

# KOHA

## Tools

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# KOHA: Tools

## More > Tools

Koha > Tools - Mozilla Firefox

File Edit View History Bookmarks Tools Help

sanjayburde - Outlook Web App x Koha > Tools x Koha online catalog > Enter a ne... x koha history - Google Search x Koha means Gift, and it should r... x Koha (custom) - Wikipedia, the f... x

192.168.8.167:8080/cgi-bin/koha/tools/tools-home.pl

display i18n multi language options koha

Circulation Patrons Search Cart More

burde | National Science Library Help

 Enter search keywords:

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

Home > Tools

### Patrons and circulation

- Comments**  
Moderate patron comments.
- Import patrons**  
Import patron data
- Notices & slips**  
Define notices (print and email notification messages for overdue, etc.)
- Overdue notice/status triggers**  
Set notice/status triggers for overdue items
- Patron card creator**  
Create printable patron cards
- Batch patron deletion/anonymization**  
Batch delete patrons and delete patron circulation history
- Batch patron modification**  
Modify patrons in batch
- Tags**  
Moderate patron tags
- Upload patron images**  
Upload patron images in batch or one at a time

### Catalog

- Batch item deletion**  
Delete a batch of items
- Batch item modification**  
Modify items in a batch
- Export data**  
Export bibliographic, holdings, and authority records
- Inventory/stocktaking**  
Perform inventory (stocktaking) of your catalog
- Label creator**  
Create printable labels and barcodes from catalog data
- Quick spine label creator**  
Enter a barcode to generate a printable spine label. For use with dedicated label printers
- Stage MARC records for import**  
Stage MARC records into the reservoir.
- Staged MARC record management**  
Managed staged MARC records, including completing and reversing imports
- Upload local cover image**  
Utility to upload scanned cover images for display in OPAC

### Additional tools

- Calendar**  
Define days when the library is closed
- CSV profiles**  
Manage CSV export profiles
- Log viewer**  
Browse the system logs
- News**  
Write news for the OPAC and staff interfaces
- Task scheduler**  
Schedule tasks to run
- Edit quotes for QOTD feature**  
Quote editor for Quote-of-the-day feature in OPAC

# KOHA: Tools

- ▶ Patrons and Circulation
  - ▶ Catalog
  - ▶ Additional Tools
- 

# KOHA: Tools

## ▶ Patrons and Circulation

- ▶ Catalog
- ▶ Additional Tools

# KOHA: Tools

## Patrons and Circulation

- ▶ Comments
  - ▶ Import patrons
  - ▶ Notices & slips
  - ▶ Overdue notice/status triggers
  - ▶ Patron card creator
  - ▶ Batch patron deletion/anonymization
  - ▶ Batch patron modification
  - ▶ Tags
  - ▶ Upload patron images
- 

# KOHA: Tools

## Patrons and Circulation- Comments

- ▶ In Koha the bibliographic record contains the main information
  - *More > Tools > Patrons and Circulation > Comments*
- ▶ All comments added by patrons via the OPAC to bibliographic records require moderation by the librarians

### Tools

- [Comments pending approval:](#) **1**

### Comments

<a href="#">Approved comments</a>	<a href="#">Comments awaiting moderation</a>		
Commenter	On Title	Comment	
<a href="#">Engard, Nicole</a>	<a href="#">Death Masks: A Novel of the Dresden Files (The Dresden Files, Book 5).</a>	These books just get better and better!	<a href="#">Approve</a>   <a href="#">Delete</a>

# KOHA: Tools

## Patrons and Circulation- Comments

- ▶ To post comments, login to OPAC
- ▶ Search library catalogue

The screenshot shows the KOHA online catalog interface. The browser address bar displays the URL: 192.168.8.167/cgi-bin/koha/opac-detail.pl?biblionumber=1. The page header includes the KOHA logo, a search bar with the text 'Library catalog', and a 'Go' button. Below the search bar, there are links for 'Advanced search', 'Authority search', 'Recent comments', and 'Tag cloud'. The main content area shows the title 'Database concepts' and its details: Type: Book, Tags from this library: database (1), and an average rating of 0.0 (0 votes). The 'Holdings (5)' tab is selected, showing a table with columns: Item type, Location, Call number, Status, and Date due. The table contains two rows of data, both showing 'Books' checked out from 'National Science Library' on '19/12/2013'. On the right side, there is a sidebar with options: Place hold, Print, Save to your lists, Add to your cart, and More searches. Below these options is a 'Save record:' section with a dropdown menu set to 'BIBTEX' and a 'Go' button.

