

Training of Librarians of Western Region on Open Source Library Automation Software (KOHA)

(PAC – 16.29)
2015 - 16

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NCERT



Programme Coordinator

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**Regional Institute of Education
Bhopal**

Preface

To strengthen the academic system of any country it is inevitable to have a meaningful library set up with all academic institutions. The role of such academic libraries must to support the teaching learning environment with the institution they are attached to. In no way these libraries can contribute in the progress of the curriculum transactions unless equipped with latest technologies. Particularly in the digital age when demands come from the society to serve information through digital medium, computerization of libraries should be in top priority. But problem comes as a matter of budget involvement in the procurement of library automation software, which are not normally in the affordable range of any small educational institution. As a matter of privilege some open source library automation software are freely available in the Internet that are downloadable and customizable at end users point. Among the lot of open source Integrated Library Management Software (ILMS) the KOHA (no full form) is the most popular and widely used one.

The present training programme is meant to provide practical exposure to the librarians on KOHA with hands on practice for the following reasons:

Firstly, the demands were received from the states like Gujarat, Maharastra, Goa, MP and Chhatisgarh for providing training to their school and other institute librarians on Open Source Library Automation Software.

Secondly, according to NCF-2005 *the school library should be conceptualised as an intellectual space where teachers, children and members of the community can expect to find the means to deepen their knowledge and imagination. Further, it emphasises that a school library should provide access to new Information Technology, apart from books and magazines, to enable children and teachers to connect with the wider world. Training of teachers in library management and use is required to meet the demands of this situation.*

The notion behind the above statements in the NCF is to modernise the school library to the extent that students and teachers can access and use the information available inside the library as well as outside all across the world. To achieve this objective, the school library need to be automated first and then further developments can be taken place in libraries.

Planning

The entire training programme was scheduled to be organized in the following pattern for smooth completion:

Phase – I : For Librarians of Maharashtra and Gujarat

Phase – II : For Librarians of MP and Chhatishgarh

Phase – III : For Librarians of Goa*

** Due to expression of inability from state authority to conduct the programme at their end and deputation of librarians to RIE, Bhopal the programme was re-scheduled to be conducted for librarians from MP at Bhopal, where also no participant turned up.*

Dr. P. K. Tripathy

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List of Resource Persons

S.No.	Name	Designation	Address
1.	Dr. Shivpal Singh Kushwah	Deputy Librarian	NLIU, Bhopal
2.	Dr. Sandeep Pathak	Deputy Librarian	IISER, Bhopal
3.	Dr. R.K. Jena	Assistant Librarian	SPA, Bhopal
4.	Dr. Rakesh Kumar Khare	Librarian	AISECT University, Bhopal
5.	Dr. Ritu Singh	Assistant Professor	Bundelkhand University, Jhansi.
6.	Dr. Satish Malik	Librarian	M.D. University, Rohtak
7.	Dr. Nirmal Swain	Head of the Department, Library Science Department	M.D. University, Rohtak
8.	Dr. P.K. Tripathy	Librarian	RIE, Bhopal

NCERT

The NCERT, being apex organisation in school education, has constantly been engaged with improving the quality of education through various academic programmes such as development of curriculum, textbooks, supplementary books, educational kits, teachers' handbooks/manuals, e-resources and capacity building of Key Resource Teachers, Teacher Educators, State Functionaries and also contributing significantly in Sarva Shiksha Abhiyan (SSA), Rashtriya Madhyamik Shiksha Abhiyan (RMSA), Information and Communication Technology (ICT) in schools, National Skills Qualifications Framework (NSQF) and Right of Children to Free and Compulsory Education (RTE). During the current year (2013-14), various innovative research, development, training and extension programmes were conducted addressing emerging challenges in the field of school and teacher education. Keeping in view the need of the hour and slow pace of ICT enabled teaching learning programmes in schools, the Council has created ICT curricula for teachers and students and also established a National Repository of Open Educational Resources (NROER) to benefit the school system. Considering the importance of early childhood as the foundation for learning and development, the Council continued to conduct the Diploma Course in ECCE along with Early Literacy Programme (ELP) and Early School Mathematics Programme (ESMP) that provides handholding and academic support to States/UTs. One very significant contribution under SSA was developing stage-wise learning outcomes (III, V and VIII) and class-wise learning indicators (III-VIII) to facilitate and strengthen assessment process.

The Quality Monitoring Tools (QMTs) with reference to RTE Act, 2009 and SSA Framework, 2011 was revised in consonance with study on 'Quality Monitoring Programme in 100 Clusters of the Country: Quality Interventions in Elementary Schools'. In view of addressing the States' need of in-service teachers' professional development in the subject areas of Science and Mathematics, the Council developed model In-service Teacher Professional Development (ITPD) packages and also conducted in-service training programmes under RMSA. Our major ongoing programmes like achievement surveys, All India School Education Survey intended to reveal the existing gaps in school education and offer suggestions for future interventions are smoothly progressing. Several important activities, like Online Course on Action Research in Education, Jawaharlal Nehru National Science, Mathematics and Environment Exhibition

(JNNSMEE) for Children, Science kits and All India Children's Educational Audio-Video Festival undertaken during the year have been widely appreciated.

The educational researches conducted by the council and other academic bodies supported through Educational Research and Innovations Committee (ERIC) have a significant bearing on quality education. As part of nurturing the talents and promoting innovations in the field of school education and teacher education, the Council runs various scholarships and awards viz., NCERT Award for Excellence in Vocational Education, All India Competition on Innovative Practices and Experiments in Education for Schools and Teacher Education Institutions, National ICT Award for School Teachers, NCERT Doctoral Fellowships, and National Talent Search Examination (NTSE). These activities have a catalysing role in improving the quality of school education. Foreword iv The Council played a pivotal role in expanding guidance and counselling services in the country by offering Diploma Course in Guidance and Counselling to train professionals for serving as counsellors in schools including KVs and JNVs. To address gender issues in education, the Council has developed customised teacher training packages and conducted training programmes, especially for the teachers working in Kasturba Gandhi Balika Vidyalayas (KGBVs), to address gender issues in education. Inclusive system of education for all assumes greater significance for systemic reforms especially in the context of the socially disadvantaged and persons with disability.

The Council conducts research, development, training and extension programmes to achieve the aim and also support governmental and non-governmental agencies in developing inclusive curriculum and pedagogy. The Council has developed material on curriculum adaptation from the perspective of inclusive education, which was shared with all the States. The NCERT implements some of the major projects funded by MHRD like 'National Population Education Project (NPEP)', 'Adolescence Education Programme (AEP)', 'Monitoring the Implementation of Environmental Education' by all States/UTs in compliance with Hon'ble Supreme Court's Order. Through these programmes, we reach across the country involving learners and teachers in a participatory manner. Regional Institutes of Education (RIEs) provide innovative pre-service teacher education courses and in-service teacher education programmes in the respective regions that becomes a model for teacher education programmes for the country. Considering the necessity of giving special attention to the North-Eastern Region, NERIE, Umiam, Meghalaya has conducted focused programmes on capacity building in the region.

