 a 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
<input type="checkbox"/>	2012-05-15 13:13:26	issue	100021	23529000050113
<input type="checkbox"/>	2012-05-15 13:13:34	issue	100023	23529000050113
<input type="checkbox"/>	2012-05-15 13:13:38	return	100027	

For the selected operations:

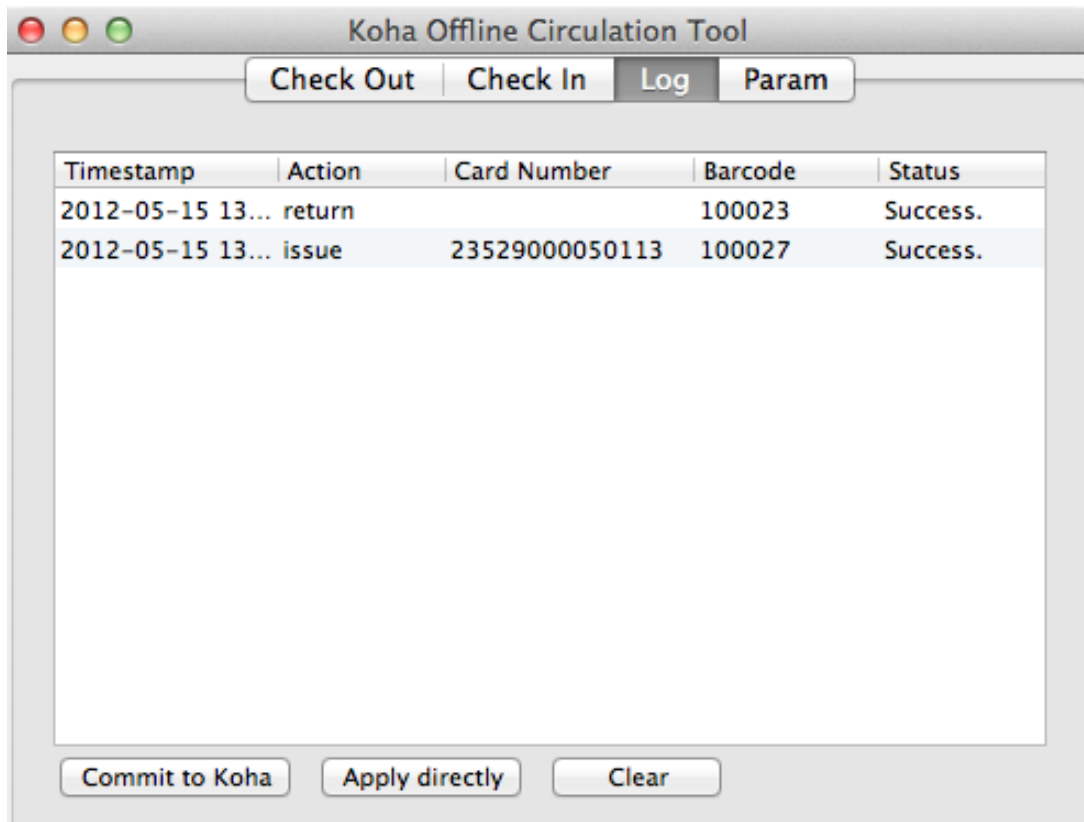
- Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.
- Click on the Process button and Koha will record every stored transaction one by one. For each transaction, the status will change to:
 - * "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

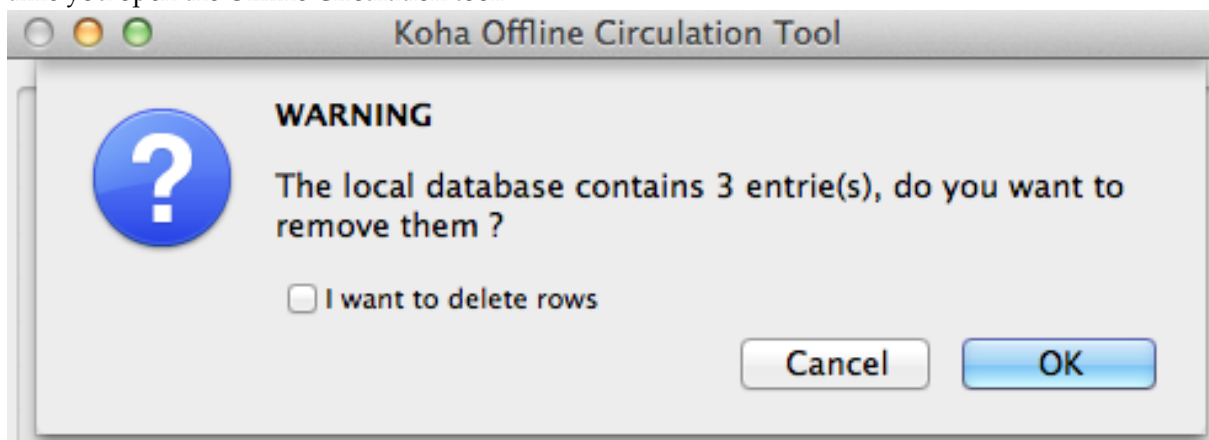
[Check all](#) | [Uncheck all](#)

	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: <http://kylehall.info/index.php/projects/koha/-koha-offline-circulation/>

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

Once the file is uploaded, click the process the file

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
<input type="checkbox"/>	2012-05-15 13:13:26	issue	100021	23529000050113
<input type="checkbox"/>	2012-05-15 13:13:34	issue	100023	23529000050113
<input type="checkbox"/>	2012-05-15 13:13:38	return	100027	

For the selected operations:

- 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	

Chapter 6

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

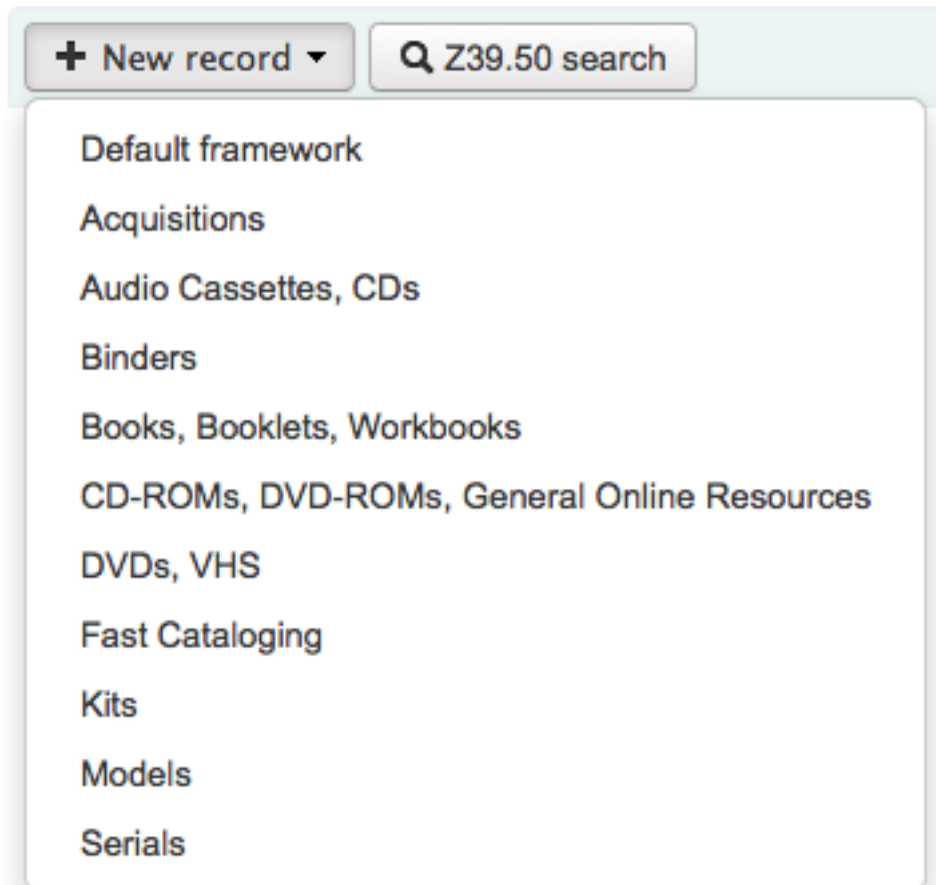
6.1 Bibliographic Records

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. If you would like to catalog a record using a blank template

- Click 'New Record'



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

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

- Click 'Z39.50 Search'

Z39.50 search points

Title: <input type="text"/>	Author: <input type="text"/>
ISBN: <input type="text"/>	ISSN: <input type="text"/>
LC call number: <input type="text"/>	Subject heading: <input type="text"/>
Control no.: <input type="text"/>	Dewey: <input type="text"/>
Raw (any): <input type="text"/>	Standard ID: <input type="text"/>

Search targets [Select all](#) [Clear all](#)

- AMICUS
- BRITISH LIBRARY
- BROWN UNIVERSITY
- CAMBRIDGE
- COLUMBIA UNIVERSITY
- DC PUBLIC LIBRARY
- DREXEL
- EAST CHICAGO
- HAMMOND PUBLIC LIBRARY
- KANSAS CITY PUBLIC
- LONDON ARTS
- METRO-BOSTON LIBRARY NETWORK
- NATIONAL LIBRARY OF SCOTLAND
- NEW YORK UNIVERSITY
- NY PUBLIC
- SEATTLE PUBLIC
- SMITHSONIAN INSTITUTION LIBRARIES
- TEMPLE
- UNIVERSITY OF LONDON
- VANCOUVER
- YALE
- LIBRARY OF CONGRESS

[Cancel](#)

- Search for the item you would like to catalog

*

TIP

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

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

Results

Server	Title	Author	Date	Edition	ISBN	LCCN	Preview		
LIBRARY OF CONGRESS	Apache Web server administration & e-commerce handbook /	Hawkins, Scott.	2001		0130898732(pbk/CDROM)	00049166	MARC	Card	Import
LIBRARY OF CONGRESS	Bibliography of intelligence literature :		1981			83602004	MARC	Card	Import
LIBRARY OF CONGRESS	The cathedral & the bazaar :	Raymond, Eric S.	1999		1565927249	99045768	MARC	Card	Import
LIBRARY OF CONGRESS	Embracing insanity :	Pavlicek, Russell C.	2000		0672319896	00103677	MARC	Card	Import

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

Results

Server	Title	Author	Date	Edition	ISBN	LCCN	Preview		
LIBRARY OF CONGRESS	Government information :	Richardson, John V.,	1987		0313256055(libbdg:alkpaper)	86027086	MARC	Card	Import
LIBRARY OF CONGRESS	Knowledge-based systems for general reference work :	John V.,	1999		0125884605(acidfreepaper)	94031851	MARC	Card	Import
LIBRARY OF CONGRESS	Understanding reference transactions :	Saxton, Matthew L.	2002		0125877803(acidfreepaper)	2002102555	MARC	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

LIBRARY OF CONGRESS	Web 2.0 for librarians and information professionals /	Kroski, Ellyssa.	2008
LIBRARY OF CONGRESS	Yahoo! Maps mashups /	Freedman, Charles,	2007

[Try Another Search](#)

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

Add MARC record

Show MARC tag documentation links

Change framework:

000 ? - LEADER

00 **fixed length control field**

001 ? - CONTROL NUMBER

00 **control field**

- 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 at the top right of the editor

Add MARC record

Show MARC tag documentation links

- Sometimes fields may not be editable due to the value in your **BiblioAddsAuthorities** system preference. If you have this preference set to not allow catalogers to type in fields controlled by authorities you may see a lock symbol to the left of the field.

100 ? **- MAIN ENTRY--PERSONAL NAME**

4 **Relator code**

a **Personal name**

- 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


- 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 



▲ x General subdivision  



▲ x General subdivision  



- 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

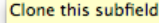
▲ e Relator term

▲ v Form subdivision  

▲ x General subdivision  

▲ y Chronological subdivision  

▲ z Geographic subdivision  

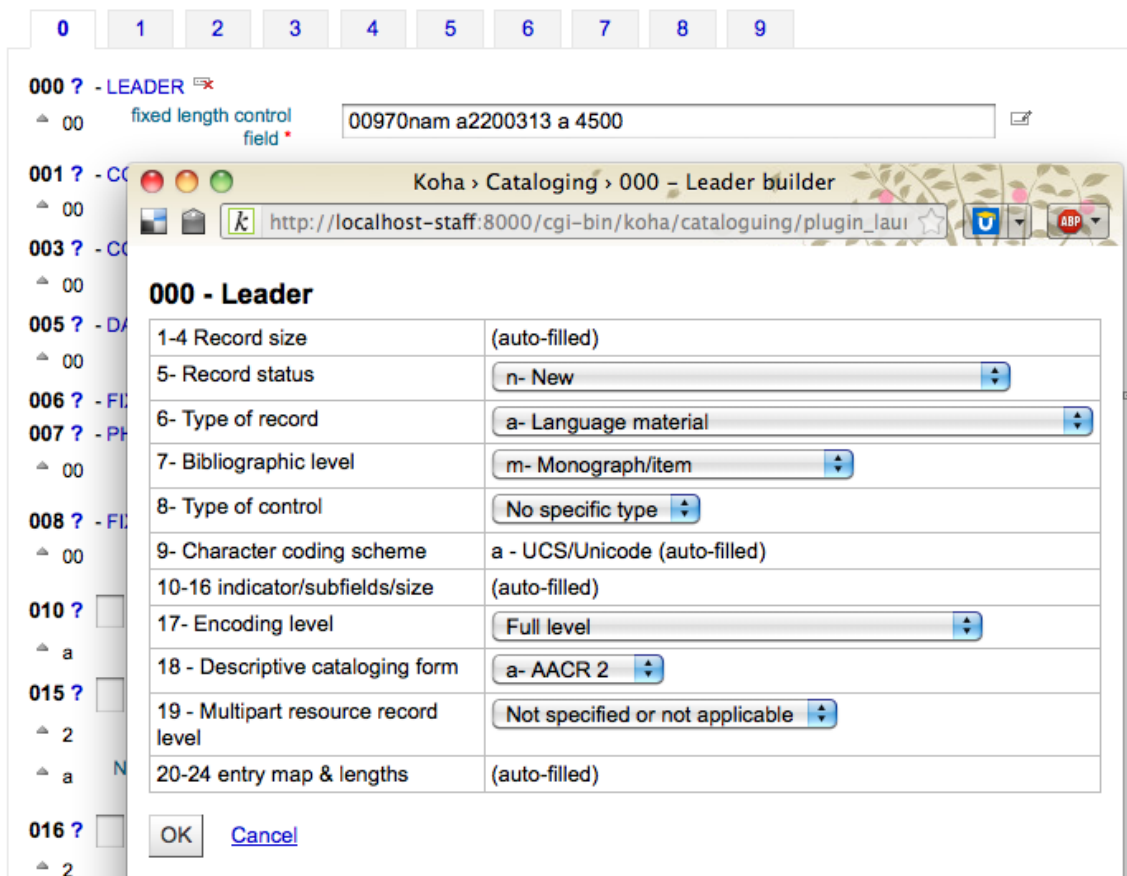
651 ? - SUBJECT--GEOGRAPHIC NAME +- 

653 ? - SUBJECT--UNCONTROLLED +-

655 ? - SUBJECT--GENRE/Form +-

- 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 field



- Some fixed fields have editors that will change based on the material type you're cataloging (for example the 006 and the 008 fields)

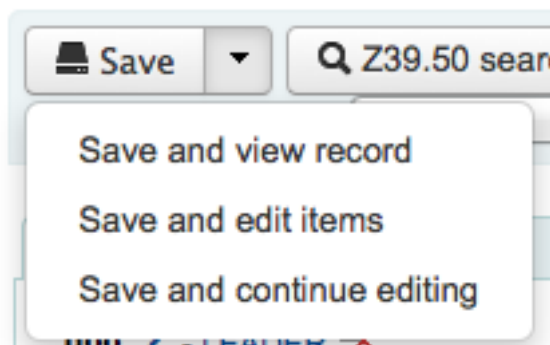
008 Fixed-length data elements--Additional material characteristics--General information

1 1 0 3 1 3 t | | | | | x x u | | | | | | | | | | 0 0 | 0 e n g d

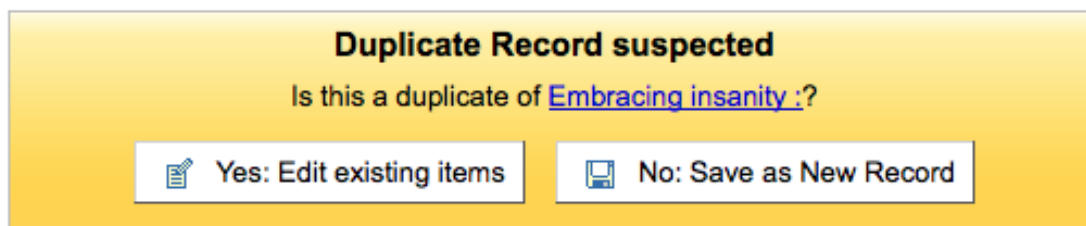
"110313t xxu||||| |||| 00| 0 eng d"

Type of Material	BKS - Books
00-05 - Date entered on file	
06 - Type of date/ Publication status	
07-10 - Date 1	
11-14 - Date 2	
15-17 - Place of publication, production, or execution	MARC Code List for Countries
18-21 - Illustrations	
22 - Target audience	- No attempt to code
23 - Form of item	# - None of the following
24-27 - Nature of contents	
28 - Government publication	# - Not a government publication
29 - Conference publication	0 - Not a conference publication
30 - Festschrift	0 - Not a festschrift
31 - Index	- No attempt to code
32 - Undefined	# - Contains a blank (#) or a fill character ().

- 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 continue 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



6.1.2 Adding Analytic Records

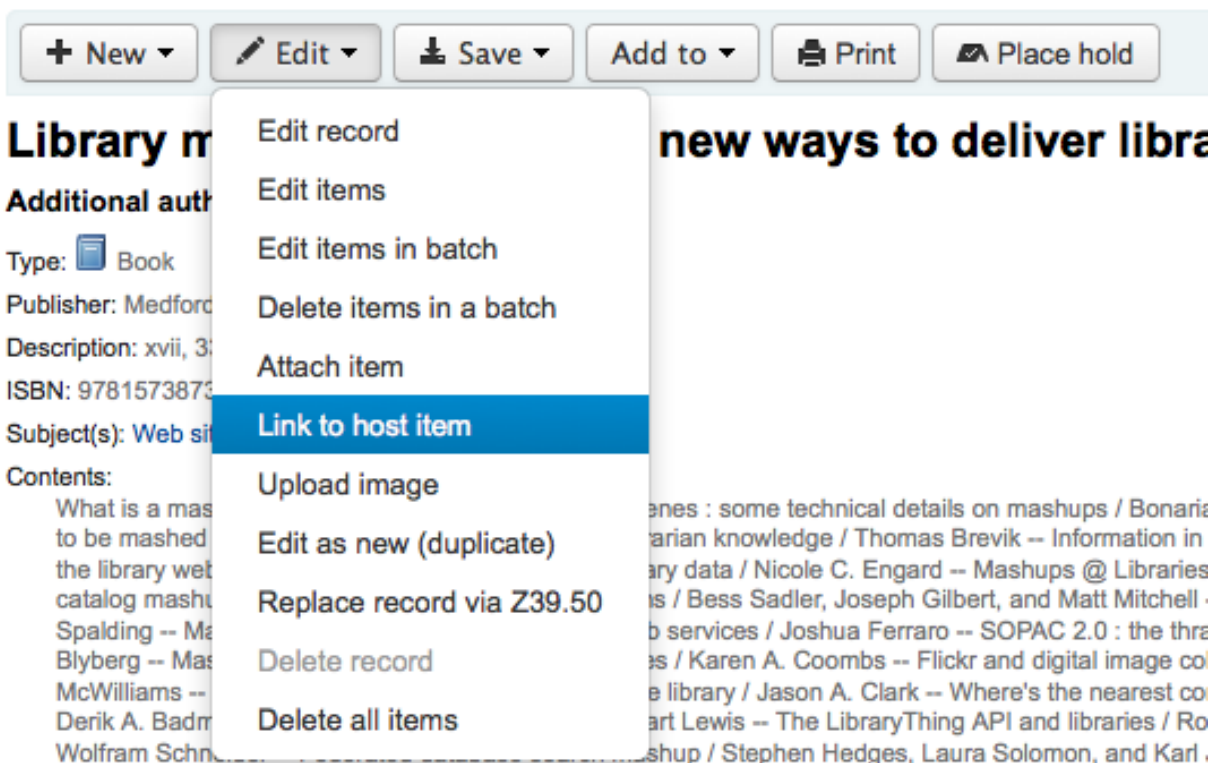
Libraries sometimes make journal articles and articles within monographs and serials accessible to library patrons through analytics cataloging. Analytics cataloging creates separate bibliographic records for these articles, chapters, sections, etc. found within a larger resource such as a book, an article 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](#) function; 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:

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.

773 ? 0	- HOST ITEM ENTRY	
0	Host Biblionumber	4038
9	Host Itemnumber	5471
d	Place, publisher, and date of publication	Westport, CT : Meckler, c1988-
o	Other item identifier	316190004778982
t	Title	Computers in libraries.
w	Record control number	(NCE)11356507
x	International Standard Serial Number	1041-7915


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.

Analytics										
Subscription(s)										
Checkout history										
Modification log										

Holdings										
Descriptions										
Subscriptions										
Images										

Item type	Current location	Home Library	Call number	Status	Last seen	Barcode	Publication details	Spine label	Used in	
Reference	Nicole's Library	Nicole's Library	MAG	Available	11/27/2011	123432124523	Volume 31, Number 1 -- Volume 31, Number 1 (2012-01-15)	Print label		Create analytics

TIP



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 analytic record you will also see a link to the host item under the 'Host records' column in the holdings table when viewing the 'Analytics' tab.

Items										
Holds										
Analytics										
Checkout history										
Modification log										

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

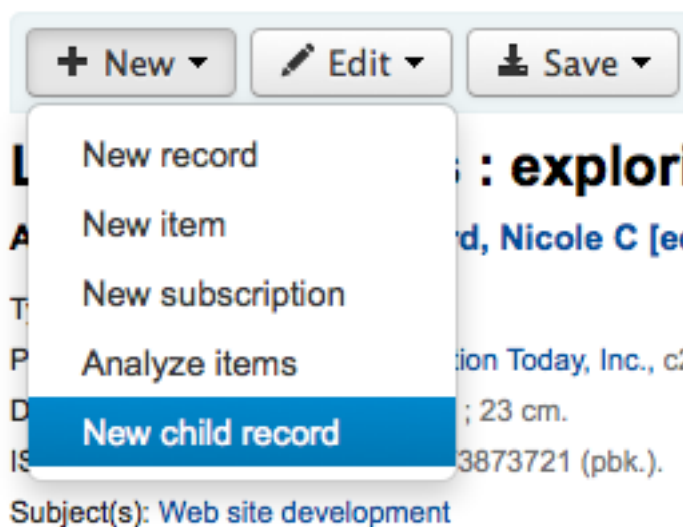
Holdings										
Descriptions										
Images										

Item type	Current location	Home Library	Call number	Status	Last seen	Barcode	Publication details	Spine label	Host records	Used in
Reference	Nicole's Library	Nicole's Library	MAG	Available	11/27/2011	123432124523	Volume 31, Number 1 -- Volume 31, Number 1 (2012-01-15)	Print label	Computers in libraries.	Create analytics

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.'



The image shows a user interface with three buttons: '+ New', 'Edit', and 'Save'. A dropdown menu is open under the '+ New' button, listing the following options: 'New record', 'New item', 'New subscription', 'Analyze items', and 'New child record'. The 'New child record' option is highlighted in blue. In the background, there is a record for 'explori' by Nicole C [ed], published by 'ion Today, Inc., c2', with a size of '23 cm.' and an ISBN of '3873721 (pbk.)'. The subject is listed as 'Web site development'.

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.

773 ? 0 - HOST ITEM ENTRY

w Record control number: 15804854

d Place, publisher, and date of publication: Medford, N.J. : Information Today, Inc., c2009.

z International Standard Book Number: 9781573873727 (pbk.)

t Title: Library mashups :

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.

Analytics

Subscription(s)

Checkout history

Modification log

Item type	Current location	Home Library	Call number	Status	Last seen	Barcode	Publication details	Spine label	Used in
Reference	Nicole's Library	Nicole's Library	MAG	Available	11/27/2011	123432124523	Volume 31, Number 1 -- Volume 31, Number 1 (2012-01-15)	Print label	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 analytic record you will also see a link to the host item under the 'Host records' column in the holdings table when viewing the 'Analytics' tab.

Items

Holds

Analytics

Checkout history

Modification log

OPAC view: Open in new window.

Item type	Current location	Home Library	Call number	Status	Last seen	Barcode	Publication details	Spine label	Host records	Used in
Reference	Nicole's Library	Nicole's Library	MAG	Available	11/27/2011	123432124523	Volume 31, Number 1 -- Volume 31, Number 1 (2012-01-15)	Print label	Computers in libraries.	Create analytics

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.

Items for Following the Yellow Brick Road to Simplified Link Management by Engard, Nicole (Record #5925)

	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Permanent location	Current location	Shelving location	Date acquired	Full call number	Barcode	Date last seen	Price effective from	Item
Edit in Host			loc			Fairfield	Fairfield	REF	2011-07-11	MAG	316190004778982	2011-09-28	2011-07-11	Re

- 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

Library mashups : exploring new ways to deliver library data / - 1573873721 9781573873727 - Information Today, Inc., - 2009 ; Medford, N.J. : - 334 p. cm.	Checked out (3), On order (3)	MARC Card	Edit biblio	Add/Edit Items
--	--	--	--	---

or by clicking the Edit button on the Bibliographic Record and choosing 'Edit Record'

The screenshot shows a toolbar with buttons for '+ New', 'Edit', 'Save', 'Add to', 'Print', and 'Place hold'. The 'Edit' button is active, and a dropdown menu is open, listing the following options:

- Edit record
- Edit items
- Edit items in batch
- Delete items in a batch
- Attach item
- Link to host item
- Upload image
- Edit as new (duplicate)
- Replace record via Z39.50
- Delete record
- Delete all items

The background shows a bibliographic record for 'Library mashups : exploring new ways to deliver library data / Information Today, Inc., - 2009 ; Medford, N.J. : - 334 p. cm.' with fields for Additional authors, Type (Book), Publisher, Description, ISBN, and Subject(s).

The record will open in the MARC editor

Editing *Library mashups : exploring new ways to deliver library data* / edited by Nicole C. Engard. (Record number 4091)

Show MARC tag documentation links

Save Z39.50 search Cancel
Change framework: Default

0	1	2	3	4	5	6	7	8	9
000 ?	- LEADER								
00	fixed length control field								
001 ?	- CONTROL NUMBER								
00	control field								
003 ?	- CONTROL NUMBER IDENTIFIER								
00	control field								
005 ?	- DATE AND TIME OF LATEST TRANSACTION								
00	control field								
006 ?	- FIXED-LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL CHARACTERISTICS--GENERAL INFORMATION								
007 ?	- PHYSICAL DESCRIPTION FIXED FIELD--GENERAL INFORMATION								
00	fixed length control field								
008 ?	- FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION								
00	fixed length control field								

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.

+ New Edit Save Add to Print

Library m **new ways to**

Additional auth

Type: Book

Publisher: Medford

Description: xvii, 3

ISBN: 9781573873

Subject(s): Web si

Contents:

What is a mas
to be mashed
the library wet
catalog mashu
Spalding -- Ma
Blyberg -- Mas
McWilliams --
Derik A. Badm
Wolfram Schn
mashups using SRU / Michael C. Witt.

- Edit record
- Edit items
- Edit items in batch
- Delete items in a batch
- Attach item
- Link to host item
- Upload image
- Edit as new (duplicate)
- Replace record via Z39.50**
- Delete record
- Delete all items

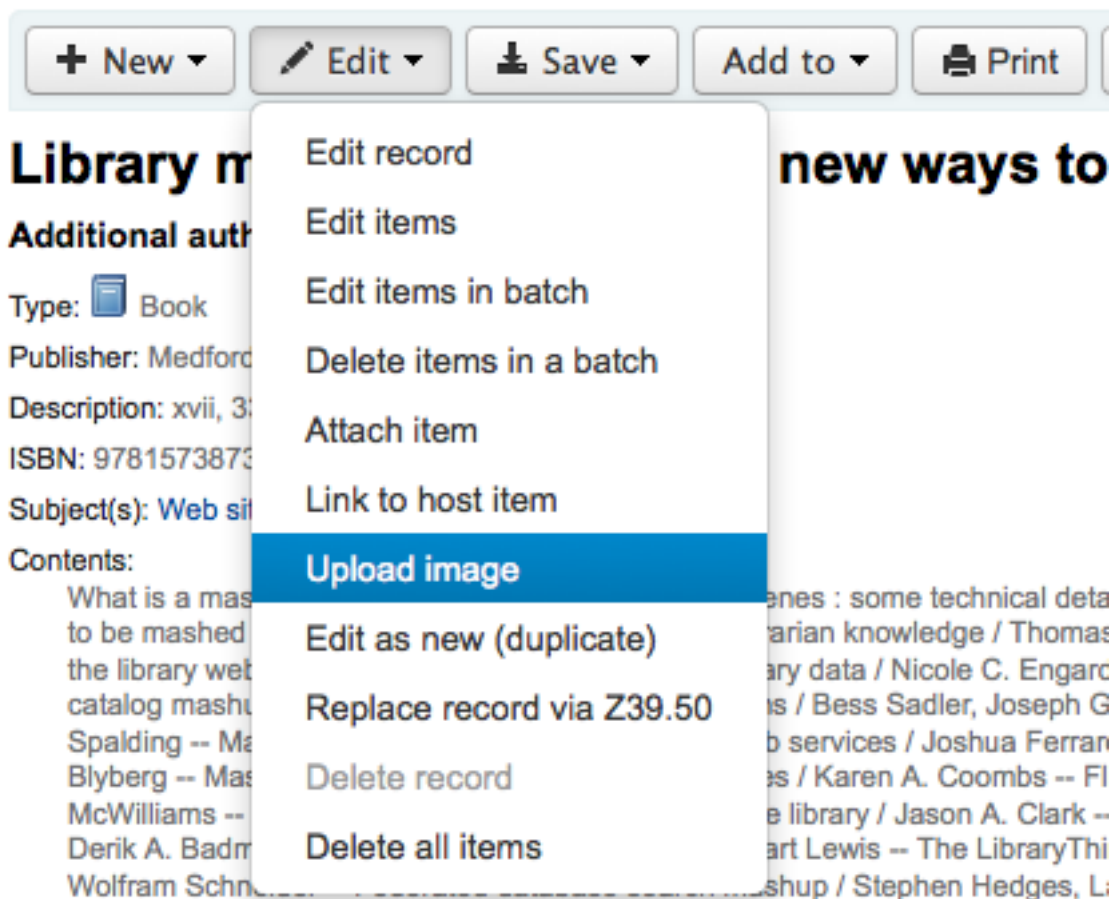
enes : some technical det
arian knowledge / Thoma
ary data / Nicole C. Engar
s / Bess Sadler, Joseph C
o services / Joshua Ferra
es / Karen A. Coombs -- F
e library / Jason A. Clark
art Lewis -- The LibraryTh
shup / Stephen Hedges, L

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.

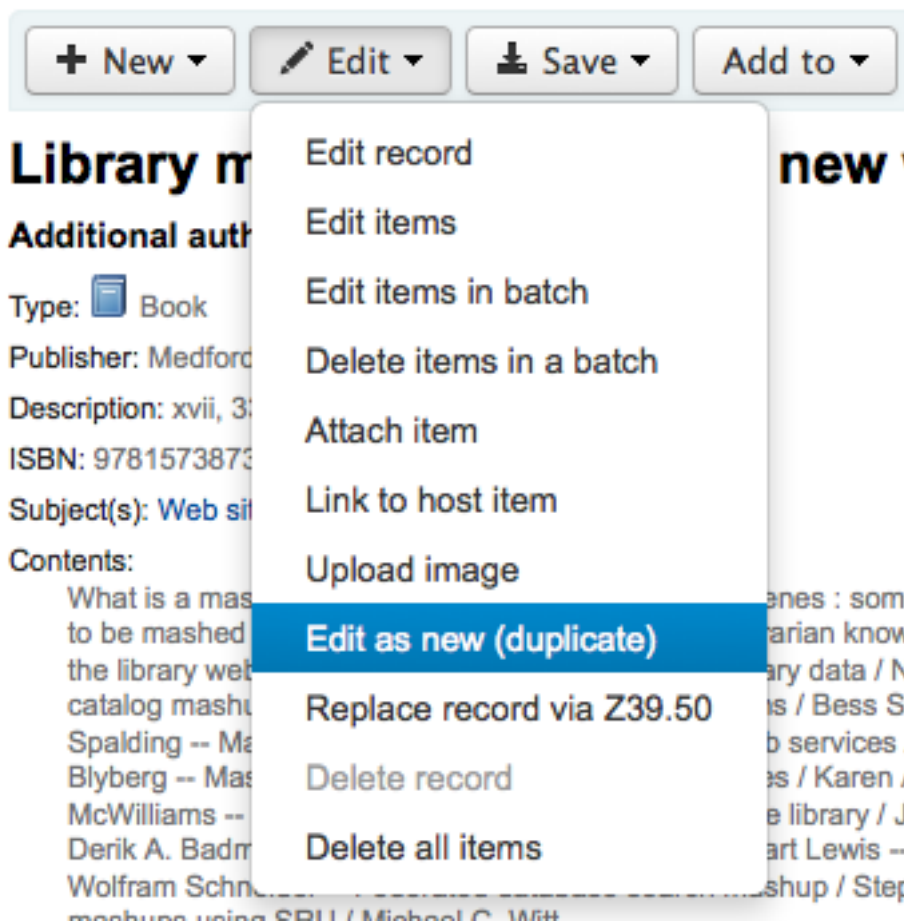
You can also use the edit menu to add your own custom cover image if you have either [OPACLocalCoverImages](#) and/or [LocalCoverImages](#) set to 'Display' by choosing 'Upload Image' from the menu.



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.

Add MARC record

Show MARC tag documentation links

Save [Z39.50 search] Cancel

Change framework: Default

0 1 2 3 4 5 6 7 8 9

210 ? [] [] - ABBREVIATED TITLE [] []

222 ? [] [] - KEY TITLE [] []

240 ? [] [] - UNIFORM TITLE [] []

243 ? [] [] - COLLECTIVE UNIFORM TITLE [] []

245 ? [0] [0] - TITLE STATEMENT [] []

▲ a Title * Library mashups :

▲ b Remainder of title exploring new ways to deliver library data /

▲ c Statement of responsibility, etc edited by Nicole C. Engard.

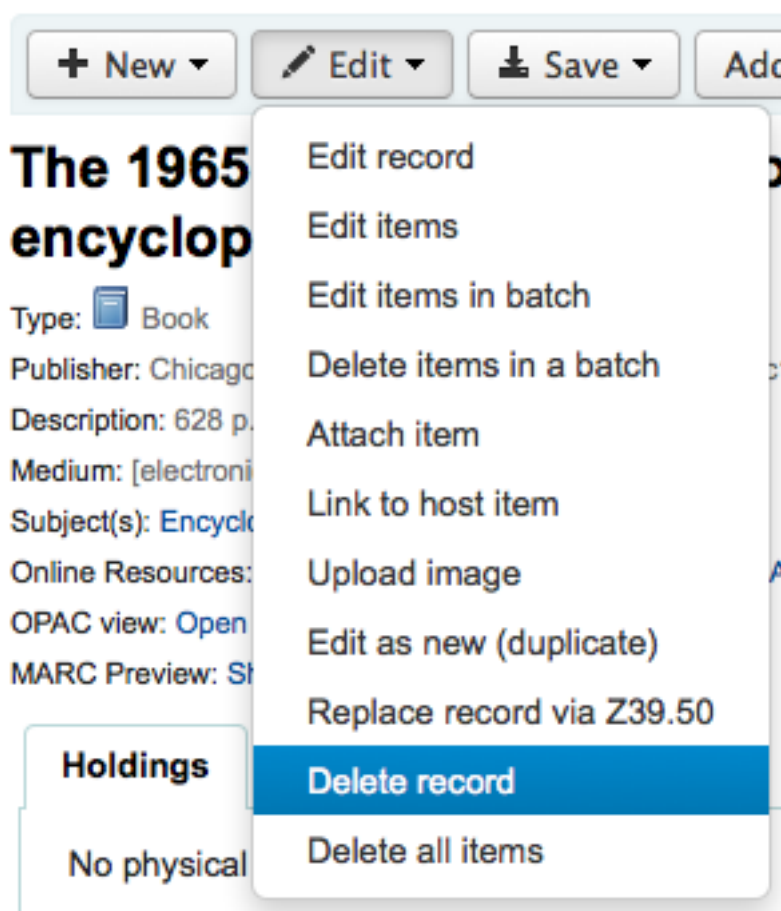
▲ h Medium

6.1.5 Merging Records

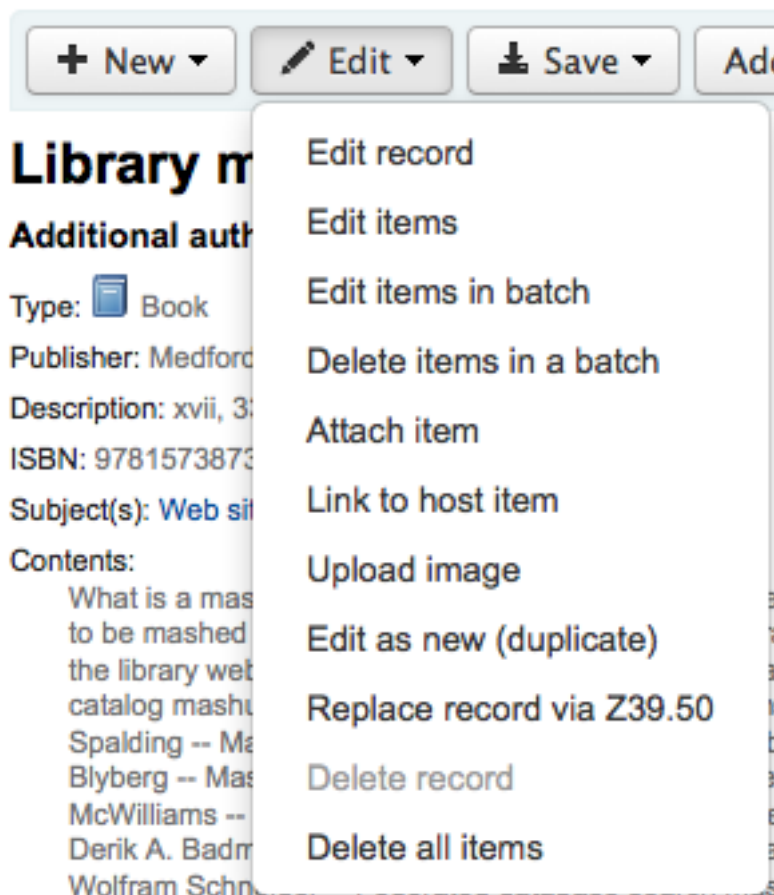
If you would like to merge together multiple records you can do that via the [Lists](#) tool. [Learn more here.](#)

6.1.6 Deleting Records

To delete a bibliographic record simply choose the 'Edit' button and select 'Delete record'



Bibliographic records can only be deleted once 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

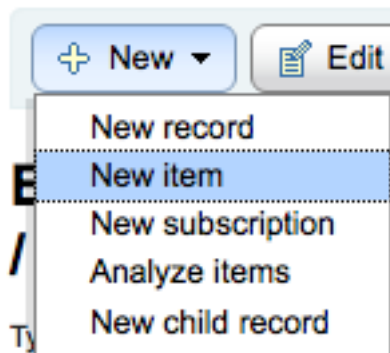
In Koha each bibliographic record can have one or more items attached. These items are sometimes referred to as holdings. Each item includes information to the physical copy the library has.

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

<p>Library mashups : exploring new ways to deliver library data / - 1573873721 9781573873727 - Information Today, Inc., - 2009 ; Medford, N.J. : - 334 p. cm.</p>	<p>Checked out (3), On order (3)</p>	<p>MARC Card</p>	<p>Edit biblio</p>	<p>Add/Edit Items</p>
---	--	----------------------------------	------------------------------------	---------------------------------------

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



The item edit form will appear:

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

Add Item

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

At the very least, 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
- 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.

x - Non-public note	<input type="text"/>
y - Koha item type	Books Required
z - Public note	<input type="text"/>

TIP



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	Add & duplicate	Add multiple items
----------	-----------------	--------------------

- 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 Embracing insanity : by Pavlicek, Russell C. (Record #1270)

	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Full call number	Barcode	Cost, replacement price	Koha item type
Edit Delete			ddc			Non Fiction	Centerville	Centerville	New Materials Shelf	2009-12-03	008.1	78990982767236	25	Books
Edit Delete			ddc				Fairview	Fairview	General Stacks	2009-12-02	008.1	837502384093289		Books

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

Holdings Descriptions Images

Activate filters

Item type	Current location	Home Library	Collection	Call number	Status	Last seen	Barcode	url	Public notes
Books	Pleasant Valley	Nicole's Library Office	Library & Information Science	Z674.75.W67 L52 2009	In transit from Nicole's Library, to Pleasant Valley, since 09/07/2011	09/07/2011	50671988		
Books	Nicole's Library	Nicole's Library Office	Library & Information Science	Z674.75.W67 L52 2009	Available	05/05/2012	47627257		

If you have [SpineLabelShowPrintOnBibDetails](#) set to 'Display' then there will also be a link to print a quick spine label next to each item.

Holdings Descriptions Images

Activate filters

Item type	Current location	Home Library	Collection	Call number	Status	Last seen	Barcode	url	Public notes	Spine label
Books	Pleasant Valley	Nicole's Library Office	Library & Information Science	Z674.75.W67 L52 2009	In transit from Nicole's Library, to Pleasant Valley, since 09/07/2011	09/07/2011	50671988			Print label
Books	Nicole's Library	Nicole's Library Office	Library & Information Science	Z674.75.W67 L52 2009	Available	05/05/2012	47627257			Print label

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.

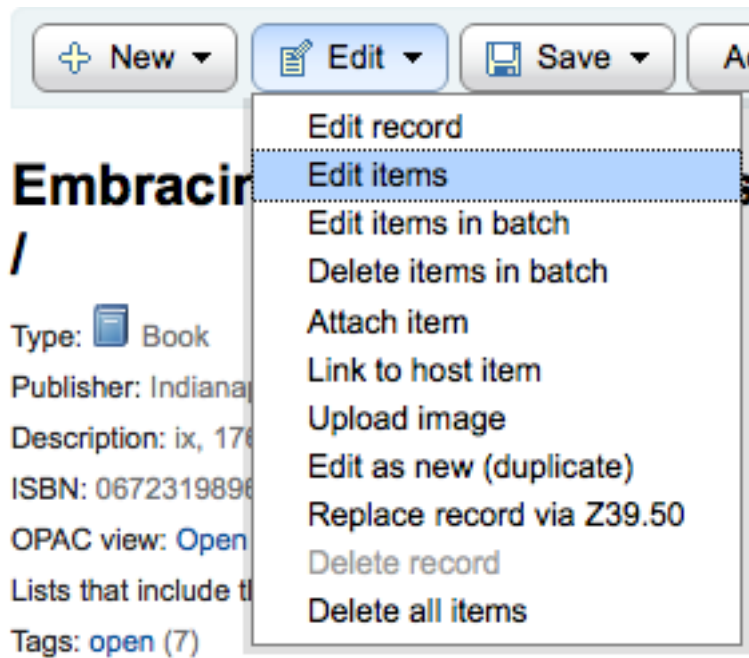
Deactivate filters

Item type	Current location	Home Library	Collection	Call number	Status	Last seen	Barcode	url	Public notes	Spine label
Item type	Current locati	Home Librar	Collection	Call number	<input type="text" value="aval"/>	Last seen	Barcode	url	Public note	Spine label
Books	Nicole's Library	Nicole's Library Office	Library & Information Science	Z674.75.W67 L52 2009	Available	05/05/2012	47627257			Print label
Books	Nicole's Library	Nicole's Library Office	Library & Information Science	Z674.75.W67 L52 2009	Available	08/15/2011	45108216			Print label

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 'Edit' to the left of the specific item you would like to edit.

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

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

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

+ New ▾
 Edit ▾
 Save

Library mashups :

exploring new ways to delive

Biblionumber:	4
Rental charge:	(
ISBN:	\$
Publisher:	f
Physical details:)
No. of items:	2

Barcode

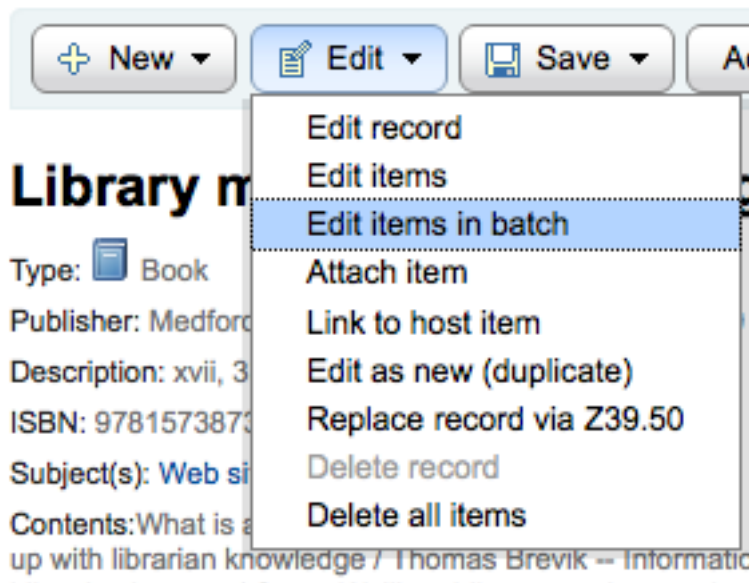
Item information [[Edit Item](#)]

Home library:	
Item type:	f
Collection:	l
Item callnumber:	
Replacement price:	(

Which will open up a list of items where you can click 'Edit' to the left of the specific item you would like to edit.

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

- 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.

Holdings					
Descriptions					
Images					
Select all Clear all Actions: Delete selected items Modify selected items					
Activate filters					
	Item type	Current location	Home library	Collection	Call number
<input checked="" type="checkbox"/>	Books	Fairfield	Fairfield	Library & Information Science	Z674.75.W67 L52 2009
<input checked="" type="checkbox"/>	Books	Nicole's Library	Fairfield	Library & Information Science	Z674.75.W67 L52 2009
<input checked="" type="checkbox"/>	Books	Nicole's Library	Fairfield	Library & Information Science	Z674.75.W67 L52 2009
<input type="checkbox"/>	Books	Nicole's Library	Nicole's Library	Library & Information Science	Z674.75.W67 L52 2009

- 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.

+ New
Edit
Save
Add to
Print
Place hold

Normal

MARC

Labeled MARC

ISBD

Items

Holds

Analytics

Checkout history

Modification log

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Biblionumber:	538
Rental charge:	0.00
ISBN:	0672319896
Publisher:	Indianapolis, IN : SAMS,
Physical details:	ix, 176 p. ; 23 cm.
No. of items:	1

Barcode 100047

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

Home library:	Nicole's Library
Item type:	Books
Collection:	Internet Non Fiction
Item callnumber:	QA76.76.D47 P379 2000
Replacement price:	29.99

Statuses

Current location:	Nicole's Library
Checkout status:	
Current renewals:	
Lost status:	<input type="text" value="Choose"/> <input type="button" value="Set Status"/>
Damaged status:	<input type="text" value="Choose"/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

History

Accession date:	02/18/2011
Total checkouts:	0 (View item's checkout history)
Last seen:	02/18/2011
Last borrowed:	
Public note:	<input style="width: 100%; height: 30px;" type="text"/> <input type="button" value="Update"/>

From this view you can mark an item lost by choosing a lost status from the pull down and clicking the 'Set Status' button.

Lost Status:

Damaged Status:

Withdrawn?:

<input type="text" value="Choose"/>	<input type="button" value="Set Status"/>
Choose	
Claims Returned	
Long Overdue (Lost)	
Lost	
Lost and Paid For	
Missing	

You can also mark an item as damaged by choosing a damaged status from the pull down and clicking the 'Set Status' button.

Damaged Status:

Withdrawn?:

tory

6.2.3 Item Information

To the left of every bibliographic record there is a tab to view the items.

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

Embracing insanity :
open source software development /

Biblionumber:	538
Rental charge:	0.00
ISBN:	0672319896
Publisher:	Indianapolis, IN : SAMS,
Physical details:	ix, 176 p. ; 23 cm.
No. of items:	1

Barcode 100047
Item information [\[Edit Item\]](#)

Home library:	Nicole's Library
Item type:	Books
Collection:	Internet Non Fiction
Item callnumber:	QA76.76.D47 P379 2000
Replacement price:	29.99

Statuses

Current location:	Nicole's Library
Checkout status:	
Current renewals:	
Lost status:	<input type="text" value=""/> <input type="button" value="Set Status"/>
Damaged status:	<input type="text" value=""/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

History

Accession date:	02/18/2011
Total checkouts:	0 (View item's checkout history)
Last seen:	02/18/2011
Last borrowed:	
Public note:	<input type="text" value=""/> <input type="button" value="Update"/>

Clicking that tab will give you basic information about the items. If you ordered the item via the acquisitions module then the History section will include information about the order.

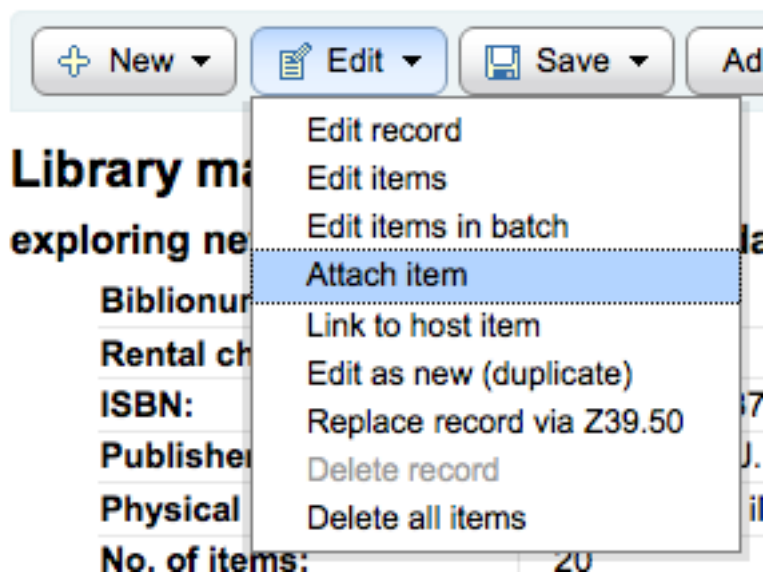
History

Order date:	09/07/2011
Vendor:	Amazon
Accession date:	09/07/2011
Invoice number:	3245423
Total checkouts:	1 (View item's checkout history)
Last seen:	08/23/2012
Last borrowed:	08/23/2012
Last borrower:	9876543453
Public note:	<input type="text"/>

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.