Database concepts

Type: Book

Tags from this library:  
[database](#) (1)

[Add](#)

average rating: 0.0 (0 votes)

**Holdings ( 5 )**   **Title notes**   **Comments ( 2 )**

Item type	Location	Call number	Status	Date due
Books	National Science Library		Checked out	19/12/2013
Books	National Science Library		Checked out	19/12/2013

Place hold  
Print  
Save to your lists  
Add to your cart  
More searches

Save record:  
BIBTEX   Go

# KOHA: Tools

## Patrons and Circulation- Comments

- ▶ To moderate, login as Librarian
- ▶ You can also review and unapprove comments approved in the past

### Comments

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

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

- ▶ Recent Comments link in OPAC-  
OpacShowRecentComments

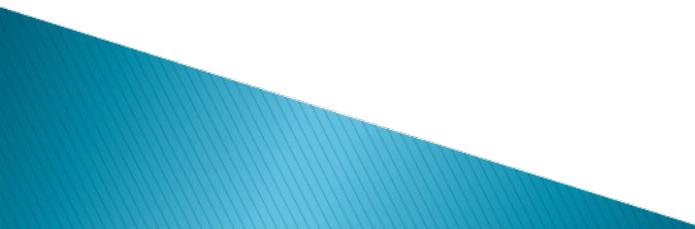
# KOHA: Tools

## Patrons and Circulation- Patron Import

- ▶ Add patrons in bulk
  - *More > Tools > Patrons and Circulation > Import Patrons*
- ▶ Creating Patron File
  - Download sample blank CSV file as a template for your patron records

# KOHA: Tools

## Patrons and Circulation- Patron Import

- ▶ The 'password' in plain text- Koha encrypts to a md5 hash
  - ▶ Date formats should match system preference (I18N/L10N)
  - ▶ Mandatory fields- 'branchcode' & 'categorycode' should be valid
- 

# KOHA: Tools

## Patrons and Circulation- Patron Import

- ▶ Select CSV file
- ▶ Match on 'Cardnumber' to prevent duplicate card numbers to the system

The screenshot shows a web interface for importing patrons. It is divided into two main sections. The top section is titled "Import into the borrowers table" and contains a label "Select the file to import:" followed by a text input field and a "Browse..." button. The bottom section is titled "Field to use for record matching" and contains a dropdown menu with "Cardnumber" selected.

- ▶ Select default values to apply to all patrons
  - For same branch, use the field branch code to apply to all patrons

# KOHA: Tools

## Patrons and Circulation- Patron Import

- ▶ Select to ignore/overwrite existing records

If matching record is already in the borrowers table:

- Ignore this one, keep the existing one
- Overwrite the existing one with this

- ▶ New patron can login to OPAC only

# KOHA: Tools

## Patrons and Circulation- Notices & Slips

- ▶ Customize all notices and circulation receipts (or slips)
  - *More > Tools > Patrons and Circulation > Notices & Slips*

The screenshot shows the Koha web interface in a Mozilla Firefox browser window. The address bar shows the URL `192.168.8.167:8080/cgi-bin/koha/tools/letter.pl`. The page title is "Koha > Tools > Notices - Mozilla Firefox". The navigation menu includes "Circulation", "Patrons", "Search", "Cart", and "More". The user is logged in as "kohaadmin" and the library is set to "NO LIBRARY SET".

The main content area is titled "Notices and Slips" and includes a search bar for existing notices. Below the search bar are links for "Search notices", "Check out", and "Search the catalog". A breadcrumb trail shows "Home > Tools > Notices & Slips".

On the left side, there is a sidebar menu with the following items:

- Tools home
- Patrons and circulation
  - Comments
  - Import patrons
  - Notices & slips**
  - Overdue notice/status triggers
  - Patron card creator
  - Batch patron deletion/anonymization
  - Batch patron modification
  - Tag moderation
  - Upload patron images
- Catalog
  - Batch item deletion

The main content area features a "Select a library" dropdown menu set to "All libraries" and a "New Notice" button. Below this is a table of notice configurations:

Library	Module	Code	Name	Copy notice		
(All libraries)	circulation	CHECKIN	Item Check-in (Digest)	Copy to Centerville	Copy	Edit
(All libraries)	circulation	CHECKOUT	Item Check-out (Digest)	Copy to Centerville	Copy	Edit
(All libraries)	circulation	DUE	Item Due Reminder	Copy to Centerville	Copy	Edit
(All libraries)	circulation	DUEDGST	Item Due Reminder (Digest)	Copy to Centerville	Copy	Edit
(All libraries)	circulation	ISSUEQSLIP	Issue Quick Slip	Copy to Centerville	Copy	Edit Delete

At the bottom of the page, there is a "type" dropdown menu and a status bar with "Highlight All" and "Match Case" options.