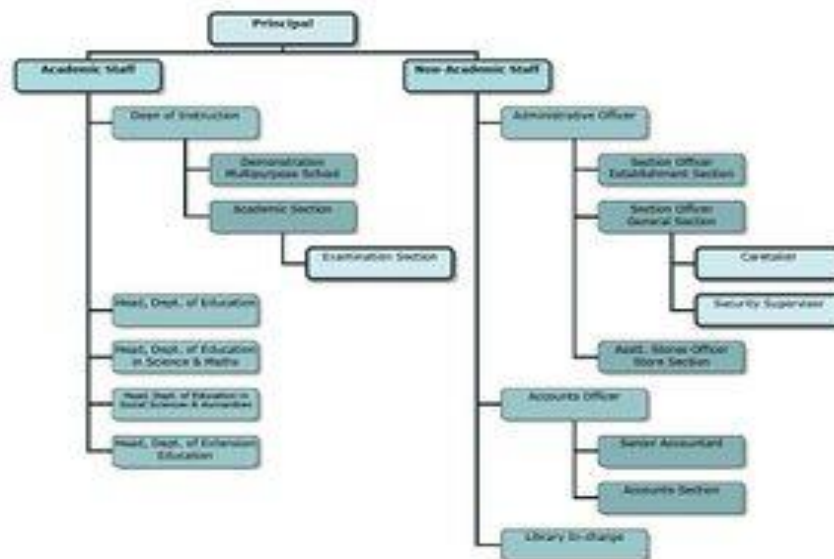
Regional Institute of Education, Bhopal



Regional Institute of Education (RIE), Bhopal It is a constituent unit of NCERT, New Delhi. The Regional Institute of Education (RIE), Bhopal looks after teacher education and other educational requirements of the States of Chhattisgarh, Goa, Gujarat, Madhya Pradesh, Maharashtra and UTs of Dadra and Nagar Haveli and Daman and Diu.

The Institute is located at Shyamla Hills and is 7 Kms away from both Bhopal and Habibganj railway station and it is about 20 Kms from Raja Bhoj Airport, Bhopal.

Organizational structure:



Major roles and functions:

To act as resource centre for conducting research, training and development of school education and teacher education.

To prepare quality teachers and teacher educators at all levels of school education. This is done

through various pre-service courses i.e. B.Sc. B.Ed., B.Ed. M.Ed. and Post Graduate Diploma in Guidance and Counselling, and in-service teacher training programmes conducted throughout the year.

To undertake pilot studies and research projects on all aspects of school education.

To conduct in-service training programmes for teachers, teacher educators, supervisors and administrators concerned with school education and according to the needs of the States/Union Territories of the region.

To provide necessary help to the state agencies concerned with school education.

To act as support system for institutions like SCERTs/ DIETs/ CTEs/ IASEsS/ Block Education Centres in the western region

To produce instructional material for school education.

To advise state departments of education on policies and programmes related to various aspects of school education.

To act as monitoring and co-ordination agency for effective implementation of centrally sponsored scheme in the field of school education. For example at present, RIE Bhopal is monitoring institute of SSA for the State of Chhattisgarh.

To provide consultancy services and extension programmes of national and international level.

RIE Library, Bhopal

Five Laws of Library Science

Books Are for Use

Every Book Its Reader

Every Reader His Books

Save The Time of the Reader

Library is a Growing Organism

-S.R. Ranganathan

RIE Library Bhopal

The Institute Library is regarded as one of the best libraries in Bhopal especially in view of the size and nature of collections acquired by it over the years and the nature of services extended to a large number of clientele. The library started its functioning since the session 1964-65 when the college was established

It assumes a significant place in the teaching learning programmes of the Institute Preliminary it caters to the needs of the staff and students of the Institute, research students & participants of the In-service programmes such as Workshops, Refresher Courses and Seminars etc. It is rapidly emerging as Resources and Consultancy on Education of the Western region of the country.

The library block is situated at the north-west part of the main building of the Institute with its back faced towards the panoramic view of the upper lake. It has a floor area of 10,000 sq.ft, spread over 4 halls having sizes 60'X40', 80'x40', 80'x40' and 40'x30'. It has adopted open access system for access to books and other reading materials since its inception in 1964-65.

Through the main entrance of the library, the Library users enter the first hall(Hall No.1) where the important sections Reference, Text Books, Current numbers of periodicals etc. are housed. From the first hall the users can have their access to hall No.2, 3 and 4, The hall no.2 beneath the hall no.1, is relatively smaller in area where the Bound Volume of journals, books of lesser demand old books etc. are kept.

The halls No.3 and 4 are in the extended block. In hall no.3 are provided the Newspapers Reading corner, Light Magazine Corner, New arrivals display area, Circulation counter, stack area for books in English bearing class numbers from 000 to 509, NCERT, Govt. of India, UNESCO, HMSO, UGC Publications corner, Reading area and the Photocopy corner are

located. In this hall are stacked books in English Version, on Psychology, Philosophy, Religion, Social Sciences Education Languages and General Science.

The Hall number 4 is in the ground floor. Books classified under numbers 510 to 990 in English Version and all books in Hindi, Marathi, Gujrati and Urdu Versions including language and Literature classified under numbers 000 to 990 are shelved in this hall. Books on all branches of Science, Technology, Commerce, Fine Arts, History etc. are kept in this hall. The reading area has been provided near the stack area. The old issues of newspapers of the current month are available in this section for consultation.

Since reading area has already been provided in every hall, the users are urged not to carry the books of one hall to another hall for the purpose of reading/consultation. The internal planning of various sections has been depicted in the chart shows in the inner part of front cover page.

Library Timings

The Library remains open from 9.00 AM to 8.30 PM on all days including Sundays, Saturdays and Govt. of India Holidays.

The timings of circulation are from 10.00 AM to 1.00 PM and from 2.30 PM to 5.00 PM.

