Administration

Basic parameters

Get there: More > Administration

> **Important**
>
> Configure all 'parameters' in the order they appear.

Libraries

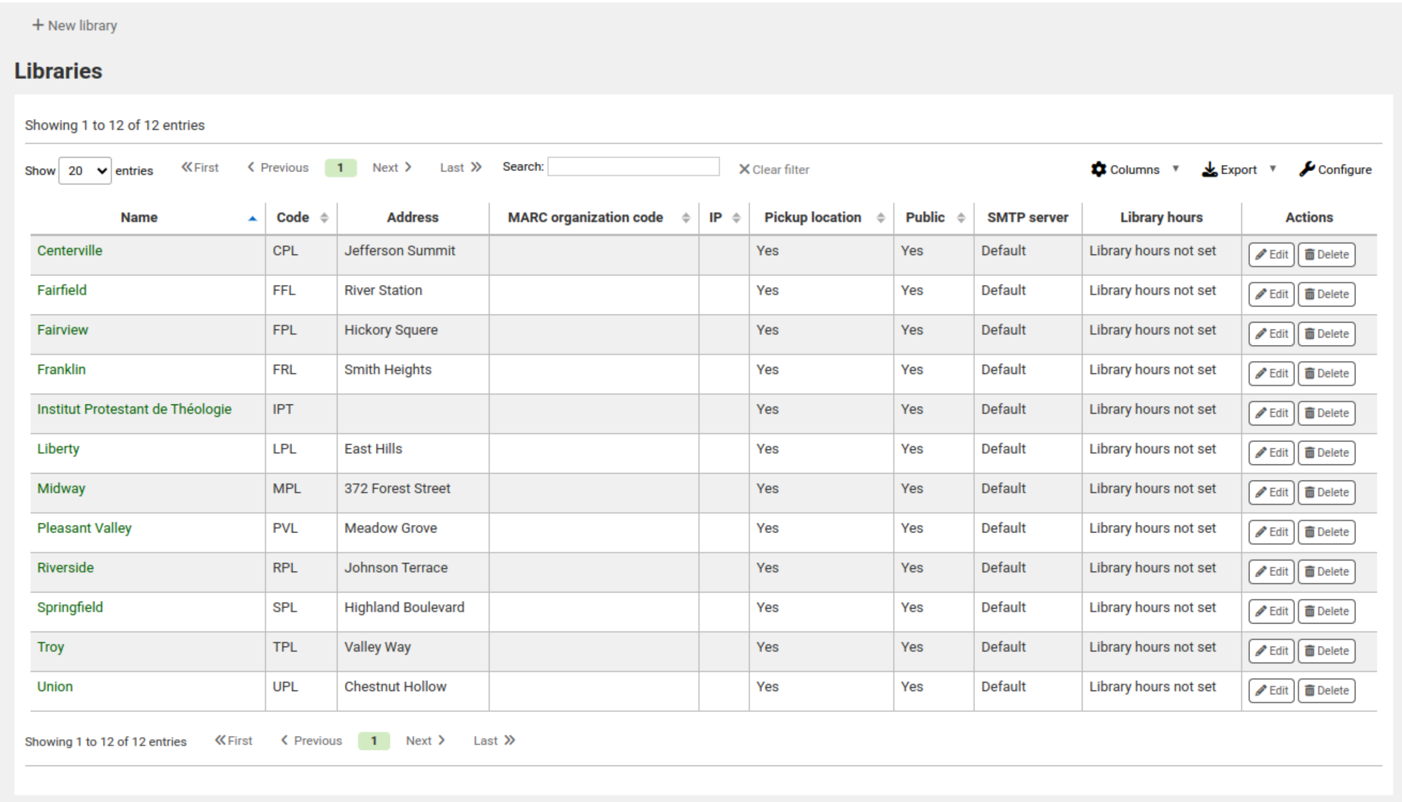
When setting up your Koha system you will want to add information for every library that will be sharing your system. This data is used in several areas of Koha.

- *Get there:* More > Administration > Basic parameters > Libraries

Note

Only staff with the [manage_libraries permission](#) (or the [superlibrarian permission](#)) will have access to this section.

When visiting this page you are presented with a list of the libraries that have already been added to the system.