Attach an item to *Library mashups* :

Enter the barcode of the item to attach:

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

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

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

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'.

The screenshot shows a library cataloging interface. On the left is a sidebar with navigation buttons: Normal (highlighted), MARC, Labeled MARC, ISBD, Items, Holds, Analytics, Checkout history, and Modification log. The main area has a top toolbar with '+ New', 'Edit', and 'Save' buttons. The 'Edit' dropdown menu is open, showing options: Edit record, Edit items (highlighted), Edit items in batch, Attach item, Link to host item, Edit as new (duplicate), Replace record via Z39.50, Delete record, and Delete all items. Below the menu, the record details for a 'Book' are visible, including publisher, description, ISBN, and subject. A 'Holds: 13' indicator is present. At the bottom, there are tabs for 'Holdings' and 'Descriptions', with a table showing item types and locations.

Item type	Current location	Home Library
 7-DAY BOOK Books		
 7-DAY BOOK Books	Centerville	Centerville

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.





Holdings

Descriptions

Images

[Select all](#) | [Clear all](#) | Actions: [Delete selected items](#) [Modify selected items](#)

[Activate filters](#)

	Item type	Current location	Home library	Collection	Call number
<input checked="" type="checkbox"/>	 Books	Fairfield	Fairfield	Library & Information Science	Z674.75.W67 L52 2009
<input checked="" type="checkbox"/>	 Books	Nicole's Library	Fairfield	Library & Information Science	Z674.75.W67 L52 2009
<input checked="" type="checkbox"/>	 Books	Nicole's Library	Fairfield	Library & Information Science	Z674.75.W67 L52 2009
<input type="checkbox"/>	 Books	Nicole's Library	Nicole's Library	Library & Information Science	Z674.75.W67 L52 2009

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.

- MARC
- Labeled MARC
- ISBD
- Items**
- Holds
- Analytics
- Checkout history
- Modification log

Library mashups :

exploring new ways to deliver library data /

Biblionumber:	4091
Rental charge:	0.00
ISBN:	9781573873727 (pbk.) 1573873
Publisher:	Medford, N.J. : Information Today, Inc.,
Physical details:	xvii, 334 p. : ill., maps ; 23 cm.
No. of items:	20

You are only viewing one item. [View All](#)

Barcode 323122

Item information [[Edit Item](#)]

Home library:	Nicole's Library
Item type:	Books
Collection:	Library & Information Science
Item callnumber:	Z674.75.W67 L52 2009
Replacement price:	0.00

Statuses

Current location:	Pleasant Valley
Checkout status:	
Current renewals:	
Lost status:	<input type="text"/> <input type="button" value="Set Status"/>
Damaged status:	<input type="text"/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

History

Order date:	09/07/2011
Vendor:	Amazon
Accession date:	09/07/2011
Invoice number:	3245423
Total checkouts:	1 (View item's checkout history)
Last seen:	08/23/2012
Last borrowed:	08/23/2012
Last borrower:	9876543453
Public note:	<input type="text"/> <input type="button" value="Update"/>

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.

The image shows a user interface for creating a new authority. At the top, there is a button labeled '+ New authority' with a dropdown arrow, and a search button labeled 'New from Z39.50'. Below the '+ New authority' button, a dropdown menu is open, listing the following authority types: Chronological Term, Corporate Name, Default, Genre/Form Term, Geographic Name, Meeting Name, Personal Name, Topical Term, and Uniform Title.

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.

Adding authority Personal Name

The image shows a form for adding a new authority record. At the top left, there is a 'Save' button. Below it, there are tabs numbered 0 through 8. The form is currently on tab 0. The fields are as follows:

- 000 - LEADER
 - ▲ 00 fixed length control field *
- 001 - CONTROL NUMBER
- 003 - CONTROL NUMBER IDENTIFIER
 - ▲ 00 control field *
- 005 - DATE AND TIME OF LATEST TRANSACTION
 - ▲ 00 control field *
- 008 - FIXED-LENGTH DATA ELEMENTS
 - ▲ 00 fixed length control field *
- 010 - LIBRARY OF CONGRESS CONTROL NUMBER
- 014 - LINK TO BIBLIOGRAPHIC RECORD FOR SERIAL OR MULTIPART ITEM

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

239.50 Authority search points

Search targets [Select all](#) [Clear all](#)

- AUSTRALIA AUTHORITIES
- LOC NAME AUTHORITIES
- LOC SUBJECT AUTHORITIES

[Cancel](#)

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 :

You will then be presented with the form to edit the authority before saving it to your system

Adding authority Personal Name

0

1

2

3

4

5

6

7

8

000 - LEADER ✖

▲ 00 fixed length control field * ...

001 - CONTROL NUMBER ✖

▲ 00 control field

003 - CONTROL NUMBER IDENTIFIER ✖

▲ 00 control field * ...

005 - DATE AND TIME OF LATEST TRANSACTION ✖

▲ 00 control field * ...

008 - FIXED-LENGTH DATA ELEMENTS ✖

▲ 00 fixed length control field * ...

6.3.2 Searching Authorities

From the authorities page you can search for existing terms and the bibliographic records they are attached to.

Enter authority heading (\$a):

[Search Authorities](#)

[Search Main Heading](#)

[Search All Headings](#)

From the results you will see the authority record, how many bibliographic records it is attached to, an **edit** link, a **merge** link and a **delete** link (if there are no bibliographic records attached).

[+ New authority ▾](#)
[Q New from Z39.50](#)

Authority search results

[<<](#)
[<](#)
[1](#)
[2](#)
[3](#)
[...](#)
[17](#)
[>](#)
[>>](#)

Results 1 to 20 of 336

Summary		Used in	
Adventure stories, American.	Details	1 records(s)	Edit Merge
Adventure stories, American.	Details	1 records(s)	Edit Merge
Adventure stories, American.	Details	0 records(s)	Edit Merge Delete
Adventure stories, American.	Details	0 records(s)	Edit Merge Delete
African American children Fiction.	Details	0 records(s)	Edit Merge Delete
African American children Fiction.	Details	1 records(s)	Edit Merge
African American clergy Fiction.	Details	1 records(s)	Edit Merge
African American clergy Fiction.	Details	1 records(s)	Edit Merge
African American clergy Fiction.	Details	0 records(s)	Edit Merge Delete
African American clergy Fiction.	Details	0 records(s)	Edit Merge Delete
African American families Mississippi Fiction.	Details	0 records(s)	Edit Merge Delete
African American families Mississippi Fiction.	Details	1 records(s)	Edit Merge
African-American heritage series	Details	1 records(s)	Edit Merge
African American men Drama.	Details	1 records(s)	Edit Merge
African American teenage girls Fiction.	Details	0 records(s)	Edit Merge Delete
African American teenage girls Fiction.	Details	1 records(s)	Edit Merge
African American women Fiction.	Details	1 records(s)	Edit Merge
African Americans Fiction.	Details	1 records(s)	Edit Merge
African Americans Politics and suffrage.	Details	1 records(s)	Edit Merge
Afro-American studies United States.	Details	1 records(s)	Edit Merge

[<<](#)
[<](#)
[1](#)
[2](#)
[3](#)
[...](#)
[17](#)
[>](#)
[>>](#)

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.

[✎ Edit](#)
[📄 Duplicate](#)
[💾 Save ▾](#)
[+ New authority ▾](#)
[🔍 New from Z39.50](#)

Tepper, Sheri S.

Authority #1042 (Personal Name)

Used in 21 record(s)

[0](#)
[1](#)
[5](#)
[6](#)

```

000 - LEADER
    @ 01220cz a2200253n 4500
001 - CONTROL NUMBER
    @ 1042
003 - CONTROL NUMBER IDENTIFIER
    @ NCE
005 - DATE AND TIME OF LATEST TRANSACTION
    @ 20120927041135.0
008 - FIXED-LENGTH DATA ELEMENTS
    @ 880111n| acannaabn |a aaa
010 ## - LIBRARY OF CONGRESS CONTROL NUMBER
    a LC control number n 87909711
    
```

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.

[+ New authority ▾](#)
[🔍 New from Z39.50](#)

Authority search results

Results 1 to 2 of 2

Summary		Used in	
Horlak, E. E. <i>see also: Tepper, Sheri S. (n)</i>	Details	0 records(s)	Edit Merge Delete
Tepper, Sheri S. <i>see also: Orde, A. J.</i> <i>see also: Oliphant, B. J.</i> <i>see also: Horlak, E. E.</i>	Details	21 records(s)	Edit Merge

6.3.3 Editing Authorities


Authorities can be edited by clicking on the authority summary from the search results and then clicking the 'Edit' button above the record. Or by clicking on the 'Edit' link to the left of the authority on the search results.


Modify authority #491 Personal Name

Save

0 1 2 3 4 5 6 7 8 9

100 - HEADING--PERSONAL NAME -

▲ a Personal name Engard, Nicole C., 

▲ d Dates associated with 1979- 

Save

Once you’ve made the necessary edits, simply click ‘Save’ and if you have the **dontmerge** system preference set to ‘Do’ the next time the **merge_authorities.pl cronjob** runs it will update all of the bib records that use that authority.

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 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.

Authority search results

Merging with authority: [Engard, Brian. \(101392\)](#) [Cancel merge](#)

Results 1 to 10 of 10

Summary		Used in	
Engard, Brian.	Details	1 records(s)	Edit Merge
Engard, Brian.	Details	1 records(s)	Edit 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.

Merging records

Please choose which record will be the reference for the merge. The record chosen as reference will be kept, and the other will be deleted.

Merge reference

Engard, Brian. (101393)

Engard, Brian. (101392)

Next

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

101393 | 101392

- 001 / 101393
- 003 / NCE
- 005 / 20130429140809.0
- 008 / 130429|| aca||aabn | a|a d
- 040
- a / NCE
- c / NCE
- 100
- a / Engard, Brian.
- 667
- a / Machine generated authority record.
- 670
- a / Work cat.: (NCE)5710: Engard, Brian., Instant Action: Mischief Night., 2006.
- 942
- a / PERSO_NAME

Destination record

- 001 / 101393
- 003 / NCE
- 005 / 20130429140809.0
- 008 / 130429|| aca||aabn | a|a d
- 040
 - a / NCE
 - c / NCE
- 100
 - a / Engard, Brian.
- 667
 - a / Machine generated authority record.
- 670
 - a / Work cat.: (NCE)5710: Engard, Brian., Instant Action: Mischief Night., 2006.
- 942
 - a / PERSO_NAME

Merge

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.

Engard, Brian.

Authority #101393 (Personal Name)

Used in 1 record(s)

0 | 1 | 6

```

000 - LEADER
  @ 00371nz a2200133o 4500
001 - CONTROL NUMBER
  @ 101393
003 - CONTROL NUMBER IDENTIFIER
  @ NCE
005 - DATE AND TIME OF LATEST TRANSACTION
  @ 20131015144833.0
008 - FIXED-LENGTH DATA ELEMENTS
  @ 130429|| aca||aabn | a|a d
040 ## - CATALOGING SOURCE
  a Original cataloging NCE
  c Transcribing agency NCE
    
```

6.4 Cataloging Guides

6.4.1 Bibliographic Record Cataloging Cheat Sheet

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 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 MARC Org Code 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.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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 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.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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, however, the first indicator should be '0'.
110	MAIN ENTRY--CORPORATE	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 ENTRY--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'.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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 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.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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 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.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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 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'.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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'.
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'.

Table 6.1: (continued)

Tag	Label	Description	Instructions
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'.
710	ADDED ENTRY--CORPORATE	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 ENTRY--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'.

Table 6.1: (continued)

Tag	Label	Description	Instructions
730	ADDED ENTRY--UNIFORM 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 indicator 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:").

Table 6.1: (continued)

Tag	Label	Description	Instructions
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: <ul style="list-style-type: none"> • 0 = Not withdrawn • 1 = Withdrawn 	Coded value, matching Authorized Value category ('WITHDRAWN' in default installation)

Table 6.2: (continued)

MARC21 Tag/subfield	Data Element	Description	Notes
952\$1	Lost status	Default values: <ul style="list-style-type: none"> • 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 Default-ClassificationSource 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: <ul style="list-style-type: none"> • 0 = Not damaged • 1 = Damaged 	Coded value, matching Authorized Value category ('DAMAGE' in default installation)
952\$5	Use restrictions	Default values: <ul style="list-style-type: none"> • 0 = No use restrictions • 1 = Restricted Access 	Coded value, matching Authorized Value category ('RESTRICT' in default installation). This value has no effect on circulation.

Table 6.2: (continued)

MARC21 Tag/subfield	Data Element	Description	Notes
952\$7	Not for loan	Default values: <ul style="list-style-type: none"> • -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	
952\$t	Copy number	Max 32 characters	

Table 6.2: (continued)

MARC21 Tag/subfield	Data Element	Description	Notes
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

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.

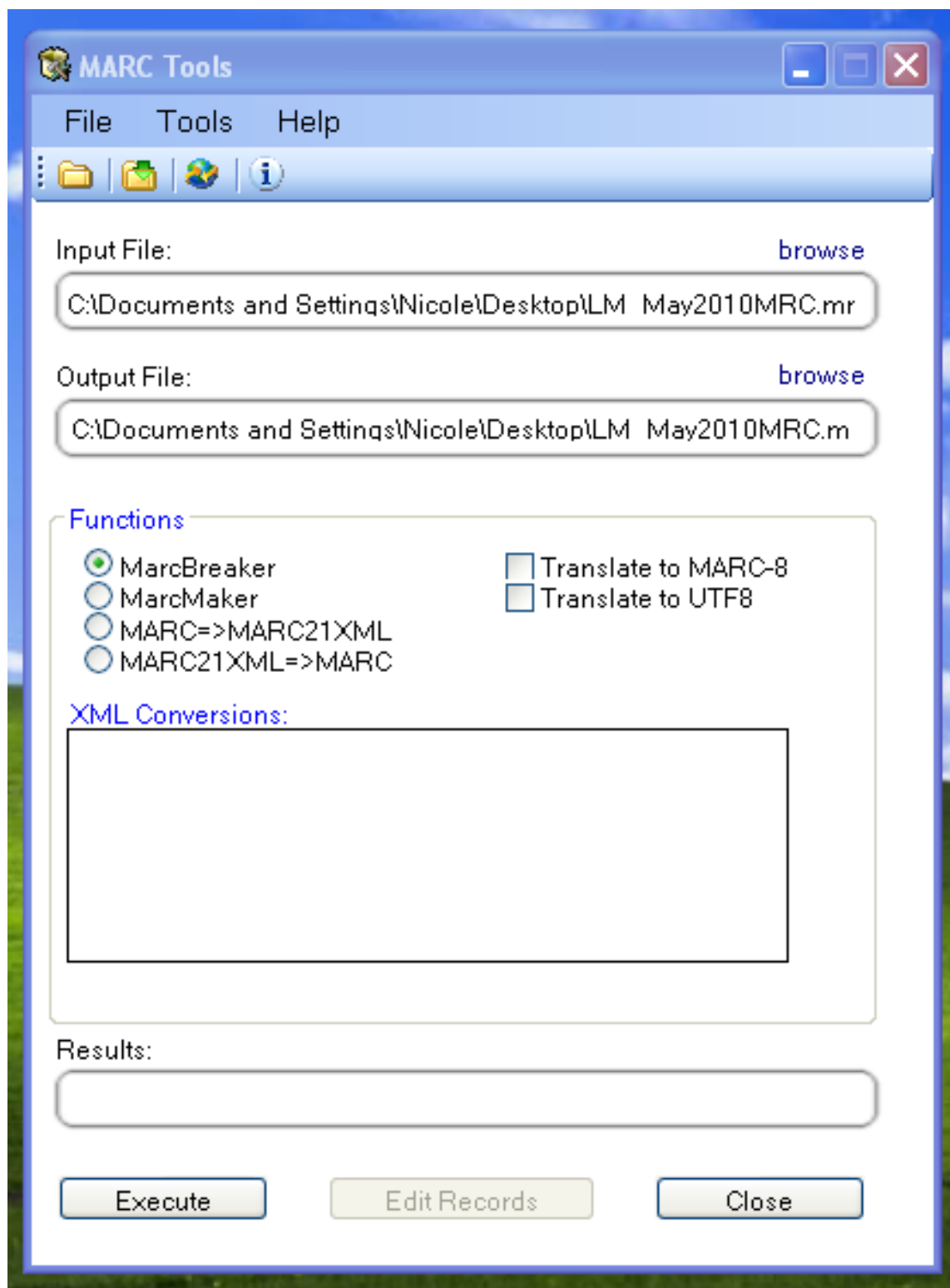
The easiest way to import your latest order is to first run your records through **MARCEdit**. Download your MARC records, saving them to your desktop or some other location you use/will remember. If you have MARCEdit already installed you should simply have to double click on your MARC records, and they will automatically open in MARCEdit.

IMPORTANT

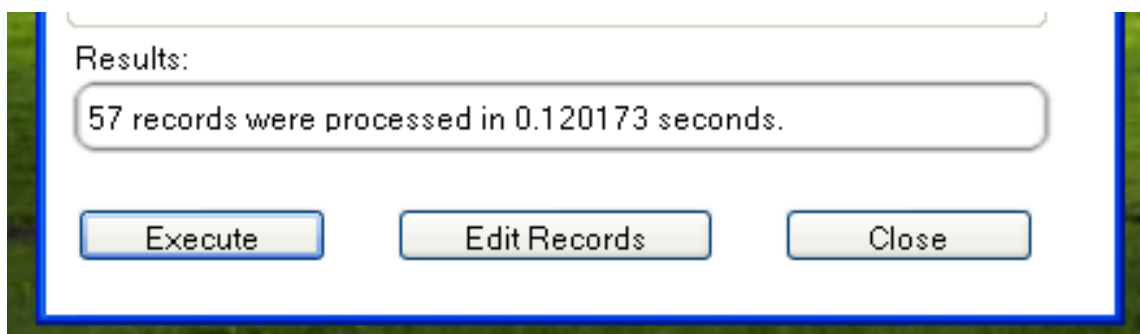


This tutorial was written with MARCEdit version 5.2.3769.41641 on Windows XP, instructions may be different if your version or operating system is different.

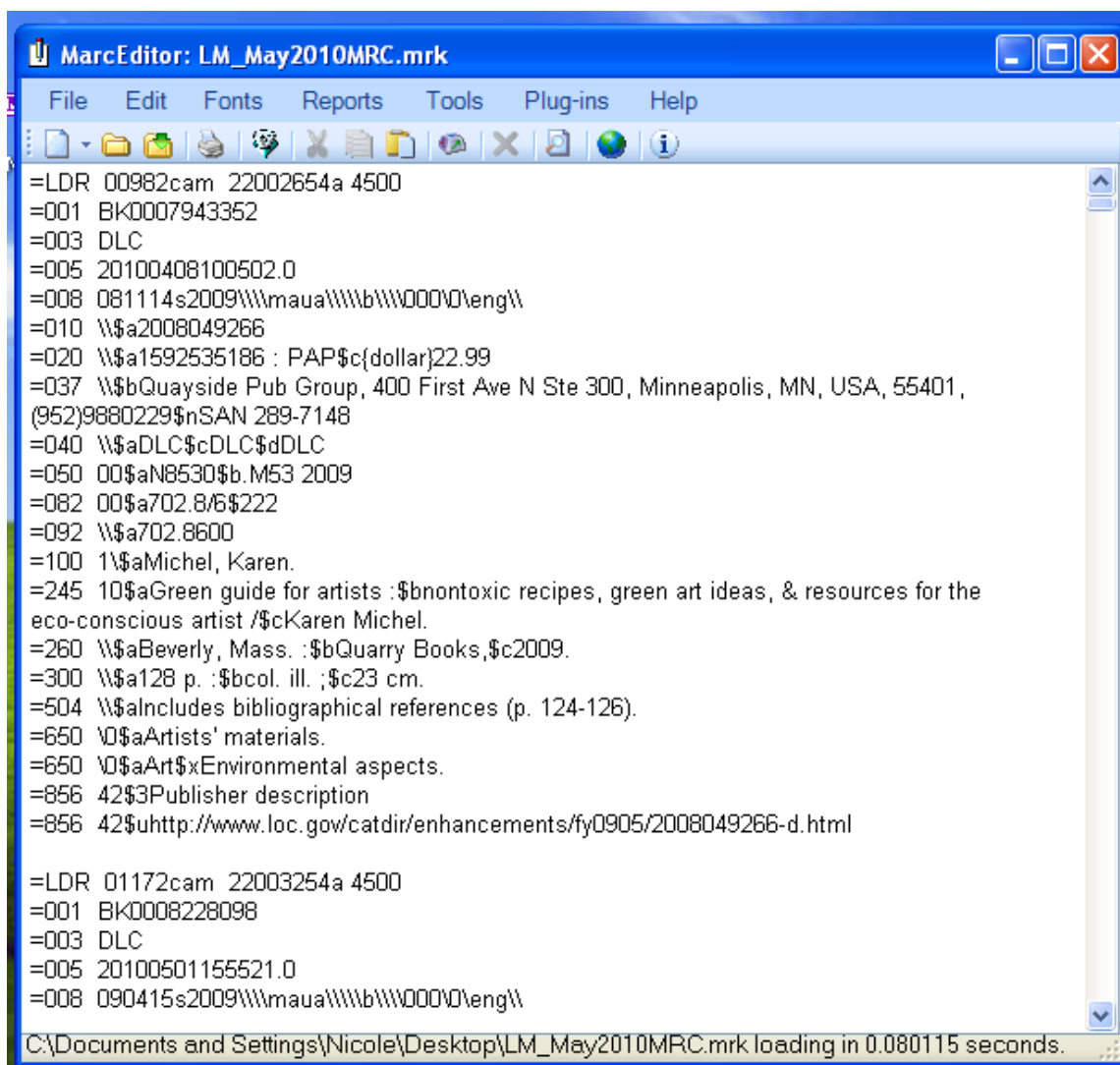
- Your original file will automatically be in the input; ensure MarcBreaker is chosen, and then click "Execute"



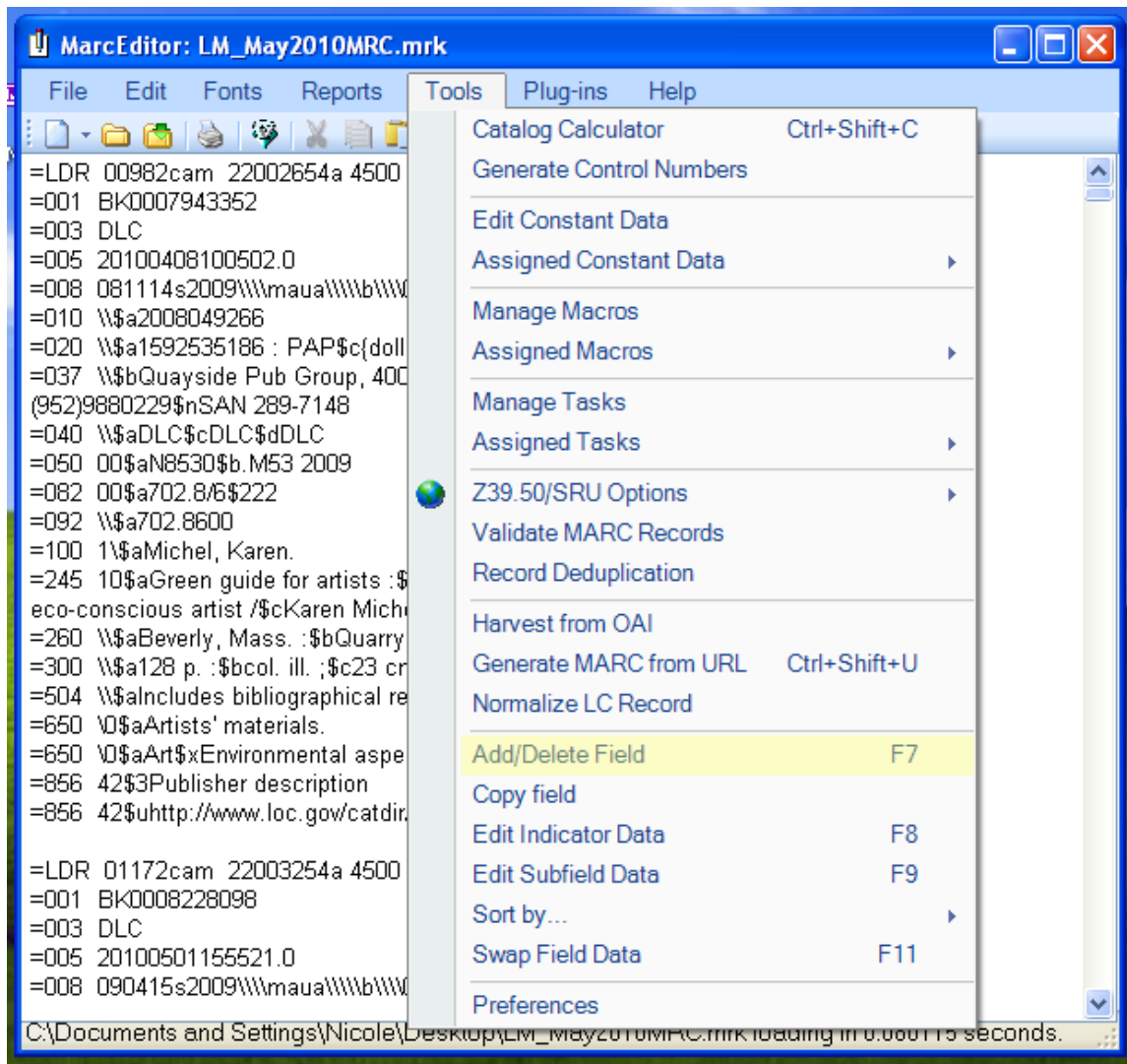
- You will be presented with a summary of the records processed at the bottom of the screen



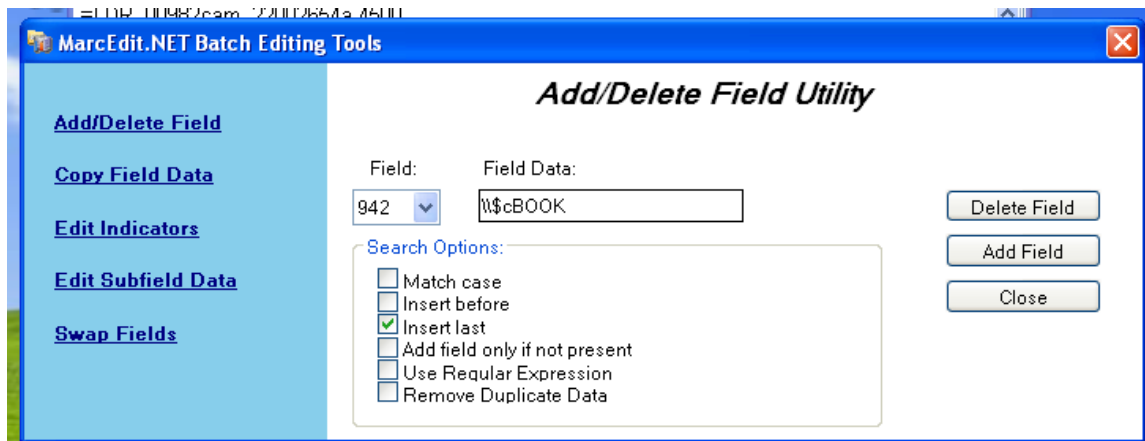
- Click 'Edit Records' to continue on to adding item records
- Your screen will be replaced with a larger screen containing the MARC records



- Click on Tools > Add/Edit Field

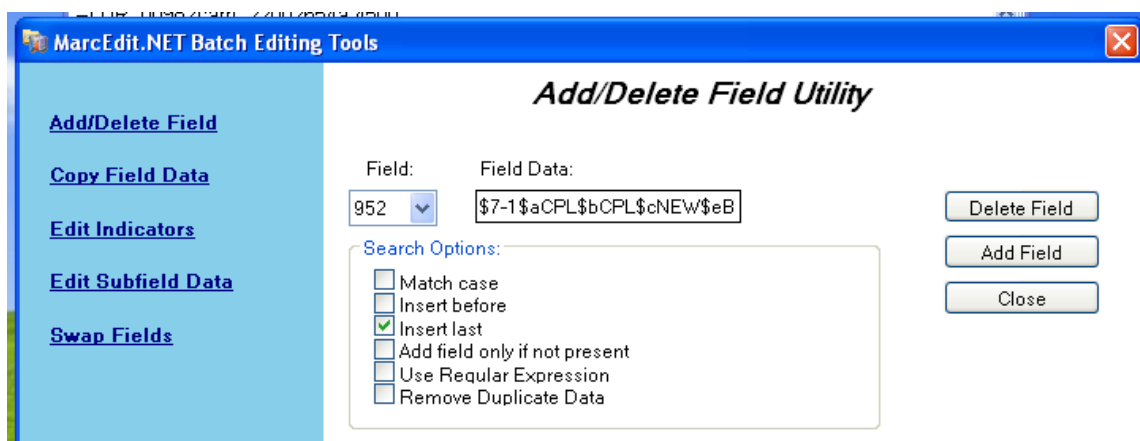


- Enter in the Koha specific item info

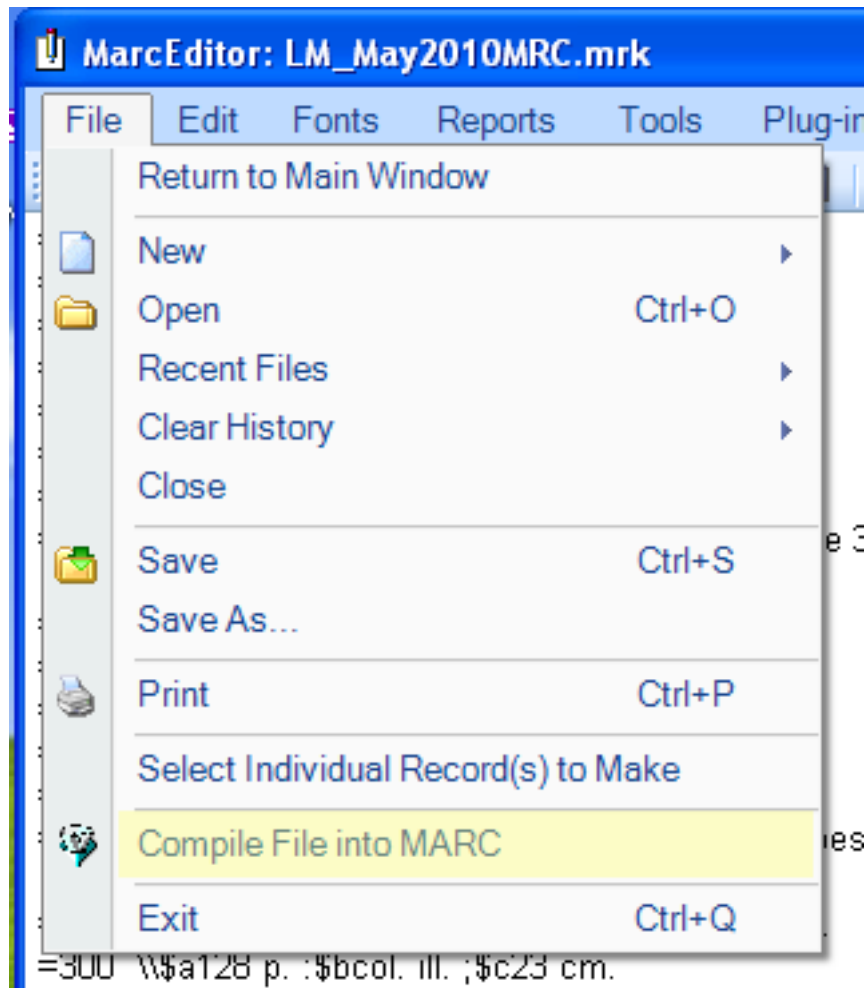


- In the Field box, type 942
- In the Field Data box, type \\\$c and the item type code (\\\$cBOOK in this example)
- Check the 'Insert last' option
- Click 'Add Field'

- 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
 - * 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.

TIP



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.

Chapter 7

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'.

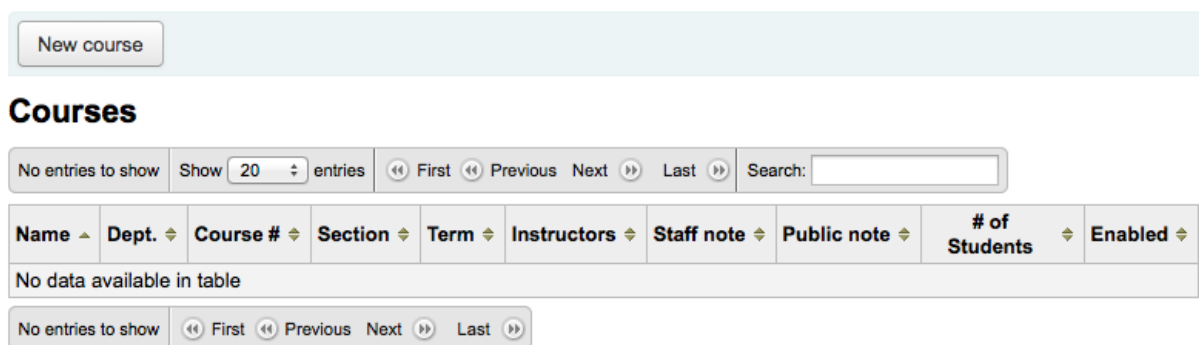
Next you will need to have all of your course instructors **added as patrons**.

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.



The screenshot shows the Koha Course Reserves interface. At the top left, there is a button labeled "New course". Below this is a section titled "Courses". The interface includes a table with the following columns: Name, Dept., Course #, Section, Term, Instructors, Staff note, Public note, # of Students, and Enabled. The table currently displays "No data available in table". Above the table, there are navigation controls including "No entries to show", "Show 20 entries", and buttons for "First", "Previous", "Next", and "Last". A search box is also present.

From the main course reserves page you can add a new course by clicking the 'New course' button at the top left.

Create course

Department:

Course number:

Section:

Course name:

Term:

Instructors:

Instructor search:

Staff note:

Public note:

Number of students:

Enabled?

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.

Instructor search:

Staff note:

Public note:

- Engard, Beau (9876543456) 123 My Street Philadelphia, PA 19101
- Engard, Brian (9876543453) 123 My Street Philadelphia 19101
- Engard, Coda (9876543452) 123 My Street Philadelphia, PA 19101
- Engard, Nicole (9876543457) 123 My Street Philadelphia 19101
- Engard, Unnamed Puppy (23529001223643) 123 My Street Philadelphia 19101

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.

Instructors:

Nicole Engard ([Remove](#))

Instructor search:

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.

Courses

Showing 1 to 2 of 2 Show 20 entries First Previous Next Last Search:

Name	Dept.	Course #	Section	Term	Instructors	Staff note	Public note	# of Students	Enabled
Intro to Library Science	Library Science	101		Spring	Nicole Engard				Yes
Intro to Open Source	Library Science	601		Spring	Nicole Engard				Yes

Showing 1 to 2 of 2 First Previous Next Last

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.

Courses

Showing 1 to 2 of 2 Show 20 entries First Previous Next Last Search:

Name	Dept.	Course #	Section	Term	Instructors	Staff note	Public note	# of Students	Enabled
Intro to Library Science	Library Science	101		Spring	Nicole Engard				Yes
Intro to Open Source	Library Science	601		Spring	Nicole Engard				Yes

Showing 1 to 2 of 2 First Previous Next Last

Click on the title of the course you would like to add materials to.

+ Add reserves
✎ Edit course
✖ Delete course

Course name	Intro to Library Science
Term	Spring
Department	Library Science
Course number	101
Section	
Instructors	Nicole Engard
Staff note	
Public note	
Student count	
Status	Active

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.

Add items: scan barcode

Item
barcode:

Submit
Cancel

After you are done scanning the barcodes to add to the course you can see them on the course page

+ Add reserves
✎ Edit course
✖ Delete course

Course name	Intro to Library Science
Term	Spring
Department	Library Science
Course number	101
Section	
Instructors	Nicole Engard
Staff note	
Public note	
Student count	
Status	Active

Showing 1 to 1 of 1 Show entries

 ⏪ First ⏪ Previous Next ⏩ Last ⏩ Search:

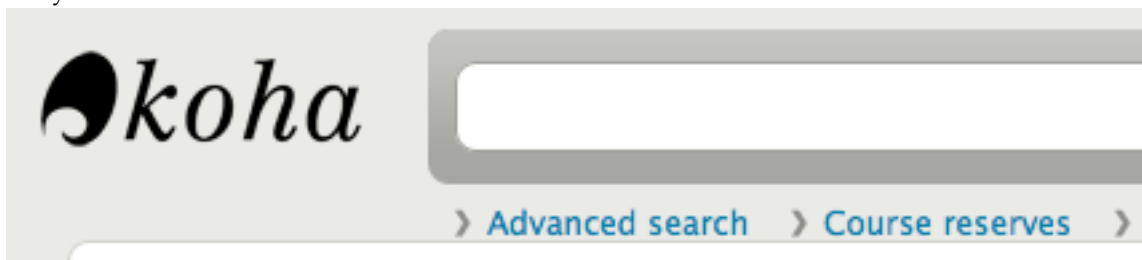
Reserves

Title ^	Barcode ⇅	Call number ⇅	Item type ⇅	Collection ⇅	Location ⇅	Library ⇅	Staff note ⇅	Public note ⇅			Other course reserves
Library mashups :	2345043241	Z674.75.W67 L52 2009	Unchanged (Books)	Unchanged (Library & Information Science)	Unchanged	Unchanged (Nicole's Library)					Edit Remove

Showing 1 to 1 of 1
 ⏪ First ⏪ Previous Next ⏩ Last ⏩

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).

Courses

Name	Dept.	Course #	Section	Term	Instructors	Notes
Intro to Library Science	Library Science	101		Spring	Nicole Engard	
Intro to Open Source	Library Science	601		Spring	Nicole Engard	

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		

Chapter 8

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

TIP



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

Name:

Description:

Numbering formula:

Display order:

	X	Y	Z
Label	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add	<input type="text"/>	<input type="text"/>	<input type="text"/>
Every	<input type="text"/>	<input type="text"/>	<input type="text"/>
Set back to	<input type="text"/>	<input type="text"/>	<input type="text"/>
When more than	<input type="text"/>	<input type="text"/>	<input type="text"/>
Formatting	<input type="text"/>	<input type="text"/>	<input type="text"/>

Test prediction pattern

Frequency:

First issue publication date:

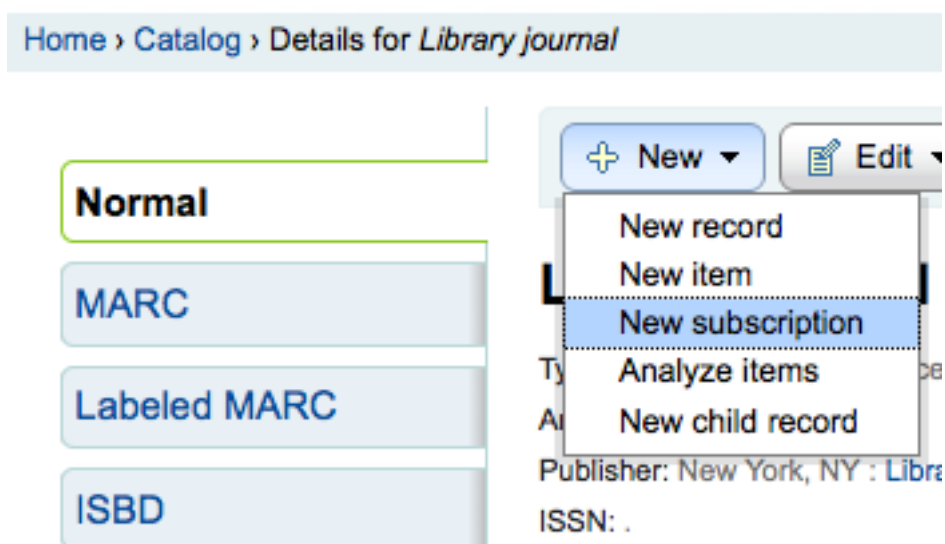
Subscription length:

Locale: If empty, system locale is used

	X	Y	Z
Begins with	<input type="text"/>	<input type="text"/>	<input type="text"/>
Inner counter	<input type="text"/>	<input type="text"/>	<input type="text"/>

8.3 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)

Subscription details

Vendor: () [Search for a vendor](#)

Biblio: (Computers in libraries.) *Required*
[Search for Biblio](#) | [Create Biblio](#)

create an item record when receiving this serial
 do not create an item record when receiving this serial

When there is an irregular issue:
 Skip issue number
 Keep issue number

Manual history

Call number

Library: (select a library)

Public note:

Nonpublic note:

Patron notification:
Select a notice and patrons on the routing list will be notified when new issues are received.

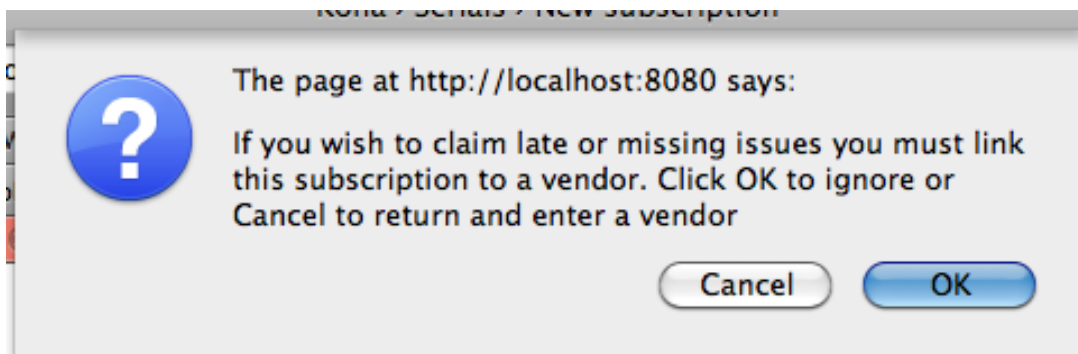
Location:

Grace period: day(s)

Number of issues to display to staff:

Number of issues to display to the public:

- '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.

Information **Planning** Issues Summary

Beginning date: 01/01/2011

Frequency: 1/month

Manual history: Enabled [Edit history](#)

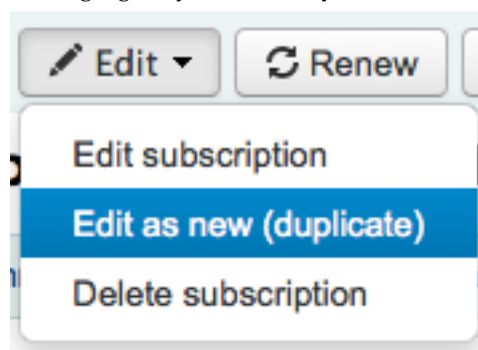
Number pattern: Backup pattern 3

Starting with:	31	9
Rollover:	9999999	10

First arrival: 04/15/2011

Number of issues: 12

- '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.


Add a new subscription (2/2)


Serials planning


First issue publication date: (*) 


Frequency: (*) -- please choose -- 

Subscription length: issues  (enter amount in numerals)

Subscription start date: (*) 

Subscription end date: 

Numbering pattern: -- please choose -- 

Locale _____  If empty, system locale is used

[Show/Hide advanced pattern](#)

<< Previous

Test prediction pattern

Save subscription

- 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 periodicity: some very specific (usually high level science journals) don’t have a true periodicity. When you subscribe to the title, you subscribe for 6 issues, which can arrive in 1 year... or 2... There is no regularity or known schedule.
 - Unknown select this if none of the other choices are relevant
 - Irregular: The journal is not "regular" but has a periodicity. You know that it comes out on January, then in October and December, it is irregular, but you know when it’s going to arrive.
 - 2/day: Twice daily
 - 1/day: Daily
 - 3/week: Three times a week
 - 1/week: Weekly
 - 1/ 2 weeks: Twice monthly (fortnightly)
 - 1/ 3 weeks: Tri-weekly
 - 1/month: Monthly
 - 1/ 2 months (6/year): Bi-monthly

- 1/ 3 months (1/quarter): Quarterly
 - 1/quarter (seasonal) : Quarterly related to seasons (ie. Summer, Autumn, Winter, Spring)
 - 2/year: Half yearly
 - 1/year: Annual
 - 1/ 2 years: Bi-annual
- '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: (*)

Numbering formula:

Advanced prediction pattern			
	X	Y	Z
Label	<input type="text" value="Volume"/>	<input type="text" value="Number"/>	<input type="text"/>
Begins with	<input type="text" value="40"/>	<input type="text" value="10"/>	<input type="text"/>
Add	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
Every	<input type="text" value="12"/>	<input type="text" value="1"/>	<input type="text"/>
Set back to	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
When more than	<input type="text" value="99999"/>	<input type="text" value="12"/>	<input type="text"/>
Inner counter	<input type="text"/>	<input type="text" value="10"/>	<input type="text"/>
Formatting	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 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.

Numbering pattern:

Locale:

	Vol
Begins with	<input type="text"/>
Inner counter	<input type="text"/>

- The 'Begins with' number is the number of the issue you're holding in your hand.
- The 'Inner counter' is usually only needed in the first field (the 'Volume' in the image above) to help with the rollover of the number. The 'Inner counter' is 1 less than the last field. If the 'Number' is 4 the 'Inner counter' under 'Volume' should be 3
- 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.

Prediction pattern

Please check issues that are NOT published (irregularities)

Number	Publication Date	Not published
Vol 40, No 10	12/01/2013	
Vol 40, No 11	01/01/2014	<input type="checkbox"/>
Vol 40, No 12	02/01/2014	<input type="checkbox"/>
Vol 40, No 1	03/01/2014	<input type="checkbox"/>
Vol 40, No 2	04/01/2014	<input type="checkbox"/>
Vol 40, No 3	05/01/2014	<input type="checkbox"/>
Vol 40, No 4	06/01/2014	<input type="checkbox"/>
Vol 40, No 5	07/01/2014	<input type="checkbox"/>
Vol 40, No 6	08/01/2014	<input type="checkbox"/>
Vol 40, No 7	09/01/2014	<input type="checkbox"/>

Click 'Save Subscription' to save the information you have entered. [Find sample serial examples in the appendix.](#)

8.4 Receive Issues

Issues can be marked as received from several locations. To find a subscription, use the search box at the top of the Serials page to search for the serial you'd like to receive issues for:

Search subscriptions:

ISSN: Title: [Advanced search](#)

Serials subscriptions (8 found)

Opened (5)

Showing 1 to 5 of 5 Show 10 entries Search:

ISSN	Title	Notes	Library	Call number	Expiration date	Routing list	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).			01/01/2012	Edit (4)	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).	Fairfield	MAG	01/01/2013	Edit (5)	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).	Centerville			New	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).	Nicole's Library	MAG	04/01/2019	New	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).	Centerville	Journal	04/01/2020	New	Issue history	Serial receive

Search ISSN Search title Search notes Search library Search callnumber Search expiration date

Showing 1 to 5 of 5

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.

Subscription for Computers in libraries.

Information

Subscription ID:	5	Number of issues to display to staff:	12
Librarian identity:	nce	Number of issues to display in OPAC:	4
Vendor:		Patron notification:	RLIST (subscribers)
Biblio:	Computers in libraries. (4038)		
Library:	Centerville		
Items:	Serial receipt does not create an item record.		
Grace period:	10		

The final way to receive serials is from the 'Serial Collection' page. To the left of the Subscription summary page there is a menu with a link to 'Serial Collection'

Home > Serials > Details for subscription #5

- Serial collection
- Create routing list
- Claims
- Check expiration

+ New subscription Edit Renew

Subscription for Computers in l

Information
Planning
Issues
Summ

Subscription ID:	5	
Librarian identity:	nce	
Vendor:		
Biblio:	Computers in libraries. (4038)	
Library:	Centerville	
Items:	Serial receipt does not create an item record.	
Grace period:	10	

From the page that opens up you can click 'Edit Serial' with the issue you want to receive checked.

2011

Edit serials
Generate next

[Select all](#) | [Clear all](#)

Edit	Date published	Date received	Number	Status	Notes	Library	Routing
<input checked="" type="checkbox"/>	07/15/2011	07/15/2011	V. 31, N. 7	Expected		FFL	Print list
<input type="checkbox"/>	06/15/2011	07/05/2011	V. 31, N. 6	Arrived		FFL	Print list

All three of these options will open up the issue receive form:

Serial edition *Library journal*

Numbered	Published on	Expected on	Status	Notes
Issue <input type="text" value="Issue 6 : 2012"/>	<input type="text" value="06/15/2012"/>	<input type="text" value="06/15/2012"/>	Expected	<input type="text"/>
Click to add item				
Supplemental issue <input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
Click to add item				
<input type="button" value="Save"/>			<div style="border: 1px solid #ccc; padding: 2px;"> Expected <ul style="list-style-type: none"> <li style="background-color: #e0e0e0; padding: 2px;">Arrived <li style="padding: 2px;">Late <li style="padding: 2px;">Missing <li style="padding: 2px;">Claimed <li style="padding: 2px;">Not available <li style="padding: 2px;">Delete </div>	

- 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'

Serial edition *Computers in libraries.* (Periodicals) callnumber: MAG

Numbered	Published on	Expected on	Status	Notes
Issue Vol 34, No 2	07/15/2013	02/20/2013	Arrived	

Item

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme

4 - Damaged status

5 - Use restrictions

7 - Not for loan

8 - Collection code

a - Permanent location

b - Current location

c - Shelving location

d - Date acquired

e - Source of acquisition

f - Coded location qualifier

g - Cost, normal purchase price

h - Serial Enumeration / chronology

o - Full call number

p - Barcode

t - Copy number

u - Uniform Resource Identifier

v - Cost, replacement price

w - Price effective from

y - Koha item type

z - Public note

Issue Vol 34, No 3	09/15/2013	09/15/2013	Expected	
--------------------	------------	------------	----------	--

Click to add item

Supplemental issue				
--------------------	--	--	--	--

Click to add item

- If your issue has a supplemental issue with it, fill in the Supplemental Issue information.
- If you have decided to have an item record created for each issue an **item add form** will appear for your supplement and for the issue itself
- Once you have entered your info you can click 'Save'

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.