District Institute of Educational Training (DIET): An Introduction

While all the inputs listed in the preceding paragraph are crucial, the last two are especially so. About teachers, the Education Commission (1964-66) had observed, “of all the factors that influence the quality of education... the quality, competence and character of teachers are undoubtedly the most significant”. But these in turn depend substantially on the quality of training and other support provided to them. The importance of the last input mentioned in the preceding para viz. academic and resource support-can therefore hardly be over-emphasized. Until the adoption of the NPE, this support in the area of elementary education was being provided largely at the national and State levels only by institutions like NCERT, NIEPA and SCERTs. Likewise in the area of adult education, this support was being provided by the Central Directorate of Adult Education at the national level, and by State Resource Centres (SRCs) at the State level. Below the State level, there were elementary teacher education institutions but their activities were confined mostly to pre-service teacher education. The physical, human and academic resources of most of the institutions were inadequate even for this limited role. They also tended to adopt teaching practices, which were not in consonance with the ones they prescribed to prospective teachers. There were certain larger problems as well e.g. courses of study being out-dated.

By the time of adoption of the NPE, elementary and adult education systems were already too vast to be adequately supported by national and State level agencies alone. The NPE implied their further expansion as also considerable qualitative improvement. Provision of support to them in a decentralized manner had therefore become imperative. The NPE and POA accordingly envisaged addition of a third-district level-tier to the support system in the shape of District institutes of Education and Training (DIETs). With this, expectation would be of wider quantitative coverage as well as qualitatively better support as these Institutes would be closer to the field, and therefore more alive to its problems and needs.

Pursuant to the provisions of NPE on teacher education, a Centrally sponsored Scheme of Restructuring and Reorganization of Teacher Education was approved in October 1987. One of the five components of the Scheme was establishment of DIETs. Draft guidelines for

implementing the DIET component were circulated to States in October 1987 and have, together with certain subsequent circulars, formed the basis for its implementation so far. Till October 1989, Central assistance had been sanctioned under the Scheme for setting up a total of 216 DIETs in the country.

The present document purports to consolidate, amplify and revise the existing guidelines in regard to DIETs. With this, all earlier guidelines on the subject would stand superseded.

DIETs: Mission and Role

With the background given in the preceding sections, a DIETs Mission could be briefly stated in the following terms: -

To provide academic and resource support at the grass-roots level for the success of the various strategies and programmes being undertaken in the areas of elementary and adult education.

Introduction

For conduct of the training one of the ICT Laboratories of the Institution was selected where some of the PCs were updated with Linux operating system to act as Servers. All these servers were also upgraded with 2 GB RAM to support KOHA operation. All the PCs were connected with LAN and Internet connection as the software operates on browser and can work on-line. Each PC was devoted for two participants for hands-on practice.

On some selected areas of library activities theoretical lectures were also conducted to make the back ground of the participants clear. The invited resource persons delivered their lectures before proceeding to hands-on practice on particular modules they were invited to train the participants. After thorough deliberations on the modules with practical demonstrations with the help of LCD projector they instructed the participants to do practice on the respective modules on the computers they were provided with in the laboratory. At the time of difficulties the resource persons individually instructed and sorted out the problems faces by each participant. At the end of each session the participants were given chance to ask questions and take clarifications from the resource persons.

The areas on which practical training was given are:

- **Introduction** – Introduction of the software and its basic features, facilities, advantages, disadvantages, etc.
- **Administration** – Administration module of the software covers the Global System Preferences like MARC format, templates, etc.
- **Tools** – This module of the software covers how to take reports etc. for different purposes.
- **Patrons** – The member details of the library are recoded here and their transaction details are also stored in database.
- **Circulation** – Circulation means transaction of books and other materials from the library to the users.
- **Cataloging** – In cataloguing the database of books is made. The book details are visible in catalogue form at OPAC.
- **Acquisitions** – covers the procurement of books, CDs, DVDs, journals, etc. in library.

At the end of training programme the software and the practice manual both were provided to the participants in softcopy in DVD. Each module has been given ahead.

Chapter 1

Introduction

1.1 Koha Basics

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

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

1.2 Koha Recommendations

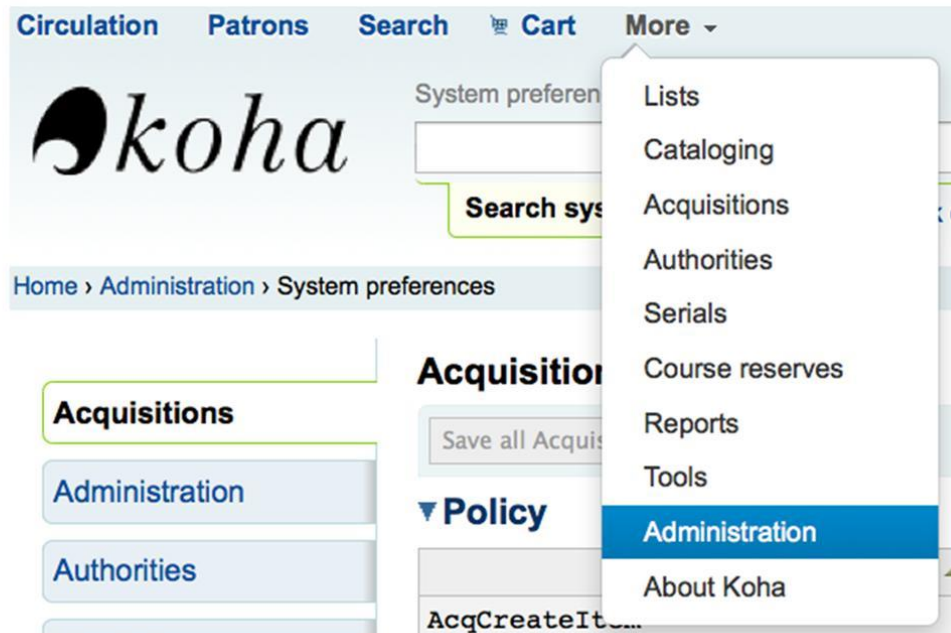
Full system recommendations can be found on the official Koha wiki along with the developer documentation: <http://wiki.koha-community.org>

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

1.3 Using this Manual

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

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



The instruction tells you where to find the necessary menu option at the top of the Koha staff client. Links will be found throughout the manual to other sections in the manual and images will depict what should be seen on the screen.

The manual can be searched using the custom Google search on the [Koha Documentation](#) page.

1.4 Contributing to the Manual

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

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

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

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

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

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:

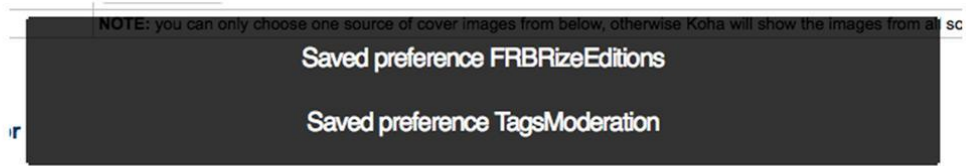
[Search system preferences](#) [Check out](#) [Search the catalog](#)

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:



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.

rather, services are based on the harvested data via OAI-PMH. Koha at present can only act as a Data Provider. It can not harvest from other repositories. The biggest stumbling block to having Koha harvest from other repositories is that MARC is the only metadata format that Koha indexes natively. Visit <http://www.oaforum.org/tutorial/english/page3.htm> for diagrams of how OAI-PMH works.

