KOHA Administration

Presented by: CSIR-KNOWGATE

KNOWGATE Email: csirknowgate@niscair.res.in
KNOWGATE Website: knowgate.niscair.res.in
Koha was created in 1999 by Katipo Communications for the Horowhenua Library Trust in New Zealand
User name: kohadmin

Password: katikoan
KOHA: Home Page

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.

Welcome to Koha.

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
- Submit Patches to Koha using Git (Version Control System)
- Chat with Koha users and developers

Warning: You're logged in with the database administrator account. This is a bad idea, and you are likely to encounter problems.

You should create a patron to use when administering Koha and give it superlibrarian permissions.
KOHA: Administration Page

Koha administration

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

Basic parameters
- Libraries and groups
- Item types
- Item types used for circulation rules
- Authorized values
- Define categories and authorized values for them

Patrons and circulation
- Patron categories
- Circulation and fines rules
- Define circulation and fines rules for combinations of libraries, patron categories, and item types
- Patron attribute types
- Define extended attributes (identifiers and statistical categories) for patron records

Library transfer limits
- Limit the ability to transfer items between libraries based on the library sending, the library receiving, and the item type involved. These rules only go into effect if the preference UseBranchTransferLimits is set to ON.
- Transport cost matrix
- Define transport costs between branches
- Item circulation alerts
- Define rules for check-in and check-out notifications for combinations of libraries, patron categories, and item types

Cites and towns
- Define cities and towns that your patrons live in.

Road types
- Define road types (street, avenue, way, etc.). Road types display as authorized values when adding/editing patrons and can be used in geographic statistics.

Catalog
- MARC bibliographic framework
  - Create and manage bibliographic frameworks that define the characteristics of your MARC Records (field and subfield definitions) as well as templates for the MARC editor.
  - Koha MARC mapping
    - Define the mapping between the Koha transactional database (SQL) and the MARC Bibliographic records. Note that the mapping can be defined through MARC Bibliographic Framework. This tool is just a shortcut to speed up linkage.
    - Keywords for MARC mapping
      - Define the mapping between keywords and MARC fields, those keywords are used to find some data independently of the framework.

MARC Bibliographic framework test
- Checks the MARC structure. If you change your MARC bibliographic framework it's recommended that you run this tool to test for errors in your definition.

Authority types
- Create and manage Authority frameworks that define the characteristics of your MARC Records (field and subfield definitions).

Classification sources
- Define classification schemes (i.e., call number schemes) used by your collection. Also define rules used for sorting call numbers.

Record matching rules
- Manage rules for automatically matching MARC records during record imports.

OAI sets configuration
- Manage OAI Sets

Search engine configuration
- Manage indexes, facets, and their mappings to MARC fields and subfields.

Acquisition parameters
- Currencies and exchange rates
  - Define currencies and exchange rates used for acquisitions.
- Budgets
  - Define your budgets
- Funds
  - Define funds within your budgets

Additional parameters
- Z39.50 client targets
  - Define which servers to query for MARC data in the integrated Z39.50 client.

Did you mean?
KOHA: Administration

- Global system preferences
- Basic parameters
- Patrons & Circulation
- Acquisition parameters
KOHA: Administration

- Global system preferences
  - Basic parameters
  - Patrons & Circulation
  - Acquisition parameters
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Global system preferences

Acquisitions preferences

Policy

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcqCreateItem</td>
<td>Create an item when placing an order</td>
</tr>
<tr>
<td>AcqViewBaskets</td>
<td>Show baskets created by staff member</td>
</tr>
<tr>
<td>BasketConfirmations</td>
<td>When closing or reopening a basket, always ask for confirmation.</td>
</tr>
<tr>
<td>CurrencyFormat</td>
<td>Display currencies using the following format: 300.000.00 (US$)</td>
</tr>
<tr>
<td>giz</td>
<td>Default tax rates are: 0</td>
</tr>
<tr>
<td>UniqueItemFields</td>
<td>The following database columns should be unique in an item: barcode</td>
</tr>
</tbody>
</table>

Printing

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>OraclePdfFormat</td>
<td>Use pdflayout:3pag when printing basket groups.</td>
</tr>
</tbody>
</table>

Save all Acquisitions preferences | Cancel |
KOHA: Administration

Global system preferences

- Controls the way Koha works
- Administration > Global System Preferences

![Global system preferences](image1)

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

![Search](image2)

Search system preferences
KOHA: Administration

Global system preferences

- A '(modified)' tag will appear next to items you change until the 'Save All' button is clicked.