2011

Edit serials Generate next

Select all | Clear all

Edit	Date published	Date received	Number	Status	Notes	Library	Routing
<input checked="" type="checkbox"/>	07/15/2011	07/15/2011	V. 31, N. 7	Expected		FFL	Print list
<input type="checkbox"/>	06/15/2011	07/05/2011	V. 31, N. 6	Arrived		FFL	Print list

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.

8.5 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'

- [Serial collection](#)
- [Create routing list](#)
- [Claims](#)
- [Check expiration](#)

+ New subscription Edit Refresh

Subscription for Computers

Information Planning Issues

Subscription ID: 5

Librarian identity: nce

Vendor:

Biblio: [Computers in libraries. \(4038\)](#)

Library: Centerville

Items: Serial receipt does not create an item record.

Grace period: 10

Clicking that link will bring you to the menu to add a new routing list.

Edit routing list for *Library journal*

Issue:

Recipients: [Add recipients](#)

Notes:

From here you want to click 'Add recipients' in order to add people to the routing list. In the menu that appears you can filter patrons by part of their name, their library and/or patron category.

Filter :

Name:

Library:

Category:

Results 1 to 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:

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:

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.

8.6 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:		Patron notification:	RLIST (subscribers)
Biblio:	Computers in libraries. (4038)		
Library:	Centerville		
Items:	Serial receipt does not create an item record.		
Serial number:	Serial number is kept when an irregularity is found.		
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)	Number of issues to display in OPAC:	3
Library:	Main Library	Routing:	yes
Items:	Serial receipt creates an item record.		
Grace period:	0		

Acquisition details

	Price exc. taxes	Price inc. taxes	Fund	
Ordered amount	18.00	18.00	Non-Fiction	See basket information
Spent amount				

8.7 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

Subscription for Computers in libraries.

Information	Planning	Issues	Summary
Subscription ID:	5		Number of issues to display to staff:
Librarian identity:	nce		Number of issues to display in OPAC:
Vendor:			Patron notification:
Biblio:	Computers in libraries. (4038)		
Library:	Centerville		
Items:	Serial receipt does not create an item record.		
Serial number:	Serial number is kept when an irregularity is found.		
Grace period:	10		

and looking on the right of the 'Information' tab.

Whereas the full view shows extensive details, broken out by year, regarding the subscription

Refine your search

Library :
(All)

Subscription :

Clear

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	FFL		02/23/2012	V. 32, N. 1	Arrived	1
01/15/2012	CPL		11/08/2011	Volume 36 / Number 1	Arrived	5
01/15/2012	NIC		11/27/2011	Volume 31, Number 1	Arrived	6

8.8 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'

[Home](#) > [Serials](#)

- [Claims](#)
- [Check Expiration](#)

The links to claims also appears to the left of the subscription detail page

[Home](#) > [Serials](#) > [Details for Subscript](#)

- [Serial Collection](#)
- [Edit Routing List](#)
- [Claims](#)
- [Check Expiration](#)

If you don't have a claim notice defined yet you will see a warning message that you need to first define a notice.

No claims notice defined. [Please define one.](#)

Clicking 'Claims' will open a report that will ask you to choose from your various serial vendors to generate claims for late issues.

Claims

Supplier:

Missing Issues

Filters :

Status :

Title : Branch:

From To (MM/DD/YYYY)

<input type="checkbox"/>	Vendor	Branch	Title	Issue number	Status	Since	Claim Date	Begin Claim
<input type="checkbox"/>	Amazon	FFL	Computers in libraries.	V. 31, N. 2	Expected	03/15/2011		Export item data

[Export selected items data](#)

Select notice:

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.

8.9 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.

Check expiration

Filter results :

Title:

ISSN:

Expiring before: *Required*
(MM/DD/YYYY)

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.

1 subscription(s) will expire before **01/01/2014**

ISSN	Title	Note	Expiration date	
1041-7915	Computers in libraries.	Combined issues in Jan/Feb and Jul/Aug.	01/01/2012	Edit Renew

8.10 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.

New Subscription
 Edit ▾
 Renew
 Receive

Subscription for **Computers in libraries 2010.**

Information
Planning
Issues
Summary

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:

Subscription length:

Number of num:

Number of weeks:

Number of months:

Note for the librarian that will manage your renewal request:

- 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.

8.11 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.

Search subscriptions:

ISSN: Title: [Advanced search](#)

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

You can also click the 'Advanced Search' link to the right of the 'Submit' button to do a more thorough search of your serials.

Search subscriptions

ISSN:

Title:

Call number:

Publisher:

Vendor:

Library:

Location:

Expires before:

From your results you can filter by using the search boxes at the bottom of each column and adjust the number of results using the toolbar at the top of the results set.

ISSN	Title	Notes	Library	Call number	Expiration date		
1041-7915	Computers in libraries 2010.	(Combined Issues Jan/Feb and Jul/Aug.)		MAG	10/15/2015	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).				Issue history	Serial receive
1041-7915	Computers in libraries 2010.	(Combined Issues Jan/Feb and Jul/Aug.)		MAG	10/15/2014	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).		Journal	04/01/2020	Issue history	Serial receive
<input type="text" value="Search ISSN"/>	<input type="text" value="Search title"/>	<input type="text" value="Search notes"/>	<input type="text" value="Search library"/>	<input type="text" value="Search callnumber"/>	<input type="text" value="Search expiration date"/>		

Showing 1 to 4 of 4
Show entries

Search:

Chapter 9

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.

On the main acquisitions page you will see your library's funds listed.

All available funds for Nicole's Library library

Show active and inactive:

Fund ▲	Fund name ◆	Owner ◆	Library ◆	Amount ◆	Ordered ◆	Spent ◆	Avail ◆
AV2013	Audio Visual stuff			2,000.00	2,017.00	11.00	-28.00
FIC	Fiction			5,000.00	34.00	55.00	4,911.00
NFIC	Non Fiction			20,000.00	0.00	0.00	20,000.00
Total				27,000.00	2,051.00	66.00	24,883.00

TIP



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.

Fund: FIC

Ordered

Showing 1 to 3 of 3 Show entries « First « Previous Next » Last » Search:

Title ^	Order ↕	Vendor ↕	Itemtype ↕	Left on order ↕	Estimated cost per unit ↕	Date ordered ↕	Subtotal ↕
Library mashups :	202	1	BK	1	10.00	01/08/2014	10.00
Scrubs.	199	2	BK	1	12.00	12/16/2013	12.00
Sesame Street	109	4	BK	1	12.00	06/17/2013	12.00
Total							34.00

Showing 1 to 3 of 3 « First « Previous Next » Last »

Learn more in the [Budget/Fund Tracking](#) section of this manual.

9.2 Vendors

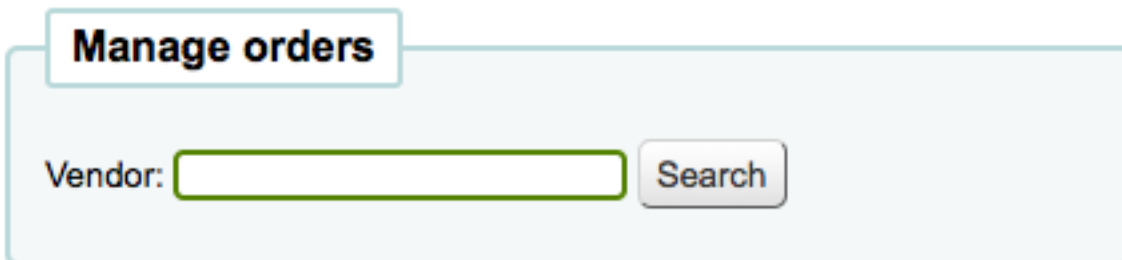
Before any orders can be places you must first enter at least one vendor.

9.2.1 Add a Vendor

To add a vendor click the 'New Vendor' button on the Acquisitions page



Acquisitions



The vendor add form is broken into three pieces

- The first section is for basic information about the Vendor

Company details

Name *

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

Contact details

Contact name

Position

Phone

Alternative phone

Fax

Email

Notes

- None of these fields are required, they should only be entered if you want to keep track of your contact's information within Koha
- The final section is for billing information

Ordering information

Vendor is: Active Inactive

List prices are

Invoice prices are

Tax Number Registered: Yes No

List prices: Include tax Don't include tax

Invoice prices: Include tax Don't include tax

Discount %

Tax rate % (leave blank for default tax of 0.0%)

Delivery time days

Notes

- 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:

[+ New vendor](#)

You searched on vendor a, 3 results found

Choose a vendor in the list to jump directly to the right place.

[Show all baskets](#)

Amazon [+ New basket](#) [Receive shipment](#)

No.	Name	Item count	Biblio count	Items expected	Created by	Date	Basket group	Closed	
9	21	1	1	1	Nicole Engard	08/05/2013			View Add to basket
7	5423321312	61	61	61	Nicole Engard	05/20/2013			View Add to basket
2	PO37772929	1	1	1	Nicole Engard	10/13/2012		10/13/2012	View
4	PO77662	103	102	100	Nicole Engard	10/25/2012			View Add to basket

Baker & Taylor [+ New basket](#) [Receive shipment](#)

No.	Name	Item count	Biblio count	Items expected	Created by	Date	Basket group	Closed	
6	32432423	0	0	0	Nicole Engard	03/30/2013			View Add to basket
10	PO282828	1	1	1	Nicole Engard	09/10/2013			View Add to basket
11	PO38923783927	21	21	21	Nicole Engard	09/23/2013		09/23/2013	View

Information Today linc. [+ New basket](#) [Receive shipment](#)

No pending baskets

From the results, click on the name of the vendor you want to view or edit

[Home](#) > [Acquisitions](#) > Baker & Taylor

[Baskets](#)
[Basket groups](#)
[Contracts](#)
[Invoices](#)
[Uncertain prices](#)

[+ New](#) [Edit vendor](#) [Delete vendor](#)

Baker & Taylor

Vendor details

Company name: Baker & Taylor
 Postal address: 2550 W Tyvola Rd Charlotte, NC 28217
 Physical address:
 Phone: (704) 998-3100
 Fax:
 Website: <http://www.btol.com/>
 Account number: 123456

Contact details

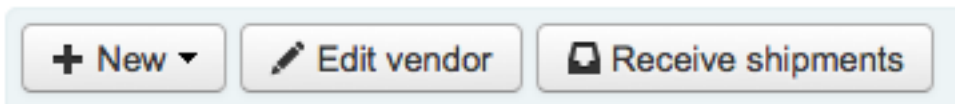
Contact name: John Smith
 Position: Sales
 Phone: (704) 998-3100
 Alternative phone:
 Fax:
 Email: sales@bt.com

Ordering information

Vendor is: Active
 List prices are: USD
 Invoice prices are: USD
 Discount: 0.0 %
 Tax rate: 0.0 %
 Delivery time: 5 days

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.



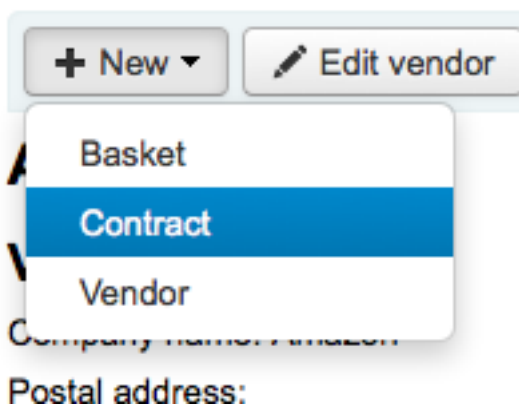
Amazon

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

New contract for Amazon

Name *	<input type="text"/>
Description	<input type="text"/>
Start date * <small>(MM/DD/YYYY)</small>	<input type="text"/>
End date * <small>(MM/DD/YYYY)</small>	<input type="text"/>
Save	Cancel

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

Billing place:

Delivery place:

Vendor

Internal note

Vendor note

Contract

9.3 Managing Suggestions

Depending on your settings in the **suggestion** system preference, patrons may be able to make purchase suggestions via the OPAC. When a suggestion is waiting for library review, it will appear on the Acquisitions home page under the vendor search.

Pending suggestions

6 suggestions waiting. [Manage suggestions.](#)

It will also appear on the main staff dashboard under the module labels:

Suggestions pending approval: **6**
 Comments pending approval: **1**
 Tags pending approval: **3**

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.

Suggestions management

Accepted (1) Pending (4) Checked (2) Ordered (1) Rejected (1)

Check all | Uncheck all

	Suggestion	Suggested by /on	Managed by /on	Library	Budget	Status
<input type="checkbox"/>	The Reader's digest. [edit] ; Published by The Reader's Digest Association	Engard, Nicole	Engard, Nicole			Accepted (Bestseller)

Mark selected as: -- Choose a status -- with this reason: -- Choose a reason -- OR: Delete selected

Submit

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 one 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.

Organize by:
 Status [dropdown] Go

Filter by: [clear]

Bibliographic information

Suggestion information

Acquisition information

Clicking on the blue headings will expand the filtering options and clicking '[clear]' will clear all filters and show all suggestions.

TIP

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

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.

Suggestions management

Accepted (1) Pending (4) Checked (2) Ordered (1) Rejected (1)

Check all | Uncheck all



	Suggestion	Suggested by /on	Managed by /on	Library	Budget	Status
<input type="checkbox"/>	Changes, by Jim Butcher [edit] © 2011 ; ISBN:0451463471 ; Published by Roc	Engard, Nicole		NIC		Pending
<input type="checkbox"/>	Storm Front, by Jim Butcher [edit] ; BK	Engard, Nicole		NIC		Pending
<input type="checkbox"/>	Practical Open Source Software for Libraries, by Nicole C. Engard [edit] © 2011 ; Published by Chandos I saw this at a conference and thought it would be helpful.	Engard, Beau		NIC		Pending
<input type="checkbox"/>	Test [edit]	Engard, Nicole		NIC		Pending

Mark selected as: -- Choose a status -- with this reason: -- Choose a reason -- OR: Delete selected

Submit

- Choose a status --
- Pending
- Accepted
- Checked
- Rejected

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.

 Edit
 Delete

Bibliographic information

Title: Mediactive

Author: Dan Gillmor and Clay Shirky

Copyright date: 210

ISBN or ISSN or other standard number: 098463360X

Publisher:

Publication place:

Collection title:

Document type:

Reason for suggestion:

Notes:

Suggestion management

Status: Pending

	Date	By
Suggestion creation	10/12/2012	Engard, Beau Fairfield (Juvenile)
Suggestion management	12/10/2013	Engard, Nicole Nicole's Library (Staff)
Suggestion accepted		

Acquisition information

Library: Fairfield

Fund:

Copies:

Currency:

Price: 0.00

Total: 0.00

[<< Back to suggestions](#)

Clicking 'edit' to the right of the suggested title or at the top of the suggestion detail page will open a suggestion editing page.

Edit purchase suggestion #10

Bibliographic information

Title:

Author:

Copyright date:

ISBN or ISSN or other standard number:

Publisher:

Publication place:

Collection title:

Document type:

Reason for suggestion:

Notes:

Suggestion management

Status:

		By
Suggestion created	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 --
- Available via ILL
- Bestseller
- Library Copy Lost
- Shelf Copy Damaged
- Others...

If you choose 'Others...' as your reason you will be prompted to enter your reason in a text box. Clicking 'Cancel' to the right of the box will bring back the pull down menu with authorized reasons.

with this reason: [Cancel](#)

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.

9.4.1 Create a basket

To create a basket you must first search for the vendor you're ordering from:

Amazon

No. ↕	Name ↕	Item count ↕	Biblio count ↕	Items expected ↕	Created by ↕	Date ↕	Basket group ↕	Closed ↕	
9	21	1	1	1	Nicole Engard	08/05/2013			View Add to basket
7	5423321312	61	61	61	Nicole Engard	05/20/2013			View Add to basket
2	PO37772929	1	1	1	Nicole Engard	10/13/2012		10/13/2012	View
4	PO77662	103	102	100	Nicole Engard	10/25/2012			View Add to basket

And click the 'New basket' button to the right of the vendor name.

TIP



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

The screenshot shows a form titled "Add a basket to Amazon". The form contains the following fields and controls:

- Basket name:** A text input field.
- Billing Place:** A dropdown menu with "Nicole's Library" selected.
- Delivery Place:** A dropdown menu with "Nicole's Library" selected.
- Vendor:** A dropdown menu with "Amazon" selected.
- Internal note:** A large text area for notes.
- Vendor note:** A large text area for notes.
- Save:** A button at the bottom left of the form.

- 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 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:

Delivery Place:

Vendor

Internal note

Vendor note

Contract

When finished, click 'Save'

✎ Edit basket
✕ Delete this basket
📄 Export this basket as CSV

Basket 2323 (71) for Baker & Taylor

Delivery place: South Branch

Billing place: South Branch

Managed by: Nicole Engard

Opened on: 09/10/2013

Add order to basket

- From an existing record:
- [From a suggestion](#)
- [From a subscription](#)
- [From a new \(empty\) record](#)
- [From an external source](#)
- [From a staged file](#)

Once your basket is created you are presented with several options for adding items to the order.

- If you are ordering another copy of an existing item, you can simply search for the record in your system.

Search existing records

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: 11/09/2011

Catalog details [Edit record](#)

Title Library mashups :

Author:

Publisher: Information Today, Inc.,

Edition:

Publication year: 2009

ISBN: 9781573873727 (pbk.) | 1573873

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.

Suggestions

Showing 1 to 2 of 2 Show entries Search:

Suggestion ▲	Suggested by ◆	Accepted by ◆	
Changes - Jim Butcher copy. year:2011 ISBN :0451463471 published by:Roc	Engard, Nicole	Engard, Nicole	Order
The Reader's digest. - published by:The Reader's Digest Association]	Engard, Nicole	Engard, Nicole	Order

Showing 1 to 2 of 2 ◀ ▶ ⏪ ⏩

- 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: 05/03/2012

Catalog details

Title:

Author:

Publisher:

Edition:

Publication year:

ISBN:

Series:

Suggestion

Suggested by: Engard, Nicole (suggestion #3)

- * 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.

Basket 21 (9) for Amazon

Delivery place: Nicole's Library
 Billing place: Nicole's Library
 Created by: Nicole Engard
 Managed by:

Branch: No branch |

Opened on: 08/05/2013

Orders

Show all details

Showing 1 to 2 of 2 | Show entries | | 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

- 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 susbscription'
- After clicking the order link you will be brought to a search page that will help you find your subscription

Advanced search

ISSN:

Title:

EAN:

Publisher:

Supplier:

Branch:

Serials subscriptions

Use the search form on the left to find subscriptions.

- 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 entries 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

- 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: 09/10/2013

Catalog details [Edit record](#)

Title Computers in libraries.

Author:

Publisher: Meckler,

Edition:

Publication year: 1988

ISBN:

Series:

Accounting Details

Quantity:

Fund: **Show all:**

Currency:

Vendor price:

- 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: 11/09/2011

Catalog details

Title:

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:

ISBN/ISSN:

LC Call Number:

Author:

Subject Heading:

Dewey:

Select used MARC framework:

Default

Search targets [Select All](#) [Clear All](#)

- NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]
- NEW YORK PUBLIC LIBRARY [catnyp.nypl.org]
- COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]
- SMITHSONIAN INSTITUTION LIBRARIES [siris-libraries.si.edu]
- LIBRARY OF CONGRESS [z3950.loc.gov]

[Cancel](#)

- From the results, click the Order link next to the item you want to purchase.

Results

Server	Title	Author	ISBN	LCCN	Preview
LIBRARY OF CONGRESS	Change of heart :	Picoult, Jodi,	9780743496742 0743496744	2007035721	MARC Card Order

- 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 / ☞](#)

Use existing record

Do not create a duplicate record. Add an order from the existing record in your catalog.

Create new record

Create a new record by importing the external (duplicate) record.

Cancel and return to order

Return to the basket without making a new order.

- * 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.

New order

Basket details

Managed by: Nicole Engard

Open on: 11/09/2011

Catalog details [Edit record](#)

Title Change of heart :

Author: Picoult, Jodi,

Publisher: Atria Books,

Edition: 1st Atria Books hardcover ed.

Publication year: 2008

ISBN: 9780743496742 | 0743496744

Series:

- The final option for ordering is to order from a staged record ([learn more about staging records](#)).

Add orders from staged file:

File name	Comments	Status	Staged	# Bibs	
Pwebrecon.mrc	italy	staged	2009-12-14 06:19:57	1	Add orders

- From the list of files you are presented with, choose the 'Add orders' link.

Add orders from staged file: italy

File name: Pwebrecon.mrc

Staged on: 2009-12-14 06:19:57

#	Citation	Match?	Order
1	Italy, a cultural guide / Hauser, Ernest O., (0689111754)	no_match	Add order

Save

- * From the list of records, click 'Add order' next to the item that you want to add to your order.

New order

Basket details

Managed by: Nicole Engard
Open on: 05/24/2012

Catalog details [Edit record](#)

Title: King Lear
Author:
Publisher: Project Gutenberg Literary Archive Foundation,
Edition:
Publication year: 1997
ISBN:
Series:

Item

2 - Source of classification or shelving scheme:

3 - Materials specified (bound volume or other):

- From the order form, you will not be able to edit the catalog details.

- * The other option is to import all records from the staged file by scrolling below the list of records in the staged file and filling in the item information.

King Solomon's Mines	no_match	Add order
The Kingdom of God Is Within You	no_match	Add order
Knots, Splices and Rope Work	no_match	Add order

Import All

Import all the lines in the basket with the following parameters:

Item

2 - Source of classification or shelving scheme:

3 - Materials specified (bound volume or other):

- If you choose this option the Koha will look in the 020\$c and grab the pricing information from that field and put that on each order line.

After bringing in the bib information, 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

3 - Materials specified (bound volume or other part)

7 - Not for loan

8 - Koha collection

a - Location (home branch)

b - Sublocation or collection (holding branch)

c - Shelving location

d - Date acquired ...

e - Source of acquisition

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

z - Public note

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).

Items list

		Barcode	Home branch	Holding branch	Not for loan	Restricted	Location	Call number	Copy number	Stock number	Co
Edit	Delete		Centerville	Centerville	Ordered					undefined	

Item

2 - Source of

Once you have entered the info about the item, you need to enter the Accounting information.

Accounting Details

Quantity:

Fund: Show all:

Currency:

Vendor price:

Uncertain price:

gstrate:

Discount: %

Replacement cost: (adjusted for USD)

Budgeted cost:

Total: (budgeted cost * quantity)

Actual cost:

Notes:

The 2 following fields are available for your own usage. They can be useful for statistical purposes


Statistic 1:

Statistic 2:

- 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 available in the fund you will be presented with a confirmation.

Warning! Order total amount exceeds allowed budget.

Do you want to confirm this order?

✓ **Yes, I confirm**

✗ **No, I don't confirm**

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:
Branch: No branch
Opened on: 08/05/2013

Orders

Show all details

Showing 1 to 2 of 2 Show entries 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

If you would like to see more details you can check the 'Show all details' checkbox

Orders

Show all details

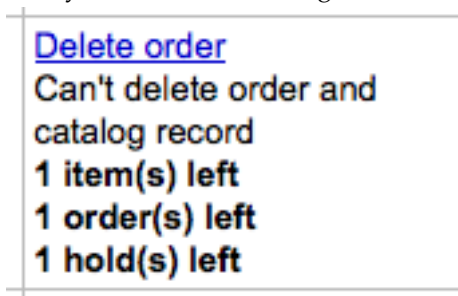
Showing 1 to 2 of 2 Show 10 entries First Previous Next Last Search:

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 catalog.
 - The catalog record cannot always be deleted. You might see notes explaining why.

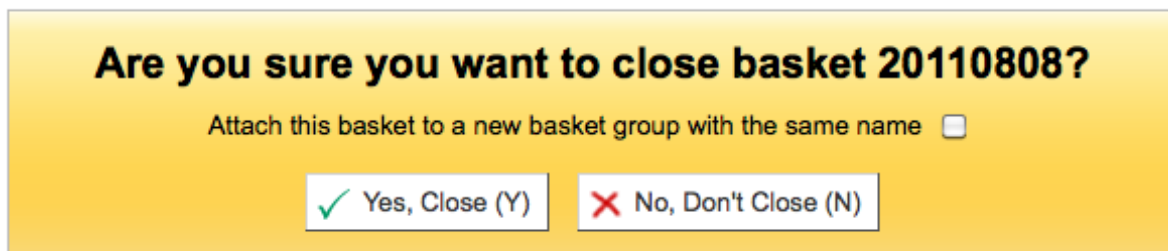


On the summary page, you also have the option to edit the information that you entered about the basket by clicking the 'Edit basket header information' button, to delete the basket altogether by clicking the 'Delete this basket' button, or to export your basket as a CSV file by clicking the 'Export this basket as CSV' button.

Basket 21 (9) for Amazon

Delivery place: Nicole's Library
Billing place: Nicole's Library
Created by: Nicole Engard
Managed by:
Branch: No branch
Opened on: 08/05/2013

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. 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.

Basket grouping for Amazon

Open		Closed						
Name ^	Number ^	Billing place ^	Delivery place ^	Number of baskets ^	Action			
21	2	Nicole's Library	Nicole's Library	1	View	Reopen	Print	Export as CSV

IMPORTANT

A basket with at least one item marked as 'uncertain price' will not be able to be closed.

Basket PO77662 (4) for Amazon

Billing place: Nicole's Library
Created by: Nicole Engard
Managed by:
Branch: No branch | Nicole's Library |
Opened on: 10/25/2012

Orders

Show all details

Showing 1 to 10 of 100 | Show 10 entries | | Search:

Order ^	RRP tax exc. ^	ecost tax exc. ^	Qty. ^	Total tax exc. (USD) ^	GST % ^	GST ^	Fund ^	Modify	Delete
Adventures of Pinocchio by Project Gutenberg Literary Archive Foundation, [Add note]	0.00 (Uncertain)	0.00	1	0.00	0.00	0.00	Book	Modify Transfer	Delete order Delete order and catalog record
Aesop's Fables; a new translation by Project Gutenberg Literary Archive Foundation, [Add note]	0.00 (Uncertain)	0.00	1	0.00	0.00	0.00	Book	Modify Transfer	Delete order Delete order and catalog record

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:

Showing 1 to 10 of 157 Show entries Search:

Basket	Order	By	Uncertain	Price	Quantity
PO77662	Adventures of Pinocchio / Project Gutenberg Literary Archive Foundation,, edit	Nicole Engard	<input checked="" type="checkbox"/>	<input type="text" value="0.000000"/>	<input type="text" value="1"/>
PO77662	Aesop's Fables; a new translation / Project Gutenberg Literary Archive Foundation,, edit	Nicole Engard	<input checked="" type="checkbox"/>	<input type="text" value="0.000000"/>	<input type="text" value="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.

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.'

Basket PO37772929 (2) for Amazon

Billing place: Nicole's Library
Created by: Nicole Engard
Managed by:
Branch: No branch
Opened on: 10/13/2012

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.

Are you sure you want to close basket PO37772929?

Attach this basket to a new basket group with the same name

Your completed order will be listed on the Basket Grouping page for printing or further modification.

Basket grouping for Amazon

Open Closed

Name ▲	Number ◆	Billing place ◆	Delivery place ◆	Number of baskets ◆	Action			
21	2	Nicole's Library	Nicole's Library	1	View	Reopen	Print	Export as CSV

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

Orders can be received from the vendor information page



Amazon

or the vendor search results page

Baker & Taylor New basket Receive shipment

Basket (#) ▲	Item count ◆	Biblio count ◆	Items expected ◆	Created by ◆	Date ◆	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

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.

Receive shipment from vendor Amazon

Receive a new shipment

Vendor invoice:

Shipment date:
(MM/DD/YYYY)

Shipment cost:

Budget:

Next Cancel

The receive page will list all items still on order with the vendor regardless of the basket the item is from.

Receipt summary for 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		
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 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 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 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:

Items

Receive?	Barcode	Home branch	Holding branch	Not for loan	Restricted
<input checked="" type="checkbox"/>	Edit	Midway	Midway	Ordered	

Accounting details

Date received: 07/10/2012
 Budget: Fiction
 Created by: Nicole Engard

Quantity to receive:
 Quantity received:
 Replacement cost:
 Budgeted cost:
 Actual cost:

Notes:

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.

TIP



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:

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 inc.	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.

Cancel

Do you want to transfer order 108 from basket PO3837292 (Baker & Taylor) to basket 21 (Amazon) ?

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.

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) <i>The tenth circle</i> / 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
<i>Deleted bibliographic record, can't find title</i>	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.


Search filters

Invoice no:


Supplier:


Shipment date

From:
 

To:
 

Billing date

From:
 

To:
 

ISBN / EAN / ISSN:

Title:

Author:

Publisher:

Publication year:

Branch:

Invoices

Use the search form

After searching, your results will appear to the right of the search options.

Invoices

<input type="checkbox"/>	Invoice no. ⚙	Vendor ⚙	Billing date ⚙	Received biblios ⚙	Received items ⚙	Status ⚙	
<input type="checkbox"/>	654321123	Amazon		2	2	Open	Details / Close
<input type="checkbox"/>	4323213	Amazon		0		Open	Details / Close / Delete
<input type="checkbox"/>	43231	Baker & Taylor		0		Open	Details / Close / Delete
<input type="checkbox"/>	23121	Baker & Taylor		0		Open	Details / Close / Delete
<input type="checkbox"/>	23121	Baker & Taylor		1	1	Open	Details / Close
<input type="checkbox"/>	43231	Baker & Taylor		0		Open	Details / Close / Delete
<input type="checkbox"/>	4323213	Amazon		0		Open	Details / Close / Delete
<input type="checkbox"/>	654321123	Amazon		0		Open	Details / Close / Delete
<input type="checkbox"/>	434312321	Baker & Taylor		0		Open	Details / Close / Delete

Merge selected 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.

Invoice: 654321123

Supplier: Amazon

Shipment date:

Billing date:

Shipment cost: Budget:

Status: Open.

Close

[Go to receipt page](#)

Invoice details


Summary ^	Publisher ⚙	Branch ⚙	RRP ⚙	Est. ⚙	Qty. ⚙	Total ⚙	Fund ⚙
The accidental library manager / by Gordon, Rachel Singer.			11.00	11.00	1	11	Professional Development
Total Tax Exc.			11.00		1	11.00	
Tax (0.00%)			0.00			0.00	
Total Tax Inc. (USD)			11.00		1	11.00	
Total + Shipment cost (USD)					1	16.00	


From the 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: 

Billing date: 

Shipment cost: 

Fund: 

Status: Open

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**.

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:

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.

Late orders

Claim using notice: Acquisition Claim ▾


Showing 1 to 6 of 6 Show 10 entries First Previous Next Last Search:

<input type="checkbox"/>	Order date	Estimated delivery date	Vendor	Information	Total cost	Basket	Claims count	Claimed date
<input type="checkbox"/>	01/24/2014 (0 days)		Amazon (1)	Cognitive Surplus Author: Clay Shirky Published by: Penguin	24.00x1 = 24.00 Book	2 NIC	0	
<input type="checkbox"/>	01/24/2014 (0 days)		Amazon (1)	House, M.D. Published by: Universal Studios Home Entertainment,	11.00x1 = 11.00 Audio Visual stuff	9 NIC	0	
<input type="checkbox"/>	01/24/2014 (0 days)		Amazon (1)	Cognitive Surplus Author: Clay Shirky Published by: Penguin	15.00x1 = 15.00 Non Fiction	9 NIC	0	
<input type="checkbox"/>	01/24/2014 (0 days)	01/29/2014	Baker & Taylor (2)	House, M.D. Published by: Universal Studios Home Entertainment,	2000.00x1 = 2000.00 Audio Visual stuff	10 NIC	0	
<input type="checkbox"/>	01/08/2014 (16 days)		Amazon (1)	Library mashups : Published by: Information Today, Inc.,	10.00x1 = 10.00 Fiction	12 NIC	0	
<input type="checkbox"/>	06/17/2013 (221 days)		Bookstore (4)	Sesame Street	12.00x1 = 12.00 Fiction	8 NIC	0	
Total					2072			

Showing 1 to 6 of 6 First Previous Next Last

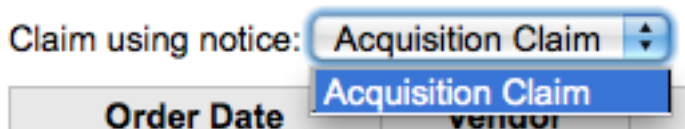
To the right of each late title you will be see a checkbox. Check off the ones you want a claim letter sent to and click 'Claim Order' at the bottom right of the list. This will automatically send an email to the vendor at the email address you have on file.

NOTE



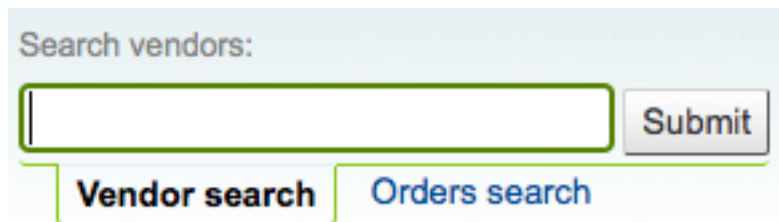
The Estimated Delivery Date is based on the Delivery time value entered on the vendor record.

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.

Search vendors:

Vendor search Orders search

Vendor b

You searched on vendor b, 2 results found

Choose a vendor in the list to jump directly to the right place. Baker & Taylor

Baker & Taylor

Basket (#)	Item count	Biblio count	Items expected	Created by	Date	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

Using the Orders Search you can search for items that have been ordered with or without the vendor.

Search orders:

Title: Vendor: [Advanced search](#)

Orders search Vendor search

You can enter info in one or both fields and you can enter any part of the title and/or vendor name.

Search orders:
 Title: Vendor: [Advanced search](#)

1) Search results

Search results

Showing 1 to 9 of 9 Show 10 entries Search:

Basket	Basket group	Invoice number	Order number	Summary	Vendor	Placed on	Received on	Quantity ordered	Unit cost
20110728 (10)	20110728 (1)	31143242	11	Social software in libraries : Farkas, Meredith G., 9781573872751 (pbk.) 1573872	Amazon	07/27/2011	10/02/2011	2	34.00
20110728 (10)	20110728 (1)	31143242	12	Library mashups : 9781573873727 (pbk.) 1573873	Amazon	07/27/2011	10/02/2011	1	25.00
3 (27)	()	2121	109	Practical open source software for libraries / Engard, Nicole C., 9781843345855 1843345854	Amazon	03/19/2012	03/19/2012	1	99.00

Clicking the plus sign to the right of the Vendor search box will expand the search and allow you to search for additional fields.

Search orders:
 Title: Vendor: [Advanced search](#)
 Basket: Invoice no.:

Clicking Advanced Search to the right of the search button will give you all of the order search options available.

Search Orders

Title:

Author:

ISBN:

Vendor:

Basket:

Bookseller invoice no:

From:
 (MM/DD/YYYY)

To:
 (MM/DD/YYYY)

9.9 Budget/Fund Tracking

On the main acquisitions page there will be a table showing you all of your active funds and a breakdown of what has been ordered or spent against them.

All available funds for Nicole's Library library

Show active and inactive:

Fund ▲	Fund name ◆	Owner ◆	Library ◆	Amount ◆	Ordered ◆	Spent ◆	Avail ◆
AV2013	Audio Visual stuff			2,000.00	2,017.00	11.00	-28.00
FIC	Fiction			5,000.00	34.00	55.00	4,911.00
NFIC	Non Fiction			20,000.00	0.00	0.00	20,000.00
Total				27,000.00	2,051.00	66.00	24,883.00

Clicking on the linked amounts under spent or ordered will show you a summary of the titles ordered/received on that budget.

Fund: FIC

Spent

Showing 1 to 4 of 4 Show 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 »

Chapter 10

Lists & Cart

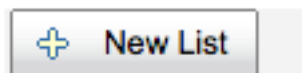
Lists are a way to save a collection of content on a specific topic or for a specific purpose. The Cart is a session specific storage space.

- *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:

A rectangular button with a light gray background and a thin border. On the left side, there is a small blue plus sign icon. To the right of the icon, the text "New list" is written in a dark blue, sans-serif font.

A light blue rounded rectangular form with a thin border. At the top left, there is a tab labeled "Create a new list". Below the tab, the form contains several fields:

- List name:** A text input field.
- Owner:** A text field containing the value "nce".
- Sort this list by:** A dropdown menu with "Title" selected.
- Category:** A dropdown menu with "Private" selected.
- Permissions:** Three radio button options:
 - Do not allow anyone else to add entries.
 - Allow anyone to remove his own contributed entries.
 - Do not allow anyone to remove other contributed entries.


At the bottom left of the form, there are two buttons: "Save" and "Cancel".

- 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

*

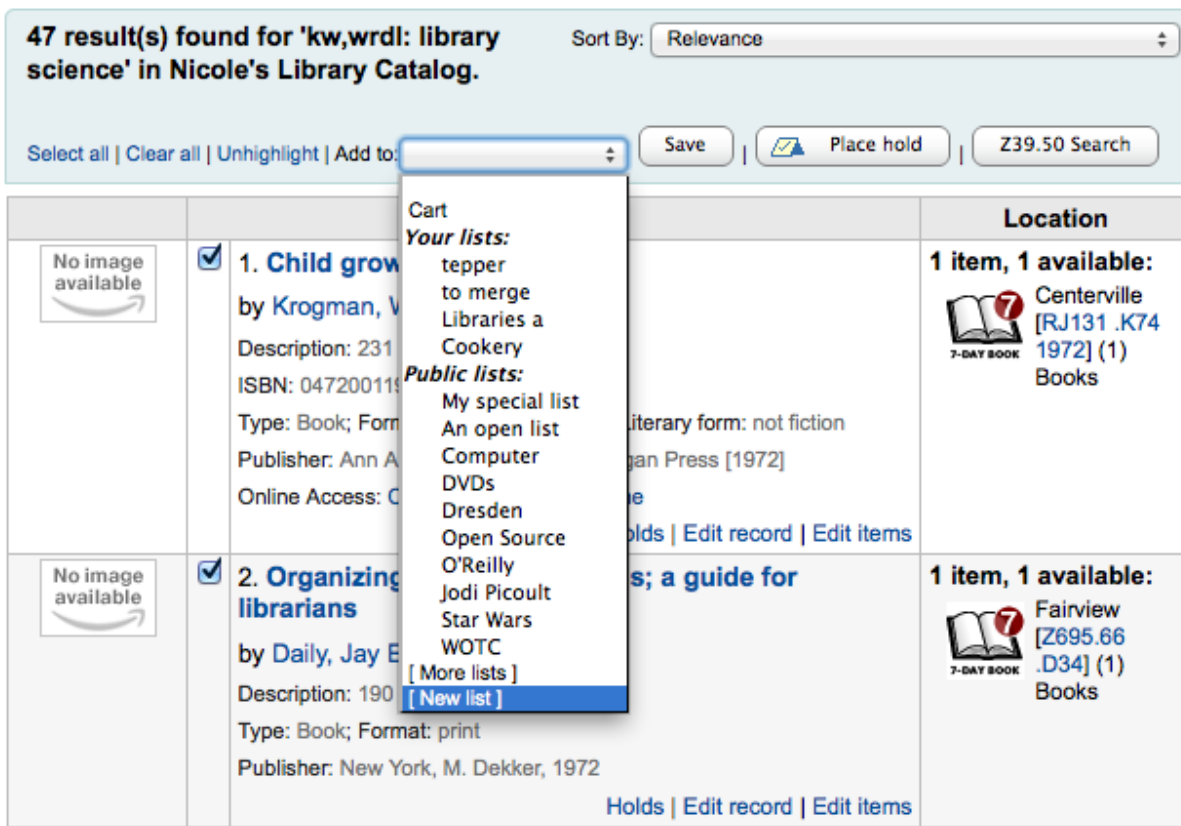
TIP



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



47 result(s) found for 'kw,wrld: library science' in Nicole's Library Catalog. Sort By: Relevance

Select all | Clear all | Unhighlight | Add to: [dropdown menu]

Save | Place hold | Z39.50 Search

			Location
<input checked="" type="checkbox"/>	<p>1. Child growth and development by Krogman, V Description: 231 ISBN: 047200115 Type: Book; Form Publisher: Ann A Online Access: C</p>	<p>Cart Your lists: tepper to merge Libraries a Cookery Public lists: My special list An open list Computer DVDs Dresden Open Source O'Reilly Jodi Picoult Star Wars WOTC [More lists] [New list]</p>	<p>1 item, 1 available: Centerville [RJ131 .K74 1972] (1) Books</p>
<input checked="" type="checkbox"/>	<p>2. Organizing libraries by Daily, Jay E Description: 190 Type: Book; Format: print Publisher: New York, M. Dekker, 1972</p>		<p>1 item, 1 available: Fairview [Z695.66 .D34] (1) Books</p>

- 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

Add 3 items to a list:

- **Child growth.** Krogman, Wilton Marion,
- **Organizing nonprint materials;** Daily, Jay Elwood.
- **Copyright--the librarian and the law;**

Add to a new list:

List name:

Category:

– 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 be 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

Lists

Your lists

Public lists

List Name	Created by	Contents	Sort By	Type	Options	
An open list	Nicole Engard	0 item(s)	Title	Public	Edit	Delete
Computer	Nicole Engard	10 item(s)	Title	Public	Edit	Delete
Dresden	Nicole Engard	6 item(s)	Title	Public	Edit	Delete
DVDs	Nicole Engard	20 item(s)	Title	Public	Edit	Delete
Harry Potter	Nicole Engard	12 item(s)	Title	Public	Edit	Delete
Jodi Picoult	Nicole Engard	13 item(s)	Title	Public	Edit	Delete
O'Reilly	Nicole Engard	15 item(s)	Title	Public	Edit	Delete
Open Source	Nicole Engard	6 item(s)	Title	Public	Edit	Delete
Star Wars	Nicole Engard	1 item(s)	Title	Public	Edit	Delete
Web Development	Nicole Engard	14 item(s)	Title	Public	Edit	Delete
Winie the Pooh	Nicole Engard	5 item(s)	Title	Public	Edit	Delete
WOTC	Nicole Engard	20 item(s)	Title	Public	Edit	Delete

From the List page you can add titles by scanning barcodes into the box at the bottom of the page

Contents of *Dresden*

	Title ▲	Author ◆	Date added	Call number ◆
<input type="checkbox"/>	Fool Moon (The Dresden Files, Book 2) by Butcher, Jim. Publisher: Roc, 2001 ISBN: 0451458125. Holds Edit record Edit items	Butcher, Jim.	03/26/2012	Nicole's Library
<input type="checkbox"/>	Grave Peril (The Dresden Files, Book 3) by Butcher, Jim. Publisher: Roc, 2001 ISBN: 0451458443. Holds Edit record Edit items	Butcher, Jim.	03/26/2012	Fairfield
<input type="checkbox"/>	Storm Front (The Dresden Files, Book 1) by Butcher, Jim. Publisher: Roc, 2000 ISBN: 0451457811. Holds Edit record Edit items	Butcher, Jim.	03/26/2012	Nicole's Library
<input type="checkbox"/>	Summer Knight: A Novel of the Dresden Files (The Dresden Files, Book 4) by Butcher, Jim. Publisher: Roc Hardcover, 2009 ISBN: 0451462750. Holds Edit record Edit items	Butcher, Jim.	03/26/2012	Nicole's Library

Add an item to *Dresden*

Barcode:

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

	Results
<input checked="" type="checkbox"/>	1. Blue book, dolls & values. Hobby House Press. Description: ; G
<input type="checkbox"/>	2. Bell, book & candle Columbia TriStar Home Video, Description: ; Burbank, CA : , 1993 : 1 videocasse

Cart

Your Lists:

Public Lists:

- Library
- Searching
- Research
- Kids
- Bears
- [New List]

10.1.3 Viewing Lists

To see the contents of a list, visit the Lists page on the staff client

Lists

Your lists

Public lists

List Name	Created by	Contents	Sort By	Type	Options	
An open list	Nicole Engard	0 item(s)	Title	Public	Edit	Delete
Computer	Nicole Engard	10 item(s)	Title	Public	Edit	Delete
Dresden	Nicole Engard	6 item(s)	Title	Public	Edit	Delete
DVDs	Nicole Engard	20 item(s)	Title	Public	Edit	Delete
Harry Potter	Nicole Engard	12 item(s)	Title	Public	Edit	Delete
Jodi Picoult	Nicole Engard	13 item(s)	Title	Public	Edit	Delete
O'Reilly	Nicole Engard	15 item(s)	Title	Public	Edit	Delete
Open Source	Nicole Engard	6 item(s)	Title	Public	Edit	Delete
Star Wars	Nicole Engard	1 item(s)	Title	Public	Edit	Delete
Web Development	Nicole Engard	14 item(s)	Title	Public	Edit	Delete
Winie the Pooh	Nicole Engard	5 item(s)	Title	Public	Edit	Delete
WOTC	Nicole Engard	20 item(s)	Title	Public	Edit	Delete

Clicking on the 'List Name' will show the contents of the list

+ New list
✎ Edit ▾
⌚ Download list ▾
✉ Send list
🖨 Print list

Contents of *Dresden*

Select all | Clear all | Add to: | Save | 📄 Place hold | ➕ Remove selected | 🔗 Merge selected

	Title ▲	Author ◆	Date added	Call number ◆
<input type="checkbox"/>	Fool Moon (The Dresden Files, Book 2) by Butcher, Jim. <small>Publisher: Roc, 2001 ISBN: 0451458125.</small> Holds Edit record Edit items	Butcher, Jim.	03/26/2012	📖 Nicole's Library
<input type="checkbox"/>	Grave Peril (The Dresden Files, Book 3) by Butcher, Jim. <small>Publisher: Roc, 2001 ISBN: 0451458443.</small> Holds Edit record Edit items	Butcher, Jim.	03/26/2012	📖 Fairfield
<input type="checkbox"/>	Storm Front (The Dresden Files, Book 1) by Butcher, Jim. <small>Publisher: Roc, 2000 ISBN: 0451457811.</small> Holds Edit record Edit items	Butcher, Jim.	03/26/2012	📖 Nicole's Library
<input type="checkbox"/>	Summer Knight: A Novel of the Dresden Files (The Dresden Files, Book 4) by Butcher, Jim. <small>Publisher: Roc Hardcover, 2009 ISBN: 0451462750.</small> Holds Edit record Edit items	Butcher, Jim.	03/26/2012	📖 Nicole's Library

Add an item to *Dresden*

Barcode:

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

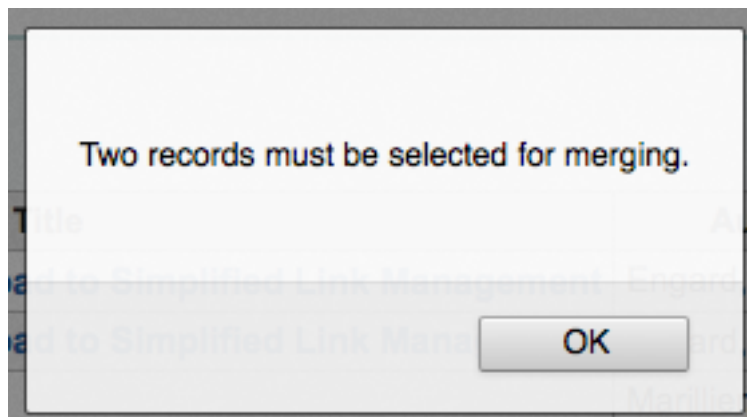
10.1.4 Merging Bibliographic Records Via Lists

The easiest way to merge together duplicate bibliographic records is to add them to a list and use the Merge Tool from there.

Contents of to merge

	Title ▲	Author ◆	Date added	Call number ◆
<input type="checkbox"/>	Practical open source software for libraries by Engard, Nicole C. Type: Book; Format: print bibliography ; Literary form: not fiction Publisher: Oxford : Chandos Publishing, 2010 Description: xxv, 242 p.: ill. ; 24 cm. ISBN: 9781843345855; 1843345854. Holds Edit record Edit items	Engard, Nicole C.,	09/25/2012	<input type="checkbox"/> Centerville <input type="checkbox"/> Fairview <input type="checkbox"/> Fairfield <input type="checkbox"/> Nicole's Library [Z678.9 .E54 2010] <input type="checkbox"/> Fairfield [Z678.9 .E54 2010]
<input type="checkbox"/>	Practical open source software for libraries by Engard, Nicole C. Type: Book; Format: print bibliography ; Literary form: not fiction Publisher: Oxford, [England] : Chandos Publishing, 2010 Description: xxv, 242 p.: ill. ; 24 cm. ISBN: 9781843345855; 1843345854. Online Access: Book site Inhaltsverzeichnis Holds Edit record Edit items	Engard, Nicole C.,	09/25/2012	<input type="checkbox"/> Centerville [Z678.9.O65 E54 2010]

From the list, check the two items you want to merge. If you choose more than or fewer than 2, you will be presented with an error:



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 two 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.

Merging records

Please choose which record will be the reference for the merge. The record chosen as reference will be kept, and the other will be deleted.

Merge reference

Seer of Sevenwaters / (5938)
 Seer of Sevenwaters / (6170)

Using framework:

You will be presented with the MARC for both 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.

