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KOHA: Tools

More > 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
- Catalog 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 reverting 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
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- Overdue notice/status triggers
- Patron card creator
- Batch patron deletion/anonymization
- Batch patron modification
- Tags
- Upload patron images
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.
KOHA: Tools

Patrons and Circulation- Comments

- To post comments, login to OPAC
- Search library catalogue
KOHA: Tools
Patrons and Circulation - Comments

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

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

- 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

- 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

![Koha interface showing customizable notices and slips](image-url)
KOHA: Tools

Patrons and Circulation - Notices & Slips

- New notice
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: HB-PC0001
- Template description: A template for home brewed patron card forms
- Units: US Inches
- Page height: 11 in
- Page width: 8.5 in
- Card width: 3.1875 in
- Card height: 1.9375 in
- Top page margin: 0.6875 in
- Left page margin: 0.875 in
- Number of columns: 2
- Number of rows: 4
- Gap between columns: 0.4375 in
- Gap between rows: 0.1875 in
- Profile: Test Printer 01/Test Bin

Save  Cancel
KOHA: Tools

Patrons and Circulation- Patron card creator-
Profiles

- Alignment of data
- Profile is not mandatory
KOHA: Tools

Patrons and Circulation- Patron card creator-

Layouts

Edit Patron card text layout

General settings

Layout name: Test Layout
Units: PostScript Points
Page side: Front
Guide box: On

Text fields

Field 1

Text
<firstname> <surname>

Font: Times-Roman
Font size: 10 pt
Text alignment: Left

Lower left X coordinate: 100 pt
Lower left Y coordinate: 100 pt

Field 2

Field 3

Save  Cancel

Edit Patron card graphic layout

Barcode

Print card number as barcode
Lower left X coordinate
Lower left Y coordinate
Barcode type: Code 39

Images

Image 1

Image source: Patron Image
Display height: 72 pt
Lower left X coordinate: 4.5 pt
Lower left Y coordinate: 63 pt

Image 2

Image source: None
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
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
KOHATH: 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.
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)
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
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
• 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.
Choose which library, shelving location, call number range, item status and when the item was last seen to generate a shelf list that you can then print to use while walking around the library checking your collection.

<table>
<thead>
<tr>
<th>Seen</th>
<th>Barcode</th>
<th>Title</th>
<th>Unseen since</th>
<th>Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10101000000498</td>
<td>Beyond homelessness;</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000001</td>
<td>1968;</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000312</td>
<td>All the rage /</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000388</td>
<td>Beauties, beasts and enchantment;</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000263</td>
<td>Arabic /</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000332</td>
<td>America's wildlife hideaways.</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000308</td>
<td>Atlas /</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>10101000000295</td>
<td>America's seashore wonderlands /</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>1010100000056</td>
<td>Amazing animals /</td>
<td>08/18/2009</td>
<td>None</td>
</tr>
</tbody>
</table>
• 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.
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
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
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.
After saving you will see the event listed in the summary to the right the calendar.
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
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
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
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
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 your 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.
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.

Profile MARC fields:

Personal name=100|title=245$a|300

Delete selected profile? □

Submit  Cancel
Your CSV Profiles will appear on the export list or cart menu under the ‘Download’ button in both the staff client and the OPAC.
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
Choosing different combinations of menu options will produce the log file for that query.
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
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 **Jobs already entered**

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon Dec 14 10:00</td>
<td>EXPORT KOHA_CONF=&quot;/home/nengard/koha-dev/etc/koha-conf.xml&quot;; /home/nengard/kohaclone/tools/runreport.pl 5 text <a href="mailto:nengard@gmail.com">nengard@gmail.com</a></td>
</tr>
</tbody>
</table>
You can also schedule reports directly from the list of saved reports by clicking the ‘Schedule’ link.

### Saved Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Type</th>
<th>Notes</th>
<th>Author</th>
<th>Creation Date</th>
<th>Saved Results</th>
<th>Saved SQL</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>patrons</td>
<td></td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>09/22/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>bib w/ titles</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>branch list</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>email list</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>issues per branch</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>zip codes</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>non grouped zips</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>patrons with fines</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>active patrons</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>11/06/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>previous month items created</td>
<td>1</td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>12/07/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>barcodes</td>
<td></td>
<td></td>
<td>Engard, Nicole (51)</td>
<td>12/14/2009</td>
<td>Show SQL</td>
<td>Run</td>
<td>Schedule</td>
<td>Delete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
KOHA: Tools
CSV Profiles - News

- Click 'New Entry'

- [Image of a form with fields for OPAC and Koha news]

- [Image of a text area for entering news]

- [Buttons: Submit, Cancel]
KOHA: Tools

CSV Profiles - News

- After filling in all of the fields, click ‘Submit’
- News in the OPAC will appear above the `OpacMainUserBlock`
News in the Staff Client will appear on the far left of the screen.
News on the circulation receipts will appear below the items that are checked out.
Thanks
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)
  - RLST (Routing List)
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: Default

### Rules for overdue actions: default library

<table>
<thead>
<tr>
<th>First</th>
<th>Second</th>
<th>Third</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delay</strong></td>
<td><strong>First Letter</strong></td>
<td><strong>Restrict</strong></td>
</tr>
<tr>
<td>Board</td>
<td>4</td>
<td>Overdue Notice</td>
</tr>
<tr>
<td>Home Bound</td>
<td>0</td>
<td>No notice</td>
</tr>
<tr>
<td>Inter-Library Loan</td>
<td>0</td>
<td>No notice</td>
</tr>
<tr>
<td>Juvenile</td>
<td>1</td>
<td>Overdue Notice</td>
</tr>
<tr>
<td>Kid</td>
<td>1</td>
<td>Overdue Notice</td>
</tr>
<tr>
<td>Library</td>
<td>0</td>
<td>No notice</td>
</tr>
<tr>
<td>Patron</td>
<td>0</td>
<td>No notice</td>
</tr>
<tr>
<td>School</td>
<td>0</td>
<td>No notice</td>
</tr>
<tr>
<td>Student</td>
<td>0</td>
<td>No notice</td>
</tr>
<tr>
<td>Young Adult</td>
<td>0</td>
<td>No notice</td>
</tr>
</tbody>
</table>

Save Changes