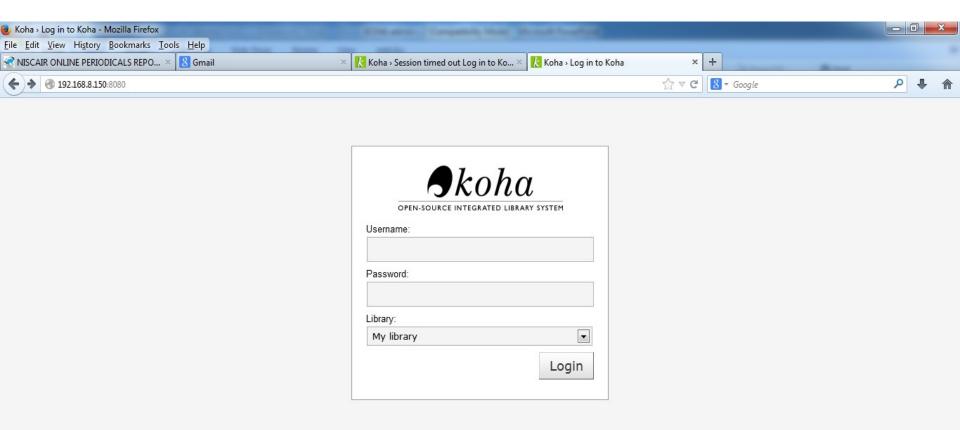
Presented by: CSIR-KNOWGATE

KNOWGATE Email:

csirknowgate@niscair.res.in KNOWGATE Website: knowgate.niscair.res.in KOHA: History

Koha was created in 1999 by Katipo Communications for the Horowhenua Library Trust in New Zealand

