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- Check Out (Issuing)
- Check In (Returning)
- Circular Messages
- Holds
- Transfers
- Set Library

- The circulation module handles the tasks of keeping track of which borrower has which materials, when the materials are due back, what late fees might be due, and so forth
- This is the mostly used part
- Circulation page which is linked from the top left of every page or from the center of the main page

Check Out (Issuing)

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- To begin the checkout process you must enter the patron barcode or part of their name. The checkout option appears in three main places:
 - Ocheck out option on the top of the main staff client



enter patron card	number or pa	artial name:	
			Submit
Check out	Check in	Search patrons	Search the catalog

O Check out option on the quick search bar on the circulation page



Ocheck out option on the patron record

Nicole Engard (23529001223637)

123 main Philadelphia, PA 19001 555-222-4444 <u>nengard@gmail.com</u> Category: Staff (S) Home Library: Fairview

Check Out

Ocheckouts menu

- Check out
- Details
- Fines
- Routing lists (A list of all of the serial routing lists the patron belongs to)
- Circulation history
- Modification log
- Statistics (StatisticsFields system preference for statistics for patron's circulation actions)
- Duplicate

KOHA: Circulation Checking Items Out- Printing Receipts

- Once you have checked out all of the items for the patron you can print them a receipt by choosing one of two methods
 - **Print slip:** It will print all of the items the patron has checked out, including those they checked out at an earlier date
 - Print quick slip: It will print only the items that were checked out today

KOHA: Circulation Checking Items Out- Clear Patron Information

When you're done checking an item out if you have the DisplayClearScreenButton preference set to <u>'Show</u>' you can clear the current patron by clicking the X in the top right of the patron's info to remove the current patron from the screen and start over

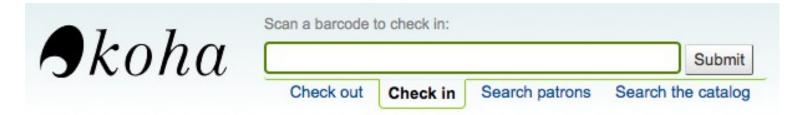
Enter item barcode:	cole Engard (9876543457)	
	Check Out	
Specify due date (MM/DD	YYYY): ember for session:	

Check Out (Issuing)

Check In (Returning)

- Holds
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- Checking in items can be performed from various different locations:
 - The check in box on the top of the main staff client



• The check in option on the quick search bar on the Circulation page

Skoha				Submit
•	Check out	Check in	Search the catalog	

• The check in link on the patron's checkout summary (and on the checkout summary page)

1 Checkout	(s) 2 Holds	(s)					
Due date ≑	Title ≑	ltem Type ≑	Call no ≑	Barcode 🔶	Renewals	Renew?	Check In? ≑
12/25/2009	<u>The</u> <u>Baltimore</u> <u>book:</u> , by	вк	975.26B	1010100000414		On Hold	Check In

• The Check in page under the Circulation menu

Circulation

- Check Out
- Check In

KOHA: Circulation Checking Items In

To check an item in scan the barcode for the item into the box provided. A summary of all items checked in will appear below the checkin box

Check In		Options
Enter item barcode:	Submit	 E Forgive overdue charges Dropbox mode

Checked-In items

Due Date	Title	Author	Barcode	Shelving Location	Call Number	Туре	Patron	Note
06/19/2011	My sister's keeper :	Picoult, Jodi,	<u>100002</u>		PS3566.I372 M9 2005	вк	<u>Engard,</u> <u>Beau (J)</u>	
05/19/2011 (overdue)	Harry Potter and the sorcerer's stone	Rowling, J. K.	<u>100020</u>		PZ7.R79835 Har 1999ab	CDBK	Engard, Nicole (S)	7 disks

- There are several messages that can appear when checking items in:
 - If you are checking an item in at a library other than the home branch, a message will appear asking you to transfer the book to the home library

		o be transferred to Union ransfer now?	
	🚔 Yes, Pri	nt slip Yes No	
Check In		Options	
Enter item barcode:	Submit	Gregive overdue charges	

Checked-in items

Due date	Title	Author	Barcode	Shelving location	Call number	Туре	Patron	Note
Not checked out	Using Moodle :	Cole, Jason R.	65459165		LB1028.68 .C65 2008	BK PROG	Not checked out	

• After this item is checked in the status of the item will be changed in the catalog to 'in transit'

Item type	Location	Collection	Call Number	Status	Last seen	Barcode
	Midway Fiction	Fiction		In transit from Fairview, to Midway, since 12/01/2009	12/01/2009	5645423243567976543