Merging records

Source records

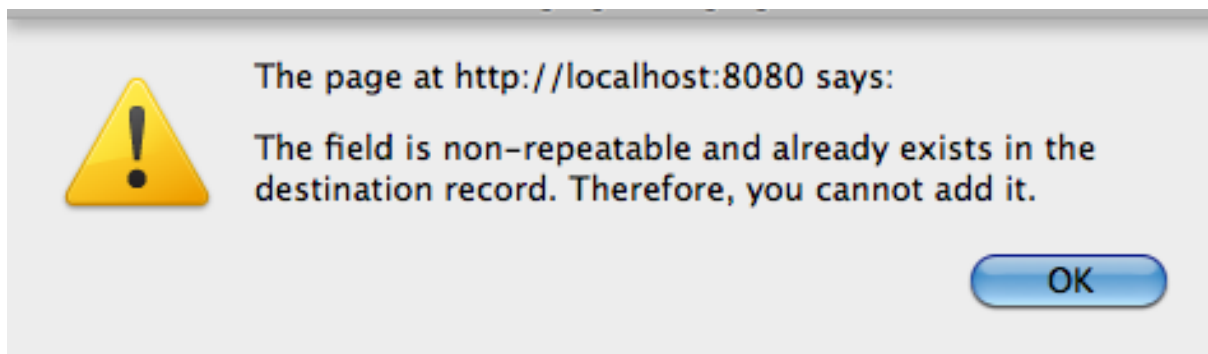
5938 6170

- 001 / BK0008833792
- 003 / DLC
- 005 / 20120710153357.0
- 008 / 100720s2010 nyuj 000 1 eng
- 010
- a / 2010029391
- 020
- a / 0451463552 : HRD
- c / \$24.95
- 037
- b / Penguin Group USA, Attn: Order Processing
405 Murray Hill Pkwy, E Rutherford, NJ, USA,
07073-2136
- n / SAN 282-5074
- 040
- a / DLC
- c / DLC

Destination record

- 001 / BK0008833792
- 003 / DLC
- 005 / 20120710153357.0
- 008 / 100720s2010 nyuj 000 1 eng
- 010
 - a / 2010029391
- 020
 - a / 0451463552 : HRD
 - c / \$24.95
- 037
 - b / Penguin Group USA, Attn: Order Processing 405
Murray Hill Pkwy, E Rutherford, NJ, USA, 07073-2136
 - n / SAN 282-5074
- 040
 - a / DLC
 - c / DLC
 - d / IG#
 - d / BTCTA

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



Once you have completed your selections click the 'merge' button. The primary record will now CONTAIN 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

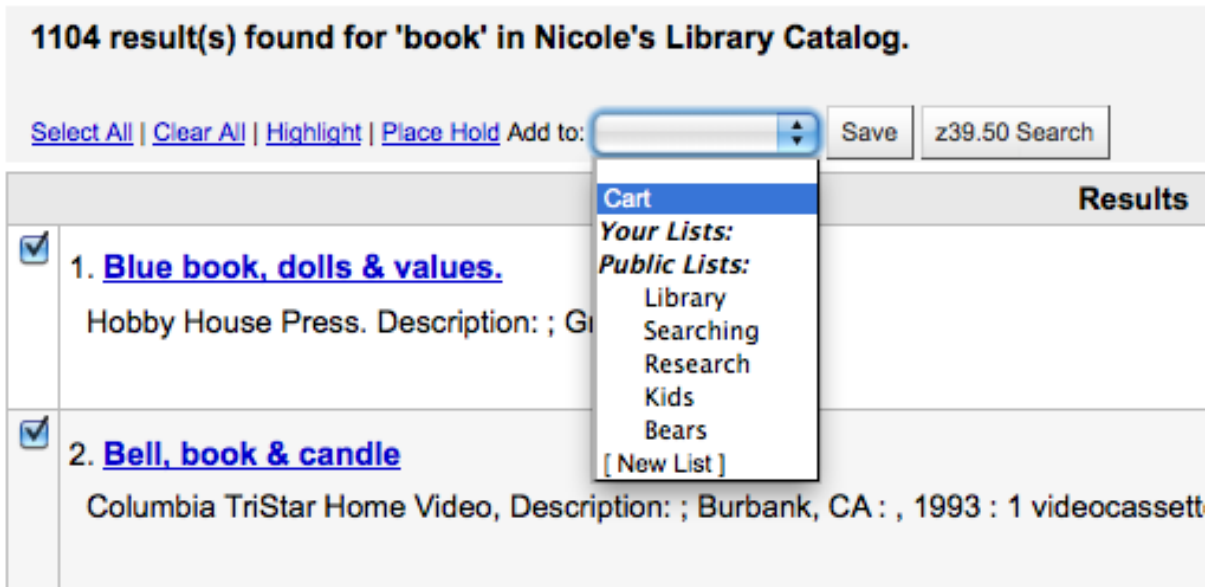


It is important to rebuild your zebra index immediately after merging records. If a search is performed for a record which has been deleted Koha will present the patrons with an error in the OPAC.

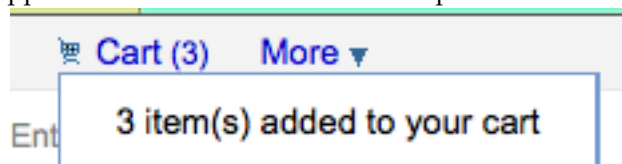
10.2 Cart

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

Your Cart

[Select All](#) | [Clear All](#) | **Selected items :** [Remove](#) | [Add to a list](#) | [Place Hold](#) | [Tag](#)

	Title	Item Type	Location
<input type="checkbox"/>	Blue book, dolls & values. - Hobby House Press. Grantsville, Md. : Title varies.		Fairview General Stacks (688.722B)
<input type="checkbox"/>	Bell, book & candle - Columbia TriStar Home Video, Burbank, CA : - 1 videocassette (ca. 103 min.) : 12 in. Originally released as a motion picture in 1958. James Stewart, Kim Novak, and Jack Lemmon. Based on the play by John van Druten.		Fairview Audio Visual (Videocassette)
<input type="checkbox"/>	Black issues book review. - Cox, Matthews and Associates, Fairfax, VA : - v. : 28 cm. Title from cover.		This record has no items.

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

Chapter 11

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=REP>

+ New ▾

Build a report

Step 1 of 6: Choose a module to report on, and Choose report visibility

Choose: Circulation ▾

Report is public: No (default) ▾

Next >>

TIP

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:

Report is public:

Cache expiry:

- Seconds (default)
- Minutes
- Hours
- Days

Step 2: Choose a report type. For now, Tabular is the only option available.

Build A Report

Step 2 of 6: Pick a report type

Choose:

Step 3: Choose the fields you want in your report. You can select multiple fields and add them all at once by using CTRL+Click on each item you want to add before clicking the Add button.

Step 3 of 6: Select columns for display

Note: Be careful selecting when selecting columns. If your choice is too broad it could result in a very large report that will either not complete

Field Name	Field Path
Borrower number	borrowers.borrowernumber
Card number	borrowers.cardnumber
Surname	borrowers.surname
First name	borrowers.firstname
Salutation	borrowers.title
Other name	borrowers.othernames
Initials	borrowers.initials
Street number	borrowers.streetnumber
Street type	borrowers.streettype
Address	borrowers.address
Address 2	borrowers.address2
City	borrowers.city
State	borrowers.state
Zip/postal code	borrowers.zipcode
Country	borrowers.country
Primary email	borrowers.email
Primary phone	borrowers.phone
Other phone	borrowers.mobile

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.

+ New ▾

Step 4 of 6: Select criteria to limit on

<input type="checkbox"/> Home library	<input type="text" value="<<branchcode branches>>"/>
<input type="checkbox"/> Category	<input type="text" value="<<categorycode categorycode>>"/>

<< Back
Next >>

Step 5: Perform math functions. If you don't want to do any calculations, simply click Next instead of making an option.

+ New ▾

Step 5 of 6: Pick which columns to total

<input type="checkbox"/> borrowers.surname	<input type="text" value="sum"/>
<input type="checkbox"/> borrowers.firstname	<input type="text" value="sum"/>

<< Back
Next >>

Step 6: Choose data order. If you want the data to print out in the order it's found in the database, simply click Finish.

+ New ▾

Step 6 of 6: Choose how you want the report ordered

<input type="checkbox"/> borrowers.surname	<input type="text" value="asc"/>
<input type="checkbox"/> borrowers.firstname	<input type="text" value="asc"/>

Finish

When you are finished you will be presented with the SQL generated by the report wizard. From here you can choose to save the report by clicking 'Save' or copy the SQL and make edits to it by hand.

+ New ▾

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

Save

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.

Save your custom report

Report name:

Report group: Select (None) ▾ or create Code Name

Notes:

Save Report

Once your report is saved it will appear on the 'Use Saved' page with all other saved reports.

Filter

Date:
(MM/DD/YYYY)

Author:

Keyword:

Apply filter

Run reports

- [Saved reports](#)

Reports dictionary

- [View dictionary](#)

Useful resources

- [Koha report library](#)
- [Koha database schema](#)

+ New report ▾

Saved reports

All
Accounts
Acquisitions
Catalog
Circulation
Patrons

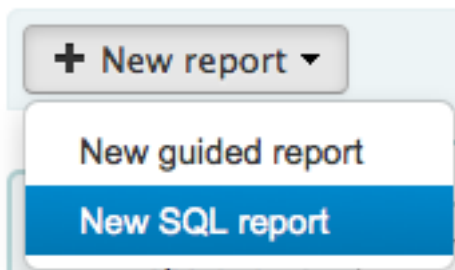
ID	Report name	Type	Group	Subgroup	Notes	Author	Creation date	Public	Saved results	
167	[no name]	1	Catalog			Engard, Nicole (51)	12/21/2012	No		Actions ▾
169	[no name]	1	Circulation			Engard, Nicole (51)	01/02/2013	No		Actions ▾
170	[no name]	1	Catalog			Engard, Nicole (51)	01/22/2013	No		Actions ▾
171	[no name]	1	Catalog			Engard, Nicole (51)	02/25/2013	No		Actions ▾
172	[no name]	1	Catalog			Engard, Nicole (51)	02/25/2013	No		Actions ▾
173	[no name]	1				Engard, Nicole (51)	03/23/2013	No		Actions ▾

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>.

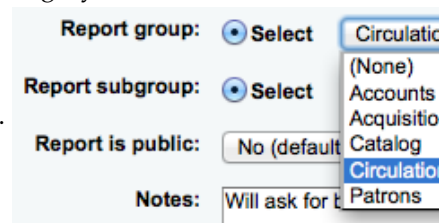
To add your query, click the link to 'Create from SQL' on the main reports module or the 'New report' button at the top of the 'Saved reports' page.



Fill in the form presented

- 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.



TIP



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.

The screenshot shows a form with three main sections:

- Report group:** A radio button for 'Select' is selected. Next to it is a dropdown menu showing 'Catalog'. To the right is a radio button for 'or create' which is unselected, followed by 'Code' and 'Name' input fields.
- Report subgroup:** A radio button for 'Select' is selected. A dropdown menu is open, showing options: '(None)', 'Added', and 'Deleted'. To the right is a radio button for 'or create' which is unselected, followed by 'Code' and 'Name' input fields.
- Report is public:** A dropdown menu is set to 'No (default)'.

-

TIP



If you're adding a report subgroup on the fly, remember that you code should be fewer than 10 characters and should not include special characters or spaces.

- '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=REPO`

- '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, a list with the Koha authorized values will be displayed instead of a free field Note that you can have more than one parameter in a given SQL Note that entering nothing at run time won't probably work as you expect. It will be considered as "value empty" not as "ignore this parameter". For example entering nothing for : `"title=<<Enter title>>"` will display results with `title=""` (no title). If you want to have to have something not mandatory, use `"title like <<Enter title>>"` and enter a % at run time instead of nothing


Examples:

- `SELECT surname,firstname FROM borrowers WHERE branchcode=<<Enter patrons library | branches>> AND surname like <<Enter filter for patron surname (% if none)>>`
- `SELECT * FROM items WHERE homebranch = <<Pick your branch | branches>> and barcode like <<Partial barcode value here>>`

TIP


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: 


TIP

You have to put "%" in a text box to 'leave it blank'. Otherwise, it literally looks for "" (empty string) as the value for the field.




IMPORTANT

In addition to using any authorized value code to generate a dropdown, you can use the following values as well: Branches (branches), Item Types (itemtypes) and Patron Categories (categorycode). For example a branch pull down would be generated like this <<Branch|branches>>




Owning branch:

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).

TIP

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.



Cache expiry:

Notes:

Seconds (default)

Minutes

Hours

Days

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.

Saved reports

ID	Report name	Type	Group	Subgroup	Notes	Author	Creation date	Public	Saved results	Actions
155	Items added by Cataloger	1	Catalog	Added	Will ask for borrowernumber	Engard, Nicole (51)	09/24/2012	No		Actions
156	Lost Items	1	Catalog		Will show who lost the item	Engard, Nicole (51)	09/24/2012	No		<ul style="list-style-type: none"> Show Edit Duplicate Run Schedule Delete
157	Overdues w/ Holds Waiting	1	Circulation	Holds	Will ask for branch	Engard, Nicole (51)	09/24/2012	No		
158	Top 10 Titles Placed on Hold in the Last 6 Months	1	Circulation			Engard, Nicole (51)	09/24/2012	Yes		
159	New Patrons	1	Patrons	Added	Will ask for month and	Engard	09/24/2012	No		

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.'

Filter

Date:
(MM/DD/YYYY)

Author:

Keyword:

Apply filter

Run reports

- Saved reports

Reports dictionary

- View dictionary

Useful resources

- Koha report library
- Koha database schema

+ New report

Saved reports

All Accounts Acquisitions Catalog Circulation Patrons

ID	Report name	Type	Group	Subgroup	Notes	Author	Creation date	Public	Saved results	Actions
167	[no name]	1	Catalog			Engard, Nicole (51)	12/21/2012	No		Actions
169	[no name]	1	Circulation			Engard, Nicole (51)	01/02/2013	No		Actions
170	[no name]	1	Catalog			Engard, Nicole (51)	01/22/2013	No		Actions
171	[no name]	1	Catalog			Engard, Nicole (51)	02/25/2013	No		Actions
172	[no name]	1	Catalog			Engard, Nicole (51)	02/25/2013	No		Actions
173	[no name]	1				Engard, Nicole (51)	03/23/2013	No		Actions

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.

Saved reports

ID	Report name	Type	Group	Subgroup	Notes	Author	Creation date	Public	Saved results	Actions
155	Items added by Cataloger	1	Catalog	Added	Will ask for borrowernumber	Engard, Nicole (51)	09/24/2012	No		Actions
156	Lost Items	1	Catalog		Will show who lost the item	Engard, Nicole (51)	09/24/2012	No		<ul style="list-style-type: none"> Show Edit Duplicate Run Schedule Delete
157	Overdues w/ Holds Waiting	1	Circulation	Holds	Will ask for branch	Engard, Nicole (51)	09/24/2012	No		
158	Top 10 Titles Placed on Hold in the Last 6 Months	1	Circulation			Engard, Nicole (51)	09/24/2012	Yes		
159	New Patrons	1	Patrons	Added	Will ask for month and	Engard,	09/24/2012	No		Actions

The form to edit the report will appear.

+ New report
▶ Run report

Edit SQL report

Report name:

Report group: Select or create

Report subgroup: Select or create

Report is public:

Notes:

```
SELECT borrowers.cardnumber, borrowers.surname, borrowers.firstname,
borrowers.phone, borrowers.address, borrowers.city, borrowers.zipcode,
issues.date_due,
(TO_DAYS(curdate())-TO_DAYS( date_due)) AS 'days overdue',
items.itype, biblio.title, biblio.author, items.itemcallnumber,
items.barcode, COUNT(reserves.biblionumber) AS 'holds'
FROM borrowers
LEFT JOIN issues ON (borrowers.cardnumber=issues.borrowerid)
```

Update SQL
Cancel

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'.

ID	Report name	Type	Group	Subgroup	Notes	Author	Creation date	Public	Saved results	Actions
155	Items added by Cataloger	1	Catalog	Added	Will ask for borrowernumber	Engard, Nicole (51)	09/24/2012	No		Actions
156	Lost Items	1	Catalog		Will show who lost the item	Engard, Nicole (51)	09/24/2012	No		<ul style="list-style-type: none"> Show Edit Duplicate Run Schedule Delete
157	Overdues w/ Holds Waiting	1	Circulation	Holds	Will ask for branch	Engard, Nicole (51)	09/24/2012	No		
158	Top 10 Titles Placed on Hold in the Last 6 Months	1	Circulation			Engard, Nicole (51)	09/24/2012	Yes		
159	New Patrons	1	Patrons	Added	Will ask for month and	Engard,	09/24/2012	No		Actions

When you report runs you will either be asked for some values

Enter parameters for report New Patrons:

Month enrolled (mm):	<input type="text"/>
Year enrolled (yyyy):	<input type="text"/>

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:

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.'

TIP



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.

Acquisitions statistics

Title	Row	Column	Filter
Placed On	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
	group by <input type="text" value="None"/>		
Received On	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
	group by <input type="text" value="None"/>		
Supplier	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text" value="All Suppliers"/>
Item Type	<input type="radio"/>	<input type="radio"/>	<input type="text" value="All Item Types"/>
Budget	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="All budgets"/>

Cell value

Count items

Amount

Output

To screen into the browser:

To a file: Named: Into an application ;

If you choose to output to the browser your results will print to the screen.

Acquisitions statistics

aqbooksellers.name / aqbudgets.budget_code	CHILD	GEN	REF	TOTAL
Baker & Taylor		2	9	11
Borders	8	3		11
TOTAL	8	5	9	22

You can also choose to export to a file that you can manipulate to your needs.

When generating your report, note that you get to choose between counting or summing the values.

Cell value

Count items

Amount

Choosing amount will change your results to appear as the sum of the amounts spent.

Acquisitions statistics

aqbooksellers.name / aqbudgets.budget_code	CHILD	GEN	REF	TOTAL
Baker & Taylor		24.98	365.1	390.08
Borders	80	66.99		146.99
TOTAL	80	91.97	365.1	537.07

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.

Patrons statistics

Title	Row	Column	Filter
Patron category	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Patron status			<input type="text"/>
Patron activity	<input type="text" value="1"/> years of activity		<input type="text"/>
Zip Code	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
		<input type="text" value=""/> digits	
Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>
Date of Birth			From <input type="text"/> To <input type="text"/>
Sex	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Output

To screen into the browser:

To a file: Named: Into an application: EXCEL

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.

Catalog statistics

Title	Row	Column	Filter
Koha Full Call Number	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
	<input type="text" value="10"/> characters		
Item Type	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Publisher	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Publication Year	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
Home Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Filter barcode			like <input type="text"/> (use * to do a fuzzy search)

Output

To screen into the browser:

To a file: Named: Into an application: ;

If you choose to output to the browser your results will print to the screen.

Catalog statistics

items.itype / items.homebranch	CPL	FFL	FPL	FRL	LPL	MMM	MPL	PVL	RPL	SPL	TPL	TOTAL
BK	20	1	48		1	228	5	2	4	31	1	341
CR			10							4		14
Donated by	1		1			1	1					4
MU	1		3				1			4		9
REF			3	2								5
REF-BK						24						24
VID						5						5
VM			8				1		1	13		23
NULL	1											1
TOTAL	23	1	73	2	1	258	8	2	5	52	1	426

You can also choose to export to a file that you can manipulate to your needs.

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.

Circulation statistics

Title	Row	Column	Filter
Period	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/> (MM/DD/YYYY)
Type: <input type="button" value="Checkout"/>	group by	<input type="button" value="None"/>	Select Day: <input type="button" value=""/> Select Month: <input type="button" value=""/>
Patron Category	<input type="radio"/>	<input type="radio"/>	<input type="button" value=""/>
Item Type	<input type="radio"/>	<input type="radio"/>	<input type="button" value=""/>
Library	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Fairview"/>
Collection	<input type="radio"/>	<input type="radio"/>	<input type="button" value=""/>
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="button" value=""/>
Item Call Number			From <input type="text"/> (inclusive) to <input type="text"/> (exclusive)
Patron sort1	<input type="radio"/>	<input type="radio"/>	<input type="button" value=""/>
Patron sort2	<input type="radio"/>	<input type="radio"/>	<input type="button" value=""/>
Home branch	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Fairview"/>
Holding branch	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Fairview"/>

Cell value

Count total items

Count unique items

Output

To screen into the browser:

To a file: Named: Into an application

If you choose to output to the browser your results will print to the screen.

Circulation statistics

Filtered on

- Event return
- Display by 2

datetime / branch	FPL	MPL	SPL	TOTAL
August	1	0	0	1
October	1	0	0	1
November	1	0	0	1
December	10	4	1	15
TOTAL	13	4	1	18

You can also choose to export to a file that you can manipulate to your needs.

TIP

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.
 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:

Circulation statistics

Title	Row	Column	Filter
Period	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/> (MM/DD/YYYY)
Type:	<input type="radio"/>	group by	Select Day: <input type="text"/> Select Month: <input type="text"/>
Patron	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Ty	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Library	<input type="radio"/>	<input type="radio"/>	Fairview <input type="text"/>
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Call Number	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> (inclusive) to <input type="text"/> (exclusive)
Patron sort1	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Patron sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

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.

Serials subscriptions

Vendor:

Branch:

Include expired subscriptions:

Output

To screen into the browser:

To a file: Named: Into an application: ;

If you choose to output to the browser your results will print to the screen.


Serials subscriptions

Bookseller	Title	Subscription id	Branch	Callnumber	Subscription Begin	Subscription End
	Computers in libraries.	1	FPL	MAG	01/15/2009	01/15/2010
	Computers in libraries.	2	LPL		01/01/2009	01/01/2010
Baker & Taylor	Library mashups :	3	PVL		12/15/2009	12/14/2010

You can also choose to export to a file that you can manipulate to your needs.

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.

Hold statistics

Title	Row	Column	Filter
Hold Status	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/> Asked <input type="checkbox"/> Processing <input type="checkbox"/> Waiting <input type="checkbox"/> Satisfied <input type="checkbox"/> Cancelled
Hold Date	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> <input type="text"/> To <input type="text"/> <input type="text"/>
Notification Date	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> <input type="text"/> To <input type="text"/> <input type="text"/>
Reminder Date	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> <input type="text"/> To <input type="text"/> <input type="text"/>
Waiting Date	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> <input type="text"/> To <input type="text"/> <input type="text"/>
Cancellation Date	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> <input type="text"/> To <input type="text"/> <input type="text"/>
Patron Category	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Type	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Pickup Library	<input checked="" type="radio"/>	<input type="radio"/>	Nicole's Library <input type="text"/>
Holding Library	<input type="radio"/>	<input type="radio"/>	Nicole's Library <input type="text"/>
Home Library	<input type="radio"/>	<input type="radio"/>	Nicole's Library <input type="text"/>
Collection	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Shelving Location	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Item Call Number			From <input type="text"/> (inclusive) to <input type="text"/> (exclusive)
Patron sort1	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Patron sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Cell value

- Count holds**
- Count unique borrowers**
- Count unique items**
- Count unique biblios**

Output

To screen into the browser:

To a file: **Named:** **Into an application**

Submit

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: To:

Check-in date from: To:

Library:

Item Type:

Patron Category:

Day:

Month:

Year:

Limit to:

By:

Output

To screen into the browser:

To a file: Named: Into an application: Delimiter:

If you choose to output to the browser your results will print to the screen.

Top 5 List patrons for Checkouts

Filtered on

Issue From =06/01/2009

Issue To =12/31/2009

Rank	FPL		SPL	
	Patron	Issues count	Patron	Issues count
1	Engard, Nicole	8	Engard, Nicole	
2	Acosta, Edna	4	Acosta, Edna	1
3	WALKER, Andrea	2	WALKER, Andrea	
4		1		
5	Harper, Ruben	1	Harper, Ruben	

You can also choose to export to a file that you can manipulate to your needs.

11.2.8 Most Circulated Items

This report will simply list the items that have the been checked out the most.

Most-Circulated Items

Checkout date from: 01/01/2009 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:

Limits

Limit to: 5

By: None

Output

To screen into the browser:

To a file: Named: Export Into an application EXCEL ;

Submit

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:

Not checked out since: 

Limits

Limit to:

By:

Output

To screen into the browser:

To a file: Named: Into an application ;

If you choose to output to the browser your results will print to the screen.

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

Library:

Document Type:

Limits

Limit to:

By:

Output

To screen into the browser:

To a file: Named: Into an application: ;

If you choose to output to the browser your results will print to the screen.

Items with no checkouts

Filtered on

Branch = CPL

Doc Type = BK

limit = 10

Summary

Group	Call Number Range	Number of Items Displayed	Total Items in Group
NULL	SF As to 025.5/24	10	
TOTAL		10	0

NULL

#	Call Number	Barcode	Item Details
1	SF As	10101000000084	The Asimov chronicles: at CPL
2	R Md.975.294A	10101000000079	Allegany County : a history / at CPL
3	F Am	10101000000052	America and I: at CPL
4	959.70433A	10101000000098	The American experience in Vietnam : at CPL
5	809.3872T	10101000000011	10 women of mystery / at CPL
6	797.1E	10101000000031	80 years of Yachting / at CPL
7	796.352N	10101000000006	The 19th hole : at CPL

You can also choose to export to a file that you can manipulate to your needs.

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  Select none to see all branches

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

Title	Author	Lost Code	Barcode	Date last seen	Price	Rep.Price	Library	Itemtype	Holdingbranch	Location	Notes
The skeptical business searcher :	Berkman, Robert I.	Lost	88377264409309	08/23/2009			FPL	BK	FPL	GEN	
Elva S. Smith's The history of children's literature :	Smith, Elva Sophronia,	Lost		12/19/2009			CPL	BK	CPL	CART	

11.2.13 Average Loan Time

This report will list the average time items are out on loan based on the criteria you enter:

Average checkout period statistics

Title	Row	Column	Filter
Issue date	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
	by <input type="text"/>		
Returns	<input type="radio"/>	<input type="radio"/>	From <input type="text"/> To <input type="text"/>
	by <input type="text"/>		
Patron category	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Item type	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Library	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>
Sort1	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Sort2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Output

To screen into the browser:

To a file: Named: Into an application: EXCEL

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:

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

<ul style="list-style-type: none">items.stocknumberbiblioitemsBiblioitem NumberBiblio NumberVolume NumberNumberBiblio-level Item TypeISBNISSNPublication DatePublisherVolume Datebiblioitems.volumedescbiblioitems.collectiontitlebiblioitems.collectionissnbiblioitems.collectionvolumebiblioitems.editionstatementbiblioitems.editionresponsibilityTimestampIllustrator	<p>Add</p> <p><< Delete</p>	<p>Publisher</p>
--	-----------------------------------	------------------

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

Column: biblioitems.publishercode

Choose:

- Human Sciences Press
- Human Service Press
- Humanities Press,
- Hyperion,
- i Press; distributed by G. Braziller, New York,
- Image Books
- Indian Historian Press
- Indiana University Press
- Indiana University Press,
- Industrial Research Unit, Wharton School, University of Pennsylvania; distributed by University of Pennsylvania Press, Philadelphia
- Information Today,**
- Information Today, Inc.,
- Insurors Press,
- Integrated Education Associates,
- Interlink Books,
- International Arts and Sciences Press
- International Publishers
- International Textbook Co.
- International Universities Press
- Interscience Publishers

Next

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,

Your definitions will all appear on the Reports Dictionary page

Dictionary

Use the dictionary to define custom criteria for reporting.







Current Terms

Filter by area

Name	Description	Area	Definition	
zip		Patrons	AND borrowers.zipcode='44236'	<input type="button" value="Delete Definition"/>
last name		Patrons	AND borrowers.surname='en%'	<input type="button" value="Delete Definition"/>
testing2		Circulation	AND borrowers.dateofbirth >= '2011-07-17' AND borrowers.dateofbirth <= '2011-07-27'	<input type="button" value="Delete Definition"/>
Call Number	my call number rule	Catalog	AND items.itemcallnumber='PS3566.I372 N56 2007'	<input type="button" value="Delete Definition"/>
Info Today Publications		Catalog	AND biblioitems.publishercode='Information Today,'	<input type="button" value="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

<input type="checkbox"/> Item-level Item Type	BK
<input type="checkbox"/> Item Number (koha internal)	from <input type="text"/> to <input type="text"/>
<input type="checkbox"/> Biblio Number (koha internal)	from <input type="text"/> to <input type="text"/>
<input type="checkbox"/> Barcode	from <input type="text"/> to <input type="text"/>
<input type="checkbox"/> Framework Code	Default
<input type="checkbox"/> Current Branch	CPL
<input type="checkbox"/> Permanent Branch Code	CPL
<input type="checkbox"/> Creation Date	from <input type="text"/>  to <input type="text"/> 
<input type="checkbox"/> Modification Date	from <input type="text"/>  to <input type="text"/> 
<input type="checkbox"/> On loan	from <input type="text"/>  to <input type="text"/> 
<input type="checkbox"/> Koha Collection	NFIC
<input type="checkbox"/> Item Call Number	from <input type="text"/> to <input type="text"/>
<input type="checkbox"/> Item-level Item Type	BK
<input type="checkbox"/> Item Lost	0
<input type="checkbox"/> Location	CART

Dictionary Definitions
 Info Today Publications

Chapter 12

OPAC

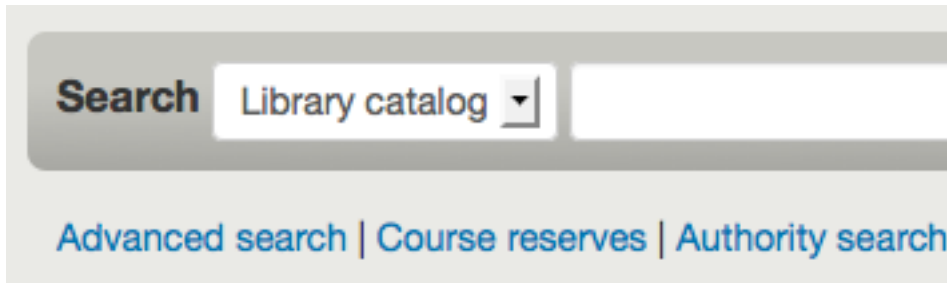
This chapter assumes that you have the following preferences set as follows:

- `opathemes` = 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

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

Home - Results for search for 'kw.wrd: open source'

Your search returned 110 results.

Did you mean: [Open Source](#). [Open source software Social aspects](#). [Open source software Indonesia Directories](#). [Open source software Law and legislation](#).

1 2 3 4 5 6 Next »

Unhighlight Relevance

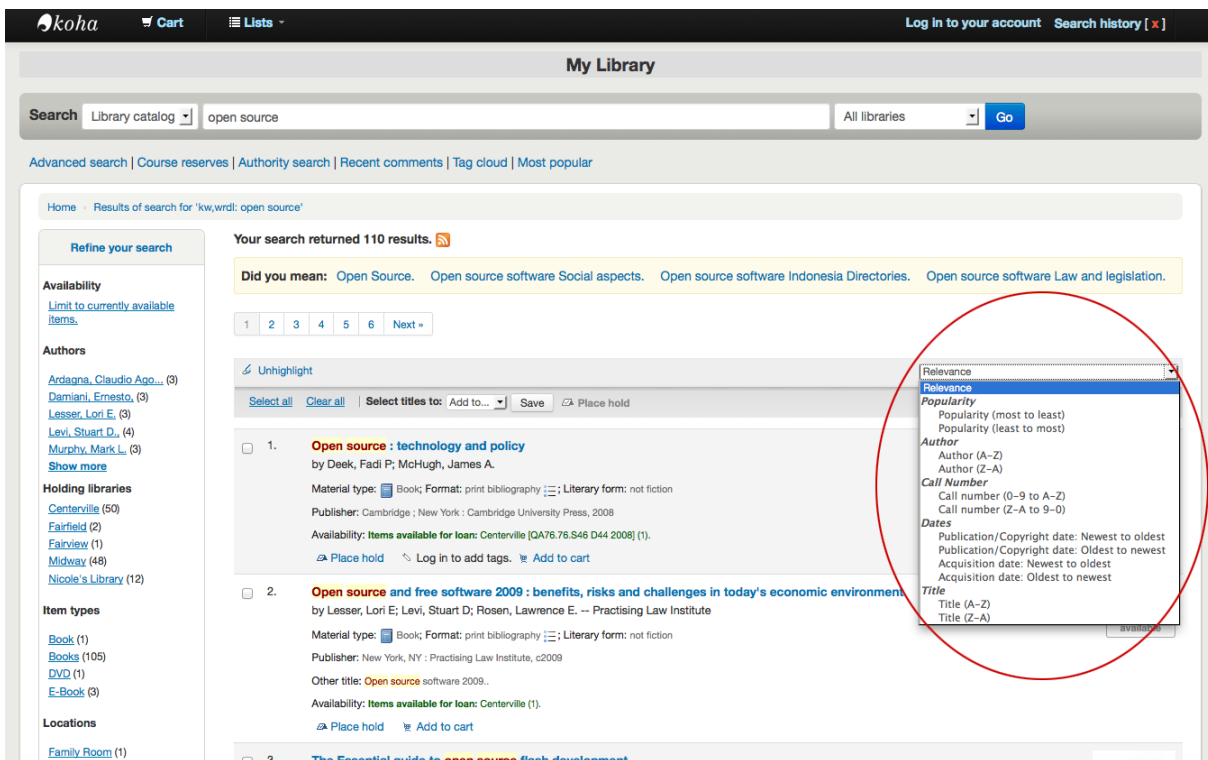
Select all Clear all Select titles to: Add to... Save Place hold

1. **Open source : technology and policy**
by Deek, Fadi P; McHugh, James A.
Material type: Book; Format: print bibliography; Literary form: not fiction
Publisher: Cambridge ; New York : Cambridge University Press, 2008
Availability: **Items available for loan:** Centerville [QA76.76.S46 D44 2008] (1).
[Place hold](#) [Log in to add tags](#) [Add to cart](#)

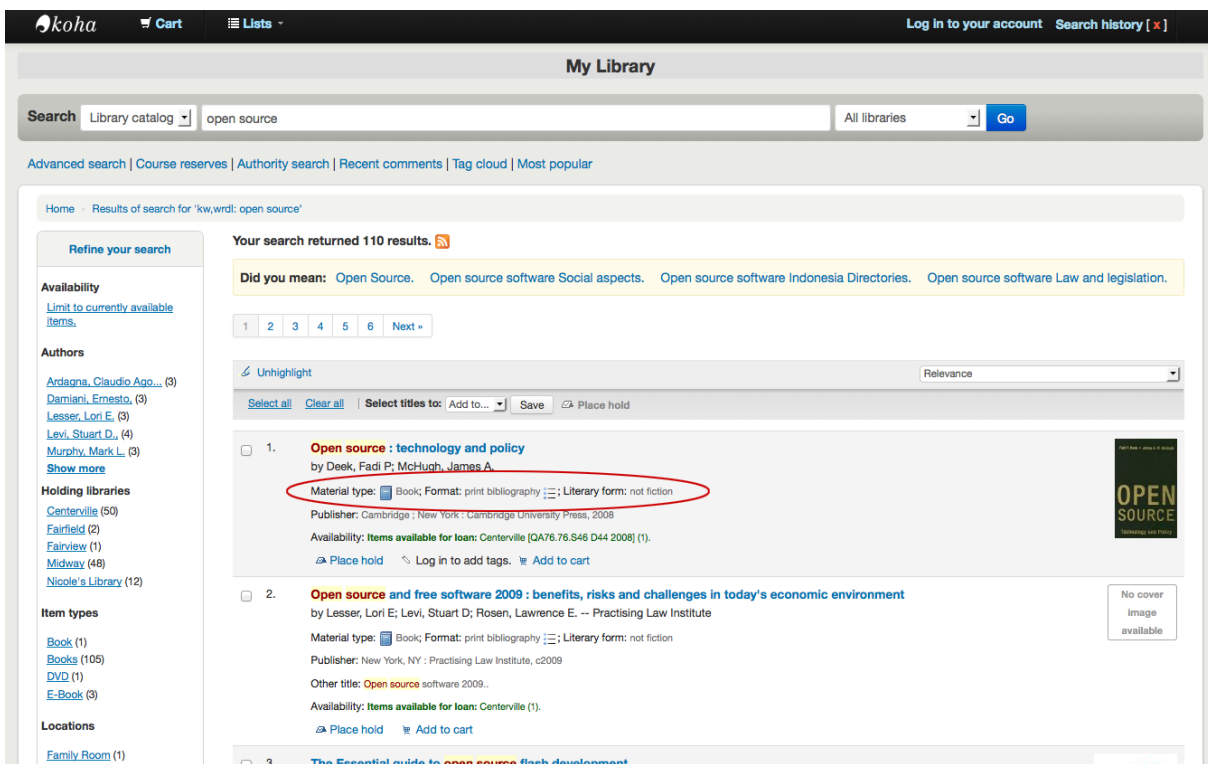
2. **Open source and free software 2009 : benefits, risks and challenges in today's economic environment**
by Lesser, Lori E; Levi, Stuart D; Rosen, Lawrence E. -- Practising Law Institute
Material type: Book; Format: print bibliography; Literary form: not fiction
Publisher: New York, NY : Practising Law Institute, c2009
Other title: **Open source** software 2009..
Availability: **Items available for loan:** Centerville (1).
[Place hold](#) [Add to cart](#)

3. **The Essential guide to open source flash development**

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 **DisplayOPACicon-sXSLT** 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'.

The screenshot shows a library OPAC interface. At the top, there's a navigation bar with 'koha', 'Cart', 'Lists', 'Log in to your account', and 'Search history'. Below that is a search bar with 'Library catalog' selected and 'open source' entered. The search results show 110 results. A 'Did you mean' section suggests 'Open Source', 'Open source software Social aspects', 'Open source software Indonesia Directories', and 'Open source software Law and legislation'. The first result is 'Open source : technology and policy' by Deek, Fadi P; McHugh, James A. Its availability is listed as 'Availability: Items available for loan: Centerville [QA76.76.S46 D44 2008] (1)'. The second result is 'Open source and free software 2009 : benefits, risks and challenges in today's economic environment' by Lesser, Lori E; Levi, Stuart D; Rosen, Lawrence E. -- Practising Law Institute. Its availability is listed as 'Availability: Items available for loan: Centerville (1)'. The third result is 'The Essential guide to open source flash development'. The left sidebar shows filters for Availability, Authors, Holding libraries, Item types, and Locations.

If you have turned on **Enhanced Content** preferences you may have book jackets on your search results.

The screenshot shows the 'My Library' interface. At the top, there's a search bar with 'Library catalog' selected and 'open source' entered. Below the search bar, there are links for 'Advanced search', 'Course reserves', 'Authority search', 'Recent comments', 'Tag cloud', and 'Most popular'. The main content area shows 'Your search returned 110 results.' followed by a yellow banner with 'Did you mean: Open Source. Open source software Social aspects. Open source software Indonesia Directories. Open source software Law and legislation.' Below this is a pagination bar (1-6, Next) and a 'Unhighlight' section. The results list includes:

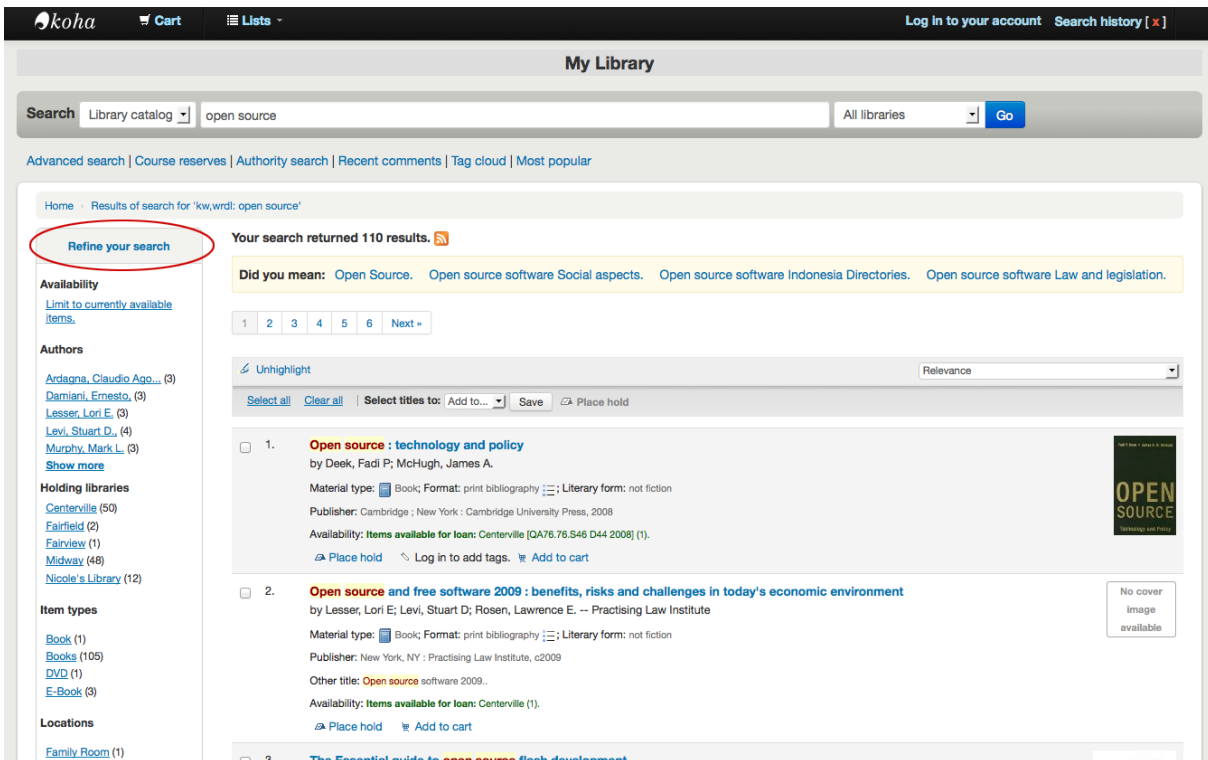
- 1. **Open source : technology and policy** by Deek, Fadi P; McHugh, James A. Material type: Book; Format: print bibliography; Literary form: not fiction. Publisher: Cambridge : New York : Cambridge University Press, 2008. Availability: Items available for loan: Centerville [QA76.76.S46 D44 2008] (1).
- 2. **Open source and free software 2009 : benefits, risks and challenges in today's economic environment** by Lesser, Lori E; Levi, Stuart D; Rosen, Lawrence E. -- Practising Law Institute. Material type: Book; Format: print bibliography; Literary form: not fiction. Publisher: New York, NY : Practising Law Institute, c2009. Other title: Open source software 2009.. Availability: Items available for loan: Centerville (1).
- 3. **The Essential guide to open source flash development**

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.

This screenshot is identical to the one above, but a red oval highlights the yellow banner containing the 'Did you mean' suggestions: 'Open Source. Open source software Social aspects. Open source software Indonesia Directories. Open source software Law and legislation.'

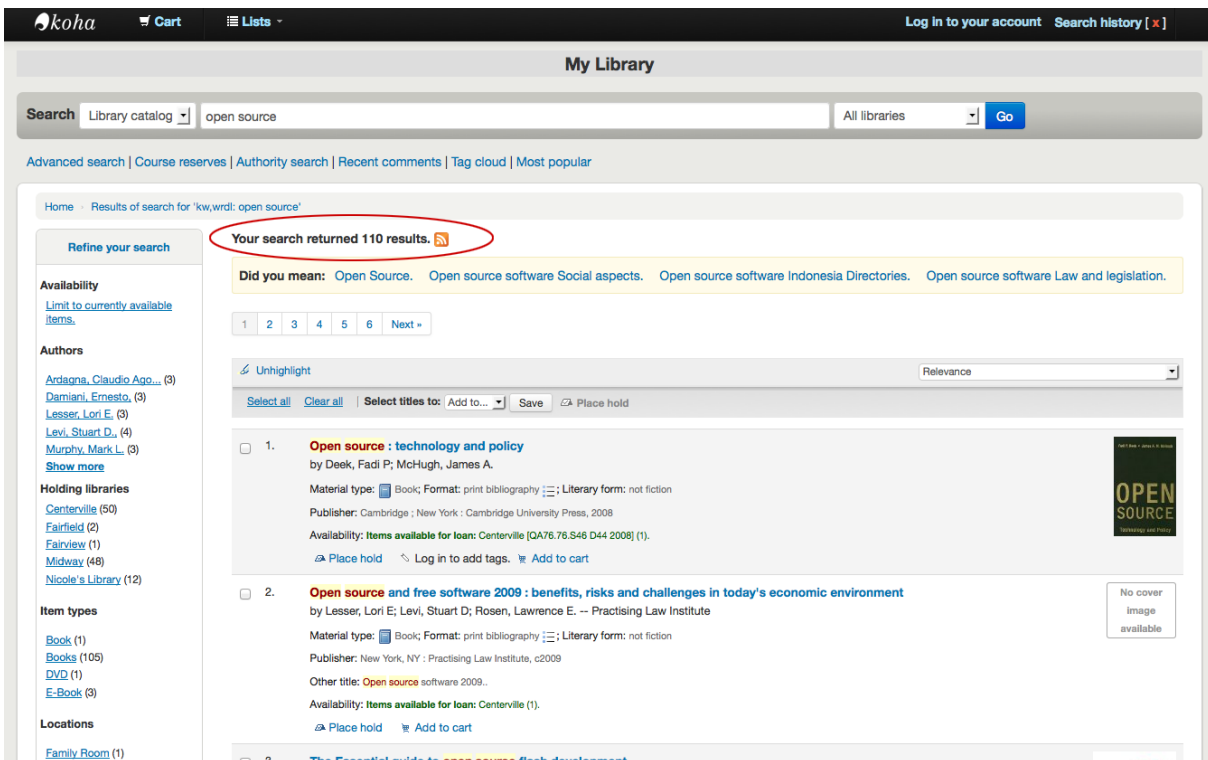
12.1.2 Filters

To filter your results click on the links below the 'Refine Your Search' menu on the left of your screen



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](#).



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:

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /
by **Rowling, J. K.**

Material type: Book
Publisher: New York : A.A. Levine Books, 1998
Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

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.

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /
by **Rowling, J. K.**

Material type: Book
Publisher: New York : A.A. Levine Books, 1998
Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

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.

Home > Details for: Library mashups :, exploring new ways to deliver library data /

Normal view
 MARC view
 ISBD view



Library mashups : exploring new ways to deliver library data /
 by Engard, Nicole C [edt.]

Material type: Book

Publisher: Medford, N.J. : Information Today, Inc., c2009

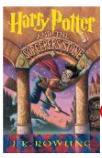
Description: xvii, 334 p. : ill., maps ; 23 cm.

ISBN: 9781573873727 (pbk.); 1573873721 (pbk.).

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).

Home > Details for: Harry Potter and the sorcerer's stone /

Normal view
 MARC view
 ISBD view



Harry Potter and the sorcerer's stone /
 by Rowling, J. K.

Material type: Book

Publisher: New York : A.A. Levine Books, 1998

Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.

ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).

Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) [Add tag\(s\)](#)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

[Browse results](#)
[Previous](#) [Back to results](#) [Next >](#)
[Place hold](#)
[Print](#)
[Save to your lists](#)
[Add to your cart](#)
[Save record](#)
[More searches](#)
[Share](#) [Facebook](#) [Twitter](#) [LinkedIn](#) [Email](#) [8+1](#) [Tweet](#)

Next you'll see the description of the record you're viewing:

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /
by **Rowling, J. K.**

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
 Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
 ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
 Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Following that information you'll find the subject headings which can be clicked to search for other titles on similar topics

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /
by **Rowling, J. K.**

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
 Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
 ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
 Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

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

Home - Details for: Harry Potter and the sorcerer's stone /

Normal view | MARC view | ISBD view

Harry Potter and the sorcerer's stone /

by **Rowling, J. K.**

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
 Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
 ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
 Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: **Harry Potter**

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

In the tabs below the details you will find your holdings data

Home - Details for: Harry Potter and the sorcerer's stone /

Normal view | MARC view | ISBD view

Harry Potter and the sorcerer's stone /

by **Rowling, J. K.**

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
 Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
 ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
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Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Any notes (5xx fields) that have been cataloged will appear under 'Title Notes'

Home Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /

by Rowling, J. K.

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
 Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
 ISBN: 0590353403 (hardcover) ; 059035342X (pbk.).
 Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) **Title notes** Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

If you're allowing comments they will appear in the next tab

Home Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /

by Rowling, J. K.

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
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Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) Title notes **Comments (0)** Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

And finally if you have enabled FRBR and you have other editions of the title in your collection you will see the 'Editions' tab.

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view | MARC view | ISBD view

Harry Potter and the sorcerer's stone /

by Rowling, J. K.

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
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Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | **Editions**

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Browse results
 « Previous | Back to results | Next »

Place hold
 Print
 Save to your lists
 Add to your cart
 Save record
 More searches

Share

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.

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view | MARC view | ISBD view

Harry Potter and the sorcerer's stone /

by Rowling, J. K.

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
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Description: vi, 309 p. : ill. ; 24 cm.
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Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Browse results
 « Previous | Back to results | Next »

Place hold
 Print
 Save to your lists
 Add to your cart
 Save record
 More searches

Share

Clicking Browse Results at the top of the right column will open up your search results on the detail page

Home Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /
by Rowling, J. K.

Material type: Book
Publisher: New York : A.A. Levine Books, 1998
Edition: 1st American ed.

Description: vi, 309 p. : ill. ; 24 cm.
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Online resources: Official Website
Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.
List(s) this item appears in: Harry Potter
Tags from this library: magic (10) , wizards (11) Add tag(s)
average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Browse results Close

- 1 Harry Potter and the Order of the Phoenix / by Rowling, J. K.
- 2 Harry Potter and the Half-Blood Prince / by Rowling, J. K.
- 3 Harry Potter and the Chamber of Secrets / by Rowling, J. K.
- 4 Harry Potter and the sorcerer's stone / by Rowling, J. K.
- 5 Harry Potter and the goblet of fire / by Rowling, J. K.
- 6 Harry Potter and the goblet of fire / by Rowling, J. K.
- 7 Harry Potter and the goblet of fire / by Rowling, J. K.
- 8 The Place Beyond the Winds / by Comstock, Harriet T., 1860-
- 9 Kate Bonnet The Romance of a Pirate's Daughter / by Stockton, Frank Richard, 1834-1902
- 10 Hidden Treasures Or, Why Some Succeed While Others Fail / by Lewis, Harry A.
- 11 Holiday Stories for Young People

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

Home Details for: Harry Potter and the sorcerer's stone /

Normal view MARC view ISBD view

Harry Potter and the sorcerer's stone /
by Rowling, J. K.

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Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.
List(s) this item appears in: Harry Potter
Tags from this library: magic (10) , wizards (11) Add tag(s)
average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (0) Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Browse results

« Previous Back to results Next »

- Place hold
- Print
- Save to your lists
- Add to your cart
- Save record
- More searches

Share Facebook LinkedIn Email RSS+ Tweet

Clicking 'More Searches' will show the list of libraries you entered in your OPACSearchForTitleIn preference

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view | MARC view | ISBD view

Harry Potter and the sorcerer's stone /

by Rowling, J. K.

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
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Description: vi, 309 p. : ill. ; 24 cm.
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 Uniform titles: Harry Potter and the philosopher's stone.

Subject(s): Potter, Harry (Fictitious character) -- Juvenile fiction | Granger, Hermione (Fictitious character) -- Juvenile fiction | Weasley, Ron (Fictitious character) -- Juvenile fiction | Hogwarts School of Witchcraft and Wizardry (Imaginary organization) -- Juvenile fiction | Wizards -- Juvenile fiction | Magic -- Juvenile fiction | Schools -- Juvenile fiction | Wizards -- Fiction | Magic -- Fiction | Schools -- Fiction | England -- Juvenile fiction | England -- Fiction

Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | Editions

Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Save record ▾

- Search for this title in:
- Other Libraries (WorldCat)
- Other Databases (Google Scholar)
- Open Library

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.

Home · Details for: Harry Potter and the sorcerer's stone /

Normal view | MARC view | ISBD view

Harry Potter and the sorcerer's stone /

by Rowling, J. K.