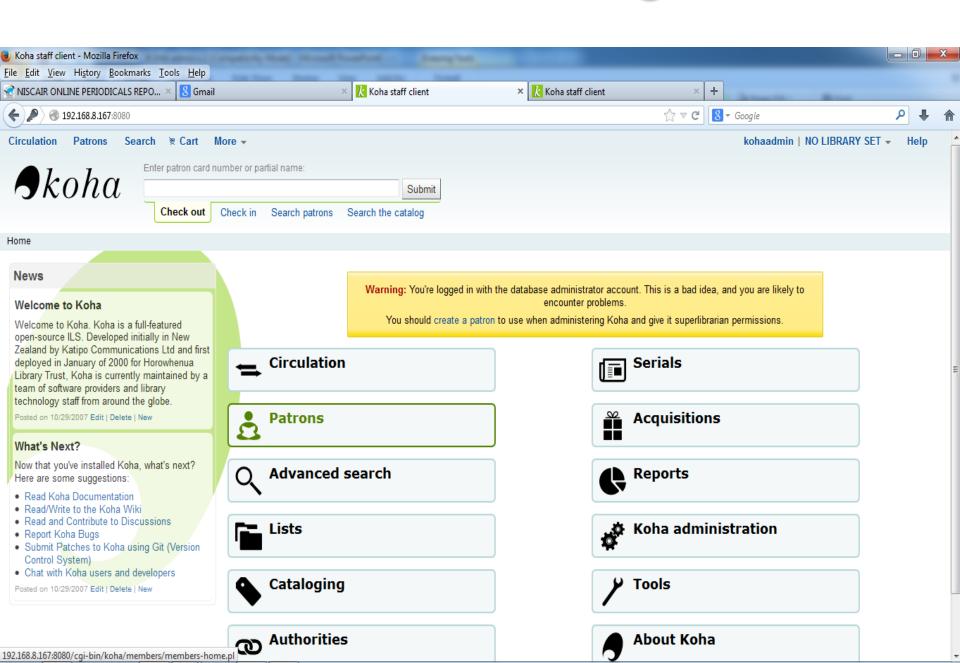
KOHA: Home Page



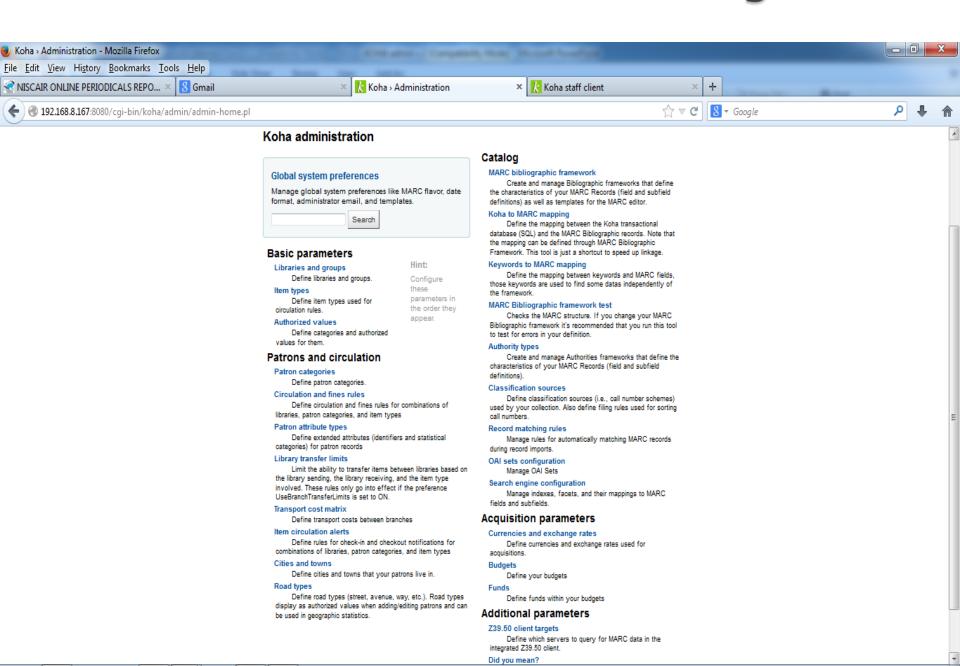
User name: kohaadmin

Password:

KOHA: Home Page

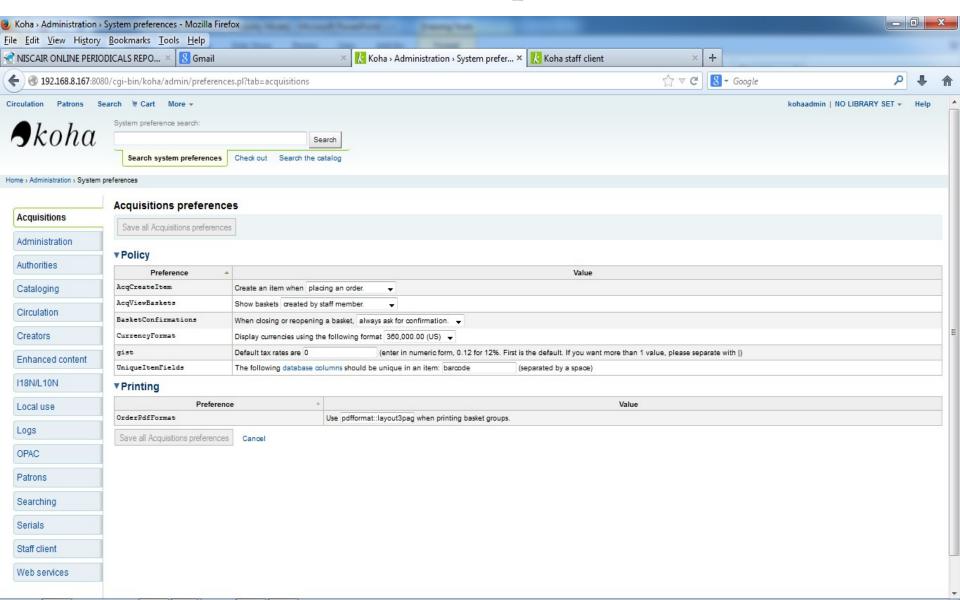


KOHA: Administration Page

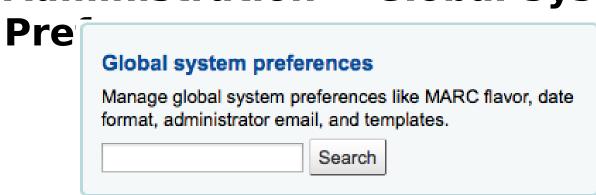


- Global system preferences
- Basic parameters
- Patrons & Circulation
- Acquisition parameters

- Basic parameters
- Patrons & Circulation
- Acquisition parameters



- Controls the way Koha works
- Administration > Global System





Global system preferences

A '(modified)' tag will appear next to items you change until the 'Save All'

Dutton is TagsModeration (modified) Require TagsShowOnDetail Show 10	
	tags on
TagsShowOnList Show 6	tags on