<table>
<thead>
<tr>
<th>Preference</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>TagsModeration</td>
<td>(modified)</td>
</tr>
<tr>
<td>TagsShowOnDetail</td>
<td>Show 10 tags on</td>
</tr>
<tr>
<td>TagsShowOnList</td>
<td>Show 6 tags on</td>
</tr>
</tbody>
</table>

Save all Enhanced Content preferences  
Cancel

- Confirmation message for preferences saved:

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

Saved preference FRBRizeEditions
Saved preference TagsModeration
KOHA: Administration
Global system preferences

- Acquisitions
- Administration
- Authorities
- Cataloging
- Circulation
- Creators
- Enhanced content
- I18N/L10N
- Local use

- Logs
- OPAC
- Patrons
- Searching
- Serials
- Staff client
- Web services
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Global system preferences- Administration

- KohaAdminEmailAddress
- noItemTypeImages
- delimiter
- virtualshelves (show/hide “Lists” button in OPAC)
- AutoLocation
- IndependantBranches

Logs: Log System Preferences
KOHA: Administration

Global system preferences - Localization Configuration

- dateformat
- opaclanguagesdisplay
- language
- CalendarFirstDayOfWeek
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Global system preferences- Patron System Preferences

- AddPatronLists (specific/general)
- autoMemberNum (patron card number)
- MaxFine (fine cap)
- NotifyBorrowerDeparture (expiry notification in days)
- Intranetreadinghistory (checkout history)
- BorrowerMandatoryField (patron mandatory fields)
- BorrowersTitles (Mr|Mrs|Miss|Ms)
- borrowerRelationship (guarantor relationship)
- AutoEmailPrimaryAddress
KOHA: Administration

Global system preferences - Patron System Preferences

- EnhancedMessagingPreferences (allow patron to decide message to receive)
- patronimages (upload image from Tools)
- ExtendedPatronAttributes (search/edit/display custom attributes)
- minPasswordLength
- BorrowerUnwantedField (hide patron fields)
Global system preferences

Basic parameters

- Patrons & Circulation
- Acquisition parameters
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Basic parameters

- Libraries & groups
- Item types
- Authorized values
KOHA: Administration

Basic parameters - Libraries & groups

- More > Administration > Basic Parameters > Libraries and Groups

- Add library
- Edit/Delete Library
  - You will be unable to delete any library that has patrons or items attached to it
- Add new group - types-search domain & properties
KOHA: Administration
Basic parameters - Item types

More > Administration > Basic Parameters > Item types

<table>
<thead>
<tr>
<th>Image</th>
<th>Code</th>
<th>Description</th>
<th>Not for loan</th>
<th>Renewable</th>
<th>Charge</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Book Icon]</td>
<td>BK</td>
<td>Books</td>
<td>5 times</td>
<td>0.00</td>
<td></td>
<td>[Edit] [Delete]</td>
</tr>
</tbody>
</table>
KOHA: Administration

Basic parameters - Item types

Add item type

Item type: DVD
Description: DVD

Choose an Icon:
- None
- Library-kids
- Crystal-clear
- Bridge
- Seshat
- NPL
- Carredart
- Vokel
- 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: 1.00

Summary:

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

Save Changes  Cancel
KOHA: Administration
Basic parameters- Item types

- **Edit item types**
  - Item code is uneditable but item description is editable

- **Delete item types**
  - Deleting of item types that are being used by items is not possible
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Basic parameters- Authorized values

- **More > Administration > Basic Parameters > Authorized Values**

- **Existing Values**
  - **koha installs with pre-defined values that your library is likely to use**
  - **’Lost’**: Descriptions for the items marked as lost (appears when adding or editing an item)
KOHA: Administration

Basic parameters - Authorized values

- Add new Authorized Value Category

New category

- Category
- Authorized value
- Description
- Description (OPAC)

Choose an icon:

- None
- liblime-kids
- crystal-clear
- bridge
- Seshat
- npl
- carredart
- vokal

No image:

Save  Cancel
KOHA: Administration
Basic parameters- Authorized values

- Add new Authorized Value

New authorized value

- Category: MARC504
- Authorized value: INCIBIB
- Description: Includes index and bibli
- Description (OPAC): 

Choose an icon:
- None
- liblime-kids
- crystal-clear
- bridge
- Seshat
- npl
- carredart
- vokal