+ New library

Libraries

Showing 1 to 12 of 12 entries

Show 20 entries « First ‹ Previous 1 Next › Last » Search: ✕ Clear filter ⚙ Columns ▾ Export ▾ Configure

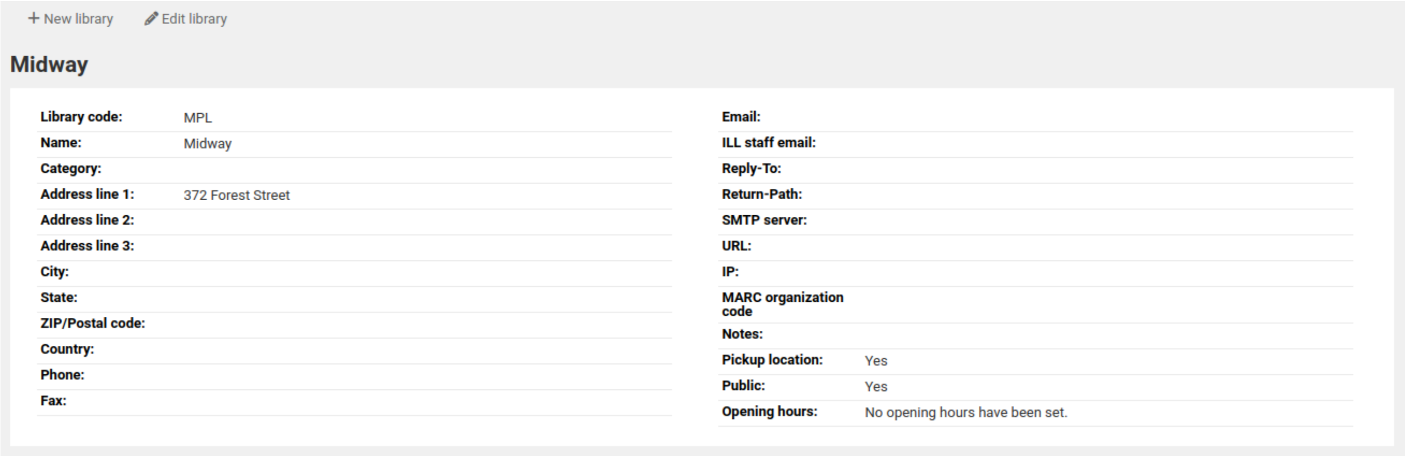
Name	Code	Address	MARC organization code	IP	Pickup location	Public	SMTP server	Library hours	Actions
Centerville	CPL	Jefferson Summit			Yes	Yes	Default	Library hours not set	Edit Delete
Fairfield	FFL	River Station			Yes	Yes	Default	Library hours not set	Edit Delete
Fairview	FPL	Hickory Squere			Yes	Yes	Default	Library hours not set	Edit Delete
Franklin	FRL	Smith Heights			Yes	Yes	Default	Library hours not set	Edit Delete
Institut Protestant de Théologie	IPT				Yes	Yes	Default	Library hours not set	Edit Delete
Liberty	LPL	East Hills			Yes	Yes	Default	Library hours not set	Edit Delete
Midway	MPL	372 Forest Street			Yes	Yes	Default	Library hours not set	Edit Delete
Pleasant Valley	PVL	Meadow Grove			Yes	Yes	Default	Library hours not set	Edit Delete
Riverside	RPL	Johnson Terrace			Yes	Yes	Default	Library hours not set	Edit Delete
Springfield	SPL	Highland Boulevard			Yes	Yes	Default	Library hours not set	Edit Delete
Troy	TPL	Valley Way			Yes	Yes	Default	Library hours not set	Edit Delete
Union	UPL	Chestnut Hollow			Yes	Yes	Default	Library hours not set	Edit Delete

Showing 1 to 12 of 12 entries « First ‹ Previous 1 Next › Last »

Note

You can customize the columns of this table in the ['Table settings'](#) section of the Administration module (table id: libraries).