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

- Logs
- OPAC
- Patrons
- Searching
- Serials
- Staff client
- Web services

Global system preferences- Administration

- KohaAdminEmailAddress
- noltemTypeImages
- delimiter
- virtualshelves (show/hide "Lists" button in OPAC)
- AutoLocation
- IndependantBranches

Logs: Log System Preferences

Global system preferences- Localization Configuration

- dateformat
- opaclanguagesdisplay
- language
- CalendarFirstDayOfWeek

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

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 fileds)

Global system preferences

Basic parameters

- Patrons & Circulation
- Acquisition parameters

Basic parameters

- Libraries & groups
- Item types
- Authorized values

Basic parameters- Libraries & groups

More > Administration > Basic ParametersLibraries and Groups



- Ada IIDrary
- 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

Basic parameters- Item types

More > Administration > Basic Parameters > Item types

New Item Type

Item Types Administration

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

Basic parameters- Item types

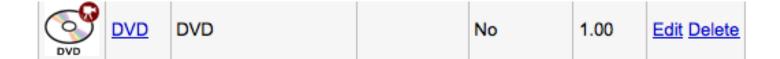
Add item type

Item type DVD
Description DVD
Choose an icon:
None liblime-kids crystal-clear bridge Seshat npl carredart vokal Remote image
Not for loan (if checked, no item of this type can be issued. If not checked, every item of this type can be issued unless notforloan is set for a specific item)
Rental charge: 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

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

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)

Basic parameters- Authorized values

Add new Authorized Value Category

New category

	Category							
Autho	rized value							
ı	Description							
ι	Description (OPAC)							
Choose	an icon:							
None	liblime-kids	crystal-clear	bridge	Seshat	npl	carredart	vokal	
	No image	: O						
Save	Cancel							

Basic parameters- Authorized values

Add new Authorized Value

New authorized value

Autho	rized value	INCBIB						
ı	Description	Includes index a	nd bibli					
ı	Description (OPAC)							
hoose	an icon:							
None	liblime-kids	crystal-clear	bridge	Seshat	npl	carredart	vokal	
	No imag	je: 🔾						

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

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

Patrons & Circulation- Patron categories

More > Administration > Patrons & Circulation > Patron Categories



Patrons & Circulation- Patron categories

Adding a patron category

New category

	ie:				
Description	on:				
Enrollment perio	Ciloose				
	In months Until date	"	nonths		
Age require	ed: years				
Upperage lim	it: years				
Enrollment fe	e: 0.00				
Overdue noti require	ed:				
Lost items in sta		*			
Lost items in st clie Hold fe Category typ	ent 0.00)		
clie Hold fe Category typ	ent 0.00	gory type 💠	,		
clie Hold fe Category typ fault messagi	pe: 0.00 Select a category ng preferences f Days in advance	gory type ‡	ron category Digests only?		
clie Hold fe Category typ	ng preferences f Days in advance	gory type ‡	ron category	Do not notify	
clie Hold fe Category typ fault messagi	pe: 0.00 Select a category ng preferences f Days in advance	gory type ‡	ron category Digests only?		
clie Hold fe Category typ fault messagi	pe: Select a category ng preferences f Days in advance	gory type ‡	ron category I Digests only?		
clie Hold fe Category typ fault messagi Advance notice Item checkout	pe: Select a category ng preferences f Days in advance	gory type ‡	Digests only?		

Patrons & Circulation- Patron attribute types

- More > Administration > Patrons & Circulation > Patron attribute types
- A common use for this field would be for a student ID number or a Driver's license number
 New Patron Attribute Type

Patron Attribute Types

Code	Description	Actions
STUID	Student ID	Edit Delete

Patrons & Circulation- Patron attribute types

Adding Patron Attributes

Add patron attribute type

Patron attribute type code:	
Description:	
Repeatable: be changed after an a	Check to let a patron record have multiple values of this attribute. This setting cannot ttribute is defined.
Unique identifier: the same value canno	If checked, attribute will be a unique identifier — if a value is given to a patron record, at be given to a different record. This setting cannot be changed after an attribute is defined.
Allow password:	Check to make it possible to associate a password with this attribute.
Display in OPAC:	Check to display this attribute on a patron's details page in the OPAC.
Searchable:	Check to make this attribute staff_searchable in the staff patron search.
Display in check-out:	Check to show this attribute in patron check-out.
Authorized value category: authorized value list is	\$\diamond\$ 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 not enforced during batch patron import.
Category:	Choose one to limit this attribute to one patron type. Please
leave blank if you wan	at these attributes to be available for all types of patrons.
Class: category 'PA_CLASS'	Group attributes types with a block title (based on Authorised values)