• To mark an item as back at the home branch, check the item in at the home branch

	Not c	hecked out.
Check In		Options
Enter item barcode:	Submit	 Forgive overdue charges Dropbox mode

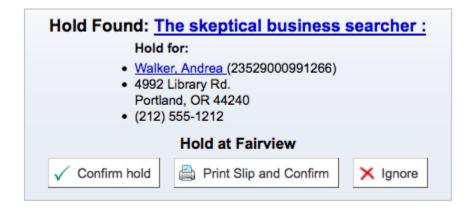
Checked-In items

Due Date	Title	Author	Barcode	Туре	Patron	Note
Not checked out	Dr. Seuss preschool		5645423243567976543	MU FIC	Not checked out	

 If you are checking in an item that should have multiple parts or pieces a message will appear warning you about the number of pieces you should have in your hand

> Note about the accompanying materials: 17 Disks

• If you're checking an item in that has a hold on it, you will be prompted to confirm the hold



 If you're checking in an item that has a hold on it at another branch you will be prompted to confirm and transfer the item

Hold Found: The Baltimore book:
Hold for:
 <u>Acosta, Edna (</u>23529001000463) 7896 Library Rd. Portland, OR 44240 (212) 555-1212
Transfer to: Fairview
✓ Confirm hold and Transfer
Print slip, Transfer, and Confirm X Ignore

If you have the system showing you fines at the time of checkin (*FineNotifyAtCheckin*) you will see a message telling you about the fine and providing you a link to the payment page for that patron

> Patron has outstanding fines of 0.45. Make payment.

- Check Out (Issuing)
- Check In (Returning)

Circulation Messages

- Holds
- Transfers
- Set Library

KOHA: Circulation Setting up Messages

- Circulation messages are short messages that librarians can leave for their patrons or their colleagues that will appear at the time of circulation
- Circulation messages are set up as Authorized Values.
 To add or edit Circulation Messages you want to work with the BOR_NOTES value

Authorized values

This table is used in MARC definition. You can define as many categories as you want, and as many authorized values as you want in each category.

When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user ask for adding of modifying a biblio, the subfield is not entered through a free field, but though a list of authorized values

Show Category: BOR_NOTES

Authorised values for category BOR_NOTES :

Authorized value	Description	Description (OPAC)	lcon	Edit	Delete
UMBOPAC	Your umbrella was found in the library. Please pick it up next time you visit.			<u>Edit</u>	<u>Delete</u>
UMBR	Patron left umbrella in library last time			<u>Edit</u>	Delete
VERID	Patron needs to bring in driver's license to verify ID			<u>Edit</u>	<u>Delete</u>

KOHA: Circulation Adding a Messages

When on the patron's check out tab you will see a link to 'Add a new message' to the right of the check out box Attention:

Fines: Patron has Outstanding fines of 2.00. Make Payment

Messages: > 09/22/2009 FPL "Patron left umbrella in library last time" [Delete] Add a new message

When you click 'Add a new message' you will be asked to choose if the message is for the librarians or the patron and the me Leave a message o leave

Predefined notes:	
UMBOPAC	•
Your umbrella was fo visit.	und in the library. Please pick it up next time you

KOHA: Circulation Viewing Messages

Circulation messages meant for the staff and/or the patron will appear on the patron's checkout screen to the right of the checkout box

Attention:

Fines: Patron has Outstanding fines of 2.00. Make Payment

Messages:

> 09/22/2009 FPL "Patron left umbrella in library last time" [Delete] Add a new message

Circulation messages meant for the patron will also appear when they log into the OPAC

Messages For You

 Your umbrella was found in the library. Please pick it up next time you visit. Written on 12/07/2009 by Fairview

Hello, Edna Acosta (Click here if you're not Edna Acosta)

KOHA: Circulation Renewing

Checked out items can be renewed (checked out for another period of time) based on your circulation rules and renewal preferences

Due date ≑	Title ≑	ltem Type ≑	Checked out on ≑	Checked out from ≑	Call no 🗘	Charge	Price	Renew select all none	Check in select a
		2 2	Previous	checkouts					
09/22/2011	Handle with care :, by Picoult, Jodi, 100004	Books	07/14/2011	Nicole's Library	PS3566.I372 H36 2009	0.00	27.95	1 🗹	
09/22/2011	Harry Potter and the sorcerer's stone, by Rowling, J. K 7 disks 100020	Book on CD	07/22/2011		PZ7.R79835 Har 1999ab	0.00	49.95	2 Not Renewable	
09/22/2011	Fool Moon, by Butcher, Jim 2345678765343234		09/08/2011	Nicole's Library		0.00		0 🗹	
~		h		05	Totals:	0.00	220.84	Renewal d	ue date:
								Forgive fin	es on