No image: 

Save  Cancel
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Patrons & Circulation

- Patron categories
- Circulation and fines rules
- Patron attribute types
- Library transfer limits
- Transport cost matrix
- Item circulation alerts
- Cities and towns
- Road types
## Patron Category Administration

<table>
<thead>
<tr>
<th>Code</th>
<th>Category name</th>
<th>Type</th>
<th>Enrollment period</th>
<th>Age required</th>
<th>Upper age limit</th>
<th>Enrollment fee</th>
<th>Overdue</th>
<th>Lost Items</th>
<th>Hold fee</th>
<th>Messaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Board</td>
<td>Prof.</td>
<td>99 months</td>
<td>5 years</td>
<td>17 years</td>
<td>0.00</td>
<td>Yes</td>
<td>Shown</td>
<td>0.00</td>
<td>Item Checkout: email&lt;br&gt; Item Due: email</td>
</tr>
<tr>
<td>HB</td>
<td>Home Bound</td>
<td>Adult</td>
<td>99 months</td>
<td>18 years</td>
<td>999 years</td>
<td>0.00</td>
<td>Yes</td>
<td>Shown</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>IL</td>
<td>Inter-Library Loan</td>
<td>Org.</td>
<td>99 months</td>
<td>18 years</td>
<td>999 years</td>
<td>0.00</td>
<td>Yes</td>
<td>Shown</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>INH</td>
<td>In house</td>
<td>Statistical</td>
<td>999 months</td>
<td>0 years</td>
<td>0 years</td>
<td>0.00</td>
<td>No</td>
<td>Shown</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>J</td>
<td>Juvenile</td>
<td>Child</td>
<td>99 months</td>
<td>5 years</td>
<td>17 years</td>
<td>0.00</td>
<td>Yes</td>
<td>Shown</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>K</td>
<td>Kid</td>
<td>Child</td>
<td>99 months</td>
<td>5 years</td>
<td>17 years</td>
<td>0.00</td>
<td>Yes</td>
<td>Shown</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>
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Patrons & Circulation- Patron categories

- Adding a patron category
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.
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Patrons & Circulation- Patron attribute types

Adding Patron Attributes

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 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.
- 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')

Save  Cancel
Editing/Deleting 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
More > Administration > Patrons & Circulation > Circulation and fines rules

The rules are applied from most specific to less specific, using the first found in this order:

- same library, same patron type, same item type
- same library, same patron type, all item type
- same library, all patron types, same item type
- same library, all patron types, all item types
- all libraries, same patron type, same item type
- all libraries, same patron type, all item types
- all libraries, all patron types, same item type
- all libraries, all patron types, all item types
Default Circulation Rules: Using the issuing rules matrix you can define rules that depend on patron/item type combos. To set your rules, choose a library from the pull down (or 'all libraries' if you want to apply these rules to all branches).
From the matrix you can choose any combination of patron categories and item types to apply the rules to.

**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.
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.

Item Hold Policies: For this library, you can edit rules for given item types, regardless of the patron's category. Currently, this means hold policies.
Cities and Towns

To standardize patron input you can define cities or towns within your region so that when new patrons are added librarians simply have to select the town from a list instead of having to type the town and zip (or postal) code information.

More > Administration > Patrons & Circulation > Cities and Towns

![Add City Form]

Add City Form:

- City:
- State:
- Zip/Postal code:
- Country:

[Submit] [Cancel]
Once you click Submit, your city will be saved and will be listed on the Cities and Towns page. Cities can be edited or deleted at any time.

Adding a City:
Viewing Cities on Patron Add Form:
If you have defined local cities using the New city form, then when adding or editing a patron record you will see those cities in a pull down menu to make city selection easy.
Road Types
To standardize patron input you can define road types within your region so that when new patrons are added librarians simply have to select the road from a list instead of having to type it in.

Adding Road Types: To add a road type, click ‘New Road Type’ and then enter the road type the way you’d like it displayed.
Road Types ....
Adding Road Types ....
Once you submit the form, your new road type will be listed on the Road Types page
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KOHA: Administration

Acquisition parameters

- Currencies and exchange rates
- Budgets
- Funds
**Currencies and Exchange Rates:** If you place orders from more than one country you will want to input currency exchange rates so that your acquisitions module will properly calculate totals.

More > Administration > Acquisitions > Currencies and Exchange Rates

![Currencies and Exchange Rates Table](image)
Thanks