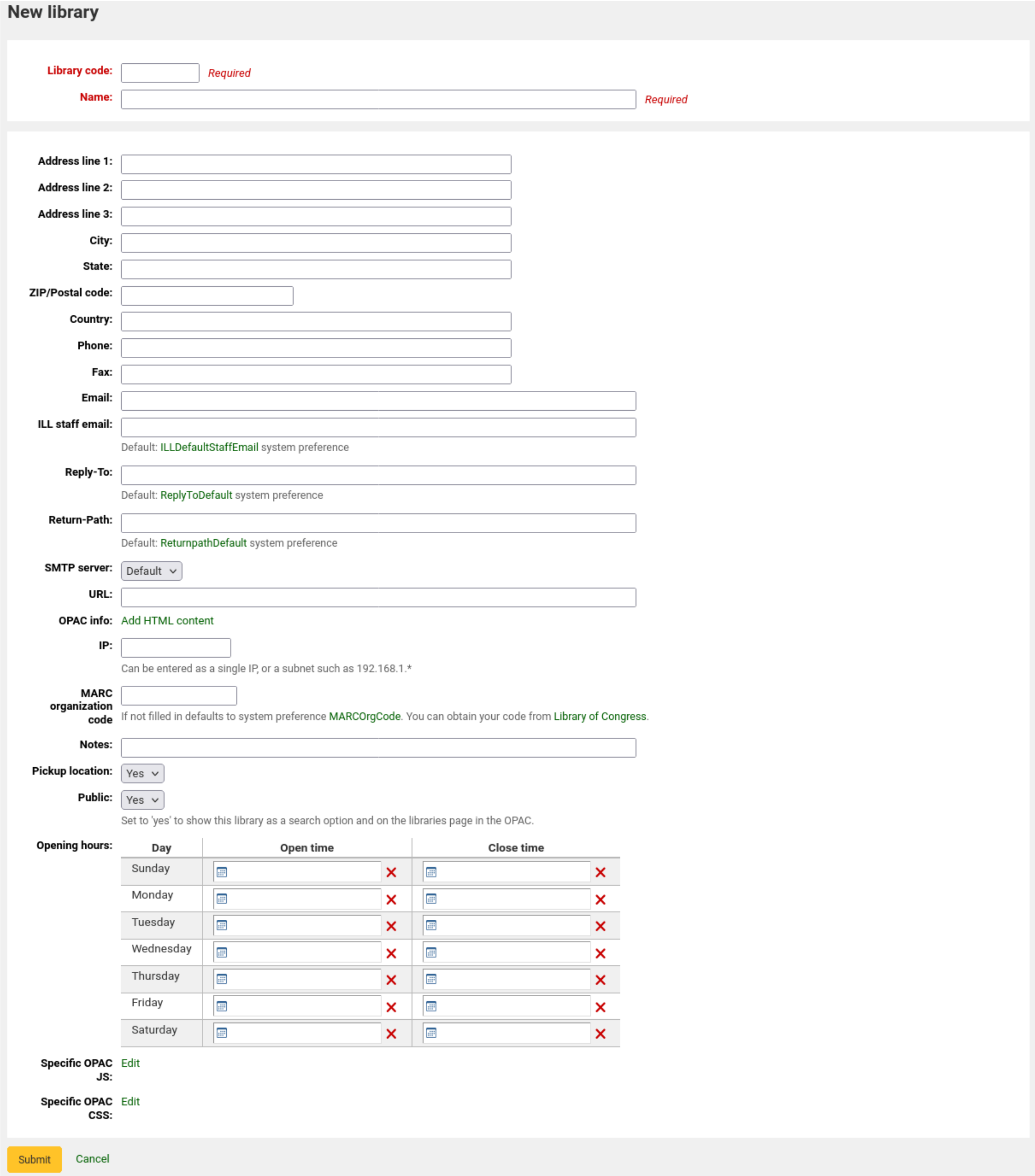
Clicking on the library’s name will bring you to a detailed view of the library’s information.



Adding a library

To add a new library:

- Click ‘New library’
- Fill out the form



- Library code (required): the code should not contain any spaces or hyphens and be 10 or fewer characters. This code will be used as a unique identifier in the database.
- Name (required): the name will be displayed on the OPAC and staff interface wherever the library name displays, and should be a name that makes sense to your patrons and staff.
- Address, city, state, zip/postal code, country, phone, fax: the address and contact fields can be used to make notices custom for each library, they will also be displayed in the ‘Libraries’ page of the OPAC, if this library is set as ‘Public’
- Email: the email address field is not required, but it should be filled for every library in your system

Note

Be sure to enter a library email address to make sure that notices are sent to and from the right address

Note

If no email address is entered here, the address in the KohaAdminEmailAddress system preference will be used to send notices from this library

- ILL staff email: if this library uses a specific email address for interlibrary loan management, enter it here

  Note

  If no email address is entered here, the address in the ILLDefaultStaffEmail system preference will be used to receive ILL requests to this library

- Reply-To: you can enter a different 'Reply-To' email address. This is the email address that all replies will go to.