# KOHA: Tools

## Patrons and Circulation- Notices & Slips

### ► New notice

**Add notice**

**Library:** All libraries

**Koha module:** Catalog

**Code:**

**Name:**

**HTML Message:**

**Message Subject:**

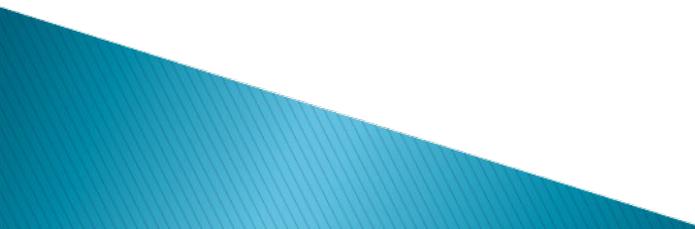
**Message Body:**

<pre>---BRANCHES--- branches.branchcode branches.branchname branches.branchaddress1 branches.branchaddress2 branches.branchaddress3 branches.branchzip branches.branchcity branches.branchstate</pre>	>>	<input type="text"/>
---	----	----------------------

[Cancel](#)

# KOHA: Tools

## Patrons and Circulation- Notices & Slips

- ▶ The Code is limited to 20 characters
  - ▶ 'HTML Message' / plain text
  - ▶ Modify existing notices
- 

# KOHA: Tools

Patrons and Circulation- Patron card creator

- ▶ Templates
- ▶ Profiles
- ▶ Layouts
- ▶ Batches
- ▶ Mange Images

**EXPORT AS PDF**

# KOHA: Tools

## Patrons and Circulation- Patron card creator- Templates

### Edit patron card template

**Template ID:** 23

**Template code:**

**Template description:**

**Units:**

**Page height:**  in

**Page width:**  in

**Card width:**  in

**Card height:**  in

**Top page margin:**  in

**Left page margin:**  in

**Number of columns:**

**Number of rows:**

**Gap between columns:**  in

**Gap between rows:**  in

**Profile:**

# KOHA: Tools

## Patrons and Circulation- Patron card creator- Profiles

- ▶ Alignment of data
- ▶ Profile is not mandatory

### Edit printer profile

**Profile settings**  
Printer name:   
Paper bin:   
Template name: Profile unassigned  
Units:

**Offset:**  
Horizontal:  pt  
Vertical:  pt

**Creep:**  
Horizontal:  pt  
Vertical:  pt

# KOHA: Tools

## Patrons and Circulation- Patron card creator- Layouts

### Edit Patron card text layout

#### General settings

Layout name:

Units:

Page side:  Front  Back

Guide box:  On  Off

#### Text fields

**Field 1**

Text

Font:

Font size:  pt

Text alignment:

Lower left X coordinate:  pt

Lower left Y coordinate:  pt

**Field 2**

**Field 3**

### Edit Patron card graphic layout

#### Barcode

Print card number as barcode:

Lower left X coordinate:

Lower left Y coordinate:

Barcode type:

Print card number as text under barcode:

#### Images

**Image 1**

Image source:

Display height:  pt

Lower left X coordinate:  pt

Lower left Y coordinate:  pt

**Image 2**

Image source:

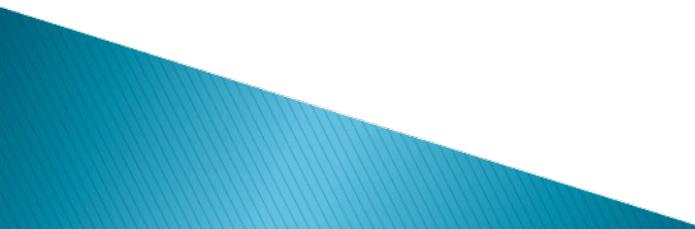
# KOHA: Tools

## Patrons and Circulation- Patron card creator- Layouts

- ▶ Maximum 3 fields
- ▶ Patron image

# KOHA: Tools

## Patrons and Circulation- Patron card creator- Batches

- ▶ Add batch
  - ▶ Add item(s)- search patron
  - ▶ Export items/batch
  - ▶ Select template, layout & starting card number
- 

# KOHA: Tools

## Patrons and Circulation- Patron card creator- Manage images

### Upload Images

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

**Select the file to upload:**

Browse...

**Image name:**

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

Upload

Cancel

### Delete Images

No images are currently available.

# KOHA: Tools

Patrons and Circulation- Batch patron  
deletion/anonymization

# KOHA: Tools

Patrons and Circulation- Batch patron  
modification

# KOHA: Tools

Patrons and Circulation- Tag moderation



# KOHA: Tools

Patrons and Circulation- Upload patron  
images

# KOHA: Administration

- ▶ Patrons and Circulation

- ▶ **Catalog**

- ▶ Additional Tools

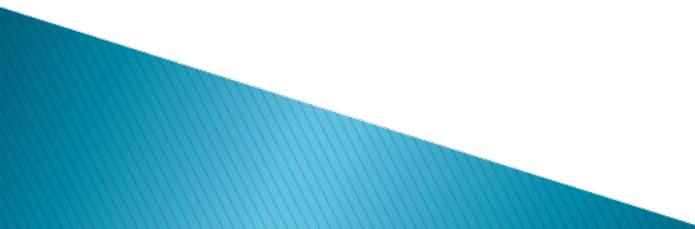
# KOHA: Tools

## Catalog

- ▶ Batch item deletion
  - ▶ Batch item modification
  - ▶ Export data
  - ▶ Inventory/stocktaking
  - ▶ Label creator
  - ▶ Quick spine label creator
  - ▶ Stage MARC records for import
  - ▶ Staged MARC record management
  - ▶ Upload local cover image
- 