Learn more about OAI-PMH at: <http://www.openarchives.org/pmh/>

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

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

2.1.17.2.3 OAI-PMH:AutoUpdateSets Default: Disable

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

Values:

- Disable
- Enable

2.1.17.2.4 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.

2.1.17.2.5 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.

2.1.17.3 Reporting

2.1.17.3.1 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.

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

 7-DAY BOOK Books	Fairfield	DVD
 7-DAY BOOK Books	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

- 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:

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: *Required*

Description: *Required*

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:

SIP media type:

Summary:

Enter a summary that will overwrite the default one in search results lists. Example, for a website itemtype :
open site will show the link just below the title

- 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-
Typelimages to 'Show'

This is a book

Check In

Enter item barcode:

Options

Forgive overdue charges


Book drop mode

Checked-in items

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


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

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.

- 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

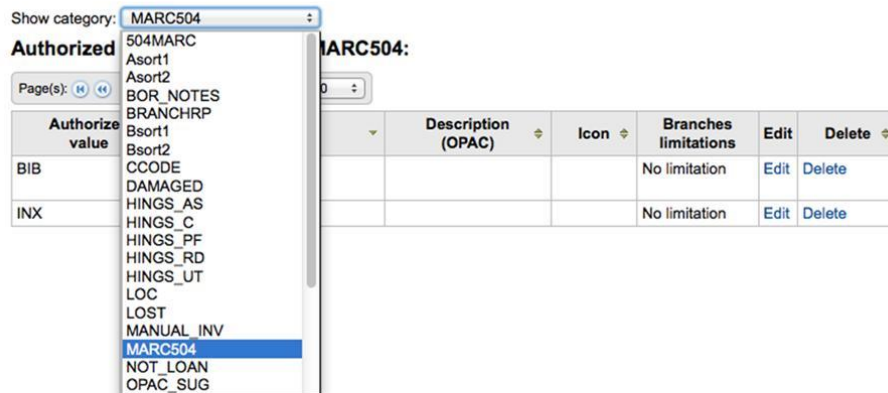
*

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



Authorized Values interface showing a dropdown menu for 'Show category:' with 'MARC504' selected. The dropdown list includes: 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, and OPAC_SUG.

	Description (OPAC)	Icon	Branches limitations	Edit	Delete
			No limitation	Edit	Delete
			No limitation	Edit	Delete

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 ...'

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"/>	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	
<input type="text" value="Board"/>	<input type="text"/>	<input type="button" value="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_BC	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 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

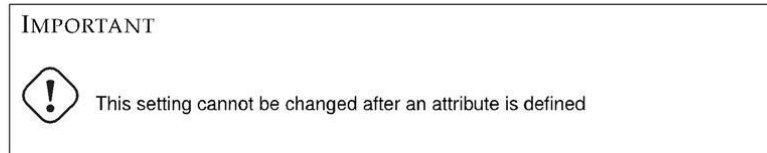
 This field is limited to 10 characters (numbers and letters only)

IMPORTANT

 This setting cannot be changed after an attribute is defined

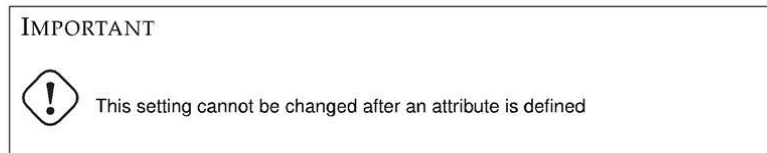
- In the 'Description' field, enter a longer (plain text) explanation of what this field will contain
- Check the box next to 'Repeatable' to let a patron record have multiple values of this attribute.

-



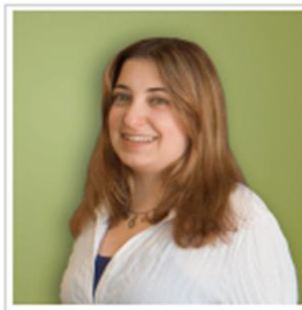
- If 'Unique identifier' is checked, the attribute will be a unique identifier which means, if a value is given to a patron record, the same value cannot be given to a different record.

-



- 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"/>	Clear
SHOW_BCODE (Show Barcode in OPAC)	<input type="text"/>	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"/>	Clear
SHOW_BCODE (Show Barcode in OPAC)	<input type="text"/>	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): 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)

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 entries [« Previous](#) [Next »](#) Search:

Name ▲	Patrons in list ◆			
My Patrons	0	+ Add patrons 👤	✎ Edit	🗑 Delete

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

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

New patron list

Create a new patron list

Name:

Owner: nce

[Save](#) [Cancel](#)

Enter a list name and save the list.

My Patrons

Add patrons

Patron search:

No entries to show Show entries Search:

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

No entries to show

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

My Patrons

Add patrons

Patron search:

Patrons

- Engard, Beau (9876543456) 123 My Street Philadelphia, PA 19101
- Engard, Brian (9876543453) 123 My Street Philadelphia 19101
- Beau Engard 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](#))

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 10 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

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, street-type, 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, branch-code, categorycode, dateenrolled, dateexpiry, gonenoaddress, lost, debarred, contactname, contactfirst-name, contacttitle, guarantorid, borrowernotes, relationship, ethnicity, ethnoses, sex, password, flags,

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	RESERVE_SLIP	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.

You will also want to review the [Notices & Slips Field Guide](#) for more information on formatting these notices.

3.1.4.1 Adding Notices & Slips

To add a new notice or slip

- Click 'New Notice'

Add notice

Library:

Koha module:


Code: *Required*

Name: *Required*

- Choose which library this notice or slip is for

-

IMPORTANT




Not all notices can be branch specific for more information review the **Notices & Slips Field Guide** in this manual.

- Choose the module this notice is related to
- The Code is limited to 20 characters

-

IMPORTANT




When working with the overdue notices you want each notice at each branch to have a unique code. Think about using the branch code in front of the notice code for each branch.