  Note

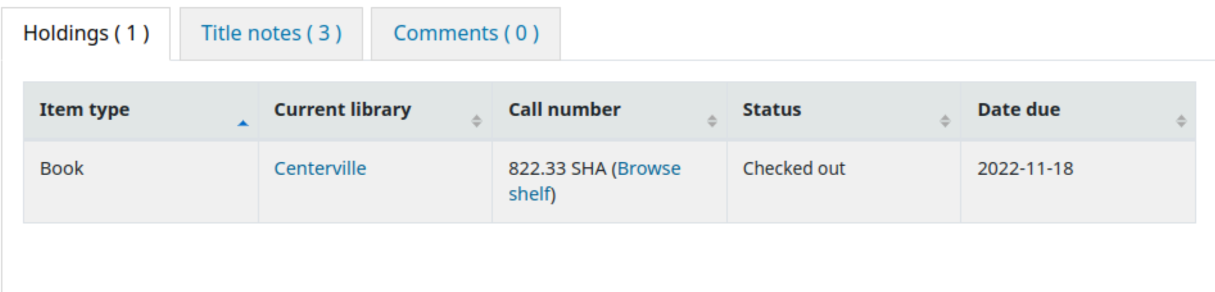
  If no email address is entered here, the address in the ReplytoDefault system preference will be used to receive replies to this library

- Return-Path: you can enter a different 'Return-Path' email address. This is the email address that all bounced messages will go to.

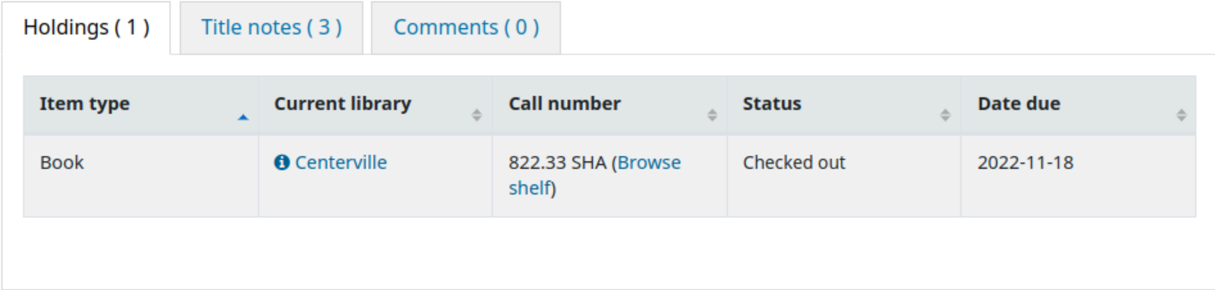
  Note

  If no email address is entered here, the address in the ReturnpathDefault system preference will be used to receive bounced messages from this library.

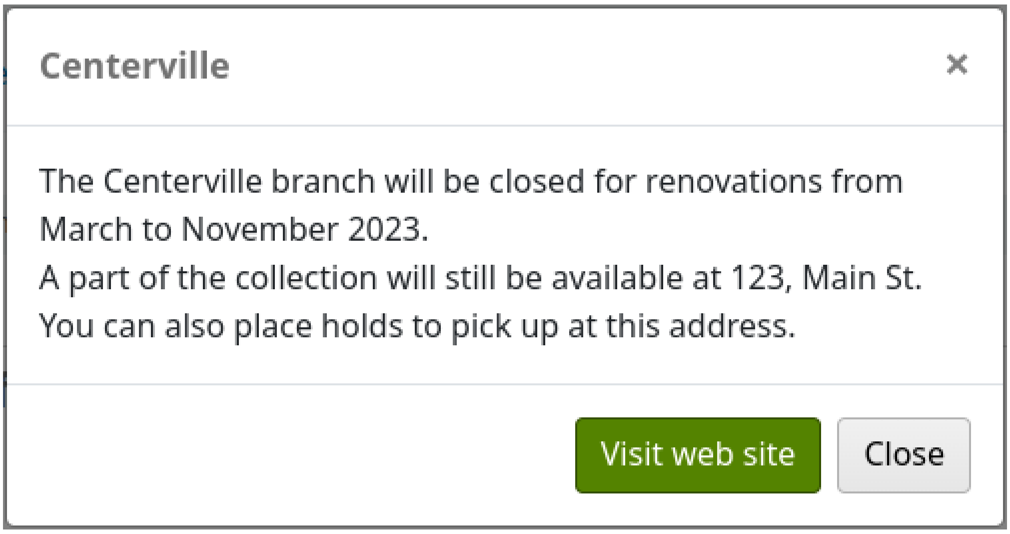
- SMTP server: if this library uses a different SMTP server from the default, specify it here.
- URL: if this field is populated, the library name will be linked in the holdings table on the OPAC



- OPAC info: this leads to the HTML customization tool, so that you can add additional information about the library. This information will appear in the 'Libraries' page in the OPAC, as well as in the holdings table in the OPAC.