# KOHA: Tools

## Export Data (MARC & Authorities)

- Koha comes with a tool that will allow you to export your bibliographic, holdings and/or authority data in bulk.
  - This can be used to send your records to fellow libraries, organizations or services; or simply for backup purposes.
- 

# KOHA: Tools

Export Data (MARC & Authorities)

Export Bibliographic Records

- ▶ For exporting bibliographic records with or without the holdings information, to click the '**Export bibliographic records**' tab.
  - Fill in the form in order to limit your export to a specific range (all fields are optional)

# KOHA: Tools

## Export Data (MARC & Authorities)

### Export Bibliographic Records

- ▶ 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
  - Limit to a specific library
  - Limit to a call number range
  - Limit to an acquisition date range

**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: -- All --

Library: -- All --

From item call number:

To item call number:

Accession date (inclusive):

Start date:  

End date:  

# KOHA: Tools

## Inventory/Stocktaking

- Koha's Inventory Tool can be used in one of two ways:
  - The first is by *printing out a shelf list* that you can then mark items off on.
  - or by uploading a text files of barcodes gathered by a portable scanner

# KOHA: Tools

## Inventory/Stocktaking

- If you do not have the ability to use your barcode scanner on the floor of the library, the first option available to you is to generate a shelf list based on criteria you enter.

Select items you want to check

Library  Home library  Current location

Library

Shelving location (items.location) is

Item call number between:  (items.itemcallnumber)

...and:

Item statuses:

**items.notforloan**

Not For Loan

Ordered

Staff Collection

**items.itemlost**

Claims Returned

Long Overdue (Lost)

Lost

Lost and Paid For

Missing

**items.withdrawn**

Weeding

Withdrawn

**items.damaged**

Damaged

Inventory date:    
(MM/DD/YYYY)

Skip copies on loan:

Show:  items

Beginning at offset:

Export to CSV file

Compare barcodes list to results

Submit

# KOHA: Tools

## Inventory/Stocktaking

- 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 inventory.

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

Seen	Barcode	Title	Unseen since	Problems
<input type="checkbox"/>	10101000000498	362.5B - <a href="#">Beyond homelessness:</a>	08/18/2009	None
<input type="checkbox"/>	10101000000001	378.1981N - <a href="#">1968:</a>	08/18/2009	None
<input type="checkbox"/>	10101000000312	391A - <a href="#">All the rage /</a>	08/18/2009	None
<input type="checkbox"/>	10101000000388	398.21B - <a href="#">Beauties, beasts and enchantment:</a>	08/18/2009	None
<input type="checkbox"/>	10101000000263	492.7A - <a href="#">Arabic /</a>	08/18/2009	None
<input type="checkbox"/>	10101000000332	508A - <a href="#">America's wildlife hideaways.</a>	08/18/2009	None
<input type="checkbox"/>	10101000000308	520A - <a href="#">Atlas /</a>	08/18/2009	None
<input type="checkbox"/>	10101000000295	574.52638A - <a href="#">America's seashore wonderlands /</a>	08/18/2009	None
<input type="checkbox"/>	10101000000056	591A - <a href="#">Amazing animals /</a>	08/18/2009	None

# KOHA: Tools

## Inventory/Stocktaking

- 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)

# KOHA: Tools

- ▶ Patrons and Circulation
- ▶ Catalog
- ▶ **Additional Tools**

# KOHA: Tools

## Additional Tools

- ▶ Calendar
  - ▶ CSV profiles
  - ▶ Log viewer
  - ▶ News
  - ▶ Task scheduler
  - ▶ Edit quotes for QOTD feature
- 

# KOHA: Tools

## Additional Tools- Calendar

- ▶ Libraries can define library closings and holidays to be used when calculating due dates
  - ▶ Get there: *More > Tools > Additional Tools > Calendar*
- ▶ You can make use of the Calendar by turning on the proper system preferences:
  - ▶ Choose the method for calculating due date - either include days the library is closed in the calculation or don't include them
    - ▶ **Get there:** *More > Administration > Global System Preferences > Circulation > useDaysMode*
  - ▶ Fines will check the holiday calendar before charging fines
    - ▶ **Get there:** *More > Administration > Global System Preferences > Circulation > finescalendar*