Material type: Book
 Publisher: New York : A.A. Levine Books, 1998
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Summary: Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

List(s) this item appears in: Harry Potter

Tags from this library: magic (10) , wizards (11) Add tag(s)

average rating: 0.0 (0 votes)

Holdings (1) | Title notes | Comments (0) | Editions

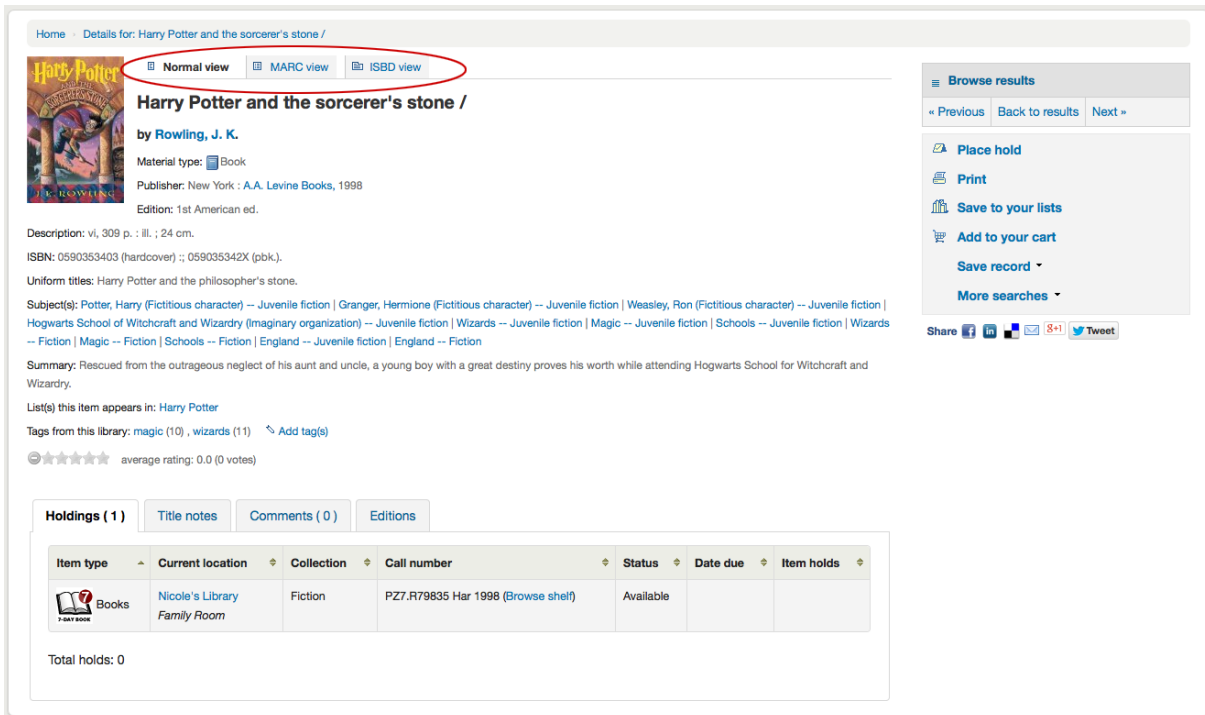
Item type	Current location	Collection	Call number	Status	Date due	Item holds
Books	Nicole's Library Family Room	Fiction	PZ7.R79835 Har 1998 (Browse shelf)	Available		

Total holds: 0

Save record ▾

- BIBTEX
- Dublin Core (XML)
- MARCXML
- MARC (non-Unicode/MARC-8)
- MARC (Unicode/UTF-8)
- MARC (Unicode/UTF-8, Standard)
- MODS (XML)
- RIS

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

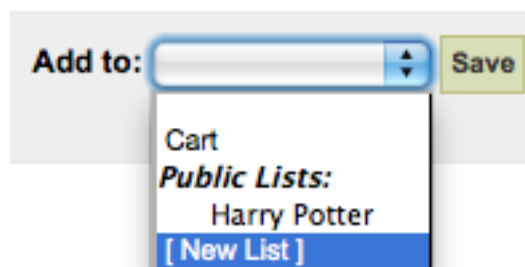
Patrons can manage their own private lists by visiting the ‘my lists’ section of their account.

Lists



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

List name:

Sort this list by:

Category:

Permissions: anyone else to add entries. (The owner of a list is always allowed to add entries, but needs permission to remove.)

anyone to remove his own contributed entries.

anyone to remove other contributed entries.

Save [Cancel](#)

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.

- 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

*

TIP

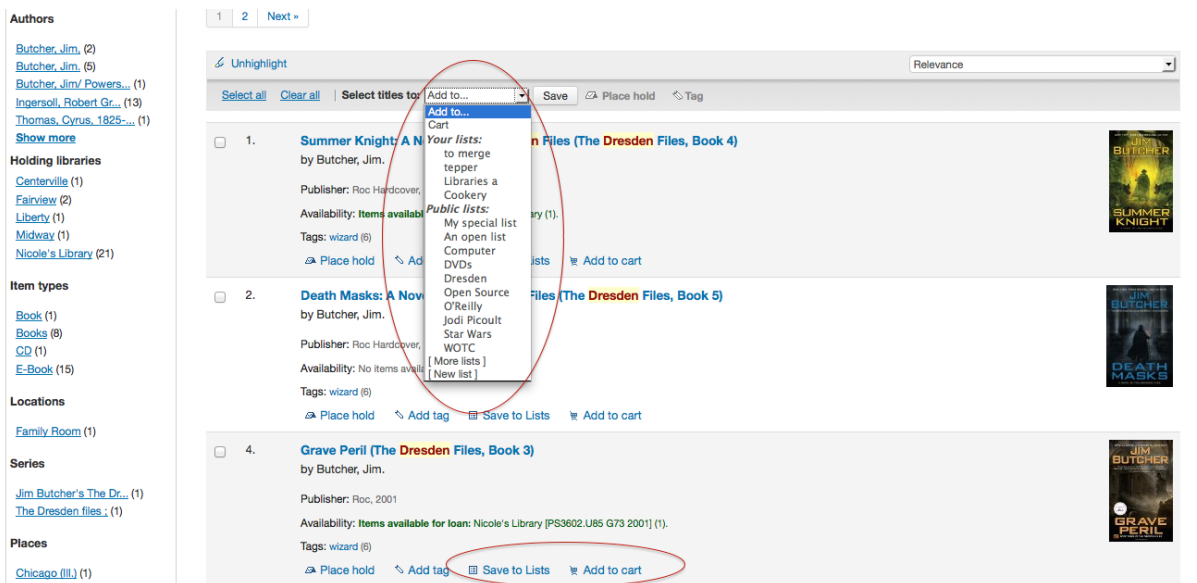


The owner of a list is always allowed to add entries, but needs permission to remove.

- anyone to remove other contributed entries

12.3.1.2 Adding titles to Lists

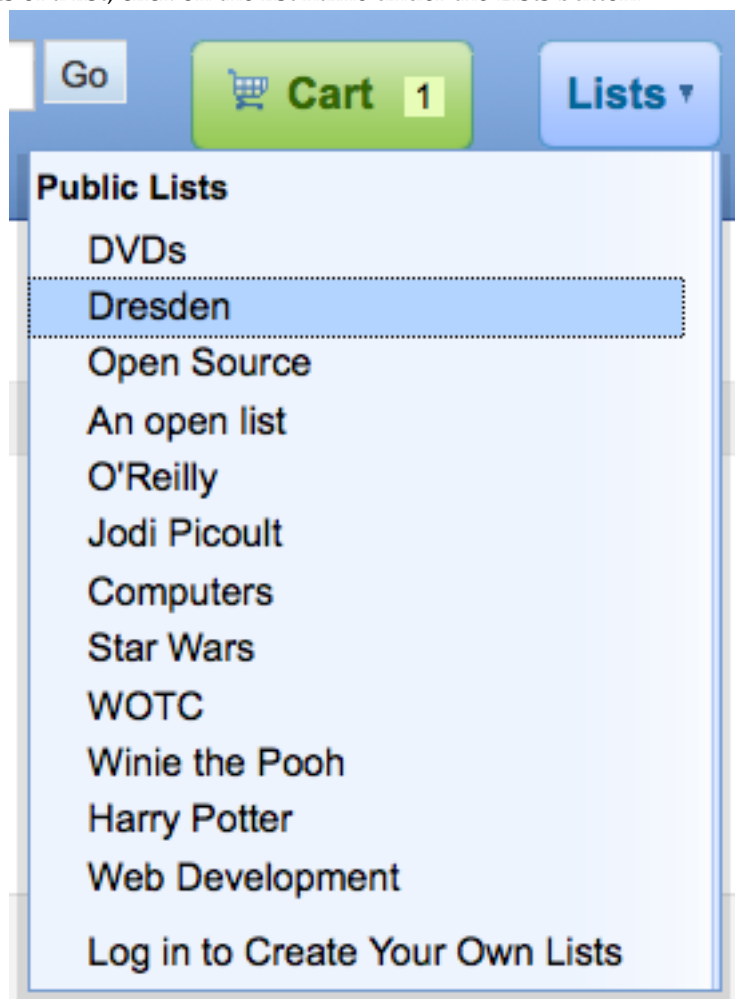
Titles can be added to lists from the search results and/or from the bibliographic record. On the search results options to add items to the list appear below each result and across the top of the results page



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.

Lists → Dresden

Select All Clear All | Place Hold Download List Send List Print List

<input type="checkbox"/> Blood Rites (The Dresden Files, Book 6) by Butcher, Jim . Publisher: Roc, 2004. Availability: Copies available for loan: Nicole's Library (1). Tags: wizard (6) Log in to add tags. Actions: Place Hold Add to Cart	
<input type="checkbox"/> Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5) by Butcher, Jim . Publisher: Roc Hardcover, 2009. Availability: Copies available for loan: Nicole's Library (1). Tags: wizard (6) Actions: Place Hold Add to Cart	
<input type="checkbox"/> Fool Moon (The Dresden Files, Book 2) by Butcher, Jim . Publisher: Roc, 2001. Availability: No copies available Checked out (1). Tags: wizard (6) Actions: Place Hold Add to Cart	

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

TIP



iso2079 is MARC format

- 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](#) [Close this window](#)

- 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.

[Home](#)

[Catalog](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

[my messaging](#)

[my lists](#)

Lists

[Your Lists](#) [Public Lists](#)

[New List](#)

List Name	Contents	Sort by	Type	
Kids	4 item(s)	title	Private	Edit Delete
mashups	1 item(s)		Private	Edit Delete

To edit the list's title or sorting patrons click the 'Edit' link to the right of the list description.

Lists --> **Jodi Picoult** --> **Editing**

List name:	<input type="text" value="Jodi Picoult"/>
Sort this list by:	<input type="text" value="Title"/>
Category:	<input type="text" value="Public"/>
Permissions:	<input type="text" value="Do not allow"/> anyone else to add entries. (The owner of a list is always allowed to add entries, but needs permission to remove.) <input type="text" value="Allow"/> anyone to remove his own contributed entries. <input type="text" value="Do not allow"/> anyone to remove other contributed entries.


Save [Cancel](#)


When clicking 'Delete' next to a list you will be asked to confirm that you want to delete the list.

The list *Jodi Picoult* is not empty.
It has **15** entries.
Use the "Confirm" button below to confirm deletion.

Lists

Your private lists | **Public lists**

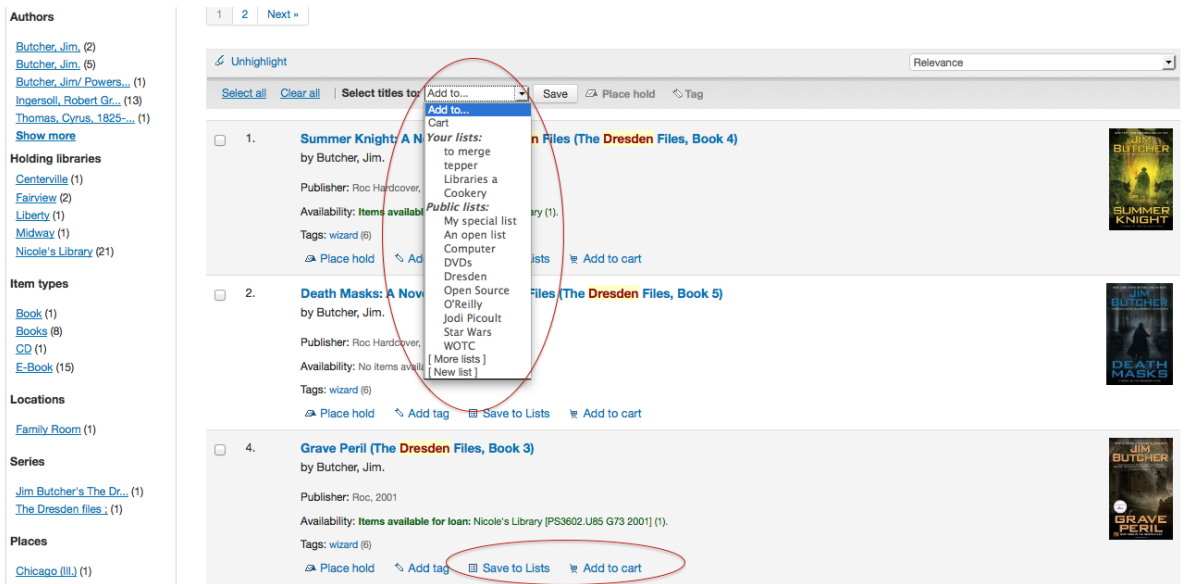
 **New List**

List Name	Contents	Type	
Jodi Picoult	15 items	Private	 Edit Confirm

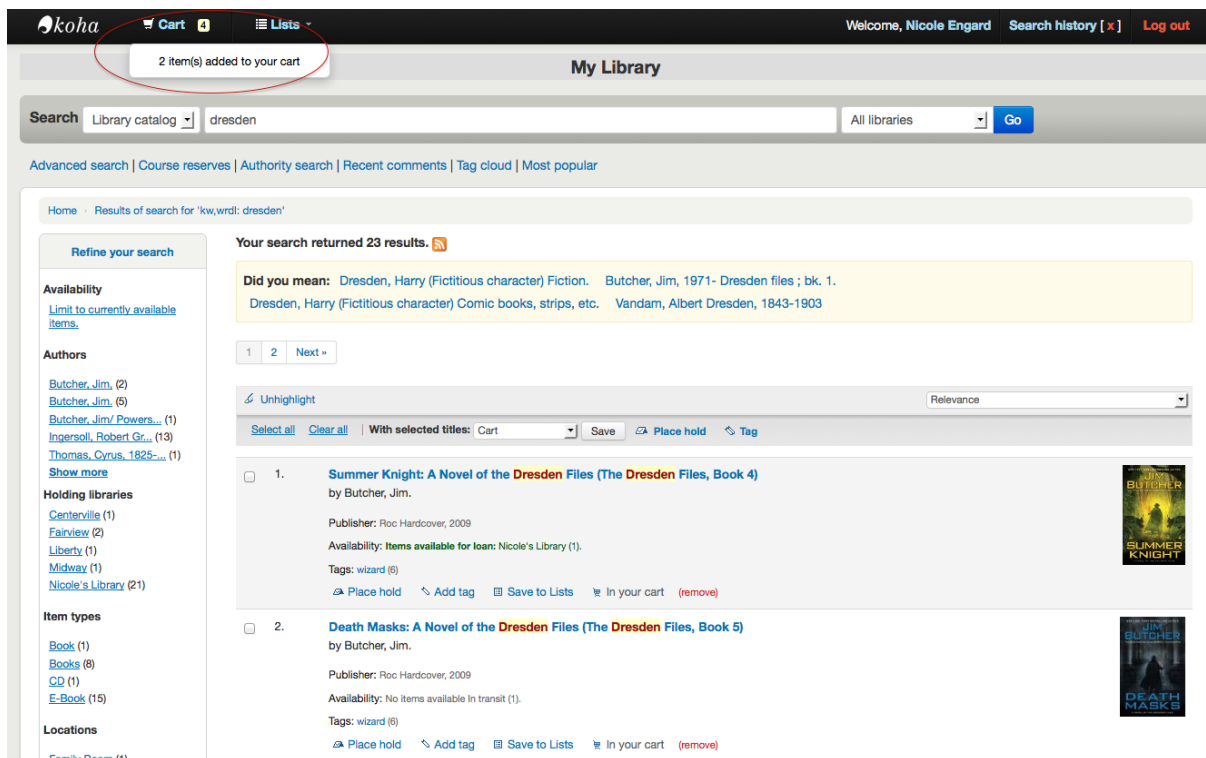
The list will not be deleted until the 'Confirm' button is clicked to the right of the list you'd like to delete.

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

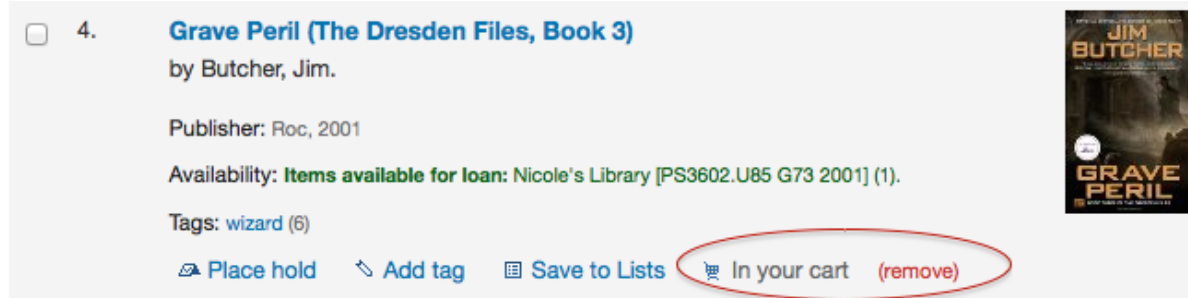


Clicking the 'Add to Cart' button will add the one title to your cart. To add multiple titles at once, check the box to the left of each result and then choose 'Cart' from the 'Add to' pull down at the top of the screen. Once titles are added to the cart you will be presented with a confirmation



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.

Your cart

🔍 More details ✉ Send 📄 Download 🖨 Print 🗑 Empty and close

[Select all](#) [Clear all](#) | **Select titles to:** ✕ Remove 📅 Add to a list 📌 Place hold 🏷 Tag

	Title ▲	Author ◆	Year ◆	Location (Status)
<input type="checkbox"/>	Blood Rites (The Dresden Files, Book 6).	Butcher, Jim.	2004	• Nicole's Library (Available)
<input type="checkbox"/>	Grave peril /	Butcher, Jim,	2001	• Nicole's Library (PS3602.U85 G73 2001) (Available)
<input type="checkbox"/>	Storm front / bk. 1	Butcher, Jim,	2000	<ul style="list-style-type: none"> • Nicole's Library (Available) • Nicole's Library, Family Room (PS3602.U85 S76 2000) (Available) • Nicole's Library (PS3602.U85 S76 2000) (Available)

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).

Your cart

🔍 Brief display ✉ Send 📄 Download 🖨 Print 🗑 Remove

[Select all](#) [Clear all](#) | **Select titles to:** ✕ Remove 📄 A

Grave peril / Butcher, Jim,

ISBN	9780451458445 0
Author(s)	Butcher, Jim,
Publisher	New York : Roc,
Details	378 p. ; 18 cm.
Subject(s)	Wizards --Illinois -- Fantasy fiction.
Copyright	2001
Notes	- "A ROC book."
LCCN	2002561970
Location(s) (Status)	• Nicole's Libra

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:

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



The screenshot shows a search results interface. At the top, there are links for 'Select All', 'Clear All', and 'Highlight', followed by an 'Add to:' dropdown menu, a 'Save' button, and a 'Place Hold' button with a checkmark icon. Below this are two search results, each with a checked checkbox:

1. **Blood Rites (The Dresden Files, Book 6)**
by Butcher, Jim .
Publisher: Roc, 2004.
Availability: **Copies available for loan: Nicole's Library (1).**
Tags: [wizard](#) (6)
Log in to add tags.
Actions: Place Hold Add to Cart
2. **Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5)**
by Butcher, Jim .
Publisher: Roc Hardcover, 2009.
Availability: **Copies available for loan: Nicole's Library (1).**
Tags: [wizard](#) (6)
Log in to add tags.
Actions: Place Hold Add to Cart

- 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

Blood Rites (The Dresden Files, Book 6)

by Butcher, Jim .

Publisher: Roc, 2004.

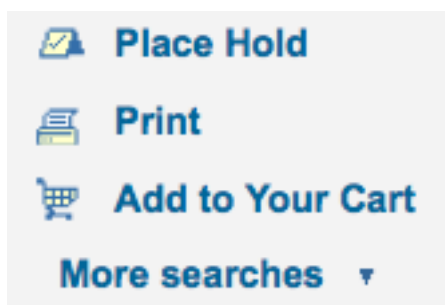
Availability: **Copies available for loan: Nicole's Library (1).**

Tags: [wizard](#) (6)

Log in to add tags.

Actions: Place Hold Add to Cart

- When viewing an individual title you'll see the option to place a hold in the box on the right side of the screen



The screenshot shows a vertical menu with four options, each with an icon:

- Place Hold
- Print
- Add to Your Cart
- More searches ▾

No matter which of the above links you click to place your hold you'll be brought to the same hold screen.

Confirm holds for: Nicole Engard (9876543457)

Place a hold on [The future of literacy.](#), by Disch, Robert,

Holds and priority: 1 out of 1

Pick up location:

[Show more options](#)

Place hold

- 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'

Confirm holds for: Nicole Engard (9876543457)

Place a hold on [The future of literacy.](#), by Disch, Robert,

Holds and priority: 1 out of 1

Pick up location:

[Hide options](#)

Hold starts on date: [Clear date](#)


Hold not needed after: [Clear date](#)

Next available copy **A specific copy**

Place hold

- 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

Confirm holds for: Nicole Engard (9876543457)

Place a hold on **The future of literacy.** , by Disch, Robert,

Holds and priority: 1 out of 1

Pick up location:

Hide options

Hold starts on date: [Clear date](#)

Hold not needed after: [Clear date](#)

Hold notes:

Next available copy **A specific copy**

- If allowed by your **OPACItemHolds** preference the patron will be allowed to choose whether to place the hold on the next available copy or a specific copy

Confirm holds for: Nicole Engard (9876543457)

Place a hold on **The future of literacy.** , by Disch, Robert,

Holds and priority: 1 out of 1

Pick up location:

Hide options


Hold starts on date: [Clear date](#)

Hold not needed after: [Clear date](#)

Hold notes:

Next available copy **A specific copy**

Select a specific copy:

Copy	Item type	Barcode	Home library	Last location	Call number	Information
<input type="radio"/>	 Books	31619000018275	Midway		P91 .D5	Not on hold

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.

The screenshot shows a search results page for 'kw,wrld: dresden'. The search returned 23 results. A yellow banner suggests alternative search terms: 'Dresden, Harry (Fictitious character) Fiction. Butcher, Jim, 1971- Dresden files ; bk. 1.' and 'Dresden, Harry (Fictitious character) Comic books, strips, etc. Vandam, Albert Dresden, 1843-1903'. The results list includes:

- 1. Summer Knight: A Novel of the Dresden Files (The Dresden Files, Book 4)** by Butcher, Jim. Publisher: Roc Hardcover, 2009. Availability: Items available for loan: Nicole's Library (1). Tags: wizard (6). A red circle highlights the 'Place hold' button and the 'New tag(s), separated by a comma:' input box with an 'Add (done)' button.
- 2. Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5)** by Butcher, Jim. Publisher: Roc Hardcover, 2009. Availability: No items available in transit (1). Tags: wizard (6). A red circle highlights the 'Add tag' button.

At the top of the results area, a 'Tag' button is circled in red.

To add a tag to one item, type the tags (separated by commas) in the 'New tag' box and click 'Add'. You will be presented with a confirmation of your tags being added.

This screenshot shows the same search results page, but the tagging process for the first item is complete. The 'New tag(s), separated by a comma:' input box now contains the text 'knight' and the 'Add (done)' button is highlighted with a red circle. Below the input box, it says 'Tags added: 1.' and 'Save to Lists' and 'Add to cart' buttons are visible.

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.

Home Results for search for 'kw,wd: dresden'

Refine your search

Availability
[Limit to currently available items.](#)

Authors
[Butcher, Jim.](#) (2)
[Butcher, Jim.](#) (6)
[Butcher, Jim/ Powers...](#) (1)
[Ingersoll, Robert Gr...](#) (13)
[Thomas, Cyrus. 1825-...](#) (1)
[Show more](#)

Holding libraries
[Centerville](#) (1)
[Fairview](#) (2)
[Liberty](#) (1)
[Midway](#) (1)
[Nicole's Library](#) (21)

Item types
[Book](#) (1)
[Books](#) (8)
[CD](#) (1)
[E-Book](#) (15)

Locations
[Family Room](#) (1)

Your search returned 23 results.

Did you mean: Dresden, Harry (Fictitious character) Fiction. Butcher, Jim, 1971- Dresden files ; bk. 1.
 Dresden, Harry (Fictitious character) Comic books, strips, etc. Vandam, Albert Dresden, 1843-1903

1 2 Next >

Highlight
 Select all Clear all With selected titles: Add to... Save Place hold

New tag: Add (done)

1. **Summer Knight: A Novel of the Dresden Files (The Dresden Files, Book 4)**
 by Butcher, Jim.
 Publisher: Roc Hardcover, 2009
 Availability: **Items available for loan:** Nicole's Library (1).
 Tags: wizard (6)
 Place hold Add tag Save to Lists Add to cart

2. **Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5)**
 by Butcher, Jim.
 Publisher: Roc Hardcover, 2009
 Availability: No items available in transit (1).
 Tags: wizard (6)
 Place hold Add tag Save to Lists Add to cart

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.

Home Details for: Summer knight :, a novel of the Dresden files /

Normal view MARC view ISBD view

Summer knight : a novel of the Dresden files /
 by **Butcher, Jim.**

Material type: Book
 Series: [Butcher, Jim, Dresden files:](#)
 Publisher: New York : [Roc](#), 2009, c2002

Description: 321 p. ; 24 cm.
 ISBN: 9780451462756 ;; 0451462750 .:

Subject(s): [Dresden, Harry \(Fictitious character\) -- Fiction](#) | [Wizards -- Fiction](#) | [Chicago \(Ill.\) -- Fiction](#) | [Fantasy fiction](#)

List(s) this item appears in: [Dresden](#)

Tags from this library: [wizard](#) (6) [Add tag\(s\)](#)

average rating: 0.0 (0 votes)

Holdings (1) Title notes **Comments (0)**

There are no comments for this item.
[Post or edit your comments on this item.](#)

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.

[Home](#) > [Details for: Summer knight :, a novel of the Dresden files /](#)



[Normal view](#)

[MARC view](#)

[ISBD view](#)

Summer knight : a novel of the Dresden files /

by [Butcher, Jim.](#)

Material type: Book

Series: [Butcher, Jim, Dresden files:](#)

Publisher: New York : [Roc](#), 2009, c2002

Description: 321 p. ; 24 cm.

ISBN: 9780451462756 ;; 0451462750 .:

Subject(s): [Dresden, Harry \(Fictitious character\) -- Fiction](#) | [Wizards -- Fiction](#) | [Chicago \(Ill.\) -- Fiction](#) | [Fantasy fiction](#)

List(s) this item appears in: [Dresden](#)

Tags from this library: [wizard](#) (6) [Add tag\(s\)](#)

average rating: 0.0 (0 votes)

[Holdings \(1 \)](#)

[Title notes](#)

[Comments \(0 \)](#)

Your comment (preview, pending approval)

This is an awesome series.

[Edit](#)

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** library.

 **Normal view** **MARC view** **ISBD view**

Summer knight : a novel of the Dresden files /

by **Butcher, Jim.**

Material type:  Book

Series: [Butcher, Jim, Dresden files:](#)

Publisher: New York : [Roc](#), 2009, c2002

Description: 321 p. ; 24 cm.

ISBN: 9780451462756 ; 0451462750 .:

Subject(s): [Dresden, Harry \(Fictitious character\) -- Fiction](#) | [Wizards -- Fiction](#) | [Chicago \(Ill.\) -- Fiction](#) | [Fantasy fiction](#)

List(s) this item appears in: [Dresden](#)

Tags from this library: [wizard](#) (6) [Add tag\(s\)](#)

      average rating: 0.0 (0 votes)

Holdings (1) **Title notes** **Comments (1)**

Your comment

05/29/2014

This is an awesome series. [Edit](#)



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).

Home > Details for: Summer knight :, a novel of the Dresden files /


Normal view MARC view ISBD view

Summer knight : a novel of the Dresden files /

by **Butcher, Jim.**

Material type:  Book

Series: [Butcher, Jim, Dresden files:](#)

Publisher: New York : [Roc](#), 2009, c2002

Description: 321 p. ; 24 cm.

ISBN: 9780451462756 ;; 0451462750 .:

Subject(s): [Dresden, Harry \(Fictitious character\) -- Fiction](#) | [Wizards -- Fiction](#) | [Chicago \(Ill.\) -- Fiction](#) | [Fantasy fiction](#)

List(s) this item appears in: [Dresden](#)

Tags from this library: [wizard \(6\)](#) [Add tag\(s\)](#)

[Log in to add tags.](#)

★★★★★ average rating: 0.0 (0 votes)

Holdings (1) Title notes Comments (1)

Patron comment on 05/29/2014

This is an awesome series.

[Log in to your account](#) to post a comment.


If you have your [OpacShowRecentComments](#) set to show then you'll see the approved comments on that page.


Recent comments

[Summer knight : a novel of the Dresden files /](#) by [Butcher, Jim,](#)

Publication: New York : [Roc](#), 2002 . 321 p. ; , Test 24 cm.

Date: 2002


This is an awesome series. Added 05/29/2014 by [you](#) 

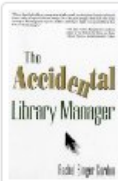


[The accidental library manager /](#) by [Gordon, Rachel Singer.](#)

Publication: Medford, N.J. : [Information Today](#), 2004 . xx, 362 p. ; 23 cm.

Date: 2004

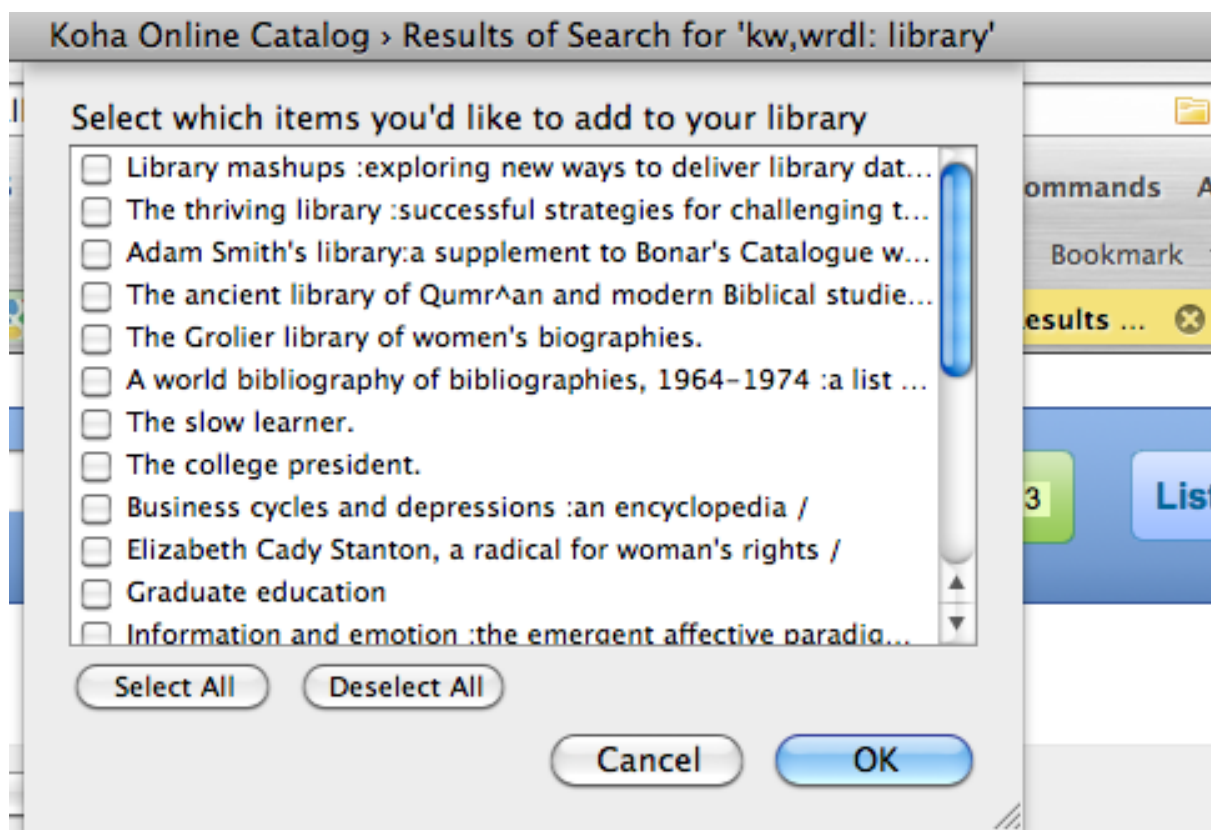
Very helpful book! Added 05/08/2012 by [you](#) 



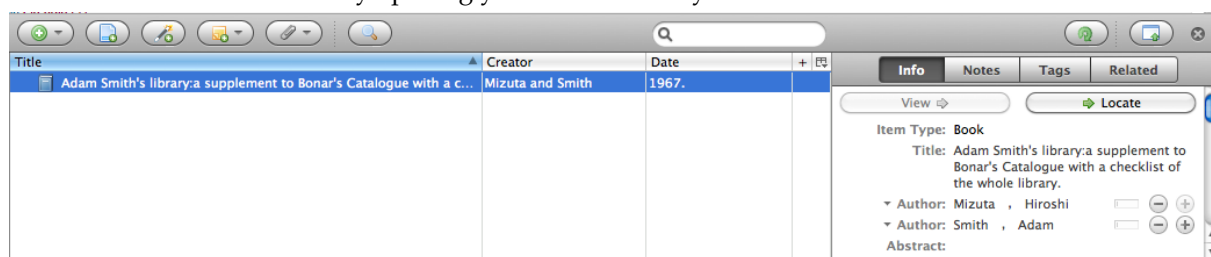
12.5.3 Zotero

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 brought to a registration page. The options on the registration page can be controlled by editing the **PatronSelfRegistrationBorrowerMandatoryField** and the **PatronSelfRegistrationBorrowerUnwantedField** preferences.

Library

Card number

Home library:

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:

Mobile phone:

Primary email:

Secondary email:

Alternate address

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

Email:

Contact Note:

Alternate contact

Surname:

First name:

Phone:

Verification:

Please type this following characters into the preceding box: QFQTI

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 My Summary

Home

Catalog

my summary

my fines

my personal details

my tags

change my password

my search history

my reading history

my privacy

my purchase suggestions

Messages For You

- You left your library card!
Written on 09/09/2010 by Fairview

Hello, Coda ENGARD ([Click here](#) if you're not Coda ENGARD)

Checked Out Overdue Fines Holds

3 Items Checked Out

	Title	Call No.	Due	Renew	Fines
No cover image available	Britannica book of the year.	R032B	10/13/2010	<input type="checkbox"/> Renew (3 of 3 renewals remaining)	No
	Harry Potter and the Order of the Phoenix :	PN1997.2.H385 H37 2007	02/05/2011	<input type="checkbox"/> Renew (3 of 3 renewals remaining)	No
No cover image available	I did it for myself	374.012 COM 2001	02/06/2011	Not renewable (On hold)	No

[Renew Selected](#) [Renew All](#)










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.

Hello, Nicole Engard ([Click here](#) if you're not Nicole Engard)

Checked Out Fines Holds

3 Item(s) Checked Out

	Title	Call No.	Due	Renew	Fines	Links
	Harry Potter and the sorcerer's stone Rowling, J. K.	PZ7.R79835 Har 1999ab	05/01/2011	<input type="checkbox"/> Renew (2 of 2 renewals remaining)	No	Share  TWEET THIS 
	Picture perfect Picoult, Jodi,	PS3566.I372 P49 2002	05/01/2011	<input type="checkbox"/> Renew (2 of 2 renewals remaining)	No	Share  TWEET THIS 
	Harry Potter and the sorcerer's stone Rowling, J. K.	PZ7.R79835 Har 1998	05/01/2011	<input type="checkbox"/> Renew (2 of 2 renewals remaining)	No	Share  TWEET THIS 

Renew Selected Renew All

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:

Description:

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

[Cancel](#)

- 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**

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)	<input type="text" value="PA1234567890"/>	Clear
HBR (Home Branch)	<input type="text"/>	Clear
SHOW_BCODE (Show Barcode in OPAC)	<input type="button" value="Yes"/>	Clear

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.

Hello, Nicole Engard ([Click here](#) if you're not Nicole Engard)

Checked Out
Overdue
Credits
Holds

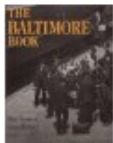
3 Item(s) Checked Out

	Title	Barcode	Call No.	Due	Renew	Fines	Links
	Picture perfect Picoult, Jodi,	100006	PS3566.I372 P49 2002	06/16/2011	<input type="checkbox"/> Renew <small>(1 of 2 renewals remaining)</small>	No	<div style="text-align: center;">   </div>
	Harry Potter and the sorcerer's stone Rowling, J. K.	100025	PZ7.R79835 Har 1998	05/19/2011	Not renewable <small>(0 of 2 renewals remaining)</small>	No	<div style="text-align: center;">   </div>
	Harry Potter and the sorcerer's stone Rowling, J. K.	100020	PZ7.R79835 Har 1999ab	05/19/2011	Not renewable <small>(On hold)</small>	No	<div style="text-align: center;">   </div>

Clicking on the 'Overdue' tab will show only the items that are overdue.

[Checked Out](#)
[Overdue](#)
[Fines](#)
[Holds](#)

Overdues (1 total)

	Title	Call No.	Due	Renew	Fines
	The Baltimore book:	975.26B	02/21/2010	Renew (0 of renewals remaining)	No

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](#)
[Overdue](#)
[Fines](#)
[Holds](#)

Fines and Charges

Amount

You currently owe fines and charges amounting to: **3.00**

Finally, clicking on the 'Holds' tab will show the patron the status of all of the items they have on hold. Items that are ready for pickup will be highlighted in yellow.

[Checked Out](#)
[Overdue](#)
[Fines](#)
[Holds](#)

Holds (14 total)

Title	Placed On	Expires On	Pick Up Location	Priority	Status	Modify
Blood Rites (The Dresden Files, Book 6).	03/29/2012	Never Expires	Nicole's Library	1	Pending	Cancel
About a boy /	03/02/2012	Never Expires	Nicole's Library		Item waiting at Nicole's Library since 03/02/2012	
100 questions every home seller should ask :	03/01/2012	Never Expires	Nicole's Library	1	Pending	Cancel
The cathedral and the bazaar :	12/23/2011	Never Expires	Nicole's Library	1	Pending	Cancel
Crowdsourcing :	12/23/2011	Never Expires	Nicole's Library	1	Pending	Cancel
Ambient findability /	12/05/2011	Never Expires	Nicole's Library	1	Pending	Cancel
Harry Potter and the deathly hallows	11/18/2011	Never Expires	Nicole's Library	1	Pending	Cancel
Computers in libraries.	11/15/2011	Never Expires	Nicole's Library	1	Pending	Cancel
The academic library and the net gen student :	11/02/2011	Never Expires	Nicole's Library		Item waiting at Nicole's Library since 11/02/2011	
Achievement among minority Americans:	10/02/2011	Never Expires	Nicole's Library		Item in transit from Midway since 11/18/2011	
10 classic mystery and suspense plays of the modern theatre.	10/02/2011	Never Expires	Centerville	1	Pending	Cancel
Web database applications with PHP and MySQL /	05/14/2011	05/17/2011	Nicole's Library		Item waiting at Nicole's Library since 09/28/2011	
Essential PHP security /	03/17/2011	Never Expires	Nicole's Library	1	Pending	Cancel
SQL /	03/16/2011	Never Expires	Nicole's Library	1	Pending	Cancel

Suspend all holds until [Clear Date](#)
[Resume all suspended holds](#)

Patrons can cancel their own holds if they are not in transit or already waiting for them. They can also suspend all of their holds (depending on the value of your **SuspendHoldsOpac** system preference) 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

12.7.2 Patron Flags

If you have **flagged your patron's account** 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 **OPAC-PatronDetails** 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.

12.7.3 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.

- Home
- Catalog
- my summary
- my fines
- my personal details
- my tags
- change my password
- my reading history
- my purchase suggestions
- my messaging
- my lists

[Nicole Engard's account](#) → Fines and Charges

Date	Description	Fine Amount	Amount Outstanding
05/04/2010	Rental Harry Potter and the chamber of secrets.	1.00	1.00
05/04/2010	Rental Library mashups :	1.00	1.00
04/07/2010	Payment,thanks -	-1.00	0.00
02/22/2010	Copier Fees	5.00	0.00
02/22/2010	Payment,thanks -	-5.00	0.00
02/22/2010	partial fine payment	-1.00	-1.00
02/16/2010	Rental The Baltimore book:	1.00	0.00
12/09/2009	New Card New Card	4.00	4.00
12/07/2009	Payment,thanks -	-3.00	0.00
12/01/2009	Payment,thanks -	-4.25	0.00
12/01/2009	Payment,thanks -	-5.00	0.00
11/26/2009	Payment,thanks -	-62.25	0.00
11/26/2009	Writeoff	-3.00	0.00
10/31/2009	Payment,thanks - Reversed -	-3.00	0.00
10/23/2009	Lost Item	4.25	0.00
10/23/2009	Payment,thanks - Reversed -	-62.25	0.00
10/23/2009	Rental The Big book of holiday plays /	3.00	0.00
10/23/2009	Rental The Big book of holiday plays /	3.00	0.00
10/23/2009	Payment,thanks -	-3.00	0.00

12.7.4 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.

Nicole Engard's account → **Personal details**

Library

Home Library:

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:

Mobile phone:

Primary email: Required

Secondary email:

Alternate address

Address:

Address 2:

City:

State:

Zip/Postal code:

Country:

Phone:

Email:

Contact Note:

Alternate contact

Surname:

First name:

Phone:

[Submit update request](#)

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.

Suggestions pending approval: 1

Comments pending approval: 1

Tags pending approval: 1

Patrons requesting modifications: 1

If the **OPACPatronDetails** preference is set to 'Don't allow' then patrons will simply see their details in plain text.

Nicole Engard's account → **Your Personal Details**

To make changes to your record please contact the library.

<p>Contact Information</p> <p>Name: Nicole Engard</p> <p>Other Name:</p> <p>Address: 123 My Street</p> <p>City: Philadelphia, PA</p> <p>State:</p> <p>Zip Code: 19101</p> <p>Country:</p> <p>Home Phone: 555.111.2345</p> <p>Mobile Phone:</p> <p>Work phone:</p> <p>Fax:</p> <p>Primary Email: magnus@enger.priv.no</p> <p>Secondary Email: nengard@bywatersolutions.com</p> <hr/> <p>Personal Information</p> <p>Date of Birth: 06/27/1979</p> <p>Gender:</p>	<p>Alternate Contact Information</p> <p>Alternate Address:</p> <p>City:</p> <p>State:</p> <p>Zip Code:</p> <p>Country:</p> <p>Phone:</p> <p>Email:</p> <hr/> <p>Library Use:</p> <p>Card number: 23529001223637</p> <p>Home library: Nicole's Library</p> <p>Patron Number: 51</p> <p>Patron Category: Staff (S)</p> <p>Joined: 02/18/2011</p> <p>Expires: 05/18/2019</p> <p>Driver's License: PA1234567890</p>
--	---

12.7.5 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.

[Home](#)

[Catalog](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

[my messaging](#)

[my lists](#)

All Tags

Show up to tags from other users. [Hide my tags](#)

american anthology book **business** data family holiday plays insanity

libraries **library** mashups open source organ donation plays **research**

short stories sisters stories

My Tags

Term	Title	Date Added	Delete
business	The skeptical business searcher : by Berkman, Robert I.	08/23/2009	<input type="button" value="Delete"/>
research	The skeptical business searcher : by Berkman, Robert I.	08/23/2009	<input type="button" value="Delete"/>
data	The skeptical business searcher : by Berkman, Robert I.	08/23/2009	<input type="button" value="Delete"/>
research	Sociological thinking and research	08/23/2009	<input type="button" value="Delete"/>
research	Mass media research : by Wimmer, Roger D.	08/23/2009	<input type="button" value="Delete"/>
business	Bilingual guide to business and professional correspondence (French-English) = by Harvard, Joseph.	08/23/2009	<input type="button" value="Delete"/>
holiday plays	The Big book of holiday plays /	11/23/2009	<input type="button" value="Delete"/>

12.7.6 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.

[Home](#)

[Catalog](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

[my messaging](#)

[my lists](#)

Nicole Engard's account> **Change your Password**

Your password must be at least 6 characters long.

Current Password:

New Password:

Re-Type New Password:

[Submit Changes](#)
[Cancel](#)

12.7.7 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.

[Home](#)

[Catalog](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my search history](#)

Search history

[x Delete your search history](#)

Previous sessions

Date	Search	Results
01/24/2011 18:44:43	kw,wrld: victor victoria	2
01/24/2011 18:31:49	kw,wrld: library	189
01/24/2011 08:27:11	kw,wrld: mytestbooksearch	0
01/24/2011 08:03:18	kw,wrld: Marc Brown	6
01/24/2011 00:47:27	kw,wrld: library	8
01/18/2011 01:26:55	su,wrld: libraries	40
01/14/2011 14:13:58	kw,wrld: mashups	3
01/05/2011 00:26:40	kw,wrld: mashups	3
01/05/2011 00:26:13	kw,wrld: library	189
01/04/2011 21:00:58	kw,wrld: magic	10
01/04/2011 20:30:40	kw,wrld: harry potter	17

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.

Welcome, Nicole Engard | Search history [x] | Log Out

12.7.8 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.’

Nicole Engard's account → Checkout History

Show All Items | Showing Last 50 Items | Order by date

	Title	Item Type	Call No.	Date
No cover image available	This is a test book test author	Books		01/29/2011
No cover image available	Voyages of discovery : timeFrame AD 1400-1500 /	Books	G400 .V69 1989	09/27/2010
No cover image available	Adam Smith's library: a supplement to Bonar's Catalogue with a checklist of the whole library. Mizuta, Hiroshi,	Books	Z988 .S62	07/16/2010
	The thriving library : successful strategies for challenging times / Block, Marylaine,	Books	Ref LB 2337.2 .C36 2000	09/08/2010
	Harry Potter and the chamber of secrets.	Books	PN1997.2.H37 H37 2002	07/16/2010

12.7.9 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.

Nicole Engard's account → Privacy policy

Privacy rule

We take great care in protecting your privacy. On this screen, you can define how long we keep your reading history.

Your options are:

- 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.

Please note that information on any book still checked-out must be kept by the library no matter which privacy option you choose.

Please also note that the library staff can't update these values for you: it's your privacy!

Please choose your privacy rule:

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!

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.

12.7.10 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.’

[Home](#)

[Catalog](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

[my messaging](#)

[my lists](#)

My Purchase Suggestions

[Select All](#) | [Clear All](#) | [New purchase suggestion](#)

	Summary	Note	Managed by	Status
<input type="checkbox"/>	Born Digital - 2009, - BK		Engard, Nicole	Accepted by the library (Bestseller)
<input type="checkbox"/>	Practical Open Source Software for Libraries Nicole C. Engard, - 2010, - Chandos (UK)		Engard, Nicole	Accepted by the library (Bestseller)
<input type="checkbox"/>	Road Trip USA - 2008,	would be a great pick	Engard, Nicole	Accepted by the library (Library Copy Lost)
<input type="checkbox"/>	Testing - 2010, - BK	something		Requested
<input type="checkbox"/>	The Importance of Open Access, Open Source, and Open Standards for Libraries --		Engard, Nicole	Accepted by the library (Bestseller)

[Delete Checked Items](#)

12.7.11 My Messaging

If your library has the **EnhancedMessagingPreferences** preference 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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item check-in	-	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>

Submit changes Cancel

If you also allow SMS messages 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	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Item check-in	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>

SMS number: 555.555.5555

Submit changes Cancel

- 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 Checkin : A notice that lists all the of the items the patron has just checked in

12.7.12 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.

[Home](#)

[Catalog](#)

[my summary](#)

[my fines](#)

[my personal details](#)

[my tags](#)

[change my password](#)

[my reading history](#)

[my purchase suggestions](#)

[my messaging](#)

[my lists](#)

Lists

Your Lists
Public Lists

[New List](#)

List Name	Contents	Sort by	Type	
Kids	4 item(s)	title	Private	Edit Delete
mashups	1 item(s)		Private	Edit Delete

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.

Search All libraries [Go](#)

[Advanced search](#) | [Course reserves](#) | [Authority search](#) | [Recent comments](#) | [Tag cloud](#) | [Most popular](#) | [Purchase suggestions](#)

There will be a link when the patron finds nothing for their search.

Not finding what you're looking for?
[Make a purchase suggestion](#)

And there will be a link on the patron's **My Purchase Suggestions** tab.

Purchase suggestions

Search for: Suggested by: [Go](#)

[New purchase suggestion](#)

Clicking any one of these links will open the purchase suggestion form.

Enter a new purchase suggestion

Please fill out this form to make a purchase suggestion. You will receive an email when the library processes your suggestion

Only the title is required, but the more information you enter the easier it will be for the librarians to find the title you're requesting. The "Notes" field can be used to provide any additional information.

Title:

Author:

Copyright date:

**Standard number
(ISBN, ISSN or
other):**

Publisher:

Collection title:

Publication place:

Item type:

Library:

**Reason for
suggestion:**

Notes:

[Cancel](#)

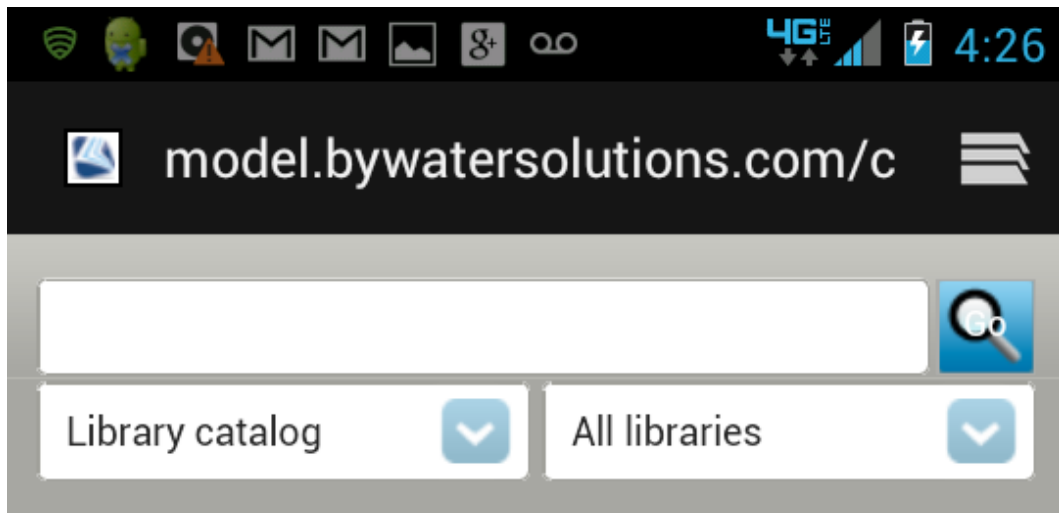
- From the form on the 'Title' is required by the library.
- If you would like the 'Reason for suggestion' menu shown in the screenshot above to appear on your suggestions list you need to add an **authorized value** category titled 'OPAC_SUG' and include reasons as values in that list.
- If you would 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.