- Use the name field to expand on your Code

-

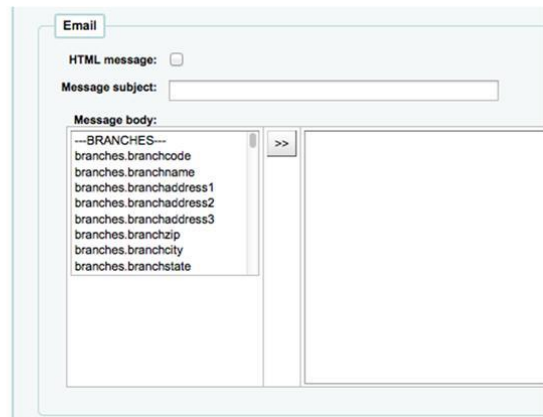
TIP



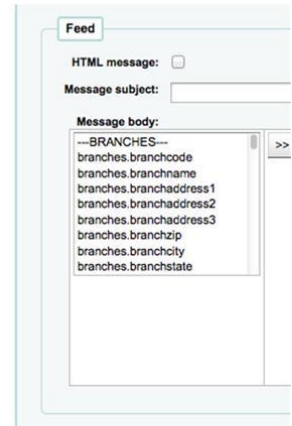
With overdue notices, be sure to put your branch name in the description as well so that it will be visible when setting up your **triggers**.

- Next you can customize the notice for every possible delivery method

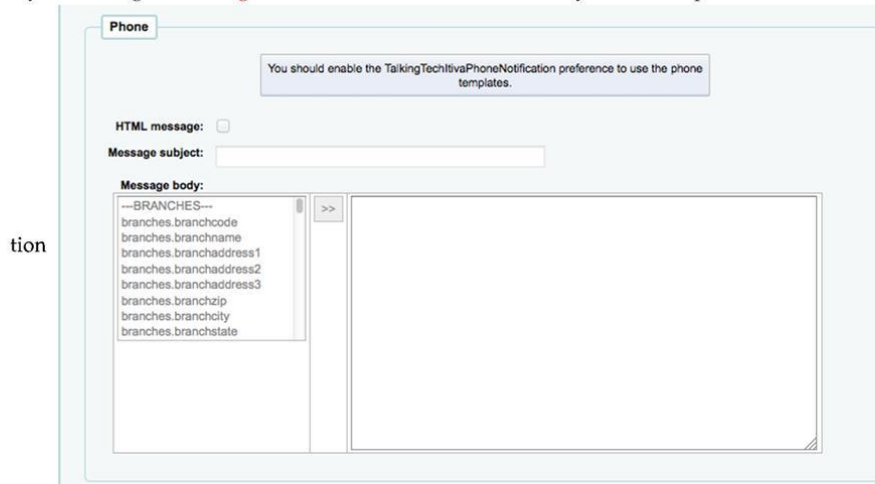
- Every notice should have an Email template set for it



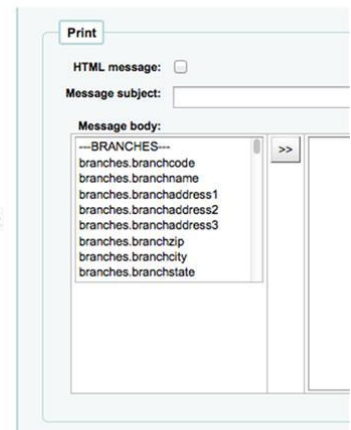
- Next, the Feed template is not yet enabled and will do nothing at this time.



- If you're using the **TalkingTechItivaPhoneNotification** service you can set up a Phone notification



- If you plan on printing this notice you can set the Print template next



- If you have enabled SMS notices with the **SMSSendDriver** preference you can set the text for

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)

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

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
<input checked="" type="checkbox"/> The lords circle /, by Picout, Jodi.		loc			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 Picout, Jodi.		loc				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 Picout, Jodi.		loc				Nicole's Library	Nicole's Library		2011-02-18	2		PS3566.I372 H68 2010	100005	0000-00-00	2013-06-13	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	<input type="text"/>	<input type="checkbox"/>
2 - Source of classification or shelving scheme	<input type="text"/>	<input type="checkbox"/>
3 - Materials specified (bound volume or other part)	<input type="text"/>	<input type="checkbox"/>
4 - Damaged status	<input type="text"/>	<input type="checkbox"/>
5 - Use restrictions	<input type="text"/>	<input type="checkbox"/>
7 - Not for loan	<input type="text"/>	<input type="checkbox"/>
8 - Collection code	<input type="text"/>	<input type="checkbox"/>
a - Permanent location	<input type="text"/>	<input type="checkbox"/>
b - Current location	<input type="text"/>	<input type="checkbox"/>
c - Shelving location	<input type="text"/>	<input type="checkbox"/>
d - Date acquired	<input type="text"/>	<input type="checkbox"/> ...
e - Source of acquisition	<input type="text"/>	<input type="checkbox"/>
f - Coded location qualifier	<input type="text"/>	<input type="checkbox"/>
g - Cost, normal purchase price	<input type="text"/>	<input type="checkbox"/>
h - Serial Enumeration / chronology	<input type="text"/>	<input type="checkbox"/>
j - Shelving control number	<input type="text"/>	<input type="checkbox"/>
o - Full call number	<input type="text"/>	<input type="checkbox"/>
t - Copy number	<input type="text"/>	<input type="checkbox"/>
u - Uniform Resource Identifier	<input type="text"/>	<input type="checkbox"/>
v - Cost, replacement price	<input type="text"/>	<input type="checkbox"/>
w - Price effective from	<input type="text"/>	<input type="checkbox"/>
x - Non-public note	<input type="text"/>	<input type="checkbox"/>
y - Koha item type	<input type="text" value="Required"/>	<input type="checkbox"/>
z - Public note	<input type="text"/>	<input type="checkbox"/>

Save Cancel

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

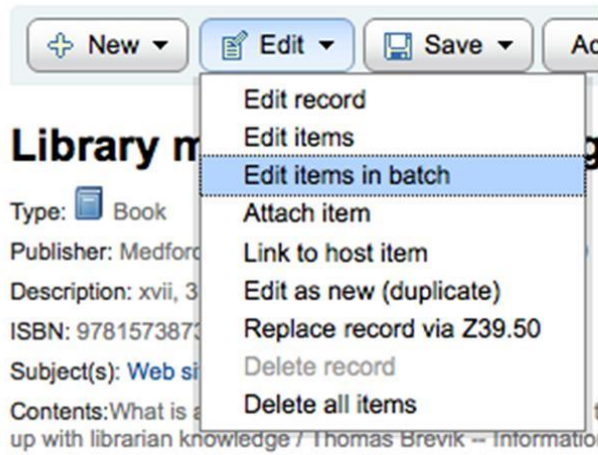
Title	Withdrawn status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Total Checkouts	Total Renewals	Full call number	Barcode	Date last seen	Date last checked out	Cost, replacement price	Price effective from	Koha item type
The tenth circle / by Popout, 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 Popout, 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 Popout, Jodi.		lcc			Fiction	Nicole's Library	Nicole's Library		2011-02-18	2		PS3566 I372 H68 2010	100005	0000-00-00	2013-08-13	26.00	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

Refresh 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 : Library & Information Science		lc			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 : Library & Information Science	Withdrawn	lc			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.