Save

Patrons & Circulation- Patron attribute types

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

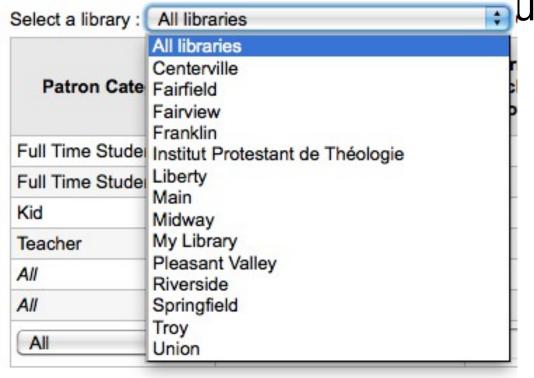
Patrons & Circulation - Circulation and fines rules

- 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

Circulation and Fines Rules

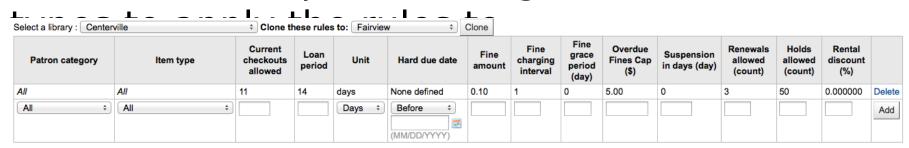
Default Circulation Rules: Using the issuing rules matrix you can define rules that depend on patron/item type combos. To set your rules, choose a library from the pull down (or 'all libraries' Select a library: All libraries

libraries' Select a library: branches

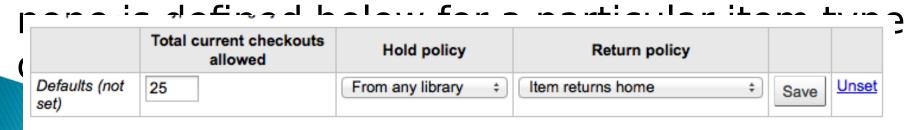


Circulation and Fines Rules

From the matrix you can choose any combination of patron categories and item



Default Checkouts and Hold Policy: You can set a default maximum number of checkouts and hold policy that will be used if



Circulation and Fines Rules

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 itemtypes, regardless of the patron's category Currently, this means hold

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

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.

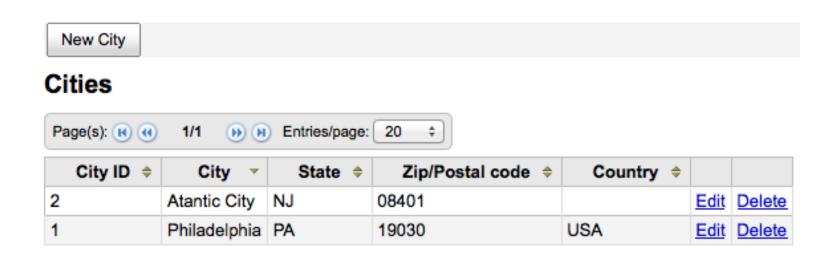
More > Administration > Patrons & Circulation > Cition and Towns

Addi

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

Main address	
Street number:	
Address:	
Address 2:	
City:	or choose ‡
State:	Atantic City NJ 08401 Philadelphia PA 19030
Zip/Postal code:	
Country:	

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 wood type 'I displayed

Road type:	
Submit Cancel	

Road Types Adding Road Types

Once you submit the form, your new road type will be listed on the Road Types page

New Road Type

Road type

Road type		
Avenue	Edit	<u>Delete</u>
Boulevard	Edit	<u>Delete</u>
Street	Edit	Delete

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

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

New Currency

Currencies and Exchange Rates

Currency	Rate	Symbol	Last Updated	Active	Actions	
CAD	1.02207	\$	02/02/2010		Edit	Delete
EUR	0.87400	€	02/02/2010		Edit	Delete
GBP	1.99290	£	02/02/2010		Edit	Delete
USD	1.00000	\$	02/02/2010	1	Edit	Delete

Thanks