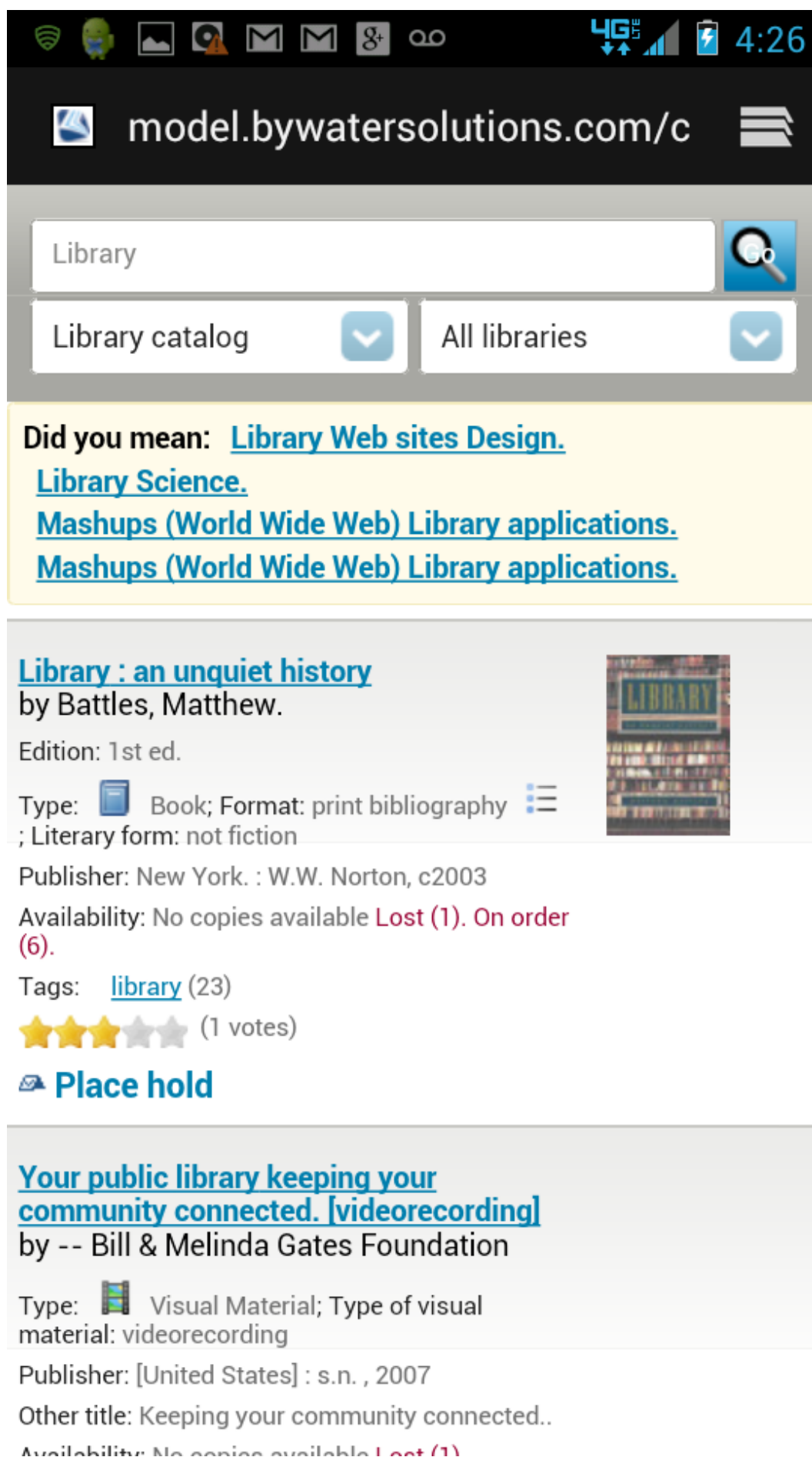
12.9 Mobile OPAC

If you have chosen to use the CCSR theme (set in the **opathemes** preference) then you also have a mobile specific view for your OPAC.


The main page of your OPAC will be customized per your **OPAC system preferences** (always be sure to test in customizations on the desktop in multiple browsers and on as many mobile devices as possible. Your main page will look something like this:





Your search results will look something like this:








model.bywatersolutions.com/c

Library 

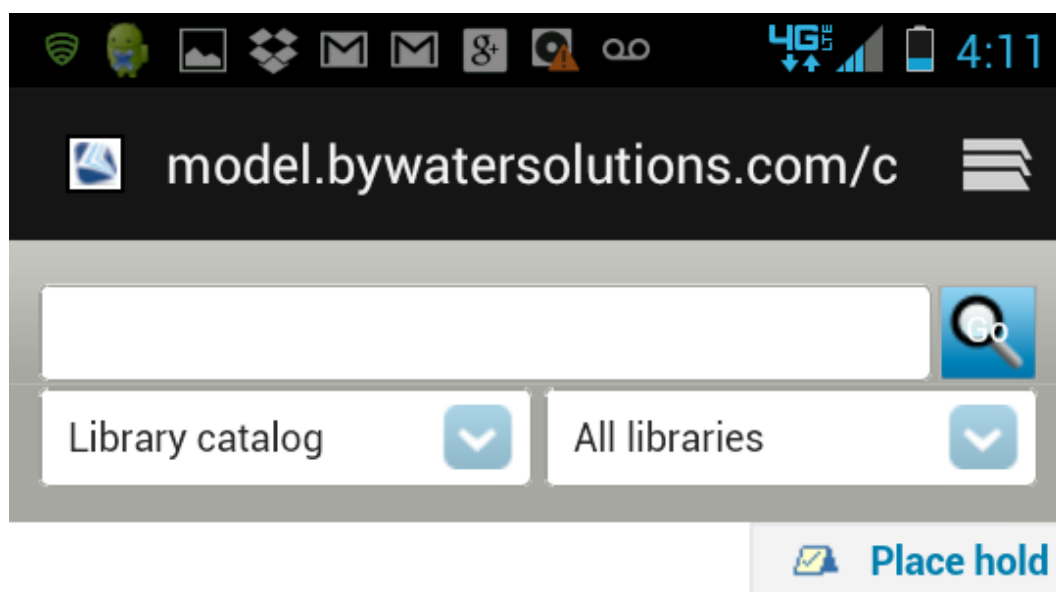
Library catalog  All libraries 

Did you mean: [Library Web sites Design.](#)
[Library Science.](#)
[Mashups \(World Wide Web\) Library applications.](#)
[Mashups \(World Wide Web\) Library applications.](#)

[Library : an unquiet history](#)
 by Battles, Matthew. 
 Edition: 1st ed.
 Type:  Book; Format: print bibliography 
 ; Literary form: not fiction
 Publisher: New York. : W.W. Norton, c2003
 Availability: No copies available **Lost (1).** **On order (6).**
 Tags: [library](#) (23)
 ★★☆☆☆ (1 votes)
 **Place hold**

[Your public library keeping your community connected. \[videorecording\]](#)
 by -- Bill & Melinda Gates Foundation
 Type:  Visual Material; Type of visual material: videorecording
 Publisher: [United States] : s.n. , 2007
 Other title: Keeping your community connected..
 Availability: No copies available **Lost (1)**

A detail page will show more info along with the place hold link in the top right



Managing your library construction project : a step-by-step guide /

by [McCarthy, Richard C. \(Richard Charles\)](#); [McCarthy, Richard C. \(Richard Charles\)](#).



Type:  Book

Publisher: Chicago : [American Library Association](#), 2007

Description: ix, 172 p. : ill. ; 28 cm.

ISBN: 9780838909317 (pbk. : alk. paper); 0838909310 (pbk. : alk. paper).

Subject(s): [Library buildings -- United States -- Design and construction](#) | [Library buildings -- Design and construction](#)

Contents:

First things first -- When to use an architect -- Anatomy of a project -- Programming -- Site analysis -- Building design -- Construction documents -- Bidding -- Construction administration -- Postconstruction -- Finding, selecting, and hiring an architect -- Project delivery -- Sustainable design -- Project costs and building costs.

Summary: Presents practical guidance for management of library building projects, covering site analysis, work with architects, evaluation of the process, and other aspects and providing checklists and sample construction documents.

Taas from this library:

Clicking the place hold link on the search results or detail page will open up the holds screen for placing holds

model.bywatersolutions.com/c

Library catalog All libraries

Confirm holds for: Joaquin D'Planque (312)

1. Hold :

[Managing your library construction project : a step-by-step guide /](#) , by McCarthy, Richard C.

Priority : 1 out of 1

Hold Starts On Date :
[Clear date](#)

Hold Not Needed After :
[Clear date](#)

Place On :

Next available copy

A specific copy

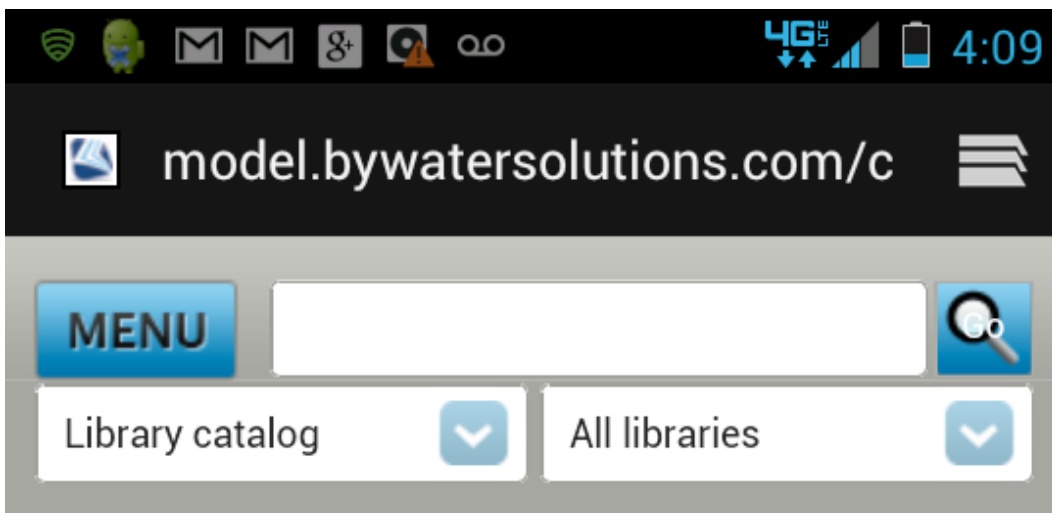
Pickup Location : East Branch

Welcome, **Joaquin D'Planque**

[Log Out](#)

 **koha**
FREE LIBRARY SYSTEM

Patrons will be able to log in to their account and see what they have checked out



Messages for you


- you are a pirate! shiver me timbers
Written on 04/12/2011 by East Branch

Hello, Joaquin D'Planque ([Click here](#) if you're not Joaquin D'Planque)

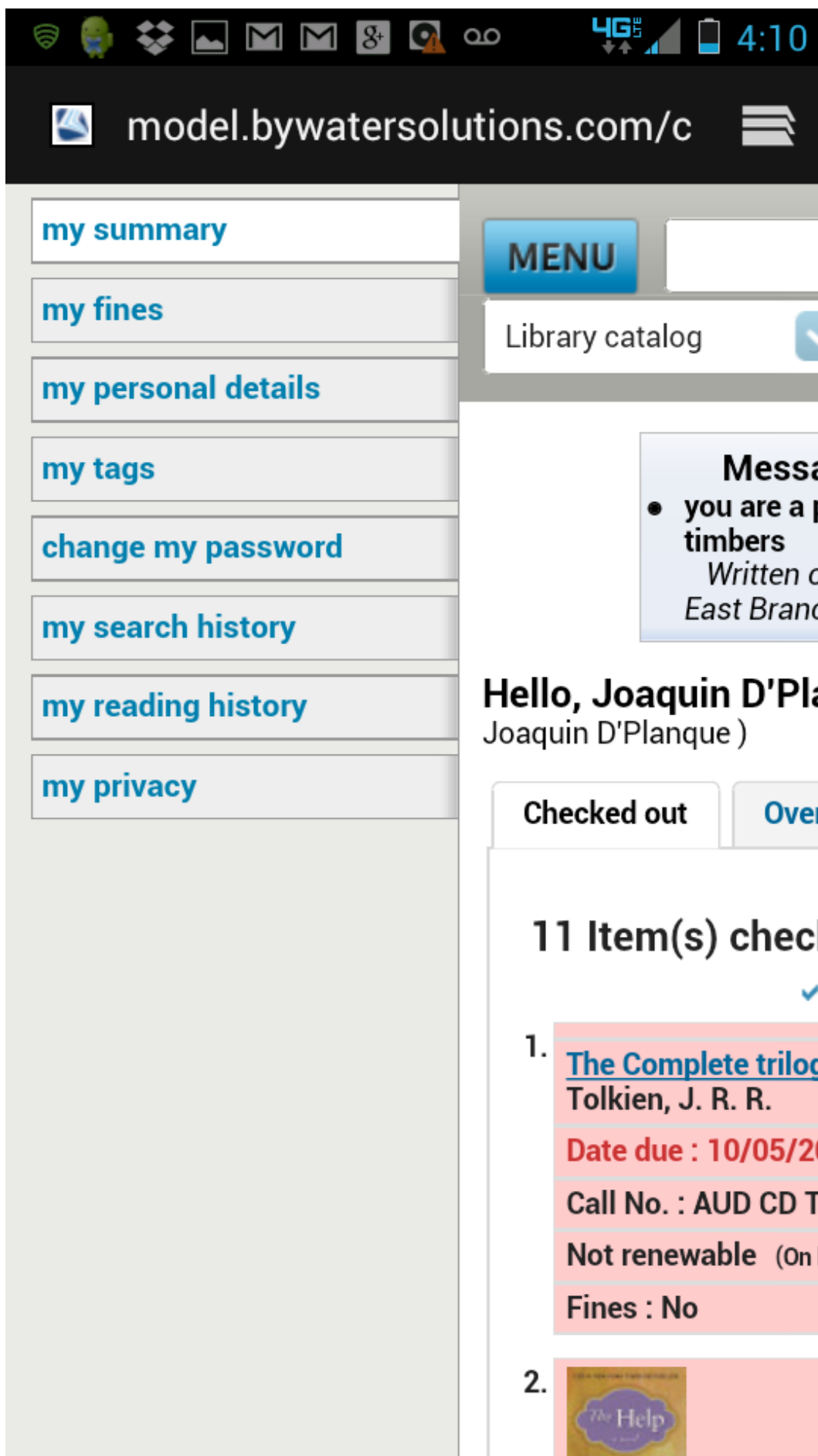
Checked out Overdue Fines Holds

11 Item(s) checked out

✓ Renew selected ✕ Renew all

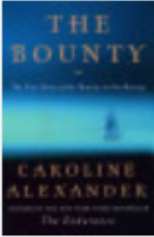

1. [The Complete trilogy, the lord of the rings](#)
Tolkien, J. R. R.
Date due : 10/05/2012
Call No. : AUD CD Tol
Not renewable (On hold)
Fines : No
2. 

Once logged in they can click the menu button in the top left to see the usualy patron account menu



They will be able to renew items (if you allow renewals via the OPAC)

4G LTE 4:10

	<p>Date due : 02/05/2013</p> <p>Call No. : JNF 002 Bro</p> <p><input type="checkbox"/> Renew (2 of 10 renewals remaining)</p> <p>Fines : No</p>
10	 <p>The Bounty : Alexander, Caroline,</p> <p>Date due : 02/05/2013</p> <p>Call No. : 996.1 Ale</p> <p><input type="checkbox"/> Renew (10 of 10 renewals remaining)</p> <p>Fines : Yes</p>
11	 <p>The book of Ruth Hamilton, Jane,</p> <p>Date due : 02/07/2013</p> <p>Call No. : FIC Ham</p> <p><input type="checkbox"/> Renew (10 of 10 renewals remaining)</p> <p>Fines : No</p>

Renew Selected
Renew All

Chapter 13

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

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 data). It allows safe, incremental database updates on live systems. Because Zebra supports the industry-standard information retrieval protocol, Z39.50, you can search Zebra databases using an enormous variety of programs and toolkits, both commercial and free, which understands this protocol..." Zebra - User's Guide and Reference, p. 1, <http://www.indexdata.dk/-zebra/doc/zebra.pdf>

This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

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 indexes. The Z39.50 Bib-1 profile is made up of several different types of attributes: Use, Relation, Position, Structure, Truncation, and Completeness. The bib-1 'Use' attribute is represented on the chart; the other attributes are used primarily when doing searches. While there are over 150+ use attributes that could be used to define your indexing set, it's unlikely that you will choose to use them all. The attributes you elect to use are those that become the indexing rules for your database. The other five attribute sets define the various ways that a search can be further defined, and will not specifically be addressed in this document. For a complete list of the standard Bib-1 attributes, go to <http://www.loc.gov/z3950/-agency/defs/bib1.html>.

The second file (`etc/zebradb/marc_defs/[marc21 | unimarc]/biblios/record.abs`) contains the abstract syntax which maps the MARC21 tags to the set of Use Attributes you choose to use. The rules established in this file provides a passable Bath level 0 and 1 service, which includes author, title, subject, keyword and exact services such as standard identifiers (LCCN, ISBN, ISSN, etc.)

The third file (`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 internal CCL query. The following description provides a definition for the word 'qualifiers'.

Qualifiers are used to direct the search to a particular searchable index, such as title (ti) and author indexes (au). The CCL standard itself doesn't specify a particular set of qualifiers, but it does suggest a few shorthand notations. You can customize the CCL parser to support a particular set of qualifiers to reflect the current target profile. Traditionally, a qualifier would map to a particular use-attribute within the BIB-1 attribute 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.

Enter search keywords:

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

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:

[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 z39.50 Search

No results match your search for '**library mashups mashing programming**' in Nicole's **Library Catalog**.

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	<input type="text"/>	Scan Indexes <input type="checkbox"/>
and	Keyword	<input type="text"/>
and	Keyword	<input type="text"/> [+]

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:

Search For:

Keyword	twain	Scan Indexes <input type="checkbox"/>
and	Title	huckleberry finn
or	Title	tom sawyer [+]

4 result(s) found for 'kw,wrld: twain and ti,wrld: huckleberry finn or ti,wrld: tom sawyer' in Nicole's Library Catalog.

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:

Search For:

Keyword	<input type="text"/>
Keyword	<input type="text"/>
Keyword	<input type="text"/>

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.

Limit to any of the following:

<input type="checkbox"/> Book	<input type="checkbox"/> CD Book on CD	<input type="checkbox"/> Books	<input type="checkbox"/> CD	<input type="checkbox"/> Computer Files
<input type="checkbox"/> Continuing Resources	<input type="checkbox"/> DVD	<input type="checkbox"/> E-Book	<input type="checkbox"/> Maps	<input type="checkbox"/> Mixed Materials
<input type="checkbox"/> Music	<input type="checkbox"/> Nicole's special type	<input type="checkbox"/> Reference		

Limits

Year: (format: yyyy-yyyy)

Language:

Subtype limits

Location and availability

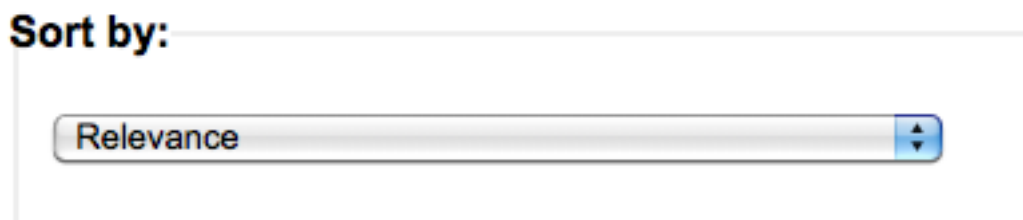
Only items currently available

Individual libraries:

OR

Groups of libraries:

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 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.

13.2.5.1 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
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

Table 13.1: (continued)

Bib-1 Attribute	Qualifier (index)
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.

13.2.5.1.1 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

13.2.5.1.2 Contents Examples

- fic:1 Fiction
- fic:0 Non Fiction
- bio:b Biography
- mus:j Musical recording
- mus:I Non musical record

13.2.5.2 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:

- rtn : right truncation
- ltrn : left truncation
- lrtn : 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
001	Control-number
005	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	ln
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

Table 13.2: (continued)

Field	Description
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
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	pl
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

Table 13.2: (continued)

Field	Description
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
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
657\$9	Koha-Auth-Number
657	Subject

Table 13.2: (continued)

Field	Description
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	Title, Title-former, Related-periodical
785	Related-periodical
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
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
999\$c	Local-Number:n, Local-Number:w, Local-Number:s
999\$d	biblioitemnumber:n, biblioitemnumber:w, biblioitemnumber:s
942\$0	totalissues:n, totalissues:s
942\$2	cn-bib-source
942\$6	cn-bib-sort:n, cn-bib-sort:s

Table 13.2: (continued)

Field	Description
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
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

Chapter 14

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.

- Create the directory `/var/lib/koha/plugins`
- Add the lines `<pluginsdir>/var/lib/koha/plugins</pluginsdir> <enable_plugins>1</enable_plugins>` to your `koha-conf.xml` file
- Add the line `Alias /plugin/ "/var/lib/koha/plugins/"` to your `koha-httpd.conf` file
- Restart your webserver

Once set up is complete you will need to alter your **UseKohaPlugins** system preference to be able to see a Plugins option under the More menu on your toolbar. On the Tools page you will see the Tools Plugins and on the Reports page you will see the Reports Plugins.

Chapter 15

About Koha

The 'About Koha' area will give you important server information as well as general information about Koha.

- *Get there:* More > About Koha

15.1 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.

About Koha

Server InformationPerl modulesKoha TeamLicensesTranslationsKoha Timeline

Server information

Koha version:	3.08.01.002
OS version ('uname -a'):	Linux ModelServer 2.6.32-5-xen-amd64 #1 SMP Thu Mar 22 21:14:26 UTC 2012 x86_64 GNU/Linux
Perl interpreter:	/usr/bin/perl
Perl version:	5.010001
Perl @INC:	/home/koha/kohaclone /etc/perl /usr/local/lib/perl/5.10.1 /usr/local/share/perl/5.10.1 /usr/lib/perl5 /usr/share/perl5 /usr/lib/perl/5.10 /usr/share/perl/5.10 /usr/local/lib/site_perl .
MySQL version:	mysql Ver 14.14 Distrib 5.1.61, for debian-linux-gnu (x86_64) using readline 6.1
Apache version:	Server version: Apache/2.2.16 (Debian)
Zebra version:	Zebra 2.0.50 (C) 1994-2010, Index Data ApS Zebra is free software, covered by the GNU General Public License, and you are welcome to change it and/or distribute copies of it under certain conditions. SHA1 ID: 732870c555c7d32c5d2b6a4914c6fa7232eb26b2 Using ICU

15.2 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.

About Koha

[Server Information](#)
[Perl modules](#)
[Koha Team](#)
[Licenses](#)
[Translations](#)

Perl modules

Algorithm::CheckDigits	0.53	Authen::CAS::Client	Not Installed	Biblio::EndnoteStyle	0.05	CGI	3.29
CGI::Carp	1.29	CGI::Session	4.35	CGI::Session::Serialize::yaml	4.21	Class::Accessor	0.31
Class::Factory::Util	1.7	DBD::SQLite2	0.33	DBD::mysql	4.007	DBI	1.605
Data::Dumper	2.121_14	Data::ICal	0.13	Date::Calc	5.4	Date::ICal	1.72
Date::Manip	5.54	Date::Time	0.42	Digest::MD5	2.36_01	Digest::SHA	5.47
Email::Date	1.103	File::Temp	0.18	GD	2.39	GD::Barcode::UPCE	1.1
Getopt::Long	2.37	Getopt::Std	1.05	Graphics::Magick	Not Installed	HTML::Scrubber	0.08
HTML::Template::Pro	0.70	HTTP::Cookies	5.810	HTTP::OAI	3.22	HTTP::Request::Common	5.811
IPC::Cmd	0.56	JSON	2.07	LWP::Simple	5.810	LWP::UserAgent	5.813
Lingua::Stem	0.83	Lingua::Stem::Snowball	0.952	List::MoreUtils	0.22	List::Util	1.19
Locale::Currency::Format	Not Installed	Locale::Language	2.07	Locale::PO	0.17	MARC::Charset	0.98
MARC::Crosswalk::DublinCore	0.02	MARC::File::XML	0.88	MARC::Record	2.0.0	MIME::Base64	3.07_01
MIME::Lite	3.021	MIME::QuotedPrint	3.07	Mail::Sendmail	0.79	Memoize::Memcached	0.03
Net::LDAP	0.36	Net::LDAP::Filter	0.15	Net::Z3950::ZOOM	1.24	Number::Format	1.52
PDF::API2	2.015	PDF::API2::Page	2.001	PDF::API2::Simple	Not Installed	PDF::API2::Util	2.000
PDF::Reuse	0.35	PDF::Reuse::Barcode	0.05	PDF::Table	0.9.3	POE	1.0003
POSIX	1.13	SMS::Send	0.05	Schedule::At	1.06	Storable	2.21
Term::ANSIColor	1.12	Test	1.25	Test::Harness	2.64	Test::More	0.94
Text::CSV	1.06	Text::CSV::Encoded	Not Installed	Text::CSV_XS	0.52	Text::Iconv	1.7
Text::Wrap	2006.1117	Time::HiRes	1.9711	Time::localtime	1.02	URI::Escape	3.28
Unicode::Normalize	1.02	XML::Dumper	0.81	XML::LibXML	1.66	XML::LibXSLT	1.66
XML::RSS	1.33	XML::SAX::ParserFactory	1.01	XML::SAX::Writer	0.50	XML::Simple	2.18

Items listed in bold are required by Koha, items highlighted in red are missing completely and items highlighted in yellow simply need to be upgraded.

15.3 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

Home > About Koha

About Koha

[Server Information](#)
[Perl modules](#)
[System information](#)
[Koha Team](#)
[Licenses](#)
[Translations](#)
[Koha Timeline](#)

Warnings regarding the system configuration

Preferences

Warning	System preference 'nozebra' set. Deprecated!
Warning	System preference 'AutoCreateAuthorities' set, but needs 'BiblioAddsAuthorities' set as well.
Warning	System preference 'EasyAnalyticalRecords' set, but UseControlNumber preference is set to 'Use'. Set it to 'Don't use' or else the 'Show analytics' links in the staff client and the OPAC will be broken.

Chapter 16

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.

16.1 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

16.2 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

16.3 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

16.4 Circulation Configuration

Before you start circulating your collection you'll need to set up your rules and preferences for circulation.

- Define you **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

- **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
- **todayIssuesDefaultSortOrder** : 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
- **AllowOnShelfHolds** : Decide if patrons can place holds on items that are marked as being available
 - * **AllowHoldPolicyOverride** : Decide if you want the staff to be able to override the setting for the above at checkout
- **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** : Decide 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
- **finesModule** : 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
- 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)

16.5 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
 - **AddPatronLists** : Decide how patron categories appear when creating a new patron
 - **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 patrons can choose from a series of notices (other than overdues)
 - **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

16.6 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

16.7 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**

16.8 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
 - [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

16.9 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



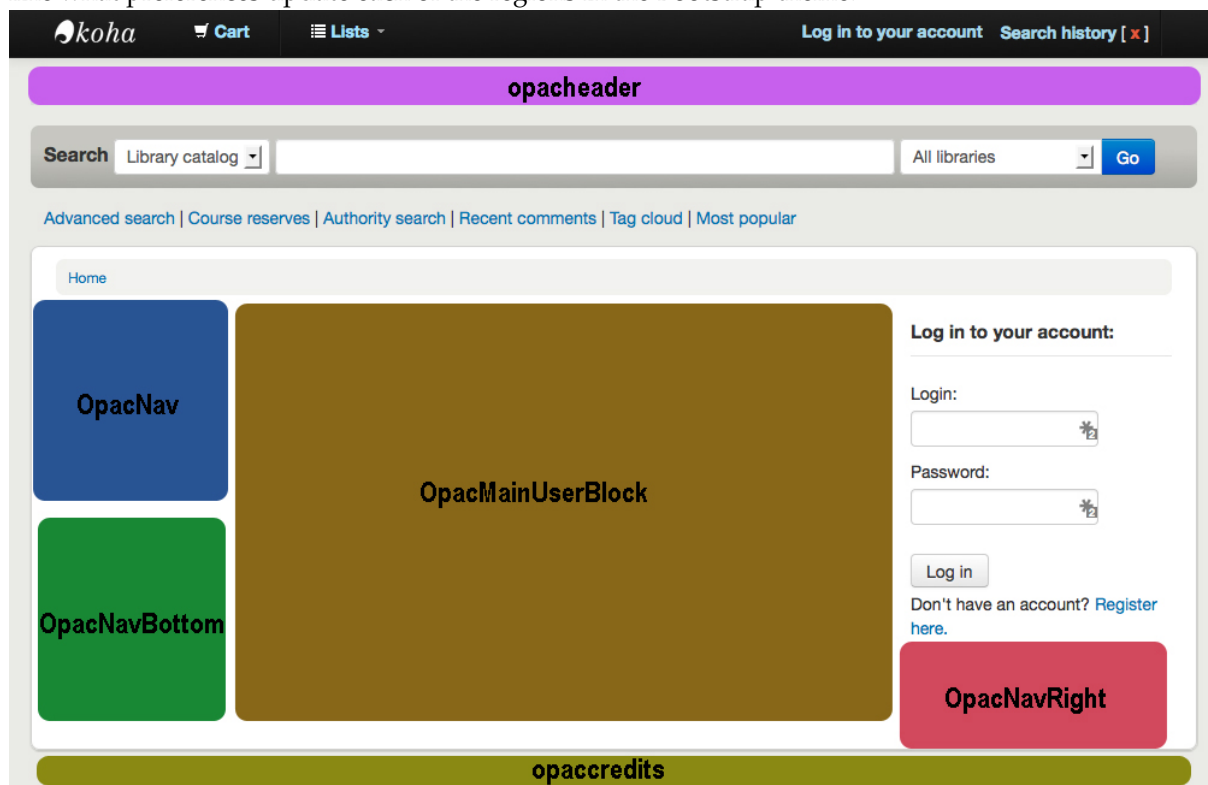
Do not edit the default CSS files, instead create a new one, that way the system can always fall back on the original CSS.

- Create a custom XSLT stylesheet to change the way search results and bib records appear in the OPAC
- OPAC System preferences
 - [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
 - * [OPACItemHolds](#) : Decide if patrons can place holds on specific items (instead of just the next available item)
 - * [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
- **OPACXSLTResultsDisplay** : Decide if you want to use the XSLT stylesheets on the OPAC search results
- **OPACXSLTDetailsDisplay** : Decide if you want to use the XSLT stylesheets on the bib records in the OPAC
- **LibraryName** : Enter your library name for display in the <title> tag and on the top of the OPAC
- **opacsmallimage** : Choose a logo to replace the Koha logo
- **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
 - * **opaccolorstylesheet** : 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
- **opacthemes** : Choose which theme you would like to use. If you would like a responsive theme pick 'bootstrap'.
- **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
- **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**
 - If you have **custom RSS feeds**, decide when you want the **feed to be populated**

16.9.1 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.



16.10 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.
- **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
- **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.

16.11 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

16.12 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

16.13 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

Chapter 17

SOPAC2 Installation

17.1 Introduction

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.

17.2 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.

17.2.1 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
```

17.2.2 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
```

17.2.3 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
```

17.2.4 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';
```

17.2.5 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 = ""
```

17.2.6 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.

17.3 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
```

17.4 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
```

17.5 Installation of Sphinx

Sphinx is the indexer for the database used by Locum and Insurge.

17.5.1 Dependencies

There is no Debian package for Sphinx so you'll have to compile the source directly:

```
# apt-get install g++ make libmysql++-dev
```

17.5.2 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*
```

17.5.3 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
```

17.5.4 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
```

17.5.5 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/local/sphinx/etc/sphinx.conf
```

17.5.6 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
```

17.6 Installation of SOPAC2

Now to the SOPAC software itself:

17.6.1 Download

Download from SVN:

```
$ cd /chemin/vers/drupal/sites/all/
$ mkdir modules
$ cd modules/
$ svn co http://dobby.darienlibrary.org/svn/sopac/trunk/ sopac
```


17.6.2 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.

17.6.3 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.

Chapter 18

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.

18.1 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/

18.1.1 Search

18.1.1.1 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

18.1.2 Circulation

18.1.2.1 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 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.

18.1.2.1.1 Perl Documentation `GetBibsWithPendingHoldRequests`

```
my $biblionumber_oref = 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.

18.1.2.2 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

18.1.2.3 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

18.1.2.4 Fines

Script path: misc/cronjobs/fines.pl

Does: Calculates and posts fines to patron accounts.

Required by: `finesMode` system preference

Frequency suggestion: nightly

18.1.2.5 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

18.1.2.5.1 Perl Documentation NAME

longoverdue.pl cron script to set lost statuses on overdue materials. Execute without options for help.

18.1.2.6 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

18.1.2.6.1 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>

18.1.2.7 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

18.1.3 Patrons

18.1.3.1 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

18.1.3.2 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

18.1.3.3 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.

18.1.3.4 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

18.1.3.4.1 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.

18.1.4 Notices

18.1.4.1 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](#).

18.1.4.2 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

18.1.4.2.1 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

18.1.4.3 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

18.1.4.3.1 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 filename 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 overdue for one specific library. Use the value in the branches.branchcode table. This option can be repeated in order to select overdue 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 overdue 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/cronjobs/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

18.1.4.4 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

18.1.4.5 Talking Tech

To learn more about setting up this third party product view the [Talking Tech Appendix](#).

18.1.4.5.1 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

18.1.4.5.1.1 Perl Documentation USAGE

TalkingTech_itiva_outbound.pl

TalkingTech_itiva_outbound.pl --type=OVERDUE -w 0 -w 2 -w 6 --output=/tmp/talkingtech/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.

18.1.4.5.2 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

18.1.4.5.2.1 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.

18.1.5 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: [NewItemDefaultLocation](#), [InProcessingToShelvingCart](#), & [ReturnToShelvingCart](#) system preferences

Frequency suggestion: hourly

18.1.5.1 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.

18.1.6 Catalog

18.1.6.1 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

18.1.6.1.1 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/imag

--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.

18.1.6.2 Merge Authorities

Script path: misc/migration_tools/merge_authorities.pl

Does: Updates biblio data with changes to authorities records

Required by: **dontmerge** system preference

Frequency suggestion: nightly

18.1.6.3 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

18.1.7 OPAC

18.1.7.1 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

18.1.7.2 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.

18.1.7.3 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.

18.1.7.3.1 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 keywords 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.

18.1.8 System Administration**18.1.8.1 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.

18.1.9 Acquisitions**18.1.9.1 Clean up old suggestions**

Script path: misc/cronjobs/purge_suggestions.pl

Does: Removes old (defined by you) suggestions from the suggestion management area.

18.1.10 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

Chapter 19

Web Services

19.1 OAI-PMH

19.1.1 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: marcxml
    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
```

19.2 REST services

Koha can now be requested by REST http requests. BibLibre writes 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.bibliolibre.com>. If you want to add features, send us a patch at dev_patches AT bibliolibre 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
```

Chapter 20

Using the SRU server

20.1 Using the SRU server

Koha implements the Search/Retrieve via URL (SRU) protocol. More information about the protocol itself can be found at <http://www.loc.gov/standards/sru/>. The version implemented is version 1.1.

20.1.1 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 following 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 Server</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>
      </index>
      <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>
  
```

20.1.2 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 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.

20.1.2.1 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&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&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/first>

20.1.3 Retrieve

My search for http://univ_lyon3.bibliothe.com:9999/biblios?version=1.1&operation=searchRetrieve&query=coralreefs&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/marcxml/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 r<U+FFFD> coralliens / A Guide to Coral Reefs</ ←
subfield>
<subfield code="b">Texte in<U+FFFD></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 Net<U+FFFD></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

System Preference Defaults

A.1 ISBD Defaults

A.1.1 MARC Default

```
#100 | | { 100a } { 100b } { 100c } { 100d } { 110a } { 110b } { 110c } { 110d } { 110e } { 110f } { 110g } { 130a } { 130d } {  
130f } { 130g } { 130h } { 130k } { 130l } { 130m } { 130n } { 130o } { 130p } { 130r } { 130s } { 130t } | <br/><br/>  
#245 | | { 245a } { 245b } { 245f } { 245g } { 245k } { 245n } { 245p } { 245s } { 245h } |  
#246 | | { : 246i } { 246a } { 246b } { 246f } { 246g } { 246n } { 246p } { 246h } |  
#242 | | { = 242a } { 242b } { 242n } { 242p } { 242h } |  
#245 | | { 245c } |  
#242 | | { = 242c } |  
#250 | - | { 250a } { 250b } |  
#254 | , | { 254a } |  
#255 | , | { 255a } { 255b } { 255c } { 255d } { 255e } { 255f } { 255g } |  
#256 | , | { 256a } |  
#257 | , | { 257a } |  
#258 | , | { 258a } { 258b } |  
#260 | - | { 260a } { 260b } { 260c } |  
#300 | - | { 300a } { 300b } { 300c } { 300d } { 300e } { 300f } { 300g } |  
#306 | - | { 306a } |  
#307 | - | { 307a } { 307b } |  
#310 | - | { 310a } { 310b } |  
#321 | - | { 321a } { 321b } |  
#340 | - | { 3403 } { 340a } { 340b } { 340c } { 340d } { 340e } { 340f } { 340h } { 340i } |  
#342 | - | { 342a } { 342b } { 342c } { 342d } { 342e } { 342f } { 342g } { 342h } { 342i } { 342j } { 342k } { 342l } { 342m }  
{ 342n } { 342o } { 342p } { 342q } { 342r } { 342s } { 342t } { 342u } { 342v } { 342w } |  
#343 | - | { 343a } { 343b } { 343c } { 343d } { 343e } { 343f } { 343g } { 343h } { 343i } |  
#351 | - | { 3513 } { 351a } { 351b } { 351c } |  
#352 | - | { 352a } { 352b } { 352c } { 352d } { 352e } { 352f } { 352g } { 352i } { 352q } |  
#362 | - | { 362a } { 351z } |  
#440 | - | { 440a } { 440n } { 440p } { 440v } { 440x } | .  
#490 | - | { 490a } { 490v } { 490x } | .  
#800 | - | { 800a } { 800b } { 800c } { 800d } { 800e } { 800f } { 800g } { 800h } { 800j } { 800k } { 800l } { 800m } {  
800n } { 800o } { 800p } { 800q } { 800r } { 800s } { 800t } { 800u } { 800v } | .  
#810 | - | { 810a } { 810b } { 810c } { 810d } { 810e } { 810f } { 810g } { 810h } { 810k } { 810l } { 810m } { 810n } {  
810o } { 810p } { 810r } { 810s } { 810t } { 810u } { 810v } | .  
#811 | - | { 811a } { 811c } { 811d } { 811e } { 811f } { 811g } { 811h } { 811k } { 811l } { 811n } { 811p } { 811q } { 811s }  
{ 811t } { 811u } { 811v } | .  
#830 | - | { 830a } { 830d } { 830f } { 830g } { 830h } { 830k } { 830l } { 830m } { 830n } { 830o } { 830p } { 830r } {  
830s } { 830t } { 830v } | .  
#500 | <br/><br/> | { 5003 } { 500a } |  
#501 | <br/><br/> | { 501a } |  
#502 | <br/><br/> | { 502a } |  
#504 | <br/><br/> | { 504a } |
```

```

#505 | <br/><br/> | { 505a } { 505t } { 505r } { 505g } { 505u } |
#506 | <br/><br/> | { 5063 } { 506a } { 506b } { 506c } { 506d } { 506u } |
#507 | <br/><br/> | { 507a } { 507b } |
#508 | <br/><br/> | { 508a } { 508a } |
#510 | <br/><br/> | { 5103 } { 510a } { 510x } { 510c } { 510b } |
#511 | <br/><br/> | { 511a } |
#513 | <br/><br/> | { 513a } { 513b } |
#514 | <br/><br/> | { 514z } { 514a } { 514b } { 514c } { 514d } { 514e } { 514f } { 514g } { 514h } { 514i } { 514j } {
514k } { 514m } { 514u } |
#515 | <br/><br/> | { 515a } |
#516 | <br/><br/> | { 516a } |
#518 | <br/><br/> | { 5183 } { 518a } |
#520 | <br/><br/> | { 5203 } { 520a } { 520b } { 520u } |
#521 | <br/><br/> | { 5213 } { 521a } { 521b } |
#522 | <br/><br/> | { 522a } |
#524 | <br/><br/> | { 524a } |
#525 | <br/><br/> | { 525a } |
#526 | <br/><br/> | { \n510i } { \n510a } { 510b } { 510c } { 510d } { \n510x } |
#530 | <br/><br/> | { \n5063 } { \n506a } { 506b } { 506c } { 506d } { \n506u } |
#533 | <br/><br/> | { \n5333 } { \n533a } { \n533b } { \n533c } { \n533d } { \n533e } { \n533f } { \n533m } { \n533n
} |
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} { \n533t } { \n533x } { \n533z } |
#535 | <br/><br/> | { \n5353 } { \n535a } { \n535b } { \n535c } { \n535d } |
#538 | <br/><br/> | { \n5383 } { \n538a } { \n538i } { \n538u } |
#540 | <br/><br/> | { \n5403 } { \n540a } { 540b } { 540c } { 540d } { \n520u } |
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#547 | <br/><br/> | { \n547a } |
#550 | <br/><br/> | { 550a } |
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552k } { 552l } { 552m } { 552n } { 562o } { 552p } { 552u } |
#555 | <br/><br/> | { 5553 } { 555a } { 555b } { 555c } { 555d } { 555u } |
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#585 | <br/><br/> | { 5853 } { 585a } |
#586 | <br/><br/> | { 5863 } { 586a } |
#020 | <br/><br/><label>ISBN: </label> | { 020a } { 020c } |
#022 | <br/><br/><label>ISSN: </label> | { 022a } |
#222 | = | { 222a } { 222b } |
#210 | = | { 210a } { 210b } |
#024 | <br/><br/><label>Standard No.: </label> | { 024a } { 024c } { 024d } { 0242 } |
#027 | <br/><br/><label>Standard Tech. Report. No.: </label> | { 027a } |
#028 | <br/><br/><label>Publisher. No.: </label> | { 028a } { 028b } |
#013 | <br/><br/><label>Patent No.: </label> | { 013a } { 013b } { 013c } { 013d } { 013e } { 013f } |
#030 | <br/><br/><label>CODEN: </label> | { 030a } |
#037 | <br/><br/><label>Source: </label> | { 037a } { 037b } { 037c } { 037f } { 037g } { 037n } |
#010 | <br/><br/><label>LCCN: </label> | { 010a } |
#015 | <br/><br/><label>Nat. Bib. No.: </label> | { 015a } { 0152 } |
#016 | <br/><br/><label>Nat. Bib. Agency Control No.: </label> | { 016a } { 0162 } |
#600 | <br/><br/><label>Subjects--Personal Names: </label> | { \n6003 } { \n600a } { 600b } { 600c } {
600d } { 600e } { 600f } { 600g } { 600h } { --600k } { 600l } { 600m } { 600n } { 600o } { --600p } { 600r } { 600s } { 600t
} { 600u } { --600x } { --600z } { --600y } { --600v } |

```



```

#610 | <br/><br/><label>Subjects--Corporate Names: </label> | {\n6103}{\n610a}{ 610b }{ 610c }{
610d }{ 610e }{ 610f }{ 610g }{ 610h }{--610k}{ 610l }{ 610m }{ 610n }{ 610o }{--610p}{ 610r }{ 610s }{ 610t }{
610u }{--610x}{--610z}{--610y}{--610v} |
#611 | <br/><br/><label>Subjects--Meeting Names: </label> | {\n6113}{\n611a}{ 611b }{ 611c }{ 611d
}{ 611e }{ 611f }{ 611g }{ 611h }{--611k}{ 611l }{ 611m }{ 611n }{ 611o }{--611p}{ 611r }{ 611s }{ 611t }{ 611u
}{--611x}{--611z}{--611y}{--611v} |
#630 | <br/><br/><label>Subjects--Uniform Titles: </label> | {\n630a}{ 630b }{ 630c }{ 630d }{ 630e }{
630f }{ 630g }{ 630h }{--630k }{ 630l }{ 630m }{ 630n }{ 630o }{--630p}{ 630r }{ 630s }{ 630t }{--630x}{--630z}{-
-630y}{--630v} |
#648 | <br/><br/><label>Subjects--Chronological Terms: </label> | {\n6483}{\n648a }{--648x}{--648z}{-
-648y}{--648v} |
#650 | <br/><br/><label>Subjects--Topical Terms: </label> | {\n6503}{\n650a}{ 650b }{ 650c }{ 650d
}{ 650e }{--650x}{--650z}{--650y}{--650v} |
#651 | <br/><br/><label>Subjects--Geographic Terms: </label> | {\n6513}{\n651a}{ 651b }{ 651c }{
651d }{ 651e }{--651x}{--651z}{--651y}{--651v} |
#653 | <br/><br/><label>Subjects--Index Terms: </label> | { 653a } |
#654 | <br/><br/><label>Subjects--Facted Index Terms: </label> | {\n6543}{\n654a }{--654b}{--654x}{-
-654z}{--654y}{--654v} |
#655 | <br/><br/><label>Index Terms--Genre/Form: </label> | {\n6553}{\n655a }{--655b}{--655x }{
-655z}{--655y}{--655v} |
#656 | <br/><br/><label>Index Terms--Occupation: </label> | {\n6563}{\n656a }{--656k}{--656x}{-
-656z}{--656y}{--656v} |
#657 | <br/><br/><label>Index Terms--Function: </label> | {\n6573}{\n657a }{--657x}{--657z}{--657y}{-
-657v} |
#658 | <br/><br/><label>Index Terms--Curriculum Objective: </label> | {\n658a }{--658b}{--658c}{-
-658d}{--658v} |
#050 | <br/><br/><label>LC Class. No.: </label> | { 050a }{ / 050b } |
#082 | <br/><br/><label>Dewey Class. No.: </label> | { 082a }{ / 082b } |
#080 | <br/><br/><label>Universal Decimal Class. No.: </label> | { 080a }{ 080x }{ / 080b } |
#070 | <br/><br/><label>National Agricultural Library Call No.: </label> | { 070a }{ / 070b } |
#060 | <br/><br/><label>National Library of Medicine Call No.: </label> | { 060a }{ / 060b } |
#074 | <br/><br/><label>GPO Item No.: </label> | { 074a } |
#086 | <br/><br/><label>Gov. Doc. Class. No.: </label> | { 086a } |
#088 | <br/><br/><label>Report. No.: </label> | { 088a } |

```

A.1.2 UNIMARC Default

```

#200 | <h2>Title : | {200a}{. 200c}{ : 200e}{200d}{. 200h}{. 200i} | </h2>

```

```

#461 | <label class="ipt">A part of : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=46
461h} {v. 461v}{(461d)}<br/> |

```

```

#200b | <label class="ipt">Material Designation : </label> | {200b } | <br/>

```

```

#101a | <label class="ipt">Language(s): </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=

```

```

#200f | <label class="ipt">Authors : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=20
; }</a> | <br/>

```

```

#200g | <label class="ipt">Co-authors : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=
; }</a> | <br/>

```

```

#210a | <br/><label class="ipt">Place of publication : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=

```

```

#210c | <label class="ipt">Publisher : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&id=
; }</a> | <br/>

```

```

#210d | <label class="ipt">Date of publication : </label> | { 210d } | <br/>

```

```

#215 | <label class="ipt">Description : </label> | {215a}{ : 215c}{ ; 215d}{ + 215e} | <br/>

```

```

#225a | <label class="ipt">Series : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&q=225a
; }</a> |

```

```

#225 | | { = 225d}{ : 225e}{. 225h}{. 225i}{ / 225f}{, 225x}{ ; 225v} | <br/>

```

```

#686 | <label>Classification : </label> | { 686a } | <br/>

```

```

#608 | <label>Form, Genre : </label> | <a href="/cgi-bin/koha/catalogue/search.pl?op=do_search{&id=su&q={6
border="0" src="/opac-tmpl/css/en/images/filefind.png" height="15" title="Search on {608a}"> { 608a }</a> | <br/><

```

```

#200 | | <label class="ipt">Subjects : </label><br/> | <ul>

```

```

#600 | <label class="ipt">Person(s) </label><br/> | <li><a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&id=
border="0" src="/opac-tmpl/css/en/images/filefind.png" height="15" title="Search on {600a}">{ 600a}</a></li> | <br/>
#601 | <label class="ipt">Organisation(s) </label><br/> | <li><a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&id=
border="0" src="/opac-tmpl/css/en/images/filefind.png" height="15" title="Search on {601a}">{ 601a}</a></li> | <br/>
#606 | <label class="ipt">Term(s) </label><br/> | <li><a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&id=
border="0" src="/opac-tmpl/css/en/images/filefind.png" height="15" title="Search on {606a}">{ 606a}</a></li> | <br/>
#607 | <label class="ipt">Place(s) </label><br/> | <li><a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&id=
border="0" src="/opac-tmpl/css/en/images/filefind.png" height="15" title="Search on {607a}">{ 607a}</a></li> | <br/>
#610 | <label>Keywords</label><br/> | <li><a href="/cgi-bin/koha/catalogue/search.pl?op=do_search&id=su&q={6
border="0" src="/opac-tmpl/css/en/images/filefind.png" height="15" title="Search on {610a}">{ 610a}</a></li> |
#200 | | </ul> |
#856 | <label class="ipt">Electronic resource : </label> | <a href="{856u}">click here</a> to go to the
external resource<br/>
#010 | <label class="ipt">ISBN : </label> | {010a ;} | <br/>
#011 | <label class="ipt">ISSN : </label> | {011a ;} | <br/>
#200 | | <label class="ipt">Notes : </label> | <br/><ul>
#300 | | <li>{300a}</li> |
#307 | | <li>{307a}</li> |
#310 | | <li>{310a}</li> |
#326 | | <li>{326a}</li> |
#327 | | <li>{327a}</li> |
#333 | <li>Public : | {333a}</li> |
#200 | | </ul> |
#330 | | <label class="ipt">Abstract : </label> | <br/>
#330 | | {330a} | <br/>
#200 | | <br/><h2>Items</h2> |
#200 | <table> | <th>Call number</th><th>Copy note</th><th>Fonds</th><th>Genre detail</th><th>Circulation
type</th><th>Barcode</th> |
#995 | | <tr><td> {995k}</td><td> {995u}</td><td> {995y}</td><td>{995e} </td><td> {995o}</td><td>{995f}</td></tr></table>

```

Appendix B

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.

