

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 overdues, 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

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

KOHA: Tools

Patrons and Circulation- Comments

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

The screenshot shows the Koha online catalog interface. At the top, there is a navigation bar with the Koha logo, a search bar containing 'Library catalog', and buttons for 'All libraries', 'Go', 'Cart', and 'Lists'. Below the search bar, there are links for 'Advanced search', 'Authority search', 'Recent comments', and 'Tag cloud'. The main content area displays 'Database concepts' with options for 'Normal view', 'MARC view', and 'ISBD view'. A sidebar on the right contains options for '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. The main content area also shows 'Type: Book', 'Tags from this library: database (1)', and 'Add' button. A rating section shows 'average rating: 0.0 (0 votes)'. At the bottom, there are tabs for 'Holdings (5)', 'Title notes', and 'Comments (2)'. The 'Holdings (5)' tab is active, displaying a table with columns for 'Item type', 'Location', 'Call number', 'Status', and 'Date due'.

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
BOOK Books	National Science Library		Checked out	19/12/2013
BOOK Books	National Science Library		Checked out	19/12/2013

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	
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

- ▶ 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:

- Import into the borrowers table:** This section contains a text input field labeled "Select the file to import:" and a "Browse..." button.
- Field to use for record matching:** This section 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 box for existing notices. Below the search box are three buttons: "Search notices" (highlighted with a green border), "Check out", and "Search the catalog".

The left sidebar contains a navigation 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 notices and slips:

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 footer with the text "Highlight All Match Case".

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:


Library:

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.wthdrawn

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

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

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


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:

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.

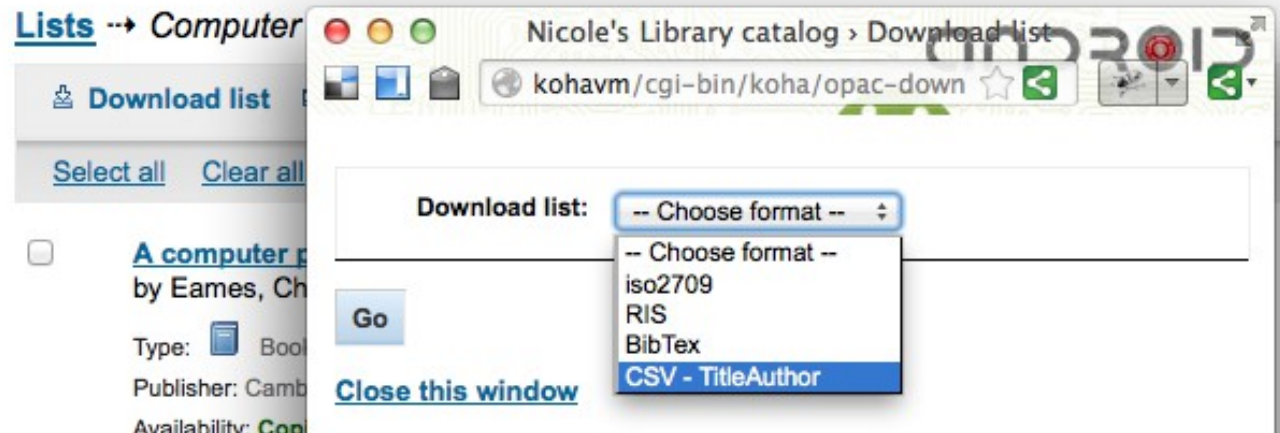
You can also use your own headers (instead of the ones from Koha) by prefixing the field number with an header, followed by the equal sign.

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 a web interface for modifying a CSV export profile. At the top, there are two tabs: 'New profile' and 'Edit existing profile'. The 'Edit existing profile' tab is active. Below the tabs is the title 'Modify or delete a CSV export profile'. The form contains several 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.

At the bottom of the form, there is a checkbox labeled 'Delete selected profile ?' which is currently unchecked. Below 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. It features a text input field for 'Profile MARC fields' containing the text 'Personal name=100|title=245\$a|300'. Below the input field is a checkbox labeled 'Delete selected profile ?'. At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

Profile MARC fields:

Delete selected profile ?

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

Librarian:

Module:
Catalog
Authorities
Patrons

Action:

Object:

Info:

Display from:
(MM/DD/YYYY)

Display to:
(MM/DD/YYYY)

Output

To screen in the browser:

To a file: Named:

Submit

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	Item TVSN500009826C
2012-08-06 10:22:08	34	CIRCULATION	RETURN	34	Item TVSN5000180321
2012-08-06 10:22:39	34	CIRCULATION	ISSUE	34	Item TVSN500017286B

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 filed 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		Show SQL	Edit SQL	Run	Schedule	Delete	
bib w/ titles	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
branch list	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
email list	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
isses per branch	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
zip codes	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
non grouped zips	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
patrons with fines	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
active patrons	1		Engard, Nicole (51)	11/06/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
previous month items created	1		Engard, Nicole (51)	12/07/2009		Show SQL	Edit SQL	Run	Schedule	Delete	
barcodes			Engard, Nicole (51)	12/14/2009		Show SQL	Edit SQL	Run	Schedule	Delete	

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.	Edit

KOHA: Tools

CSV Profiles- News

- ▶ Click 'New Entry'

OPAC and Koha news

Display location

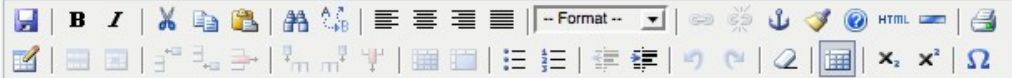
Title

Publication date
(MM/DD/YYYY)

Expiration date
(MM/DD/YYYY)

Appear in position

News



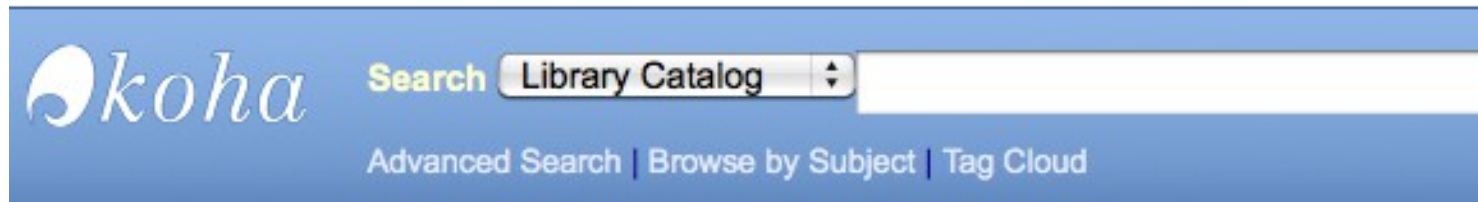
Path:

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 'Home', features a 'News' section with 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 status indicators for pending approvals: 5 suggestions, 1 comment, and 3 tags.

Circulation Patrons Search Cart More ▾

koha Enter patron card number or partial name: Submit

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

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*

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"/>