Delete selected items

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

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

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 entries **1** 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

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)

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.

1 batch(es) to export.

Select a template to be applied:

Select a layout to be applied:

Enter starting label number:

You will then be presented with three download options: PDF, Excel, and CSV.




After saving your file, simply print to the blank labels you have in your library.

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:

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.

Chapter 4

Patrons

Before importing and/or adding patrons be sure to set up your [patron categories](#).

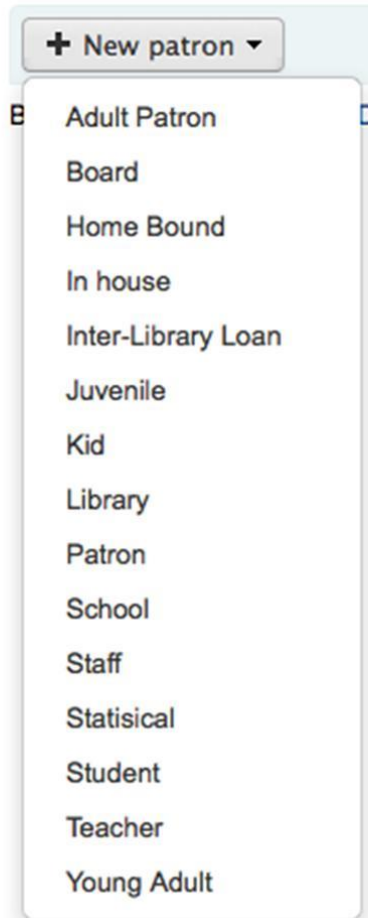
4.1 Add a new patron

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



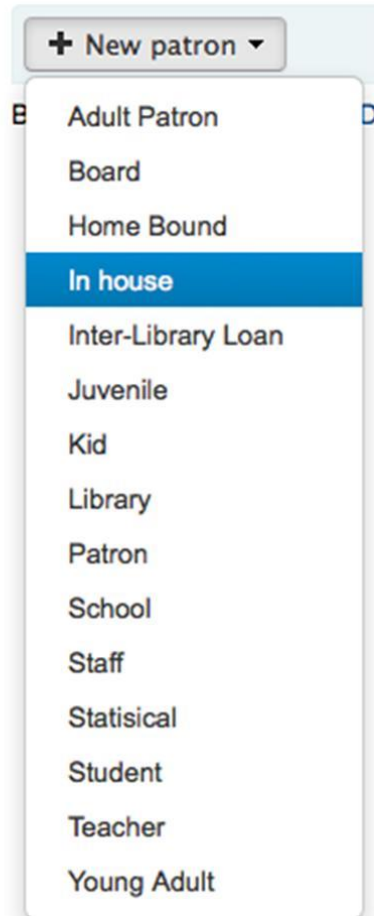
Remember to assign your staff secure usernames and passwords since these will be used to log into the staff client.

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



Nicole Engard (9876543457)

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


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

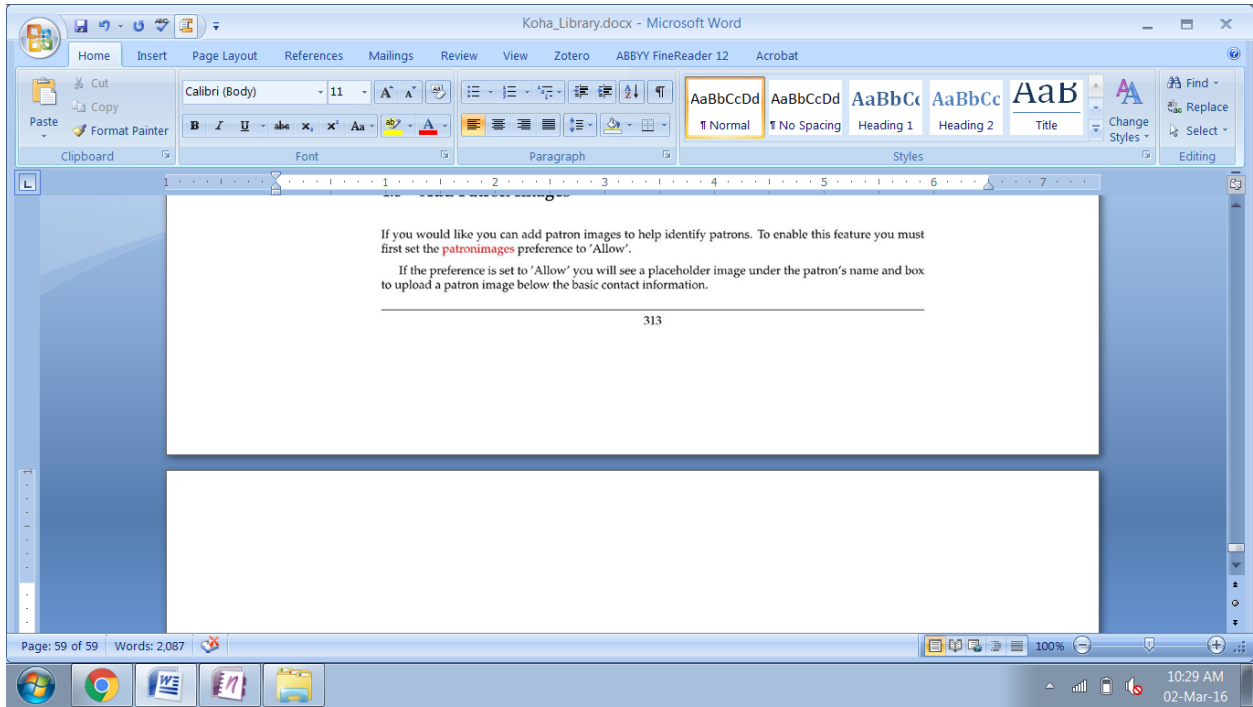
Brian Engard (9876543453)

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'.

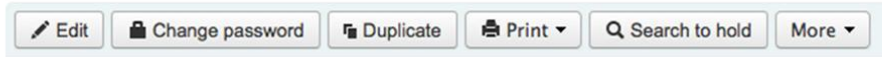
If the preference is set to 'Allow' you will see a placeholder image under the patron's name and box to upload a patron image below the basic contact information.



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](#)

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


Save Cancel

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

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.