B.1 For Epson TM-T88III (3) & TM-T88IV (4) Printers

B.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](#) 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.

B.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
- 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.

B.2 For Epson TM-T88II (2) Printers

Register at the [EpsonExpert Technical Resource Center website](#) to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

B.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:

- 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.

B.3 For Star SP542 Printers

B.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>.

B.4 Configuring Firefox to Print to Receipt Printer

- 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 C

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 renew online.

If you believe you have returned the items below please call at and library staff will be happy to help resolve the issue.

The following item(s) are currently overdue:

07/08/2008 Creating drug-free schools and communities : 502326000054 Fox, C. Lynn.

06/27/2008 Eating fractions / 502326000022 McMillan, Bruce.

Sincerely, Library Staff

Appendix D

Sample Serials

D.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).

Serials planning

First issue publication date: (*) 2014-01-07

Frequency: (*) 1month

Subscription length: months 24 (enter amount in numerals)

Subscription start date: (*) 2014-01-01

Subscription end date:

Numbering pattern: Reader's Digest (0034-0375)

Locale: If empty, system locale is used

	Volume	Number
Begins with	173	1035
Inner counter		

Show/Hide advanced pattern

Pattern name: (*) Reader's Digest (0034-0375)

Numbering formula: Vol {X}, No {Y}

	X	Y	Z
Label	Volume	Number	
Begins with	173	1035	
Add	1	1	
Every	6	1	
Set back to	1	1	
When more than	99999	99999	
Inner counter			
Formatting	-	-	-

Prediction pattern

Please check issues that are NOT published (irregularities)

Number	Publication Date	Not published
Vol 173, No 1035	2014-01-07	<input type="checkbox"/>
Vol 173, No 1036	2014-02-07	<input type="checkbox"/>
Vol 173, No 1037	2014-03-07	<input type="checkbox"/>
Vol 173, No 1038	2014-04-07	<input type="checkbox"/>
Vol 173, No 1039	2014-05-07	<input type="checkbox"/>
Vol 173, No 1040	2014-06-07	<input type="checkbox"/>
Vol 174, No 1041	2014-07-07	<input type="checkbox"/>
Vol 174, No 1042	2014-08-07	<input type="checkbox"/>
Vol 174, No 1043	2014-09-07	<input type="checkbox"/>
Vol 174, No 1044	2014-10-07	<input type="checkbox"/>
Vol 174, No 1045	2014-11-07	<input type="checkbox"/>
Vol 174, No 1046	2014-12-07	<input type="checkbox"/>
Vol 175, No 1047	2015-01-07	<input type="checkbox"/>
Vol 175, No 1048	2015-02-07	<input type="checkbox"/>
Vol 175, No 1049	2015-03-07	<input type="checkbox"/>
Vol 175, No 1050	2015-04-07	<input type="checkbox"/>
Vol 175, No 1051	2015-05-07	<input type="checkbox"/>
Vol 175, No 1052	2015-06-07	<input type="checkbox"/>
Vol 176, No 1053	2015-07-07	<input type="checkbox"/>
Vol 176, No 1054	2015-08-07	<input type="checkbox"/>
Vol 176, No 1055	2015-09-07	<input type="checkbox"/>
Vol 176, No 1056	2015-10-07	<input type="checkbox"/>
Vol 176, No 1057	2015-11-07	<input type="checkbox"/>
Vol 176, No 1058	2015-12-07	<input type="checkbox"/>

D.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.

D.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:

Serials planning

First issue publication date: (*)

Frequency: (*)

Subscription length: (enter amount in numerals)

Subscription start date: (*)

Subscription end date:

Numbering pattern:

Locale: If empty, system locale is used

	Volume	Number
Begins with	<input type="text" value="2011"/>	<input type="text" value="215"/>
Inner counter	<input type="text"/>	<input type="text"/>

[Show/Hide advanced pattern](#)

Pattern name: (*)

Numbering formula:

Advanced prediction pattern			
	X	Y	Z
Label	<input type="text" value="Year"/>	<input type="text" value="Number"/>	<input type="text"/>
Begins with	<input type="text" value="2011"/>	<input type="text" value="215"/>	<input type="text"/>
Add	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
Every	<input type="text" value="6"/>	<input type="text" value="1"/>	<input type="text"/>
Set back to	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
When more than	<input type="text" value="99999"/>	<input type="text" value="99999"/>	<input type="text"/>
Inner counter	<input type="text"/>	<input type="text"/>	<input type="text"/>
Formatting	<input type="text"/>	<input type="text"/>	<input type="text"/>

Prediction pattern	
Number	Publication Date
2011, No. 215	2011-01-01
2011, No. 216	2011-03-01
2011, No. 217	2011-05-01
2011, No. 218	2011-07-01
2011, No. 219	2011-09-01
2011, No. 220	2011-11-01
2012, No. 221	2012-01-01
2012, No. 222	2012-03-01
2012, No. 223	2012-05-01
2012, No. 224	2012-07-01
2012, No. 225	2012-09-01
2012, No. 226	2012-11-01
2013, No. 227	2013-01-01
2013, No. 228	2013-03-01
2013, No. 229	2013-05-01
2013, No. 230	2013-07-01
2013, No. 231	2013-09-01
2013, No. 232	2013-11-01

D.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:

Serials planning

First issue publication date: (*)

Frequency: (*)

Subscription length: (enter amount in numerals)

Subscription start date: (*)

Subscription end date:

Numbering pattern:

Locale: If empty, system locale is used

	Volume	Number	Issue
Begins with	<input type="text" value="41"/>	<input type="text" value="3"/>	<input type="text" value="302"/>
Inner counter	<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>

[Show/Hide advanced pattern](#)

Pattern name: (*)

Numbering formula:

	X	Y	Z
Label	<input type="text" value="Volume"/>	<input type="text" value="Number"/>	<input type="text" value="Issue"/>
Begins with	<input type="text" value="41"/>	<input type="text" value="3"/>	<input type="text" value="302"/>
Add	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Every	<input type="text" value="9"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Set back to	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
When more than	<input type="text" value="99999"/>	<input type="text" value="9"/>	<input type="text" value="99999"/>
Inner counter	<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>
Formatting	<input type="text"/>	<input type="text"/>	<input type="text"/>

Prediction pattern

Number	Publication Date
v. 41, no. 3, iss. 302	2014-01-01
v. 41, no. 4, iss. 303	2014-01-01
v. 41, no. 5, iss. 304	2014-01-01
v. 41, no. 6, iss. 305	2014-01-01
v. 41, no. 7, iss. 306	2014-01-01
v. 41, no. 8, iss. 307	2014-01-01
v. 41, no. 9, iss. 308	2014-01-01
v. 42, no. 1, iss. 309	2014-01-01
v. 42, no. 2, iss. 310	2014-01-01
v. 42, no. 3, iss. 311	2014-01-01
v. 42, no. 4, iss. 312	2014-01-01
v. 42, no. 5, iss. 313	2014-01-01

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

D.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):

Serials planning

First issue publication date: (*) 2014-07-01

Frequency: (*) 1/year

Subscription length: issues 3 (enter amount in numerals)

Subscription start date: (*) 2014-01-01

Subscription end date:

Numbering pattern: Vol. Year

Locale: If empty, system locale is used

	Volume	Year
Begins with	61	2014
Inner counter		

Show/Hide advanced pattern

Pattern name: (*) Vol. Year

Numbering formula: Vol. {X} {Y}

Advanced prediction pattern			
	X	Y	Z
Label	Volume	Year	
Begins with	61	2014	
Add	1	1	
Every	1	1	
Set back to	1	1	
When more than	99999	99999	
Inner counter			
Formatting			

Prediction pattern

Please check issues that are NOT published (irregularities)

Number	Publication Date	Not published
Vol. 61 2014	2014-07-01	
Vol. 62 2015	2015-07-01	<input type="checkbox"/>
Vol. 63 2016	2016-07-01	<input type="checkbox"/>

TIP



The prediction test will not show the right pattern, but once you receive you will see that the above does generate the right pattern.

D.6 Computers in Libraries (1041-7915)

Computers in Libraries is published ten times per year (monthly with January/February and July/August combined issues).

Subscription details

Vendor: () [Search for a vendor](#)

Biblio: () **Required**
[Search for Biblio](#) | [Create Biblio](#)

create an item record when receiving this serial
 do not create an item record when receiving this serial

When there is an irregular issue:

Skip issue number
 Keep issue number

Serials planning

First issue publication date: (*)

Frequency: (*)

Subscription length: (enter amount in numerals)

Subscription start date: (*)

Subscription end date:

Numbering pattern:

Locale If empty, system locale is used

	Volume	Number
Begins with	<input type="text" value="33"/>	<input type="text" value="1"/>
Inner counter	<input type="text"/>	<input type="text"/>

Show/Hide advanced pattern

Pattern name: (*)

Numbering formula:

Advanced prediction pattern			
	X	Y	Z
Label	Volume	Number	
Begins with	<input type="text" value="33"/>	<input type="text" value="1"/>	
Add	<input type="text" value="1"/>	<input type="text" value="1"/>	
Every	<input type="text" value="10"/>	<input type="text" value="1"/>	
Set back to	<input type="text" value="1"/>	<input type="text" value="1"/>	
When more than	<input type="text" value="99999"/>	<input type="text" value="10"/>	
Inner counter	<input type="text"/>	<input type="text"/>	
Formatting	<input type="text"/>	<input type="text"/>	<input type="text"/>

<< Previous Test prediction pattern

Prediction pattern

Please check issues that are NOT published (irregularities)

Number	Publication Date	Not published
Vol 33, No 1	01/15/2013	
Vol 33, No 2	02/15/2013	<input checked="" type="checkbox"/>
Vol 33, No 3	03/15/2013	<input type="checkbox"/>
Vol 33, No 4	04/15/2013	<input type="checkbox"/>
Vol 33, No 5	05/15/2013	<input type="checkbox"/>
Vol 33, No 6	06/15/2013	<input type="checkbox"/>
Vol 33, No 7	07/15/2013	<input type="checkbox"/>
Vol 33, No 8	08/15/2013	<input checked="" type="checkbox"/>
Vol 33, No 9	09/15/2013	<input type="checkbox"/>
Vol 33, No 10	10/15/2013	<input type="checkbox"/>
Vol 34, No 1	11/15/2013	<input type="checkbox"/>
Vol 34, No 2	12/15/2013	<input type="checkbox"/>

2014

2013

Edit serials

Generate next

Multi receiving

Select all | Clear all

Edit	Date published ⇅	Date received ⇅	Number ⇅	Status ⇅	Notes ⇅	Library ⇅	Routing ⇅
<input type="checkbox"/>	12/15/2013	12/15/2013	Vol 33, No 10	Arrived		Fairfield	Print list
<input type="checkbox"/>	11/15/2013	11/15/2013	Vol 33, No 9	Arrived		Fairfield	Print list
<input type="checkbox"/>	10/15/2013	10/15/2013	Vol 33, No 8	Arrived		Fairfield	Print list
<input type="checkbox"/>	09/15/2013	09/15/2013	Vol 33, No 7	Arrived		Fairfield	Print list
<input type="checkbox"/>	07/15/2013	07/15/2013	Vol 33, No 6	Arrived		Fairfield	Print list
<input type="checkbox"/>	06/15/2013	06/15/2013	Vol 33, No 5	Arrived		Fairfield	Print list
<input type="checkbox"/>	05/15/2013	05/15/2013	Vol 33, No 4	Arrived		Fairfield	Print list
<input type="checkbox"/>	04/15/2013	04/15/2013	Vol 33, No 3	Arrived		Fairfield	Print list
<input type="checkbox"/>	03/15/2013	03/15/2013	Vol 33, No 2	Arrived		Fairfield	Print list
<input type="checkbox"/>	01/15/2013	01/15/2013	Vol 33, No 1	Arrived		Fairfield	Print list

Appendix E

Sample List & Cart Emails

E.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) TVSN5000888940  
    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
```

E.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](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 F

Using Koha as a Content Management System (CMS)

F.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 36 change this code:

```
template_name => "opac-main.tt",
```

- To this code:

```
template_name => "pages.tt",
```

- At approximately line 54 after this code:

```
$template->param(  
    koha_news      => $all_koha_news,  
    koha_news_count => $koha_news_count  
);
```

- Add these lines:

```
my $page = "page_" . $cgi->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` command if you are actually logged in as such user:

```
$chmod 711 pages.pl
```

- Copy `/usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/opac-main.tt` to `/usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/pages.tt`

- Edit `/usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/pages.tt`
- At approximately line 38, change this:

```
[% IF ( OpacMainUserBlock ) %]<div id="opacmainuserblock" class="container ←
">[% OpacMainUserBlock %]</div>[% END %]
```

To this:

```
[% IF ( page_test ) %]<div id="opacmainuserblock" class="container">[% ←
page_test %]</div>[% END %]
```

- In the browser go to Home > Administration > System Preferences > Local Use and add a New Preference called "page_test"
- 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 localhost, 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/wiki/Koha_as_a_CMS

F.1.1 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`.

F.1.2 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.

F.2 Usage

After setting up Koha as a CMS you can create new pages following these instructions:

F.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

Add a system preference

Explanation:

Variable:

Value:

[Cancel](#)

- Set the Variable Type to Textarea
- Set the Variable options to something like 20|20 for 20 rows and 20 columns

Koha internal

Note: you should have no reasons to modify the following default values

Variable type:

(Choice, YesNo, Integer, Textarea, Float, Themes, Languages, or ClassSources)

Variable options:

(a choice list for Choice (separated by |) or cols|rows for Textarea)

F.2.2 Viewing your page

You can view your new page at <http://YOUR-OPAC/cgi-bin/koha/pages.pl?p=PAGENAME> where PAGENAME is the part you entered after 'page_' in the Variable field.

F.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 create a page for 'Recommended Reading Lists'

Modify a system preference

Explanation:

Variable: page_recommend

Value:

[Cancel](#)

Koha internal

Note: you should have no reasons to modify the following default values

Variable type:

(Choice, YesNo, Integer, Textarea, Float, Themes, Languages, or ClassSources)

Variable options:

(a choice list for Choice (separated by |) or cols|rows for Textarea)

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.

Add a system preference

Explanation:

Variable:

Value:

[Cancel](#)

Koha internal

Note: you should have no reasons to modify the following default values

Variable type:
 (Choice, YesNo, Integer, Textarea, Float, Themes, Languages, or ClassSources)

Variable options:
 (a choice list for Choice (separated by |) or cols|rows for Textarea)

Next you'll want to link your first page to your new second page, go to the page_recommend preference and click 'Edit.' Now you want to edit the HTML to include a link to your newest page:

Local Use preferences

Preference	Explanation	Value	Edit	Delete
page_recommend	For recommended Reading Links	<pre> Class 101 Class 110 </pre>	Edit	Delete

F.2.4 Live Examples

- The Crawford Library at Dallas Christian College is using this method for their recommended reading lists: <http://opac.dallas.edu/>

Appendix G

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>

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.

G.1 Truncate Tables

Use your preferred MySQL client to **truncate** the following tables:

- bibio
- biblioitems
- items
- auth_header
- sessions
- zebraqueue

G.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 authorities init  
$ sudo zebraidx -c /etc/koha/sites/YOURLIBRARY/zebra-biblios.cfg -g iso2709 -d biblios init
```

Replacing YOURLIBRARY with your Koha installation name.

Appendix H

Important Links

H.1 Koha Related

- Report Koha Bugs - <http://bugs.koha-community.org>
- Koha Versioning Control - <http://git.koha-community.org/>
- Database Structure - http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD
- Koha as a CMS - http://wiki.koha-community.org/wiki/Koha_as_a_CMS
- Kyles's Koha Tools - <http://millruntech.com/koha>
- Koha Bibliography - <http://www.zotero.org/groups/koha>
- Koha Shared Links - <http://groups.diigo.com/group/everything-koha>
- Koha Presentations - <http://www.slideshare.net/group/koha-ils/slideshows>

H.2 Cataloging Related

- Koha MARC Tutorials - <http://www.pakban.net/brooke/>
- Z39.50 Server Search - <http://targettest.indexdata.com/>
- Z39.50 Server List - <http://staff.library.mun.ca/staff/toolbox/z3950hosts.htm>
- Library of Congress Authorities - <http://authorities.loc.gov/>
- MARC Country Codes - <http://www.loc.gov/marc/countries/>
- Search the MARC Code List for Organizations - <http://www.loc.gov/marc/organizations/org-search.php>
- 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>

H.3 Enhanced Content Related

- Amazon Associates - <https://affiliate-program.amazon.com>
- Amazon Web Services - <http://aws.amazon.com>
- WorldCat Affiliate Tools - <http://www.worldcat.org/wcpa/do/AffiliateUserServices?method=initSelfRegister>
- XISBN - <http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp>
- LibraryThing for Libraries - <http://www.librarything.com/forlibraries>

H.4 Design Related

- JQuery Library - http://wiki.koha-community.org/wiki/JQuery_Library
- Owen Leonard's Koha Blog - <http://www.myacpl.org/koha>

H.5 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/>

H.6 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

H.7 Misc

- Zotero - <http://zotero.org>
- SOPAC - <http://thesocialopac.net>

Appendix I

Koha XSLT Item Types

When you have any of the XSLT system preferences ([OPACXSLTDetailsDisplay](#), [OPACXSLTResultsDisplay](#), [XSLTDetailsDisplay](#), and/or [XSLTResultsDisplay](#)) along with the [DisplayOPACIconsXSLT](#) preference 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

Type:  Mixed Materials

- Mixed [MX]

- leader6 = p

Type:  Sound;

- Sound [MU]

- leader6 = c

- leader6 = d

- leader6 = i

- leader6 = j


Type:  Visual Material;

- Visual Material [VM]

- leader6 = g

- leader6 = k

- leader6 = r

Type:  Kit

- Kit

- leader6 = o

Appendix J

MarcEdit

Download MarcEdit : <http://marcedit.reeset.net/>

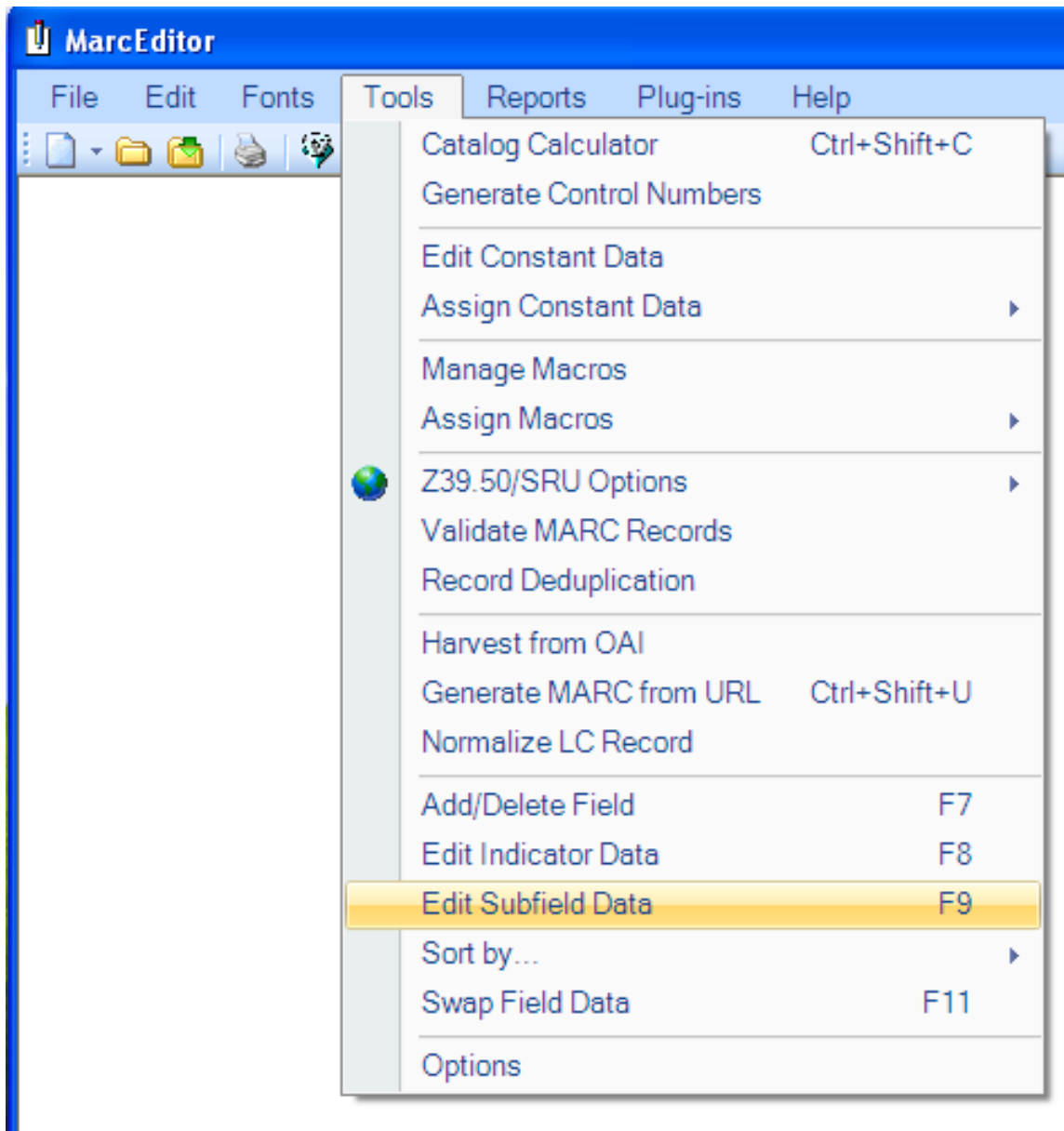
J.1 Adding a prefix to call numbers

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.

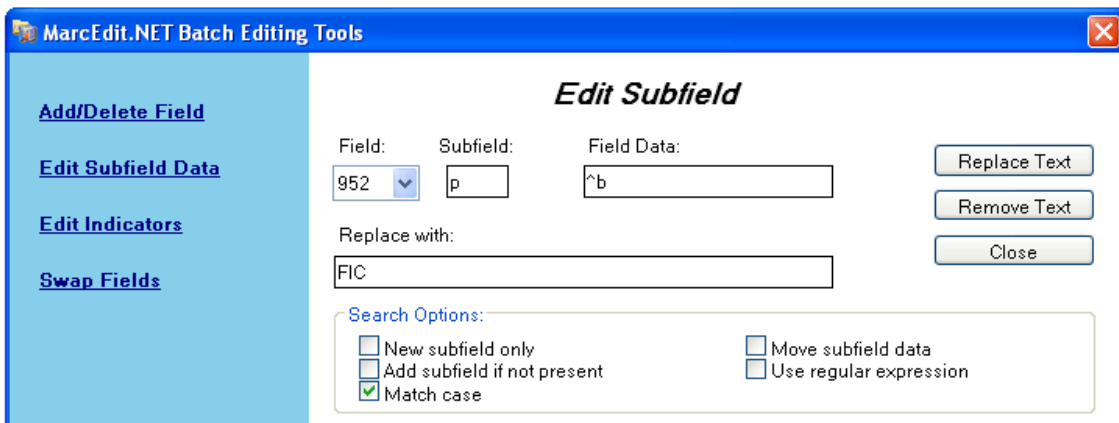
- Open MarcEdit



- 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 replace] to the Field Data textbox and the data to be appended in the Replace With textbox.

J.2 Importing Excel data into Koha

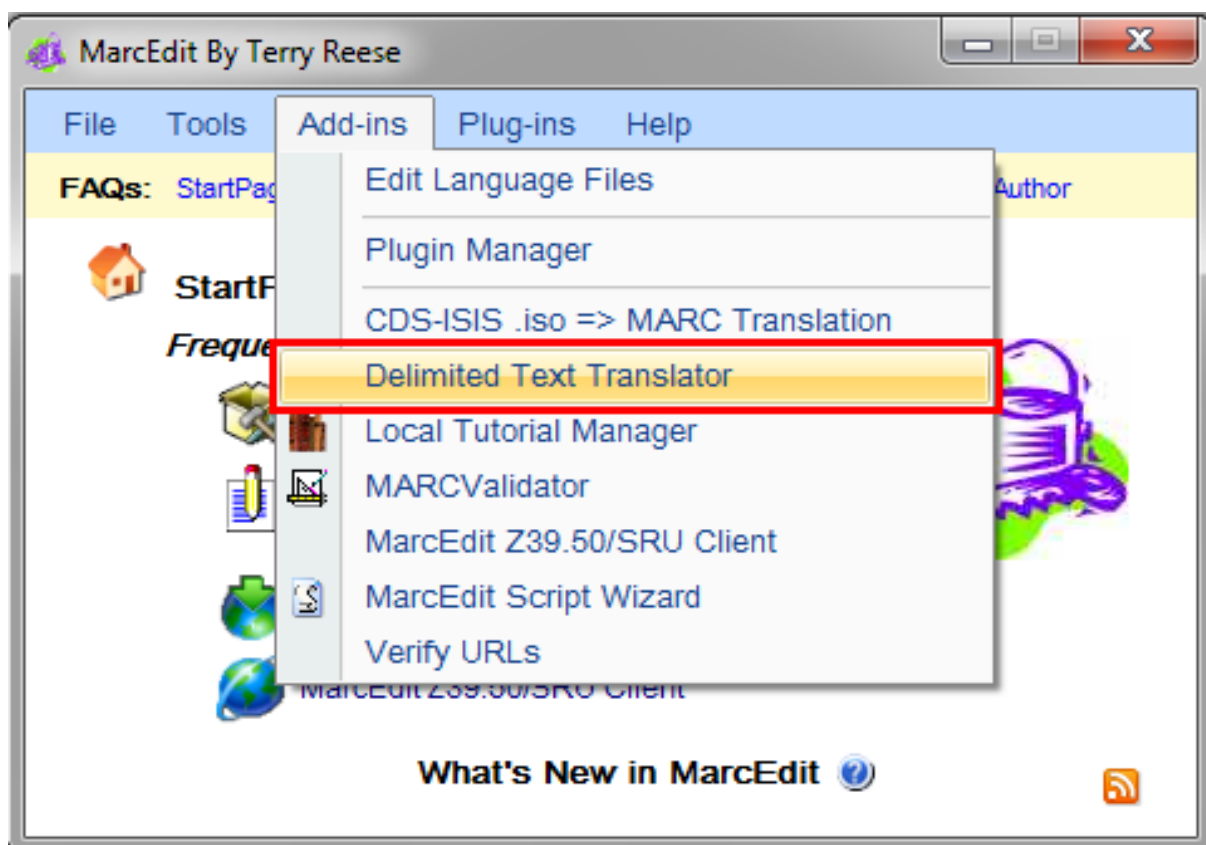
Suppose you have records of your library in excel data sheet format and want them to import into Koha. But how will you do this? Koha will not let you import excel records directly. Well here is a very simple solution for you which will let you import your excel records in Koha easily. First, we will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

Follow the given steps to import your excel records into Koha

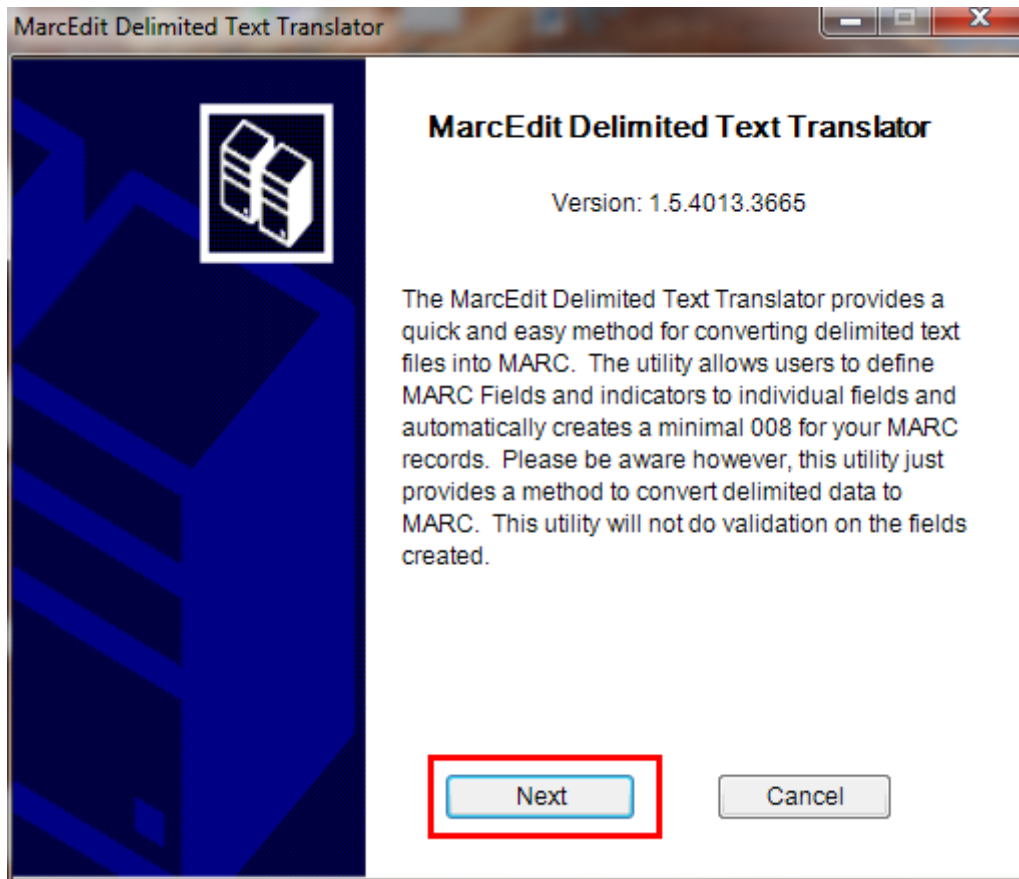
J.2.1 Converting from Excel format into .mrk format

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

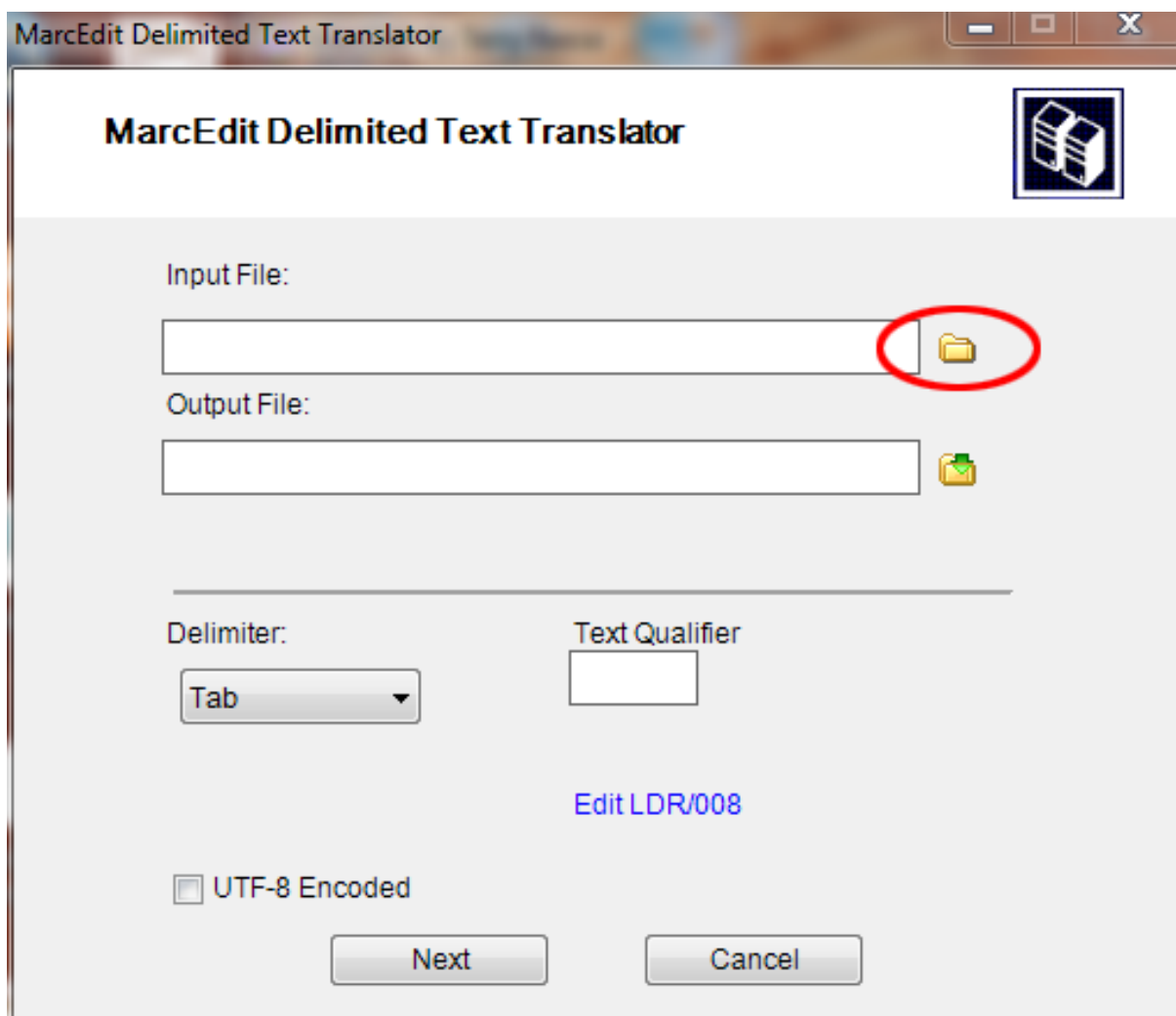
Now open it and select Add-ins-->Delimited Text Translator.



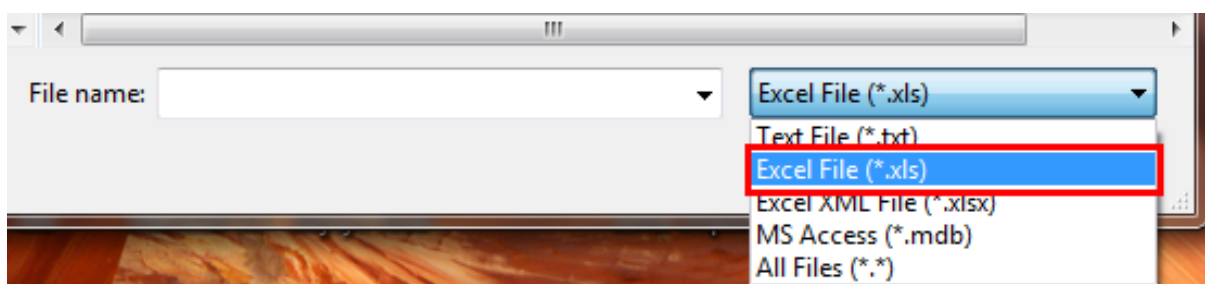
Click Next when the following window appears.



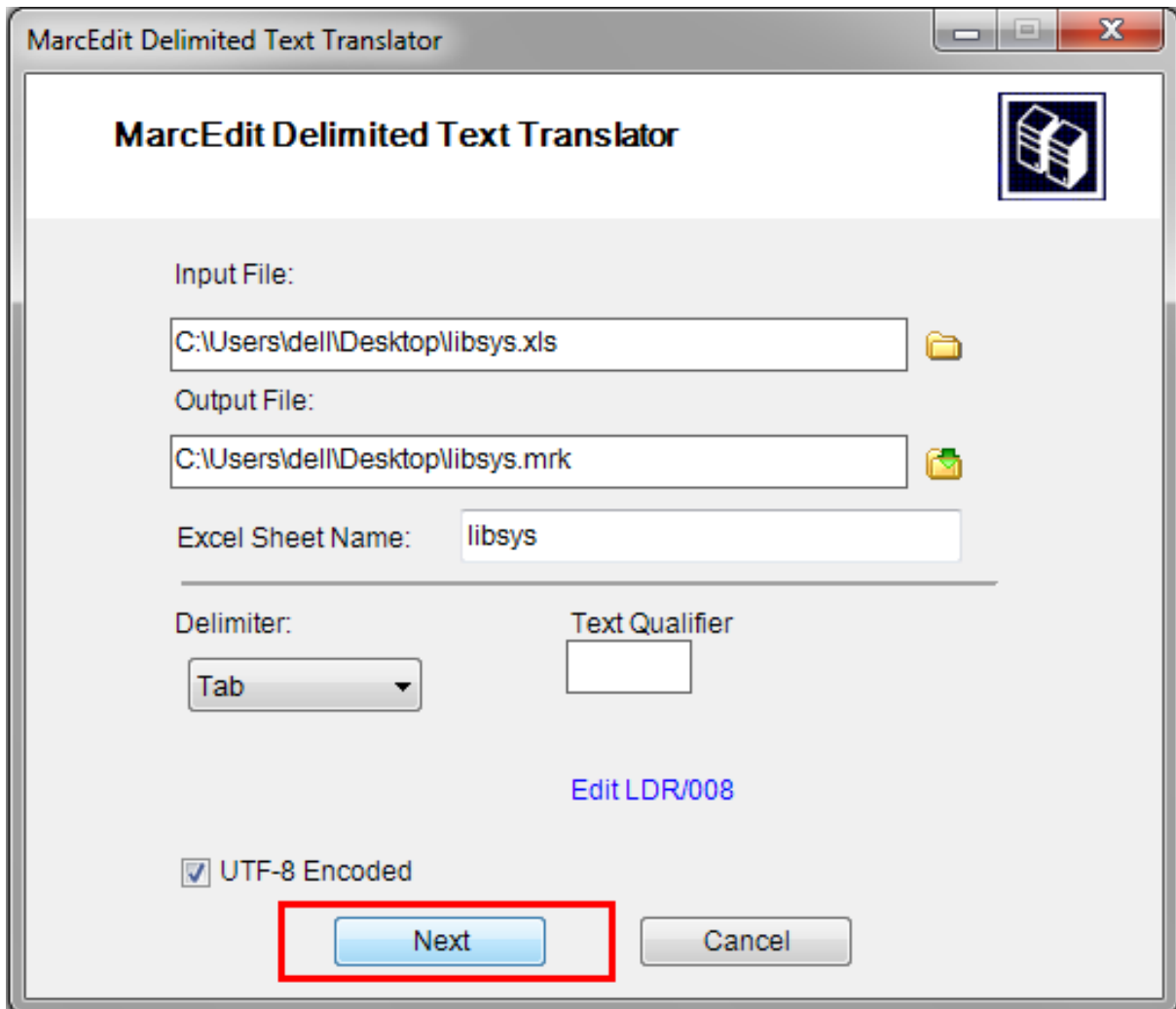
Browse for your excel file.



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.



Marcedit Delimited Text Translator

Marcedit Delimited Text Translator

Input File:
C:\Users\dell\Desktop\libsys.xls

Output File:
C:\Users\dell\Desktop\libsys.mrk

Excel Sheet Name: libsys

Delimiter: Tab

Text Qualifier:

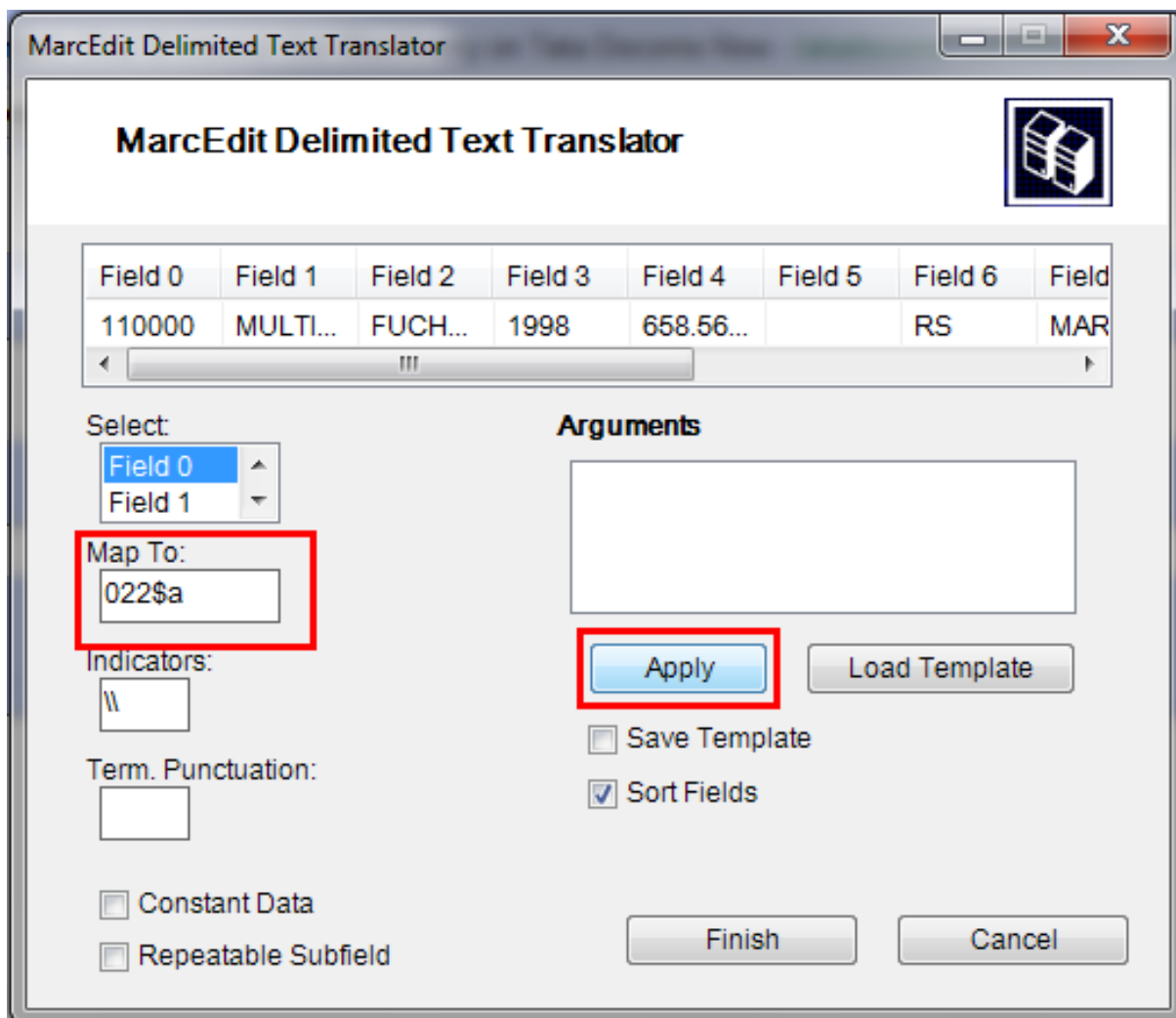
[Edit LDR/008](#)

UTF-8 Encoded

Next Cancel

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

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

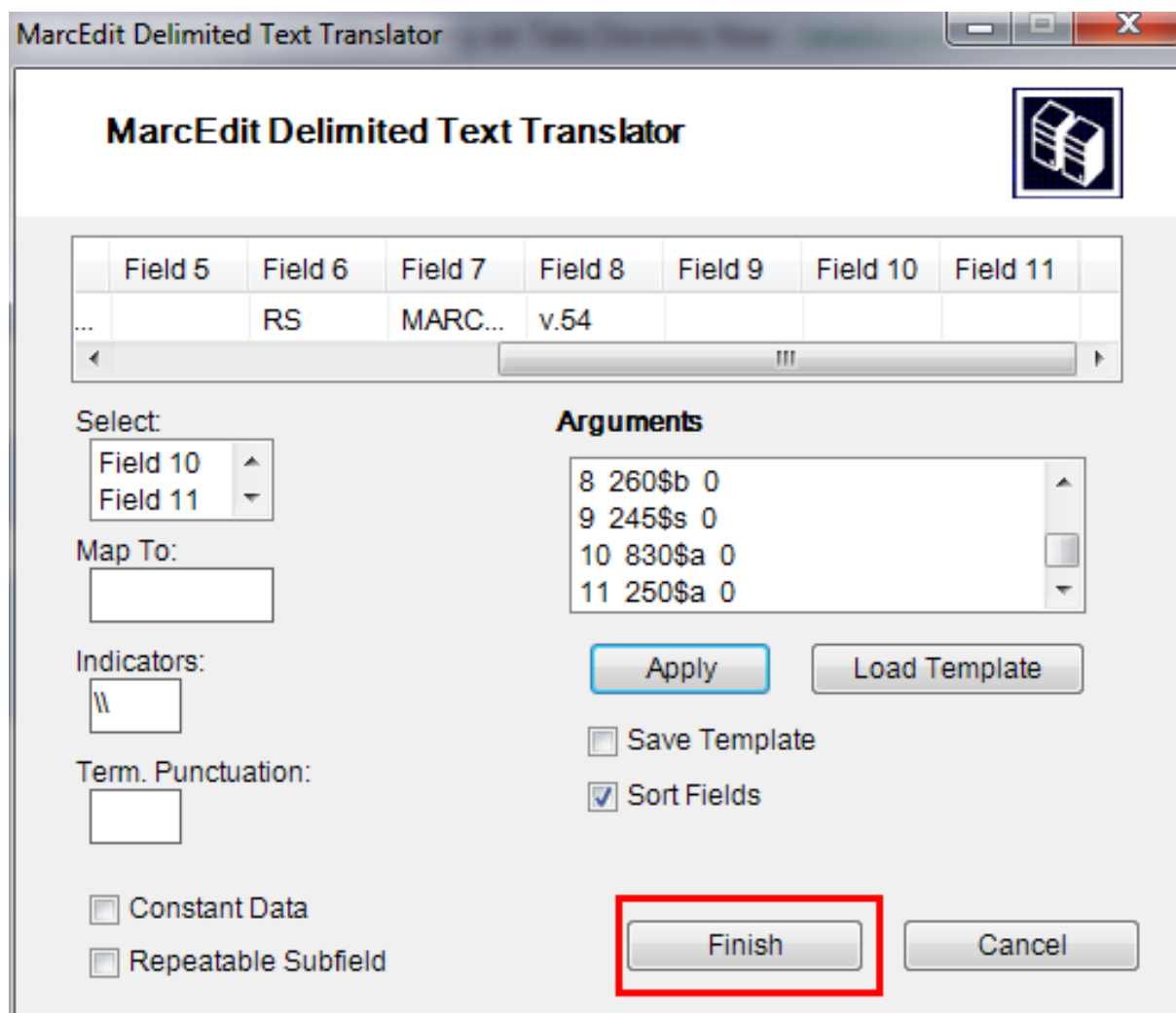


NOTE

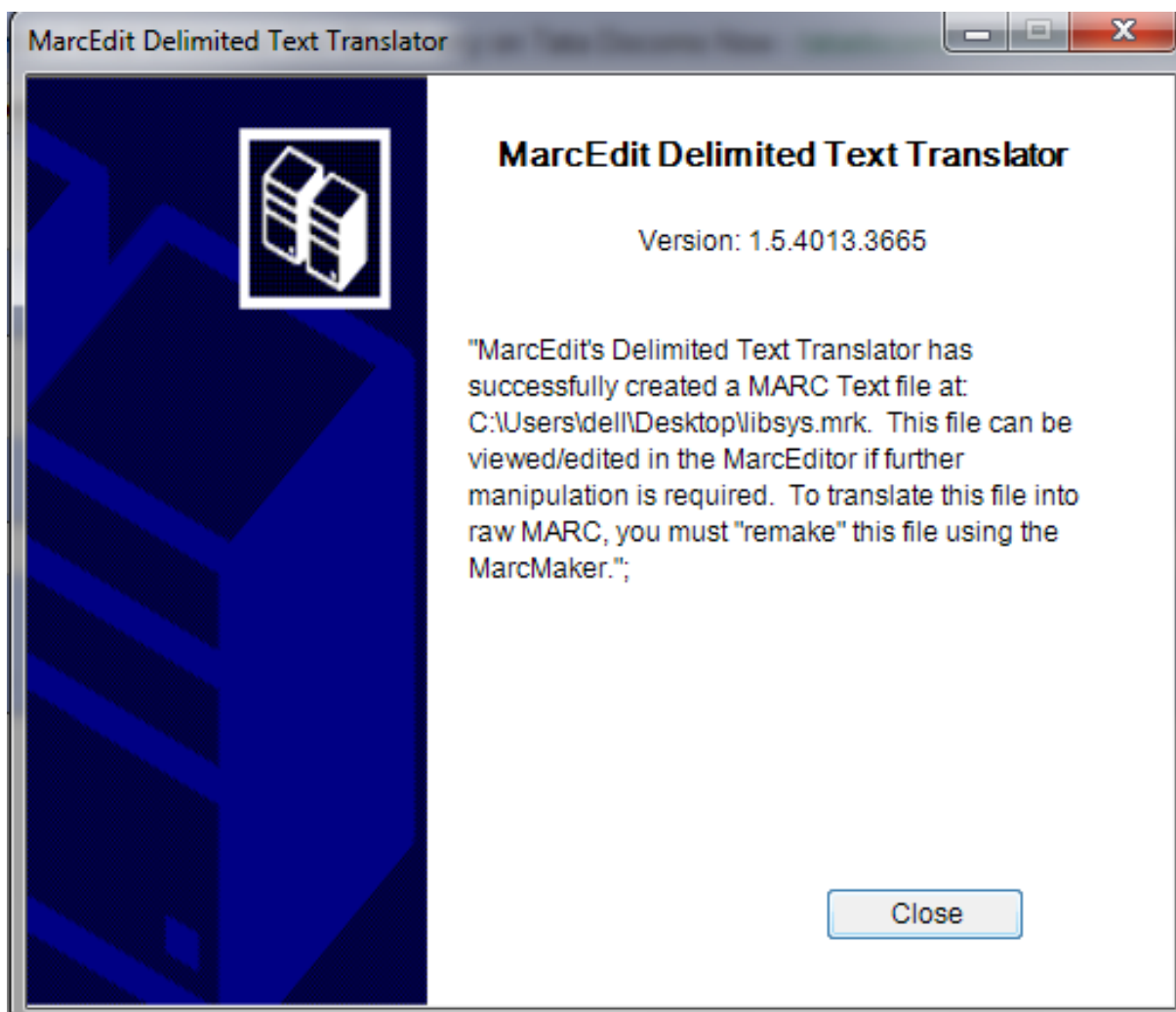


You can customize Indicators and all other things, for more information on marc21 format visit the [official library of congress site](#).

Similarly map all other fields and then Click on Finish.



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

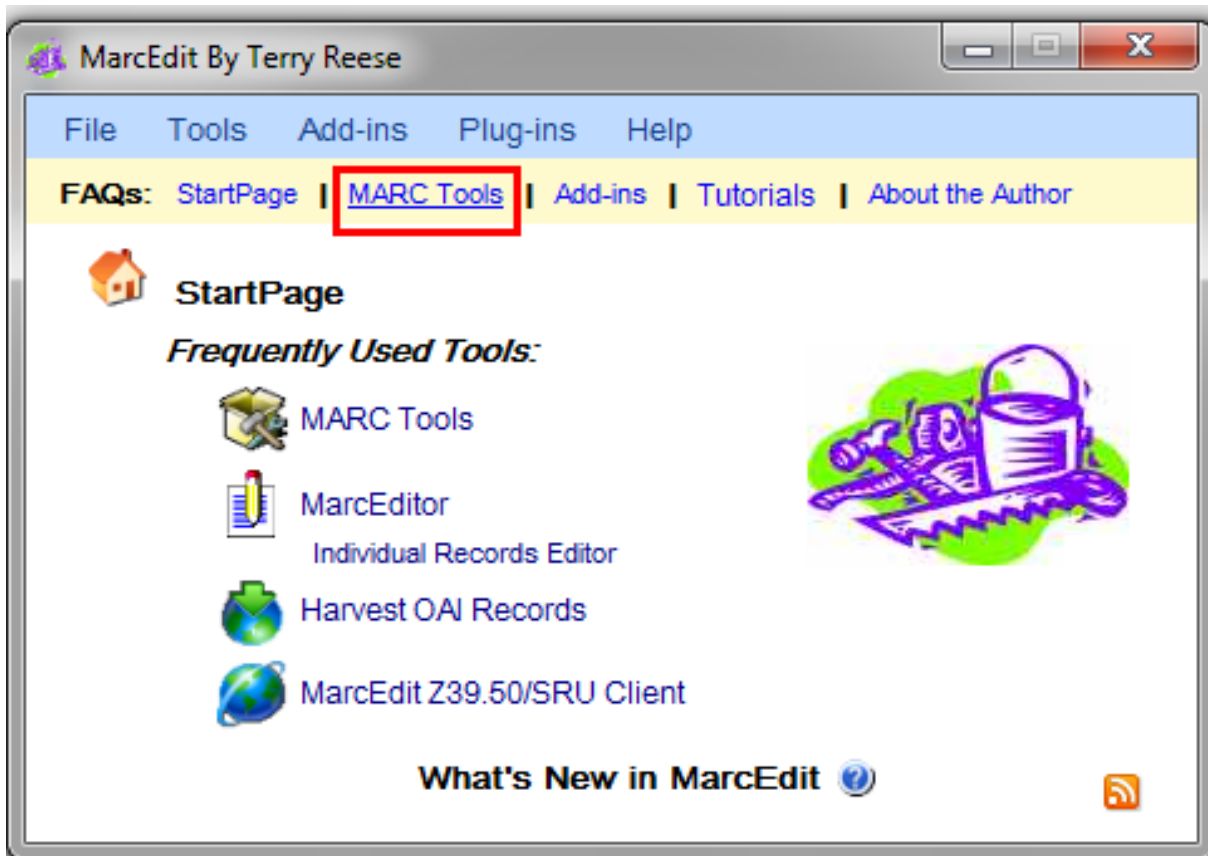


Click Close and we have created a .mrk file from .xls file in this step. You can view the file by double clicking on it.

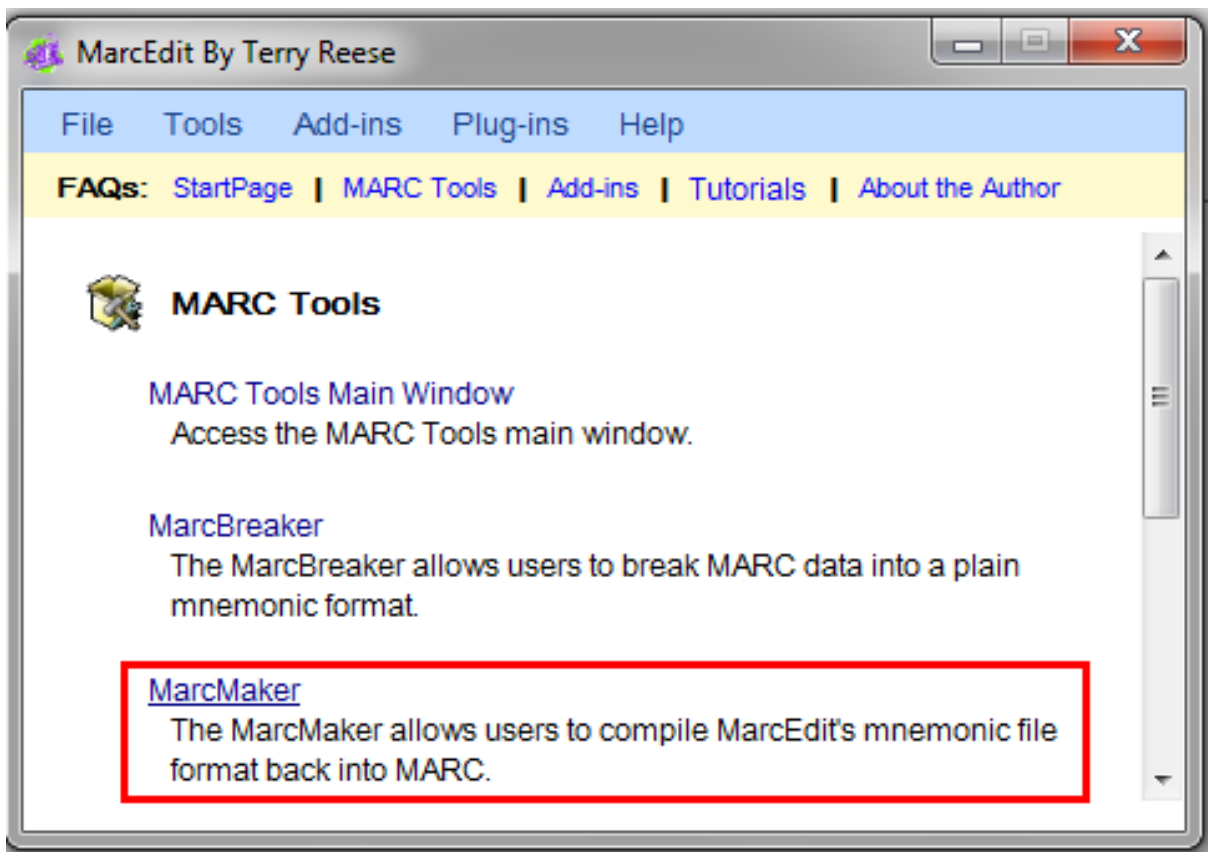
J.2.2 Convert .mrk file to .mrc

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

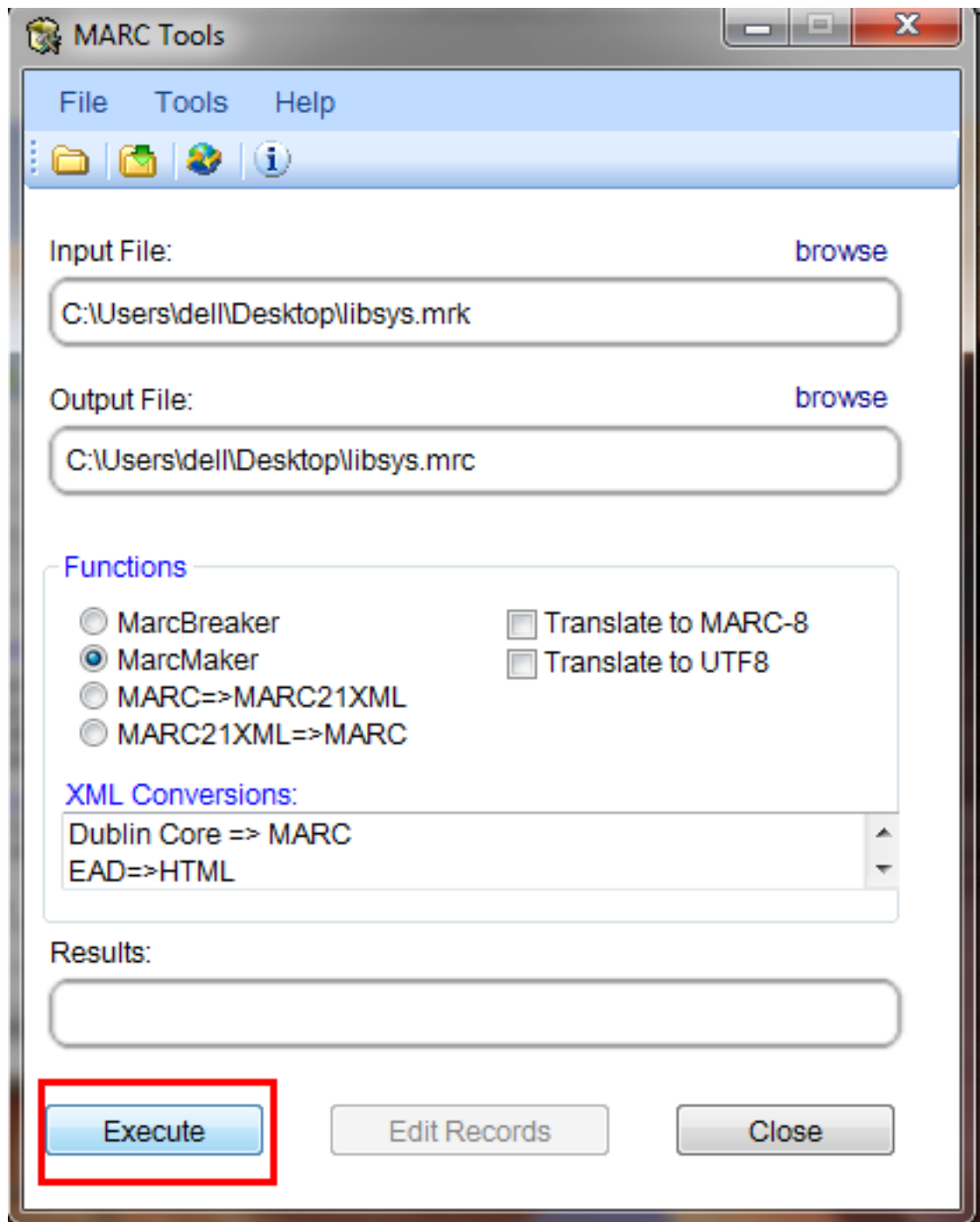
For this again open MarcEdit and Select MARC Tools.



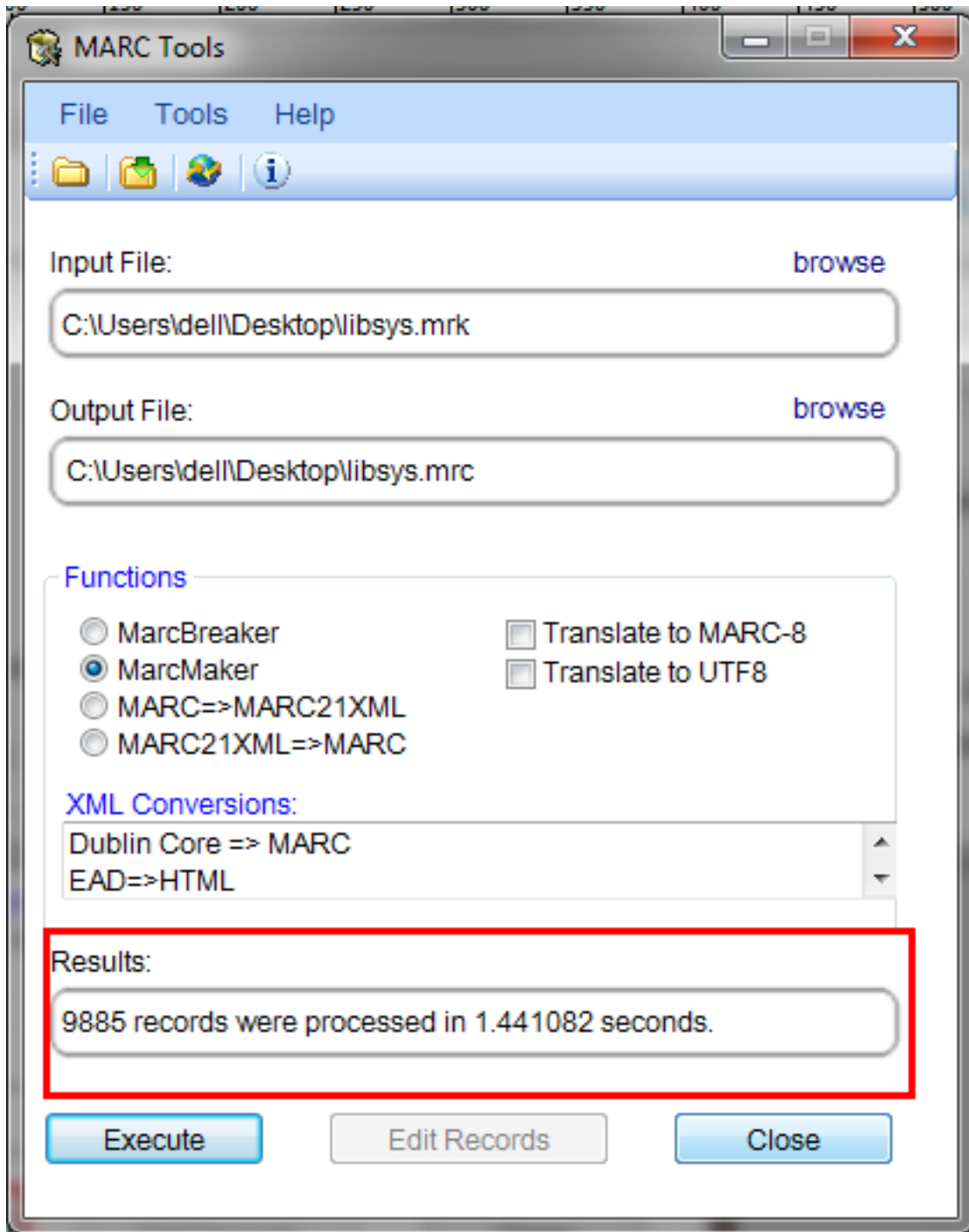
Next Select MarcMaker to convert .mrk file into .mrc format.



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).

J.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.

Circulation Patrons Search Cart More

Circulation

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

Patrons

- Search: OK

Search

- Search catalog: OK

Lists

Cataloging

- [Add MARC Record](#)
- [Authorities](#)

Serials

Acquisitions

Reports

Koha administration

- [System preferences](#)

[Tools](#)

[About Koha](#)

Next Click on Stage MARC Records for Import.

Circulation Patrons Search Cart More

koha Enter search keywords: Submit

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

Home > Tools

Patrons and circulation

- [Comments](#)
Moderate patron comments
- [Import patrons](#)
Import patron data
- [Notices](#)
Define notices (print and email notification messages for overdues, etc.)
- [Overdue notice/status triggers](#)
Set notice/status triggers for overdue items
- [Patron card creator](#)
Create printable patron cards
- [Patrons \(anonymize, bulk-delete\)](#)
Delete old borrowers and anonymize circulation history (deletes borrower reading history)
- [Tags](#)
Moderate patron tags
- [Upload patron images](#)
Upload patron images in batch or one at a time

Catalog

- [Batch item deletion](#)
Delete a batch of items
- [Batch item modification](#)
Modify items in a batch
- [Export bibliographic and holdings](#)
Export bibliographic and holdings data
- [Inventory/stocktaking](#)
Perform inventory (stocktaking) of your catalog
- [Label creator](#)
Create printable labels and barcodes from catalog data
- [Quick spine label creator](#)
Enter a barcode to generate a printable spine label. For use with dedicated label printers
- [Stage MARC records for import](#)
Stage MARC records into the reservoir.
- [Staged MARC record management](#)
Managed staged MARC records, including completing and reversing imports

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

Circulation Patrons Search Cart More NO_LIBRARY_SET (Set) | root (Log Out) | [2]

koha Enter search keywords: Submit

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

Home > Tools > Stage MARC Records For Import

Stage MARC Records For Import

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

Stage records into the reservoir

Select the file to stage: Choose File libsys.mrc

Patrons and circulation

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

Catalog

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

Additional Tools

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

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


- > [Tag moderation](#)
- > [Upload patron images](#)

Catalog

- > [Batch item deletion](#)
- > [Batch item modification](#)
- > [Export bibs/holdings](#)
- > [Inventory/stocktaking](#)
- > [Label creator](#)
- > [Quick spine label creator](#)
- > [Stage MARC for import](#)
- > [Staged MARC management](#)

Additional Tools

- > [Calendar](#)
- > [CSV profiles](#)
- > [Log viewer](#)
- > [News](#)
- > [Task scheduler](#)

Upload progress:

 100%

Comments about this file:

Character encoding:

Look for existing records in catalog?

Record matching rule:


Action if matching bibliographic record found:

Action if no match is found:

Check for embedded item record data?

Yes
 No

How to process items:

Job progress:

 15%

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

Stage MARC Records For Import

MARC Staging results :

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

Next, click on Manage staged records.

Here you can even change matching rules.

Circulation Patrons Search Cart More v NO_LIBRARY_SET (Set) | not (Log Out) | [1]

koha Enter search keywords:

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

Home > Tools > Manage Staged MARC Records > Batch 7

Manage Staged MARC Records > Batch 7

File name: libsys.mrc
 Comments: marc21(rome)
 Staged: 2010-12-29 18:18:43
 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

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

#	Citation	Status	Match?	Bib
1	MULTIVARIATE QUALITY CONTROL FUCHS C AND KENETT R S (110000)	staged	no_match	
2	PRECISION MANUFACTURING COSTING SIMS E R (110001)	staged	no_match	
3	PROCESSING MODELING IN COMPOSITES MANUFACTURING ADVANI S G AND SOZER E M (130002)	staged	no_match	
4	QS-9000 IMPLEMENTATION AND REGISTRATION NARCOLO G (110003)	staged	no_match	
5	QUALITY AND PRODUCTIVITY FOR BANKERS AND FINANCIAL MANAGERS LATZKO W J (110004)	staged	no_match	
6	QUALITY CONTROL FOR PROFIT LESTER RH AND OTHERS (110005)	staged	no_match	
7	QUALITY ENGINEERING HANDBOOK PYZDEK T AND BERGER R W, ED. (110006)	staged	no_match	
8	QUALITY MANAGEMENT HANDBOOK KIMBER R J AND OTHERS, ED. (130007)	staged	no_match	
9	QUALITY MANAGEMENT HANDBOOK WALSH L AND OTHERS, ED. (130008)	staged	no_match	
10	QUALITY PLANNING, CONTROL, AND IMPROVEMENT IN RESEARCH AND DEVELOPMENT ROBERTS G W, ED. (110009)	staged	no_match	
11	QUALITY PROMISE WOLLSCHLAGER L J (130010)	staged	no_match	
12	RE-ENGINEERING THE MANUFACTURING SYSTEM STEIN R E (110011)	staged	no_match	
13	RELIABILITY ENGINEERING AND RISK ANALYSIS MOCHARRES M AND OTHERS (130012)	staged	no_match	
14	RELIABILITY IMPROVEMENT WITH DESIGN OF EXPERIMENTS CONDRA L W (130013)	staged	no_match	
15	SPECIFICATION WRITING AND MANAGEMENT MCBORN M (130014)	staged	no_match	
16	STATISTICAL PROBLEM SOLVING GARR V E (130015)	staged	no_match	
17	THEORY OF CONSTRAINTS STEIN R E (110016)	staged	no_match	
18	THERMODYNAMIC PROPERTIES OF HELIUM SYCHEV V V (130017)	staged	no_match	
19	THERMODYNAMIC PROPERTIES OF NITROGEN SYCHEV V V (130018)	staged	no_match	
20	THERMODYNAMIC PROPERTIES OF METHANE SYCHEV V V (130019)	staged	no_match	
21	THERMODYNAMIC PROPERTIES OF ETHANE SYCHEV V V (130020)	staged	no_match	
22	THERMODYNAMIC PROPERTIES OF OXYGEN SYCHEV V V (130021)	staged	no_match	
23	THERMODYNAMIC PROPERTIES OF AIR SYCHEV V V (130022)	staged	no_match	
24	THERMODYNAMIC PROPERTIES OF ETHYLENE SYCHEV V V (130023)	staged	no_match	
25	THERMOPHYSICAL PROPERTIES OF FROGEN ALTMAN V V (110024)	staged	no_match	

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

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

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

Circulation Patrons Search Cart More v NO_LIBRARY_SET (Set) | root (Log Out) | L2

koha Enter search keywords:

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

Home > Tools > Manage Staged MARC Records > Batch 6

Manage Staged MARC Records > Batch 6

File name: **stysip-final.mrc**

Comments: **mar21(phone)**

Staged: **2010-12-29 18:13:00**

Status: **Imported**

Matching rule in effect applied: **No matching rule in effect applied**

Action if matching record found: **create_new**

Action if no match found: **create_new**

Item processing: **always_add**

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

#	Citation	Status	MATCH	Err
1	MULTIVARIATE QUALITY CONTROL FUCHS C AND KENETT R S (110000)	Imported	no_match	1
2	PRECISION MANUFACTURING COSTING SIMS E R (110001)	Imported	no_match	2
3	PROCESSING MODELING IN COMPOSITES MANUFACTURING ADVANI S G AND BODUR E M (110002)	Imported	no_match	3
4	QS-9000 IMPLEMENTATION AND REGISTRATION NARCOLA G (110003)	Imported	no_match	4
5	QUALITY AND PRODUCTIVITY FOR BANKERS AND FINANCIAL MANAGERS LATZKO W J (110004)	Imported	no_match	5
6	QUALITY CONTROL FOR PROFIT LESTER RH AND OTHERS (110005)	Imported	no_match	6
7	QUALITY ENGINEERING HANDBOOK PYZDEK T AND BERGER R W ED (110006)	Imported	no_match	7
8	QUALITY MANAGEMENT HANDBOOK KIMBERL J AND OTHERS ED (110007)	Imported	no_match	8
9	QUALITY MANAGEMENT HANDBOOK WALSH L AND OTHERS ED (110008)	Imported	no_match	9
10	QUALITY PLANNING, CONTROL, AND IMPROVEMENT IN RESEARCH AND DEVELOPMENT ROBERTS G W ED (110009)	Imported	no_match	10
11	QUALITY PROMISE WOLFSCHLAGER L J (110010)	Imported	no_match	11
12	RE-ENGINEERING THE MANUFACTURING SYSTEM STEIN R E (110011)	Imported	no_match	12
13	RELIABILITY ENGINEERING AND RISK ANALYSIS MODANRES M AND OTHERS (110012)	Imported	no_match	13
14	RELIABILITY IMPROVEMENT WITH DESIGN OF EXPERIMENTS CONDRA L W (110013)	Imported	no_match	14
15	SPECIFICATION WRITING AND MANAGEMENT MICROB M (110014)	Imported	no_match	15
16	STATISTICAL PROBLEM SOLVING GARR W E (110015)	Imported	no_match	16
17	THEORY OF CONSTRAINTS STEIN R E (110016)	Imported	no_match	17
18	THERMODYNAMIC PROPERTIES OF HELIUM SYCHEV V V (110017)	Imported	no_match	18
19	THERMODYNAMIC PROPERTIES OF NITROGEN SYCHEV V V (110018)	Imported	no_match	19
20	THERMODYNAMIC PROPERTIES OF METHANE SYCHEV V V (110019)	Imported	no_match	20
21	THERMODYNAMIC PROPERTIES OF ETHANE SYCHEV V V (110020)	Imported	no_match	21
22	THERMODYNAMIC PROPERTIES OF OXYGEN SYCHEV V V (110021)	Imported	no_match	22
23	THERMODYNAMIC PROPERTIES OF AIR SYCHEV V V (110022)	Imported	no_match	23
24	THERMODYNAMIC PROPERTIES OF ETHYLENE SYCHEV V V (110023)	Imported	no_match	24
25	THERMOPHYSICAL PROPERTIES OF FLUORINE ALTUNIN V V (110024)	Imported	no_match	25

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

You can even undo the Import operation.
 And within few minutes, we have imported around 10,000 records in Koha

Appendix K

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>.

K.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 `EnhancedMessaging-Preferences` 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).

K.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

K.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 L

OCLC Connexion Gateway

Koha can be set to work with the OCLC Connexion 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.

L.1 Setting up OCLC service on Koha

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 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 [Managed 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/config/file.cnf
```