Clicking on the library name that has a small ‘i’ icon next to it will open a pop-up with the information.



- IP: this field does not have be filled in unless you plan on limiting access to the staff interface to a specific IP address

  Warning

  An IP address is required if you have enabled AutoLocation

- MARC organization code: if this library has a specific MARC organization code [http://www.loc.gov/marc/organizations/orgshome.html], you can enter it here.

  Note

  If left blank, the code entered in the MARCOrgCode system preference will be used for this library.

- Notes: if you have any notes you can put them here. These will not show in the OPAC.
- Pickup location: choose whether this library will display as an available pickup location for holds.
- Public: choose whether this library will appear in the ‘Libraries’ page on the OPAC, as well as as a limit option in the OPAC advanced search.
- Opening hours: if you do hourly loans, fill out the library’s opening hours for each day of the week. You can then set the ConsiderLibraryHoursInCirculation system preference according to your policies.

Version

This option was added to Koha in version 24.05.

- UserJS: use this field to add custom JavaScript to the OPAC of this library (when patrons are logged in, or if there is a `SetEnv OPAC_BRANCH_DEFAULT` entry in the apache configuration file)

  Version

  This feature was added in Koha version 23.11.

  Note

  General modifications applicable to all libraries can be put in the OPACUserJS system preference.

- UserCSS: use this field to add custom CSS to the OPAC of this library (when patrons are logged in, or if there is a `SetEnv OPAC_BRANCH_DEFAULT` entry in the apache configuration file)

  Version

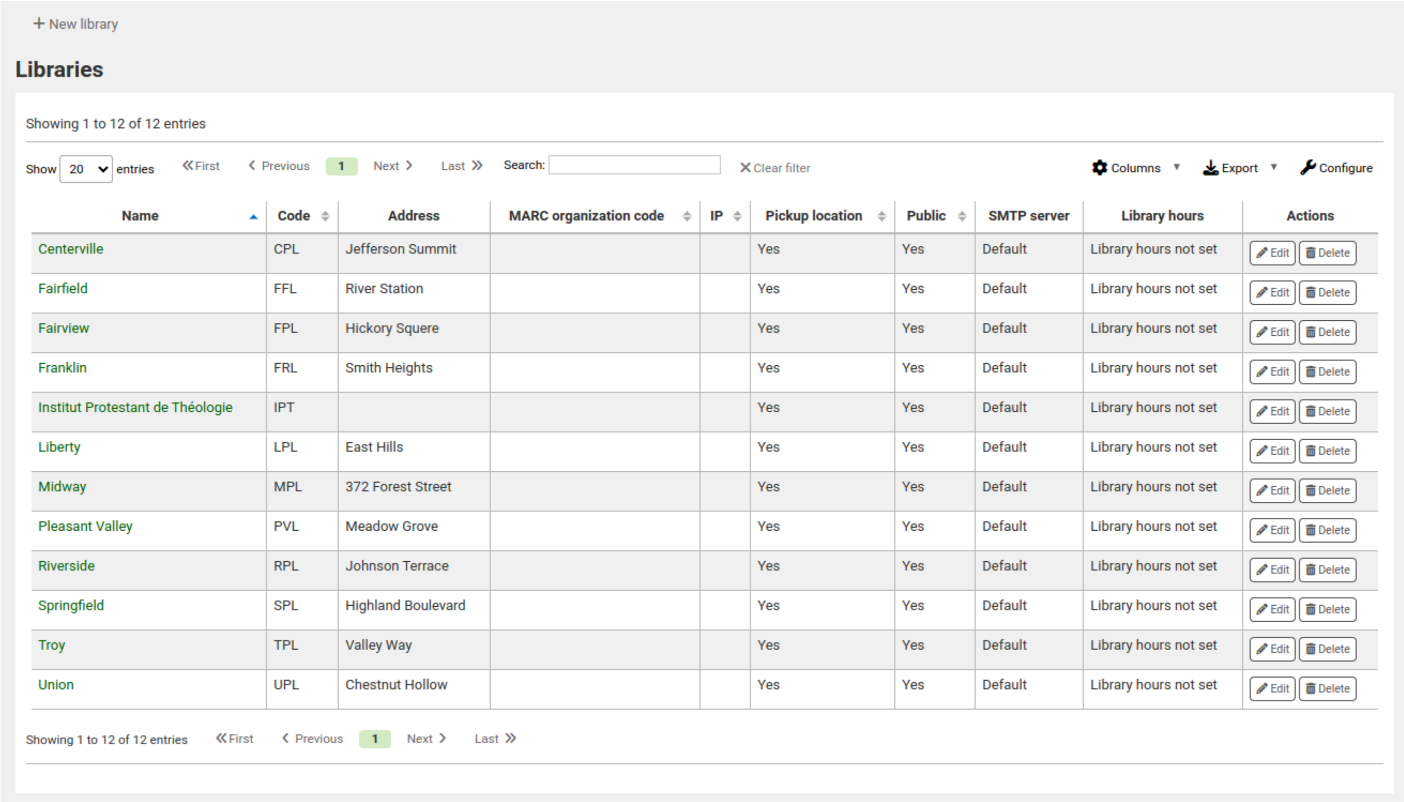
  This feature was added in Koha version 23.11.