Notice	Type	Status	Time
Purchase suggestion declined Dear Nicole Engard, You have suggested that the library acquire Book by Book. The library has reviewed your request today, and has decided not to accept the suggestion at this time. The reason given is: If you have any questions, please email us at nengard@bywatersolutions.com . Thank you, Nicole's Library	email	pending	2011-04-01 12:44:21

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:

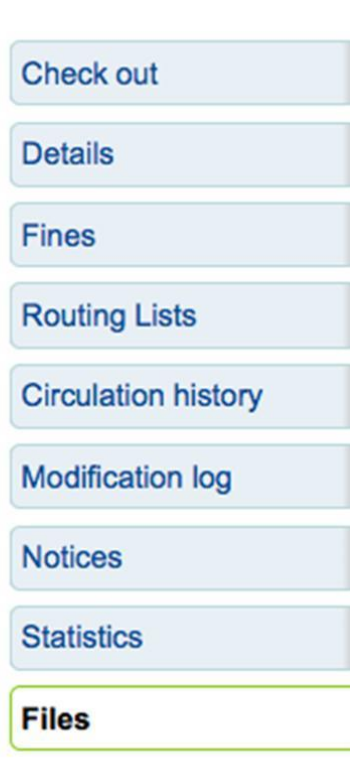
- Check out
- Details
- Fines
- Circulation history
- Modification log
- Notices
- Statistics

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:

4.9.10 Purchase Suggestions

If the patron has made any purchase suggestions you will see a purchase suggestions tab on the patron

Nicole (NCE) Engard
(9876543457)



123 My Street
Philadelphia, PA 19101
555.111.2345
nengard@gmail.com
Category: Staff (S)
Home library: Nicole's Library

Purchase suggestions

Summary	Note	Managed by	Status
Learning from Libraries that Use WordPress Kyle M. Jones and Polly-Alida Farrington , - 2012, - ALA		Engard , Nicole	Ordered by the library

record.

-
-
-
-
-
-
-
-
-

From here you can see all suggestions made by the patron and their status, you can also create a purchase suggestion on the patron's behalf by clicking the 'New purchase suggestion' button at the top.

Learn more about [Purchase suggestions](#) in the [Acquisitions](#) chapter of this manual.

4.10 Patron Search

Clicking on the link to the Patron module will bring you to a search/browse screen for patrons. From here you can search for a patron by any part of their name or their card number.

Clicking the small plus sign [+] to the right of the search box will open up an advanced patron search with more filters including the ability to limit to a specific category and/or library.

Depending on what you have chosen for the 'Search fields' you can search for patrons in various different ways.

- Standard:
 - Enter any part of their name, username, email address or barcode

- Email:
 - Enter any part of their email address and choose 'Contains' instead of 'Starts with'
- Borrower number:
 - Enter the Koha borrower number
- Phone number:
 - Enter the phone number exactly as it is in the system or by using spaces between each batch of numbers.
 - Example: To find (212) 555-1212 you can search for it exactly as it was entered or by searching for 212 555 1212
- Street address:
 - Enter any part of the patron's address (includes all address fields) and choose 'Contains' instead of 'Starts with' to find the string anywhere in the address
- Date of birth
 - 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:

Search type:

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

Search fields:

Search type:

Order by:

Library:

Category:

[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:

Search type:

Order by:

Library:

Category:

[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

Enter patron card number or partial name:

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

- 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

Enter patron card number or partial name:

Check out Check in Search the catalog

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):

Remember for session:

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 / , 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 type="text"/>	
									<input type="checkbox"/> Forgive fines on return: <input type="checkbox"/>	

Override renewal limit: Renew or Return checked items

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 <input type="checkbox"/> On hold	<input type="checkbox"/> 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 : 100a

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 I, by Schwartz, Randal L.	QA76.73.P22 S37 2008	Item 3160778947		1	No ▾	Suspended
03/02/2012	About a boy I, 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 (The Dresden Files, Book 5), by Butcher, Jim.		Item 60479696 in transit from Centerville since 06/25/2012			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

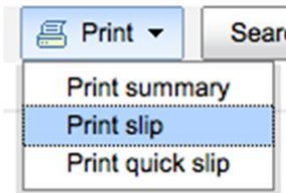
Hold date	Title	Call number	Barcode	Expiration	Priority	Delete?
03/16/2011	SQL / , by McGrath, Mike.				3	No v
10/02/2011	10 classic mystery and suspense plays of the modern theatre,, by Richards, Stanley,				1	No v
03/29/2012	Blood Rites (The Dresden Files, Book 6), by Butcher, Jim.		Item 67022150 waiting at Nicole's Library			No 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

• **The barcode was not found 2345678765343234**
[Fast cataloging](#)

- Learn more about [fast cataloging](#) later in this manual.
- Item being checked out is marked as 'lost'
 - Depending on the value in your `IssueLostItem` preference, you may just see a warning

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

or a confirmation box

Please confirm checkout

- This item has been lost with a status of "Lost". Check out anyway?

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

- Item being checked out is not recommended for a patron of this age

Please confirm checkout

- Age restriction PG 13. Check out anyway?
 - The patron has a debt of 32.45

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

- Item being checked out meets the `decreaseLoanHighHolds` system preference criteria

Please confirm checkout

- High demand item. Loan period shortened to 2 days (due 10/13/2012 00:00). Check out anyway?

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

5.2 Renewing

Checked out items can be renewed (checked out for another period of time) based on your [circulation rules](#) and [renewal preferences](#).

If [you allow it](#), patrons can renew their own items via the OPAC, but sometimes you'll need to help them by renewing their items via the staff client.

To renew items checked out to a patron, you can do one of two things.

The first is to visit their details page or checkout page and review their checkout summary at the bottom.

3 Checkout(s) | Relatives' Checkouts | 7 Hold(s)

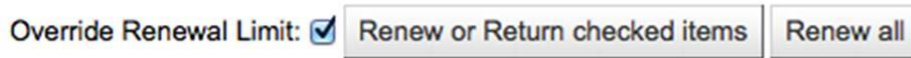
Due date	Title	Item Type	Checked out on	Checked out from	Call no	Charge	Price	Renew <small>select all none</small>	Check in <small>select all none</small>	
Previous checkouts										
09/22/2011	Handle with care . , by Picoult, Jodi, 100004	Books	07/14/2011	Nicole's Library	PS3566.I372 H36 2009	0.00	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: Renew or Return checked items Renew all

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

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

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.

If you have the [SpecifyReturnDate](#) preference set to 'Allow' you will be able to arbitrarily set the re-

turn date from below the check in box.

Check in

Enter item barcode:

Specify return date (MM/DD/YYYY) :

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	10101000000414

- Clicking the Print Slip and Confirm button will mark the item as waiting for pickup at the library and present the library with a receipt to print and place on the book with the patron's information

- Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

- If you're checking in an item that has a hold on it at another branch you will be prompted to confirm and transfer the item

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

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 * ⓘ

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 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 <input type="text"/>
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 <input type="text"/>
b - Sublocation or collection (holding branch)	Nicole's Library <input type="text"/>
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 <input type="text"/>

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

[your branch](#) or log in at that branch.