L.2 Setting up your OCLC desktop client

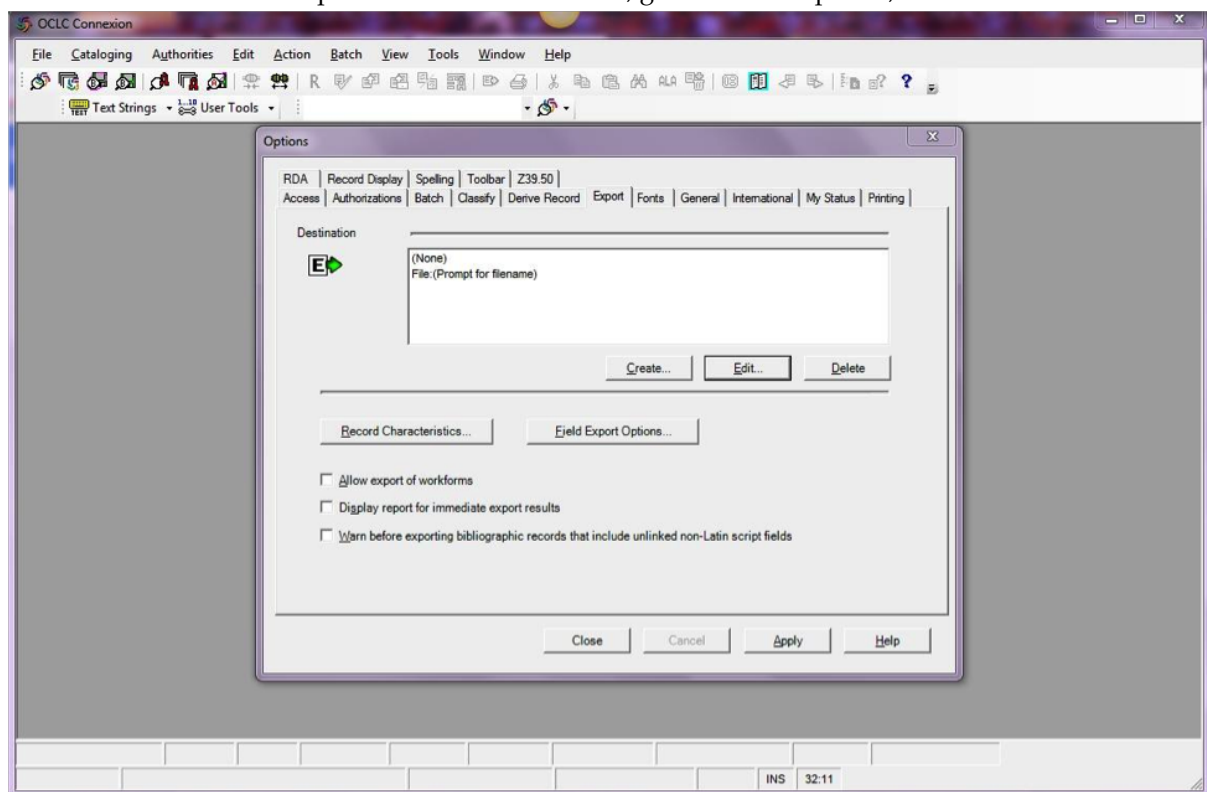
NOTE



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

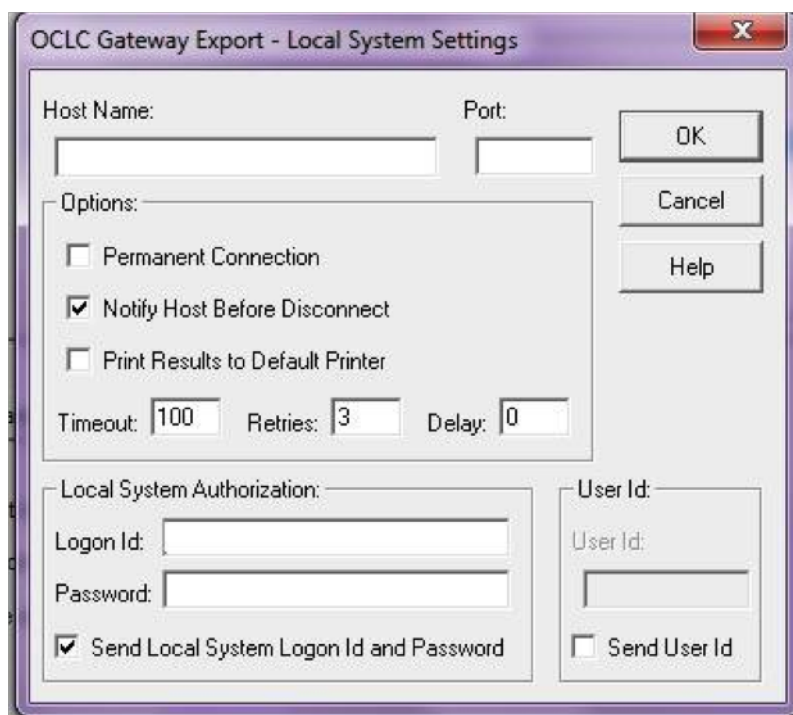
the Export tab.



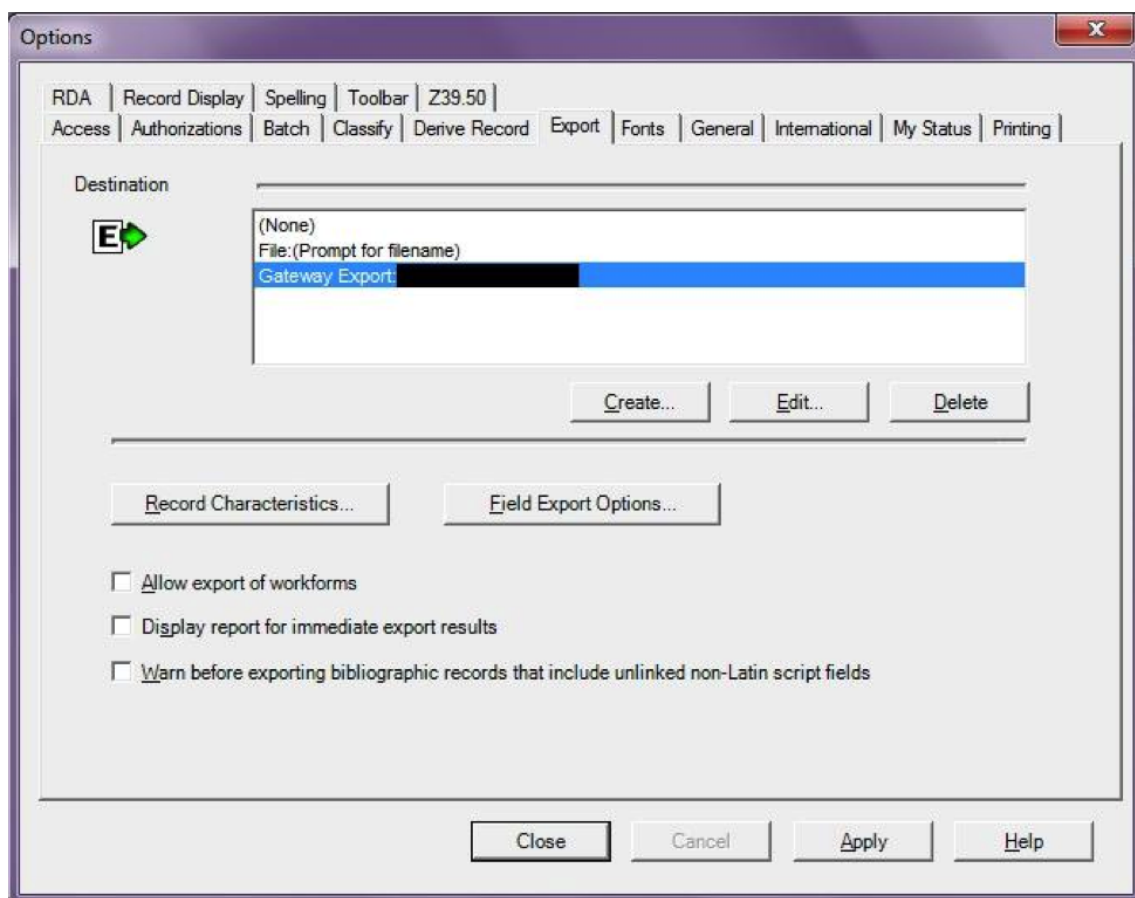
- Click the "Create..." button to set up a new destination, then choose "OCLC Gateway Export" and click OK.

– Enter the following information:

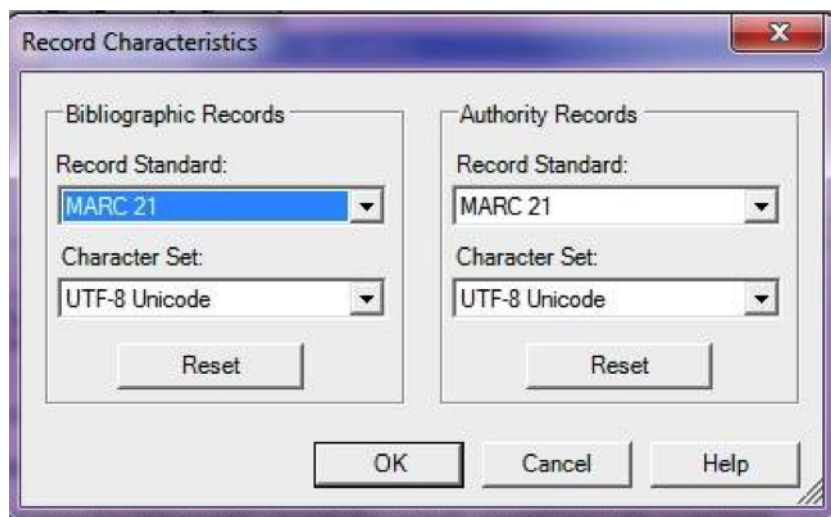
- * "Host Name:" Your catalog's appropriate IP address (from your [config file above](#))
- * "Port:" Your catalog's appropriate port number (from your [config file above](#))
- * "Login ID:" The cataloger's Koha login
- * "Password:" The cataloger's Koha password
- * "Notify Host Before Disconnect" = 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.

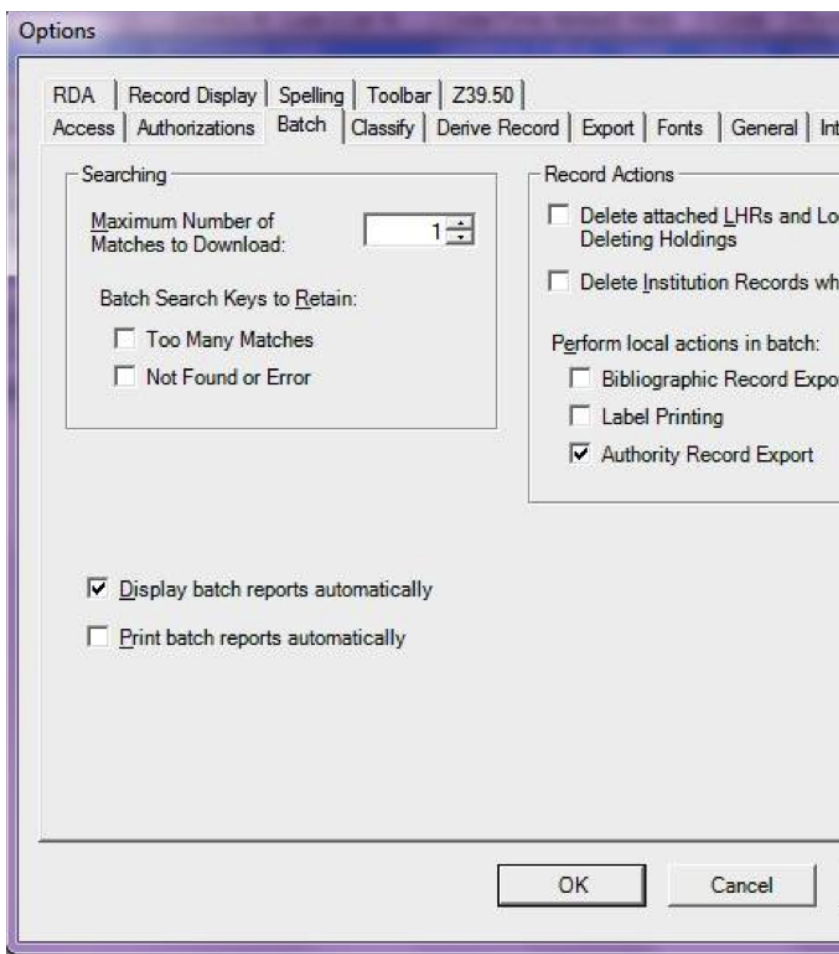
L.3 Using the OCLC Connexion Gateway

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

L.3.1 Exporting records one by one

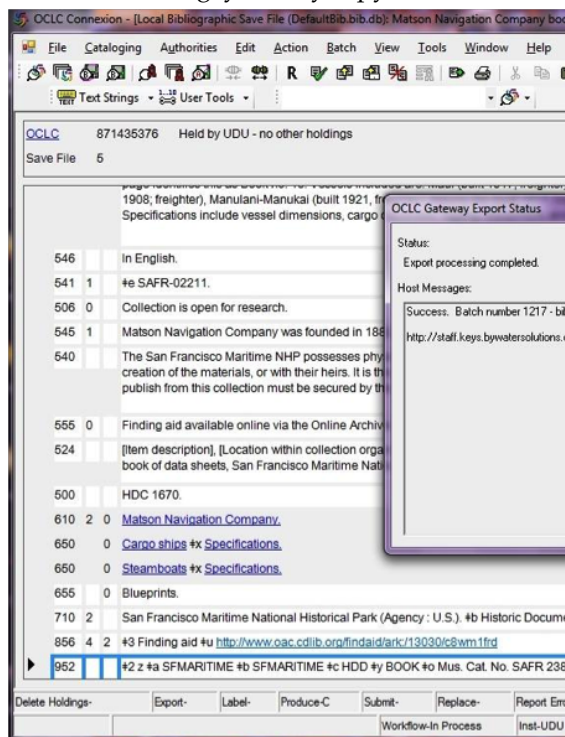
To export bibliographic records one by one, be sure your "Batch" options are correct: from the "Tools" menu, select "Options", and select the "Batch" tab. In the "Perform local actions in batch" area, "Biblio-

graphic 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"

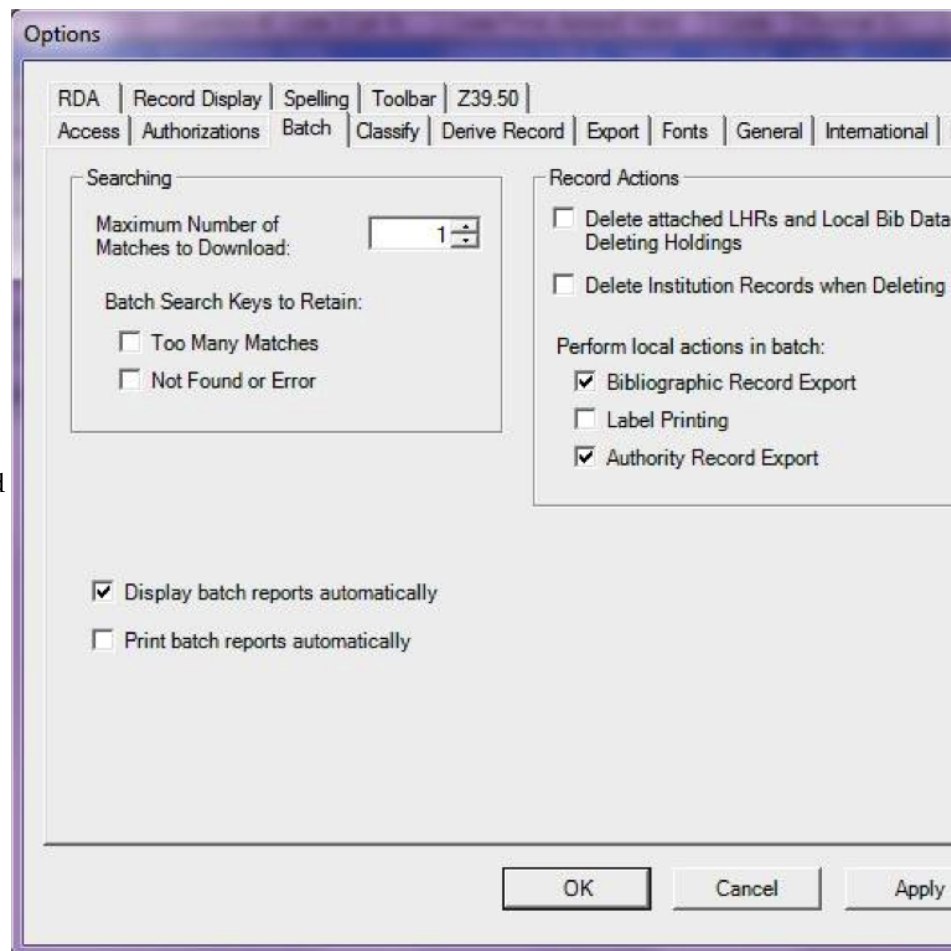
window



L.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, "Biblio-

graphic Record Export" should be checked

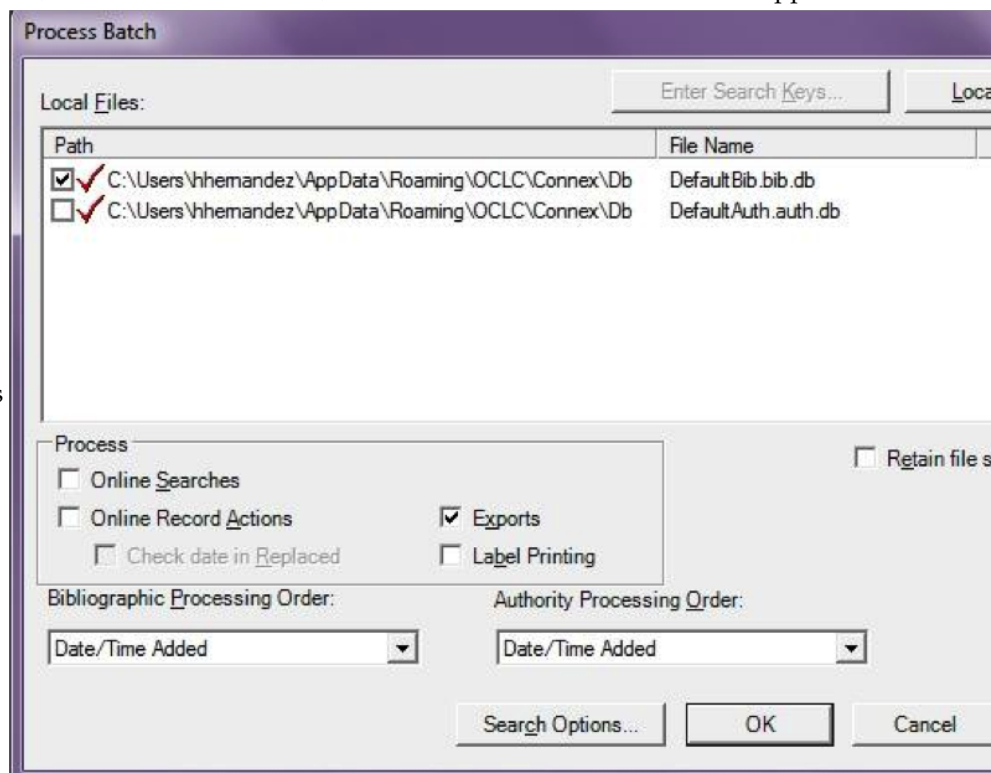


When a record is ready to export, from the "Action" menu, select "Export" or use the F5 key, and it's

export status will be "ready."

When ready to export the batch, from the "Batch" menu, select "Process batch" and check the appro-

priate "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).

Appendix M

FAQs

M.1 Display

M.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 `koha-tmpl/intranet-tmpl/prog/img/itemtypeimg/` and to `koha-tmpl/opac-tmpl/prog/itemtypeimg` and put your icons in the new directory. Your icons will show up in a new tab as soon as they are in the folders.

•

TIP



Remember to put the icons in both places (on the OPAC and the intranet).

M.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.

M.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

M.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).

M.1.5 Customize Logo on Staff Client

Question: How do I change the Koha logo on the Staff Client login page?

Answer: **Opacsmallimage** controls the display of the Koha logo in the OPAC, but there is no system preference controlling the logo on the staff client login page. Luckily the logo is displayed via CSS so it can be easily customized through some custom CSS.

These are the relevant parts of the staff client default CSS:


```
#login h1 {
  background:url("../../img/koha-logo.gif") no-repeat scroll center
top transparent;
  margin-bottom:0.5em;
  margin-top:0;
}

#login h1 a {
  border-bottom:medium none;
  display:block;
  height:74px;
  text-indent:-100px;
}
```

If you have access to the file system on your Koha server you can add a custom CSS file and specify that file using the [intranetcolorstylesheet](#) system preference.

There is no analogue to the [OPACUserCSS](#) preference in the staff client, but you can get around this by putting this in the [intranetuserjs](#) preference:

```
[/]]>
</script>
<style type="text/css">
  /* inline styles */
</style>
<script type="text/javascript">
[/<![CDATA[
```

In the above snippet where it says `/* inline styles */` we'll redeclare the relevant properties from the styles of the login image:

```
[/]]>
</script>
<style type="text/css">
  /* inline styles */

#login h1 {
  background:url("../../img/koha-logo.gif") no-repeat scroll center
top transparent;
}

#login h1 a {
  height:74px;
}
</style>
<script type="text/javascript">
[/<![CDATA[
```

I've only reproduced the properties necessary to make the change we want. You can see that the "background:" property sets the path to the default logo. You can change this to point to any image you want, on the Koha server or anywhere else. Then you just need to change the #login h1 a's "height" property to match the height of the image you choose.

For example:

```
[/]]>
</script>
<style type="text/css">
  /* inline styles */

#login h1 {
  background:url("http://www.myaopl.org/sites/all/themes/npl/logo.png")
no-repeat scroll center top transparent;
}

#login h1 a {
```

```
height:71px;  
}  
</style>  
<script type="text/javascript">  
//<![CDATA[
```

M.1.6 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:

Description:

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

[Cancel](#)

- 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**

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

[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.

Hello, Nicole Engard ([Click here](#) if you're not Nicole Engard)

3 Item(s) Checked Out

	Title	Barcode	Call No.	Due	Renew	Fines	Links
	Picture perfect Picoult, Jodi,	100006	PS3566.I372 P49 2002	06/16/2011	<input type="checkbox"/> Renew (1 of 2 renewals remaining)	No	Share TWEET THIS
	Harry Potter and the sorcerer's stone Rowling, J. K.	100025	PZ7.R79835 Har 1998	05/19/2011	Not renewable (0 of 2 renewals remaining)	No	Share TWEET THIS
	Harry Potter and the sorcerer's stone Rowling, J. K.	100020	PZ7.R79835 Har 1999ab	05/19/2011	Not renewable (On hold)	No	Share TWEET THIS

Clicking on the 'Overdue' tab will show only the items that are overdue.

M.2 Circulation/Notices

M.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.

M.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.

M.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.

M.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`

M.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, since there was no baseline number of holds to utilize.

M.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.

M.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

TIP



Mac users use the OPTION button in place of ALT

M.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%3A&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)
- Wadja (wadja.com)
- Ipipi (ipipi.com)
- T-mobile
- SMSDiscount (smsdiscount.com)
- Clickatell

M.3 Cataloging


M.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'.


TIP



Fields affected by this preference will show a lock symbol in them

100 ? - MAIN ENTRY--PERSONAL NAME 

▲ 4 Relator code  

▲ a Personal name  

M.3.2 Koha to MARC Mapping

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

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).

M.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.

M.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.

M.4 Acquisitions

M.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 were 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.

M.5 Serials

M.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.

M.6 Reports

M.6.1 Define Codes Stored in DB

M.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 accruing
- L = Lost item
- LR = Lost item returned/refunded
- M = Sundry

- N = New card
- PAY = Payment
- W = Writeoff

M.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%'"

M.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

M.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

M.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

M.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

M.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

M.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, a list with the Koha authorized values will be displayed instead of a free field Note that you can have more than one parameter in a given SQL Note that entering nothing at run time won't probably work as you expect. It will be considered as "value empty" not as "ignore this parameter". For example entering nothing for : "title=<<Enter title>>" will display results with title="" (no title). If you want to have to have something not mandatory, use "title like <<Enter title>>" and enter a % at run time instead of nothing

Examples:

- `SELECT surname,firstname FROM borrowers WHERE branchcode=<<Enter patrons library | branches>> AND surname like <<Enter filter for patron surname (% if none)>>`
- `SELECT * FROM items WHERE homebranch = <<Pick your branch | branches>> and barcode like <<Partial barcode value here>>`

TIP

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: 

TIP

You have to put "%" in a text box to 'leave it blank'. Otherwise, it literally looks for "" (empty string) as the value for the field.

IMPORTANT

In addition to using any authorized value code to generate a dropdown, you can use the following values as well: Branches (branches), Item Types (itemtypes) and Patron Categories (categorycode). For example a branch pull down would be generated like this <<Branch|branches>>

Owning branch:

M.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).

M.7 Searching**M.7.1 Advanced Search****M.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)

M.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

M.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.

M.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.

M.8 Enhanced Content

M.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)

M.8.2 Amazon

M.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).

M.9 System Administration

M.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.

M.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).

M.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.

M.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.

TIP

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

M.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'
```

M.10 Hardware

M.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.

M.10.2 Printers

M.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 IIIIP thermal receipt printers
- Epson TM-T88IV
- 1x1 labels using a Dymolabelwriter printer

M.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).

M.10.2.3 Additional Support

- <http://www.nexpresslibrary.org/go-live/configure-your-receipt-printers/>

Appendix N

Extending Koha

N.1 Amazon lookup script for Koha libraries

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!

N.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.

N.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 that takes this functionality into 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](#) has a few examples of this on the left.

N.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/66 ←
cc66.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/9999 ←
cc.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') ←
;
```

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 O

Koha and Your Website

This appendix will include tips for integrating Koha in to your library website.

O.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://YOURCATALOG/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 P

GNU General Public License version 3

Version 3, 29 June 2007

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```
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```

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