# KOHA: Tools

## Additional Tools- Calendar

### Nicole's Library Calendar

Define the holidays for:

#### Calendar information

Nov 2012

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

Today

Copy holidays to:

# KOHA: Tools

## Additional Tools- Calendar- Adding Events

- ▶ Before adding events, choose the library you would like to apply the closings to.
- ▶ When adding events, you will be asked if you would like to apply the event to one branch or all branches
  - ▶ Click on the date on the calendar that you would like to apply the closing to

**Add new holiday**  
**Library:** Nicole's Library  
**From date:** Thursdays, 11/8/2012  
**To date :**    
**Title:**  
  
**Description:**  
  
 **Holiday only on this day.** [?]  
 **Holiday repeated every same day of the week.** [?]  
 **Holiday repeated yearly on the same date.** [?]  
 **Holidays on a range.** [?]  
 **Holidays repeated yearly on a range.** [?]  
 **Copy to all libraries.** [?]

# KOHA: Tools

## Additional Tools- Calendar- Adding Events

- ▶ After saving you will see the event listed in the summary to the right the calendar

### Nicole's Library Calendar

Define the holidays for:

#### Calendar information

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

Copy holidays to:

#### Hints

- Search in the calendar the day you want to set as holiday.
- Click the date to add or edit a holiday.
- Enter a title and description for the holiday.
- Specify how the holiday should repeat.
- Click Save to finish.

#### Key

#### Weekly - Repeatable Holidays

Day of week	Title	Description
Sundays	Sunday Closed	

#### Yearly - Repeatable Holidays

Month/Day	Title	Description
10/31	Halloween	

#### Unique Holidays

Date	Title	Description
12/31/2011		
01/01/2012		
01/02/2012		
11/22/2012	Thanksgiving	

# KOHA: Tools

## Additional Tools- Calendar- Adding Events

- ▶ Click on the event on the calendar that you want to change
- ▶ (do this by clicking on the date on the calendar, not the event listed in the summary)
- ▶ From this form you can make edits to the holiday or delete the holiday completely
  - ▶ **All actions require that you click 'Save' before the change will be made**

**Edit this holiday**

Unique holiday

Library: Nicole's Library

From Date: Thursdays, 11/22/2012

To Date :

Title:

Description:

Generate exceptions on a range of dates. [?]

Delete this holiday. [?]

Delete the single holidays on a range. [?]

Delete the repeated holidays on a range. [?]

Delete the exceptions on a range. [?]

Edit this holiday [?]

# KOHA: Tools

## Additional Tools- Calendar- Adding Events

### Editing Events

- ▶ Clicking on repeatable events will offer slightly different options

### Additional Help

- ▶ When adding or editing events you can get additional help by clicking on the question mark next to various different options on the form

#### Edit this holiday

Holiday repeating weekly

Library: Nicole's Library

From Date: Sundays, 11/4/2012

To Date :  

Title:

Description:

Generate an exception for this repeated holiday. [?]

Generate exceptions on a range of dates. [?]

Delete this holiday. [?]

Delete the single holidays on a range. [?]

Delete the repeated holidays on a range. [?]

Delete the exceptions on a range. [?]

Edit this holiday [?]

# KOHA: Tools

## Additional Tools- CSV Profiles

- ▶ CSV Profiles are created to define how you would like your cart or list to export
  - ▶ Get there: More > *Tools* > *Additional Tools* > *CSV Profiles*

# KOHA: Tools

## Additional Tools- CSV Profiles- Add CSV Profiles

- ▶ Click '**CSV Profiles**' from the Tools menu

New profile

### New CSV export profile

**Profile name:**

**Profile description:**

**CSV separator:**

**Field separator:**

**Subfield separator:**

**Encoding:**

**Profile MARC fields:**

You have to define which fields or subfields you want to export, separated by pipes.

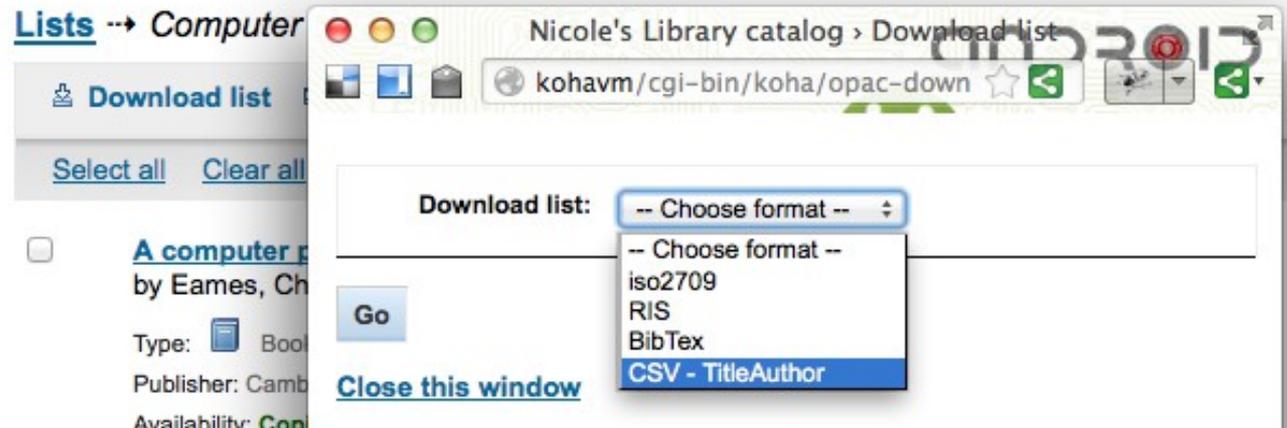
You can also use your own headers (instead of the ones from Koha) by prefixing the field number with an header, followed by the equal sign.