  Note

  General modifications applicable to all libraries can be put in the OPACUserCSS system preference.

Editing/deleting a library

From the libraries table, click 'Edit' or 'Delete' to edit or delete a library.



+ New library

Libraries

Showing 1 to 12 of 12 entries

Show 20 entries «First ‹ Previous 1 Next › Last » Search: ✕ Clear filter Columns Export Configure

Name	Code	Address	MARC organization code	IP	Pickup location	Public	SMTP server	Library hours	Actions
Centerville	CPL	Jefferson Summit			Yes	Yes	Default	Library hours not set	Edit Delete
Fairfield	FFL	River Station			Yes	Yes	Default	Library hours not set	Edit Delete
Fairview	FPL	Hickory Squere			Yes	Yes	Default	Library hours not set	Edit Delete
Franklin	FRL	Smith Heights			Yes	Yes	Default	Library hours not set	Edit Delete
Institut Protestant de Théologie	IPT				Yes	Yes	Default	Library hours not set	Edit Delete
Liberty	LPL	East Hills			Yes	Yes	Default	Library hours not set	Edit Delete
Midway	MPL	372 Forest Street			Yes	Yes	Default	Library hours not set	Edit Delete
Pleasant Valley	PVL	Meadow Grove			Yes	Yes	Default	Library hours not set	Edit Delete
Riverside	RPL	Johnson Terrace			Yes	Yes	Default	Library hours not set	Edit Delete
Springfield	SPL	Highland Boulevard			Yes	Yes	Default	Library hours not set	Edit Delete
Troy	TPL	Valley Way			Yes	Yes	Default	Library hours not set	Edit Delete
Union	UPL	Chestnut Hollow			Yes	Yes	Default	Library hours not set	Edit Delete

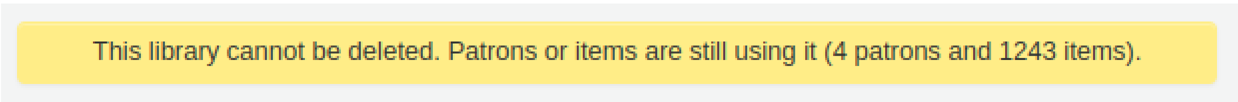
Showing 1 to 12 of 12 entries «First ‹ Previous 1 Next › Last »

Warning

You will be unable to edit the 'Library code'.

Warning

You will be unable to delete any library that has patrons or items attached to it.