- Check Out (Issuing)
- Check In (Returning)
- Circulation Messages

Holds

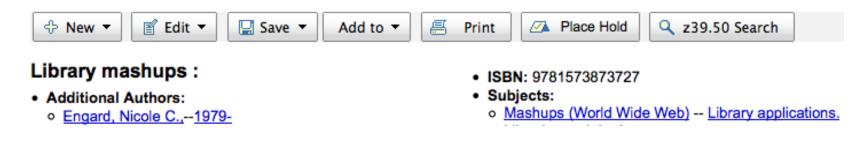
- Transfers
- Set Library

Koha allows patrons to put things on hold

A 'Hold' is a way to reserve an item



- There are several ways to place holds from the staff client
- The most obvious is using the 'Place Hold' button at the top of any bibliographic record



If you are placing a hold on one bibliographic record you will see a list of all of the items you can place a Place a hold on Library mashups : hold on

FRL)

Hold details	
Patron:	Coda Engard (23529001223638)
Priority:	2
Notes:	4
Pickup at:	Nicole's Library
Hold starts on date:	Clear Date
Hold expires on date:	Clear Date
Place a hold on the next available copy	
Place Hold	

· Pickup library is different than Coda Engard's home library (Franklin /

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Last Location	Call no.	Copy no.	Information
0	Books	316190004778977	Nicole's Library		Z674.75.W67 L52 2009		Not on hold
0	Books	45108216	Nicole's Library				Waiting at Nicole's Library since 06/02/2011. Cancel hold
	Books	47627107	Nicole's Library		Z674.75.W67 L52 2009		Not for loan (Staff Collection) Not on hold
0	Books	47627257	Nicole's Library		Z674.75.W67 L52 2009		Not on hold
0	Books	50671988	Nicole's Library	Pleasant Valley			In transit from Nicole's Library, to Pleasant Valley, since 06/02/2011 Can't be cancelled when item is in transit

Place Hold

 You can also click the smaller 'Place Hold' link found at the top of your catalog search results,
 OR the 'Holds' link found below each result

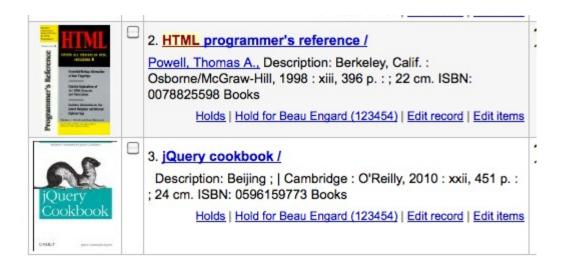
<u>Se</u>	lect All Clear All Unhighlight Place Hold Add to: Save z39.50 Search
	Results
	1. Library mashups :
	Information Today, Inc., Description: ; Medford, N.J. : , 2009 : p. cm. ISBN: 9781573873727 Books
	Holds

You will be asked to search for a patron by barcode or any part of their name to start the hold process
Place a hold on Library mashups :

Enter patron card number or partial name:

Search

After clicking the button you will be brought to the catalog search page where you can find the book(s) you want to place a hold on



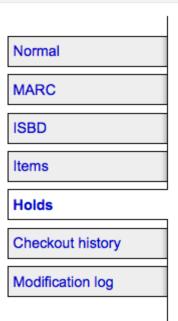
KOHA: Circulation Managing Holds

- Holds can be altered and cancelled from the Holds tab found on the left of the bibliographic record
- From the list of holds you can change the order of the holds, the pickup location, suspend and/or cancel the hold

Priority		Patron	Notes	Date	Expiration	Pick up library	Details				
Waiting +	�憂⊉♥	Henry Acevedo		03/02/2012		Item waiting at Nicole's Library	100034	♪	×		
1 +	أ∿⊉∿	Jordan Alford		03/02/2012		Nicole's Library ‡	Next available	♪	×	Suspend until	Clear Date
2 ‡	أ∿⊉∿	Brian Engard		03/02/2012		Nicole's Library ‡	Next available	∿	×	Unsuspend on 07/20/2012	Clear Dat
3 ‡	�중⊉♥	Nicole Schneider		11/28/2012		Franklin ‡	Only item 100034	♪	×	Suspend until	Clear Date
4 ‡	�중⊉♥	Beau Engard		03/02/2012		Fairview \$	Next available	♪	×	Suspend until	Clear Date
5 \$	☆₩₩	Nicole Engard		11/28/2012		Centerville ‡	Only item 100034	₽	X	Suspend until	Clear Date