Example: Personal name=200|Entry element=210\$a|300|009

# KOHA: Tools

## Additional Tools- CSV Profiles- Add CSV Profiles

- The 'Profile name' will appear on the export pull down list when choosing '**Download**' from **cart** or **list**
- The 'Profile description' is for your own benefit, but will also appear in the OPAC when patrons download content, so make sure it's clear to your patrons as well
- The 'CSV separator' is the character used to separate values and value groups



# KOHA: Tools

## CSV Profiles- Add CSV Profiles

- ▶ The 'Field separator' is the character used to separate duplicate fields

**Example:** You may have multiple 650 fields and this is the character that will appear in between each one in the column

- ▶ The 'Subfield separator' is the character used to separate duplicate subfields
- ▶ The 'Encoding' field lets you define the encoding used when saving the file
- ▶ Finally format your CSV file using the 'Profile MARC fields' fields
- ▶ When you have entered in all of the information for you profile, simply click 'Submit' and you will be presented with a confirmation that your profile has been saved

# KOHA: Tools

## CSV Profiles- Modify CSV Profiles

- ▶ Once you have created at least one CSV Profile an 'Edit profile' tab will appear next to the 'New profile' button

The screenshot shows the 'Edit existing profile' tab in the KOHA interface. The form is titled 'Modify or delete a CSV export profile' and contains the following fields:

- Profile name:** A dropdown menu with '-- Choose One --' selected.
- Profile description:** A text input field with 'TitleAuthor' entered.
- CSV separator:** A dropdown menu with 'Colon (:)' selected.
- Field separator:** A dropdown menu with 'Colon (:)' selected.
- Subfield separator:** A dropdown menu with 'Colon (:)' selected.
- Encoding:** A dropdown menu with 'ascii' selected.
- Profile MARC fields:** A text input field.
- Delete selected profile ?** A checkbox that is currently unchecked.

At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

# KOHA: Tools

## CSV Profiles- Modify CSV Profiles

- ▶ Choose the profile you would like to edit and alter the necessary fields
- ▶ After submitting your changes you will be presented with a confirmation message at the top of the screen
- ▶ To delete a profile, check the 'Delete selected profile' option before clicking 'Submit Query'

The CSV profile has been successfully modified.



The screenshot shows a web interface for modifying a CSV profile. At the top, a light blue box contains the message: "The CSV profile has been successfully modified." Below this, there is a form with a label "Profile MARC fields:" and a text input field containing the value "Personal name=100|title=245\$a|300". Underneath the input field is a checkbox labeled "Delete selected profile ?". At the bottom of the form are two buttons: "Submit" and "Cancel".

# KOHA: Tools

## CSV Profiles- Using CSV Profiles

- ▶ Your CSV Profiles will appear on the export list or cart menu under the '**Download**' button in both the staff client and the OPAC

The screenshot shows the KOHA interface with a 'Download list' dropdown menu open. The menu options are: iso2709, RIS, BibTex, CSV - TitleAuthor (highlighted), and CSV - Subjects. Below the menu, there is a table with columns: Title, Author, Date added, and Holds. The table contains three rows of data.

	Title	Author	Date added	Holds
<input type="checkbox"/>	A computer perspective,	Eames, Charles.	03/26/2012	Holds
<input type="checkbox"/>	Application of computer technology to library processes: a syllabus,	Becker, Joseph.	03/26/2012	Holds
<input type="checkbox"/>	Computer systems in the library; a handbook for managers and designers	Swihart, Stanley J.	03/26/2012	Holds

# KOHA: Tools

## Additional Tools- Log Viewer

- ▶ Actions within the Koha system are tracked in log files. Your system preferences can be changed to prevent the logging of different actions
  - ▶ Get there: More > *Tools* > *Additional Tools* > *Log Viewer*

### Browse system logs

The screenshot shows the 'Browse system logs' interface. It features several input fields for filtering logs: 'Librarian' (text input), 'Module' (dropdown menu with options: All, Catalog, Authorities, Patrons), 'Action' (dropdown menu with 'All' selected), 'Object' (text input), and 'Info' (text input). There are also two date pickers: 'Display from' and 'Display to', both showing '(MM/DD/YYYY)' format. Below the filters is an 'Output' section with two radio buttons: 'To screen in the browser' (selected) and 'To a file'. The 'To a file' option has a 'Named:' label and a text input field containing 'Export'. A 'Submit' button is located at the bottom left of the form.