IMPORTANT



If you do not charge fines and/or don't have the [fines cron job](#) running you will see no data on this report.

5.10 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:

• Local Use Recorded

Repeat these steps for all items that have been used within the library to keep accurate statistics for item use.

The other way to record local use of items is to set your [RecordLocalUseOnReturn](#) preference to 'Record.' Then whenever you check an item in that is not checked out and not on hold a local use will be recorded.

Not checked out.
Local Use recorded

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](#)

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:

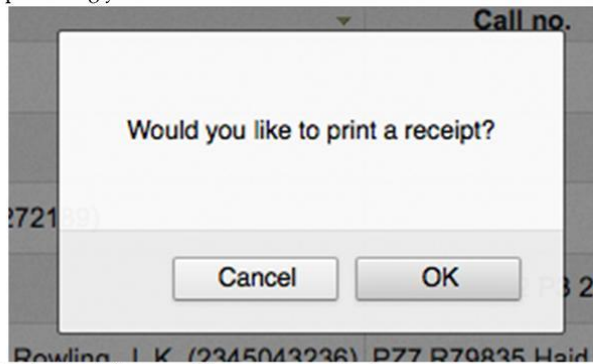
Scan a new item or enter its barcode:

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.




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'

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

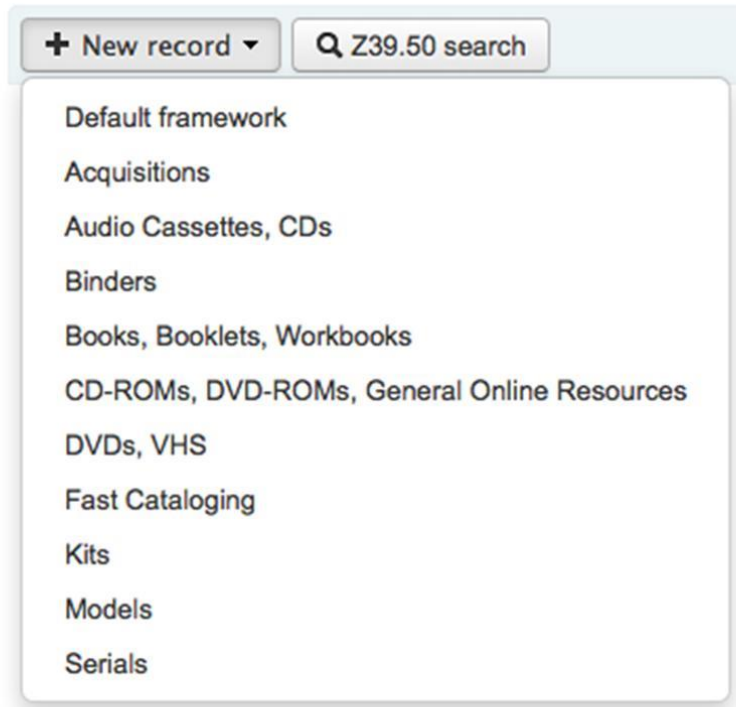
6.1 Bibliographic Records

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

- 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 :	Pavicek, 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.			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 Show tags

Change framework:

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

- If you would rather not see the MARC tag numbers you can change the value in your `hide_marc` system preference or each user can check the box next to 'Show tags' at the top of the editor.
- 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 Show tags

Change framework:

- 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 [input type="text"]

Main entry: contains [input type="text"]

Anywhere: contains [input type="text"]

Heading match: contains [input type="text"]

Sort by: Heading ascendant [dropdown]

Start search [button] Cancel [button] Clear field [button] Create new [button]

- 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 ? [input type="checkbox"] [input type="checkbox"] 0 - SUBJECT ADDED ENTRY--TOPICAL TERM [clone icon] [delete icon]

▲ a Topical term or geographic name as entry element [input type="text" value="Web sites"] [clone icon] [delete icon]

▲ x General subdivision [input type="text" value="Design"] [clone icon] [delete icon]

▲ x General subdivision [input type="text" value="Computer programs."] [clone icon] [delete icon]

- 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 [input type="text"]

▲ e Relator term [input type="text"]

▲ v Form subdivision [input type="text"] [clone icon] [delete icon]

▲ x General subdivision [input type="text"] [clone icon] [delete icon]

▲ y Chronological subdivision [input type="text"] [clone icon] [delete icon]

▲ z Geographic subdivision [input type="text"] [clone icon] [delete icon]

651 ? [input type="checkbox"] [input type="checkbox"] - SUBJECT--GEOGRAPHIC NAME +- [Clone this subfield button]

653 ? [input type="checkbox"] [input type="checkbox"] - SUBJECT--UNCONTROLLED +-

655 ? [input type="checkbox"] [input type="checkbox"] - 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

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 10 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

New vendor

Acquisitions

Manage orders

Vendor:

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 inc. [+ 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

[+ New](#) [Edit vendor](#) [Delete vendor](#)

Baker & Taylor

Baskets

Basket groups

Contracts

Invoices

Uncertain prices

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

Ordering information

Vendor is: Active
 List prices are: USD
 Invoice prices are: USD
 Discount: 0.0 %
 Tax rate: 0.0 %
 Delivery time: 5 days

Contact details

Contact name: John Smith
 Position: Sales
 Phone: (704) 998-3100
 Alternative phone:
 Fax:
 Email: sales@bt.com

To make changes to the vendor, simply click the 'Edit vendor' button.

If the vendor has no baskets attached to it then a 'Delete vendor' button will also be visible and the vendor can be deleted. Otherwise you will see a 'Receive shipment' button.

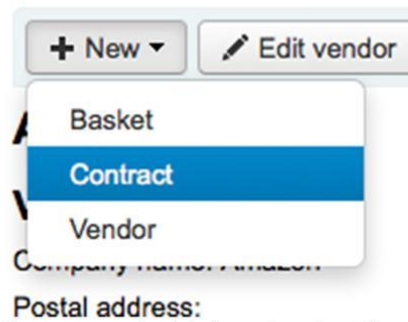


9.2.3 Vendor Contracts

You can define contracts (with a start and end date) and attach them to a vendor. This is used so that at the end of the year you can see how much you spent on a specific contract with a vendor. In some places, contracts are set up with a minimum and maximum yearly amount.

9.2.3.1 Add a Contract

At the top of a Vendor Information Page, you will see a 'New Contract' button.



The contract form will ask for some very basic information about the contract

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.