Library groups

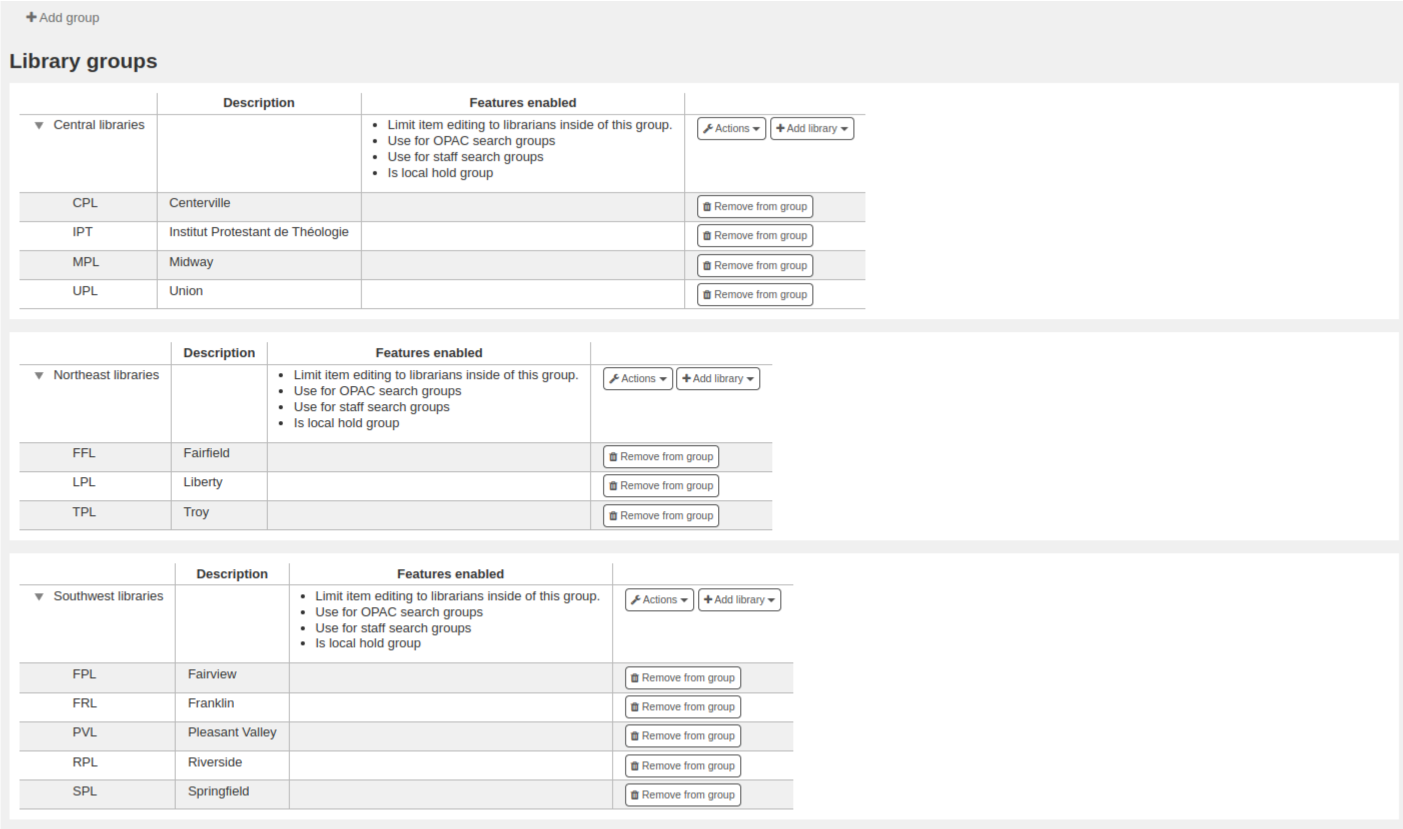
Library groups can serve various purposes: to limit access to patron data, to limit item modification, to limit OPAC or staff interface searches, or to define holds behavior.

- *Get there:* More > Administration > Basic parameters > Library groups

Note

Only staff with the manage_libraries permission (or the superlibrarian permission) will have access to this section.

