KOHA Circulation

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KOHA: Circulation

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

- 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.
KOHA: Circulation

- Check Out (Issuing)
- Check In (Returning)
- Holds
- Circulation Messages
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- Set Library
To begin the checkout process you must enter the patron barcode or part of their name. The checkout option appears in three main places:

- Check out option on the top of the main staff client

- Check out option on the quick search bar on the circulation page
Check out option on the patron record

Nicole Engard
(23529001223637)
123 main
Philadelphia, PA 19001
555-222-4444
nengard@gmail.com
Category: Staff (S)
Home Library: Fairview

Check Out
Checkouts 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
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
When you’re done checking an item out if you have the DisplayClearScreenButton preference set to 'Show' 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.
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- Check Out (Issuing)

- **Check In (Returning)**
  - Holds
  - Circulation Messages
  - Transfers
  - Set Library
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
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- The check in link on the patron’s checkout summary (and on the checkout summary page)

<table>
<thead>
<tr>
<th>Due date</th>
<th>Title</th>
<th>Item Type</th>
<th>Call no</th>
<th>Barcode</th>
<th>Renewals</th>
<th>Renew?</th>
<th>Check In?</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/25/2009</td>
<td>The Baltimore book, by</td>
<td>BK</td>
<td>975.26B</td>
<td>10101000000414</td>
<td>On Hold</td>
<td>Check In</td>
<td></td>
</tr>
</tbody>
</table>

- The Check in page under the Circulation menu
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**

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Title</th>
<th>Author</th>
<th>Barcode</th>
<th>Shelving Location</th>
<th>Call Number</th>
<th>Type</th>
<th>Patron</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/19/2011</td>
<td><em>Harry Potter and the sorcerer's stone</em></td>
<td>Rowling, J. K.</td>
<td>100020</td>
<td></td>
<td>PZ7.R79835 Har 1999ab</td>
<td>CDBK</td>
<td><strong>Engard, Nicole (S)</strong></td>
<td>7 disks</td>
</tr>
</tbody>
</table>
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.
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Checking In Messages

- After this item is checked in the status of the item will be changed in the catalog to ‘in transit’

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

If you’re checking an item in that has a hold on it, you will be prompted to confirm the hold.
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Checking In Messages

- 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.

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

**Circulation Messages**

- Holds
- Transfers
- Set Library
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.
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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 message you would like to leave
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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.
- Checked out items can be renewed (checked out for another period of time) based on your circulation rules and renewal preferences

<table>
<thead>
<tr>
<th>Due date</th>
<th>Title</th>
<th>Item Type</th>
<th>Checked out on</th>
<th>Checked out from</th>
<th>Call no</th>
<th>Charge</th>
<th>Price</th>
<th>Renew</th>
<th>Check in</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/22/2011</td>
<td><strong>Handle with care</strong>, by Picoult, Jodi</td>
<td>Books</td>
<td>07/14/2011</td>
<td>Nicole's Library</td>
<td>PS3566.I372 H36 2009</td>
<td>0.00</td>
<td>27.95</td>
<td>1</td>
<td>✔️</td>
</tr>
<tr>
<td>09/22/2011</td>
<td><strong>Harry Potter and the sorcerer's stone</strong>, by Rowling, J. K. - 7 disks</td>
<td>Book on CD</td>
<td>07/22/2011</td>
<td></td>
<td>PZ7.R79835 Har 1999ab</td>
<td>0.00</td>
<td>49.95</td>
<td>2</td>
<td>Not Renewable</td>
</tr>
<tr>
<td>09/22/2011</td>
<td><strong>Fool Moon</strong>, by Butcher, Jim</td>
<td></td>
<td>09/08/2011</td>
<td>Nicole's Library</td>
<td></td>
<td>0.00</td>
<td>0</td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

**Totals:** 0.00 220.84

Override Renewal Limit: ❌ Renew or Return checked items  ✔️ Renew all

Renewal due date: ❌
Forgive fines on return: ❌
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- Check Out (Issuing)
- Check In (Returning)
- Circulation Messages

**Holds**

- Transfers
- Set Library
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- Koha allows patrons to put things on hold

- A ‘Hold’ is a way to reserve an item
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Placing Holds in Staff Client

- 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 hold on.
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Placing Holds in Staff Client

- 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

You will be asked to search for a patron by barcode or any part of their name to start the hold process
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Placing Holds in Staff Client

- 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.
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.
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.
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#### Managing Holds

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Date</th>
<th>Library</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Brian Engard</td>
<td>09/06/2011</td>
<td>Nicole's Library</td>
<td>Next available</td>
</tr>
<tr>
<td>2</td>
<td>Sam Hawkins</td>
<td>09/06/2011</td>
<td>Pleasant Valley</td>
<td>Next available</td>
</tr>
<tr>
<td>3</td>
<td>Coda Engard</td>
<td>09/07/2011</td>
<td>Nicole's Library</td>
<td>Next available</td>
</tr>
<tr>
<td>4</td>
<td>Lester Hatfield</td>
<td>09/27/2011</td>
<td>Nicole's Library</td>
<td>Next available</td>
</tr>
<tr>
<td>5</td>
<td>Lauren Morris</td>
<td>09/27/2011</td>
<td>Springfield</td>
<td>Next available</td>
</tr>
<tr>
<td>6</td>
<td>Olga Rivera</td>
<td>06/02/2011</td>
<td>Pleasant Valley</td>
<td>Next available</td>
</tr>
<tr>
<td>7</td>
<td>Joann Duffy</td>
<td>10/02/2011</td>
<td>Midway</td>
<td>Next available</td>
</tr>
<tr>
<td>8</td>
<td>Sal Acosta</td>
<td>10/19/2011</td>
<td>Nicole's Library</td>
<td>Next available</td>
</tr>
</tbody>
</table>

**Update hold(s)**
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Receiving 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.

- 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.
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Receiving Holds

- Once confirmed the hold will show on the patron record and on the checkout screen under the ‘Hold’ tab.

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

<table>
<thead>
<tr>
<th>Item type</th>
<th>Location</th>
<th>Collection</th>
<th>Call Number</th>
<th>Status</th>
<th>Last seen</th>
<th>Barcode</th>
<th>Publication Details</th>
</tr>
</thead>
</table>
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If you work in a multi-branch system you can transfer *items* from one library to another by using the Transfer tool

- Circulation > Transfer
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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
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To transfer an item

- The item will now say that it is in transit

<table>
<thead>
<tr>
<th>Centerville</th>
<th>020.285/4678</th>
<th>In transit from Midway, to Centerville, since 12/07/2009</th>
<th>12/07/2009</th>
<th>887369820192012</th>
</tr>
</thead>
</table>

- 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]

- Home Library: Midway
- Item type: Books
- Item Callnumber: 020.285/4678
- Replacement Price: 0.00

Statuses

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

Set Status

Set Status
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- 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.

To do this you can click ‘Set’ at the top right or on the Circulation page.

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