Update hold(s)

Existing holds



Home > Catalog > Library mashups :

KOHA: Circulation Managing Holds

- To rearrange or delete holds, simply make a selection from the 'Priority' pull down or click the arrows to the right of the priority pull down
- To delete or cancel a hold click the red 'X' to the right of the hold line
- To delete/cancel a bunch of holds you can choose 'del' from pull down to the left of each line and then click 'Update hold(s)' at the bottom of the list

KOHA: Circulation Managing Holds

1	<u>�</u> ⊕ ⊕ ⊕	Brian Engard	09/06/2011	Nicole's Library ÷	Next available	*	×
2 3 4	أ∳≩∳	Sam Hawkins	09/06/2011	Pleasant Valley \$	Next available	₽	×
5 6 7	♦중⊉♥	Coda Engard	09/07/2011	Nicole's Library \$	Next available	₽	×
- 8 9 10	أ∳∰⊉	Lester Hatfield	09/27/2011	Nicole's Library \$	Next available	₽	×
- 11 12 13	�중⊉♥	Lauren Morris	09/27/2011	Springfield +	Next available	₽	×
del 6 ‡	أ∳∰⊉	Olga Rivera	06/02/2011	Pleasant Valley \$	Next available	₽	×
7 ‡	أ∿⊉∿	Joann Duffy	10/02/2011	(Midway \$	Next available	₽	×
8 \$	☆ 중 🕹 🕹	Sal Acosta	10/19/2011	Nicole's Library ÷	Next available	•	×

Update hold(s)

KOHA: Circulation Recieving Holds

- When items that are on hold are checked in or out the system will remind the circulation librarian that the item is on hold and offer them options for managing the hold
 Hold Found: The Baltimore book:
- When you check in an item that has a hold on it the system will ask you to either confirm and transfer the item
- or just confirm the hold





KOHA: Circulation Receiving Holds

Once confirmed the hold will show on the patron record and on the checkout screen under the 'Hold' tab

12/28/2009 Library mashups: 020.285/4678 Item 898739894 waiting at Centerville No	\$

The item record will also show that the item is on hold

Item type	Location	Collection	Call Number	Status	Last seen	Barcode	Publication Details
Books	Centerville General Stacks	Non Fiction	020.285/4678	Waiting for 23529001000463 at Centerville since 12/28/2009	12/28/2009	898739894	

- Check Out (Issuing)
- Check In (Returning)
- Circulation Messages
- Holds

Transfers

Set Library

If you work in a multi-branch system you can transfer *items* from one library to another by using the Transfer tool

• Circulation > Transfer

- To transfer an item
- Click 'Transfer' on the Circulation page
 - Enter the library you would like to transfer the item to
 - Scan or type the barcode on the item you would like to transfer
- Click 'Submit'
 Enter

Destination library:	
Centerville	
Enter barcode:	
887369820192012	Submit

÷

Transfered Items

Bar Code	Title	То
887369820192012	Library mashups : ()	Centerville

KOHA: Circulation To transfer an item

The item will now say that it is in transit

 \square

Centerville 020.285/4678 In transit from Midway, to Centerville, since 12/07/2009 12/07/2009 887369820192012

- When the item arrives at the other branch the librarian must check the item in to acknowledge that it is no longer in transit
- The item will not be permanently moved to the new library
 Barcode 887369820192012

Item Information [Edit Items]

Midway
Books
020.285/4678
0.00

Statuses

Current Location:	Centerville		
Checkout Status:	Not Checked out		
Lost Status:	Set Status		
Damaged Status:	Set Status		
Withdrawn?:	No Withdraw		

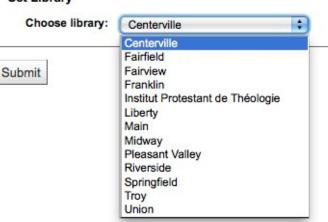
- Check Out (Issuing)
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Set Library

By default you will enter the staff client as if you are at your home library. This library will appear in the top right of the Staff Client

Fairview (Set) | nce (Log Out) | [?]

To do this you can click 'Set' at the top right or on the Circulation page
Set Library



Once you have saved your changes you new library will appear in the top right

Thanks