# KOHA: Tools

## Additional Tools- Log Viewer

- ▶ Choosing different combinations of menu options will produce the log file for that query

**3 lines found.**

Date	Librarian	Module	Action	Object	Info
2012-08-06 10:21:46	34	CIRCULATION	RETURN	34	<a href="#">Item TVSN500009826C</a>
2012-08-06 10:22:08	34	CIRCULATION	RETURN	34	<a href="#">Item TVSN5000180321</a>
2012-08-06 10:22:39	34	CIRCULATION	ISSUE	34	<a href="#">Item TVSN500017286B</a>

# KOHA: Tools

## Additional Tools- Task Scheduler

- ▶ The task scheduler is a way to schedule reports to run whenever you want
- ▶ To schedule a task, visit the Task Scheduler and fill in the form
  - ▶ Get there: *More > Tools > Additional Tools > Task Scheduler*

**Task Scheduler**

Current server time is: Mon Dec 14 09:09:09 2009

Time:

Date:

Report:

Output Format:

Email:

**Jobs already e**

Date/Time

- issues per branch
- patrons
- bib w/ titles
- branch list
- email list
- issues per branch
- zip codes
- non grouped zips
- patrons with fines
- active patrons
- previous month items created
- barcodes

# KOHA: Tools

## CSV Profiles- Task Scheduler

- ▶ Current Server Time shows the time on your server (schedule all of your reports to run based on that time - not on your local time)
- ▶ Time should be entered as **hh:mm** (2 digit hour, 2 digit minute)
- ▶ Date should be entered using the **calendar pop up**
- ▶ From Report choose the report you want to schedule
- ▶ Choose whether to receive the text of or a link to the results
- ▶ In the Email field enter the email of the person you want to receive your report
- ▶ Below the task scheduler form, there is a list of sch **Jobs already entered**

Date/Time	Action	
Mon Dec 14 10:00	EXPORT KOHA_CONF="/home/nengard/koha-dev/etc/koha-conf.xml"; /home/nengard/kohaclone/tools/runreport.pl 5 text nengard@gmail.com	Delete

# KOHA: Tools

## CSV Profiles- Task Scheduler

- ▶ You can also schedule reports directly from the list of saved reports by clicking the 'Schedule' link

### Saved Reports

Choose the report to run from the list

Report Name	Type	Notes	Author	Creation Date	Saved Results	Saved SQL					
patrons			Engard, Nicole (51)	09/22/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
bib w/ titles	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
branch list	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
email list	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
isses per branch	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
zip codes	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
non grouped zips	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
patrons with fines	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
active patrons	1		Engard, Nicole (51)	11/06/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
previous month items created	1		Engard, Nicole (51)	12/07/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	
barcodes			Engard, Nicole (51)	12/14/2009		<a href="#">Show SQL</a>	<a href="#">Edit SQL</a>	<a href="#">Run</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>	

# KOHA: Tools

## CSV Profiles- News

- ▶ Koha's news module allows librarians to post news to the OPAC, staff interface and circulation receipts
  - ▶ Get there: *More > Tools > Additional Tools > News*

Display Location:

	Location	Number	Creation Date	Expiration Date	Title	News	
<input type="checkbox"/>	Librarian interface	1	10/29/2007	01/10/2099	Welcome to Koha	Welcome to Koha. Koha is a full-featured open-source ILS. Developed initially in New Zealand by Katipo Communications Ltd and first deployed in January of 2000 for Horowhenua Library Trust, Koha is currently maintained by a team of software providers and library technology staff from around the globe.	<a href="#">Edit</a>

# KOHA: Tools

## CSV Profiles- News

- ▶ Click 'New Entry'

OPAC and Koha news

Display location

Title

Publication date   
(MM/DD/YYYY)

Expiration date   
(MM/DD/YYYY)

Appear in position

News



Path:

# KOHA: Tools

## CSV Profiles- News

- ▶ After filling in all of the fields, click 'Submit'
- ▶ News in the OPAC will appear above the *OpacMainUserBlock*

### Nicole's Koha Library



The screenshot shows the header of a Koha library OPAC. On the left is the Koha logo. To its right is a search bar with the text "Search" and a dropdown menu currently set to "Library Catalog". Below the search bar are three links: "Advanced Search", "Browse by Subject", and "Tag Cloud".

Important links here.

#### Holiday Closing

**Reminder** – The library will be closed for the holiday this week.

*(published on 11/22/2009)*

# KOHA: Tools

## CSV Profiles- News

- ▶ News in the Staff Client will appear on the far left of the screen

The screenshot displays the Koha Staff Client interface. At the top, there is a navigation bar with links for Circulation, Patrons, Search, Cart, and More. Below this is the Koha logo and a search box for patron card numbers or names, with a Submit button. A secondary navigation bar includes links for Check out, Check in, Search patrons, and Search the catalog. The main content area is divided into two columns. The left column, titled 'News', contains two articles: 'Welcome to Koha' and 'What's Next?'. The right column contains a vertical stack of tool buttons: Circulation, Patrons, Advanced search, Lists, Cataloging, and Authorities. At the bottom right, there are summary statistics for pending approvals: 5 suggestions, 1 comment, and 3 tags.

Circulation Patrons Search Cart More ▾

**koha** Enter patron card number or partial name:

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

Home

### News

#### Welcome to Koha

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

Posted on 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

#### What's Next?

Now that you've installed Koha, what's next? Here are some suggestions:

- [Read Koha Documentation](#)
- [Read/Write to the Koha Wiki](#)
- [Read and Contribute to Discussions](#)
- [Report Koha Bugs](#)
- [Submit Patches to Koha using Git \(Version Control System\)](#)
- [Chat with Koha users and developers](#)

Posted on 10/29/2007 [Edit](#) | [Delete](#) | [New](#)

### Circulation

### Patrons

### Advanced search

### Lists

### Cataloging

### Authorities

Suggestions pending approval: **5**  
Comments pending approval: **1**  
Tags pending approval: **3**

# KOHA: Tools

## CSV Profiles- News

- ▶ News on the circulation receipts will appear below the items that are checked out

Fairview  
Checked out to Coda ENGARD  
(23529001223643)

### Checked Out

Finding statistics online :  
Barcode: 10044445  
Date due: 12/22/2010

### Overdues

Harry Potter and the chamber of secrets.  
Barcode: CPL10054445  
Date due: 10/02/2010

This book  
Barcode: CPL10077667  
Date due: 09/30/2010

Britannica book of the year.  
Barcode: 10101000000415  
Date due: 10/13/2010

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### News

The library will be closed over the upcoming holidays. Normal library hours will resume on the 2nd of January. Happy Holidays! *Posted on 12/12/2010*

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**Thanks**



# KOHA: Tools

## Notices & Slips- Adding Notices & Slips

- ▶ **Overdue Notice Markup:** When creating your overdue notices there are two tags in addition to the various database fields that you can use in your notices

- ▶ An example of using these two tags in a notice template might be like:

The following item(s) is/are currently overdue:

<item>"<<biblio.title>>" by <<biblio.author>>,  
<<items.itemcallnumber>>, -

Barcode: <<items.barcode>> Fine: <fine>GBP</fine></item>

- ▶ Assuming two items were overdue, would result in a notice like:

The following item(s) is/are currently overdue:

"A Short History of Western Civilization" by Harrison, John B, 909.09821 H2451  
-,

Barcode: 08030003 Fine: £3.50

"History of Western Civilization" by Hayes, Carlton Joseph Huntley, 909.09821  
-

H3261 v.1, Barcode: 08030004 Fine: £3.50

# KOHA: Tools

## Notices & Slips- Adding Notices & Slips

### ▶ **Existing Notices & Slips:**

- ▶ Among the default notices are notices for several common actions within Koha
- ▶ All of these notices can be customized by altering their text via the Notices & Slips tool and their style using the NoticeCSS preference to define a stylesheet
- ▶ Here are some of what those notices do:
  - ▶ ACCTDETAILS
  - ▶ ACQCLAIM (Acquisition Claim)
  - ▶ HOLD (Hold Available for Pickup)
  - ▶ HOLDPLACED (a notice to the library staff that a hold has been placed)
  - ▶ HOLD\_PRINT (Printed notice when hold available for pickup)
  - ▶ ODUE (Overdue Notice)
  - ▶ RLIST (Routing List)

# KOHA: Tools

## Patrons and Circulation- Notices & Slips

### **Overdue Notice/Status Triggers**

- ▶ In order to send the overdue notices that you defined using the Notices tool, you need to first set the triggers to have these messages
  - ▶ Get there: More > *Tools* > *Patrons and Circulation* > *Overdue Notice/Status Triggers*
- ▶ In order to have overdue notices sent to your patrons, you need to set that patron category to require overdue notices
- ▶ The Overdue Notice/Status Triggers tool gives the librarian the power to send up to three notices to each patron type notifying them of overdue items

# KOHA: Tools

## Overdue Notice/Status Triggers

Select a library:

### Rules for overdue actions: default library

**First**

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