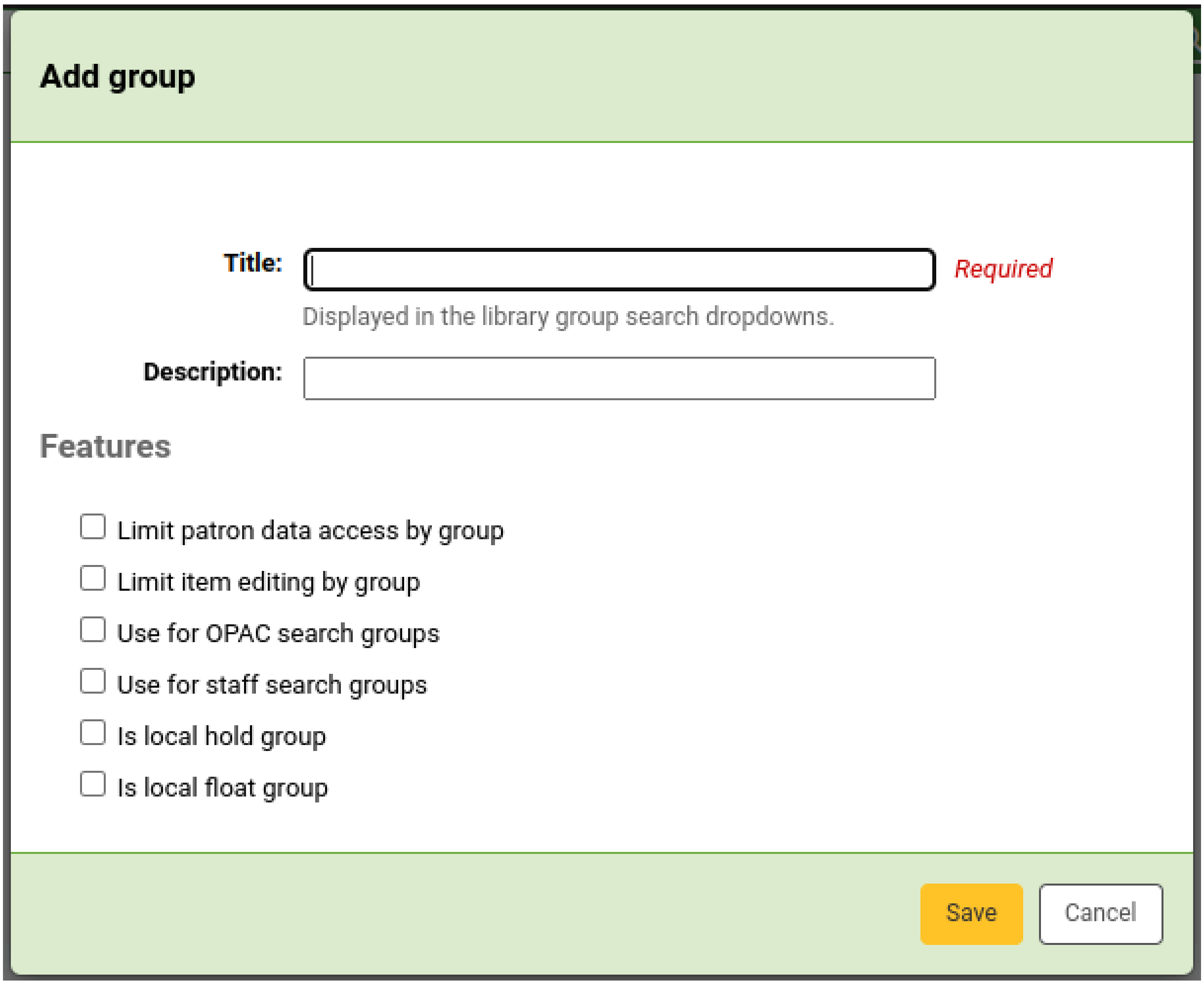
When visiting this page you are presented with a list of the groups that have already been added to the system.



Adding a group

To create a new library group,

- Click the 'Add group' button at the top of the screen.



- Title (required): give the group a title. This title will be displayed in the advanced search limit dropdown.
- Description: optionally, enter a description for this group. The description is only used in this page to give an idea of what the group is used for.
- Features: check the use of this group
  - Limit patron data access by group: this will limit staff members from seeing other groups' patrons.

    Note

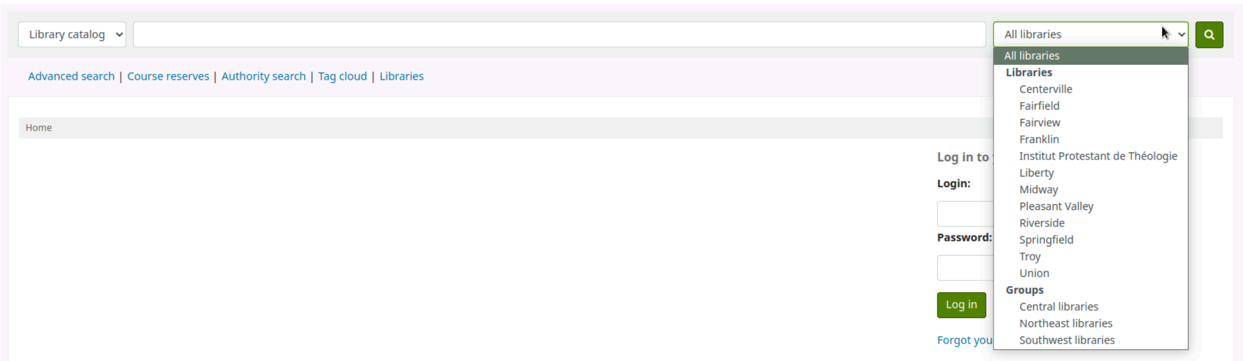
    This can be overridden with the view_borrower_infos_from_any_libraries permission (or the superlibrarian permission).

- Limit item editing by group: this will limit staff members from editing items from other groups' libraries.

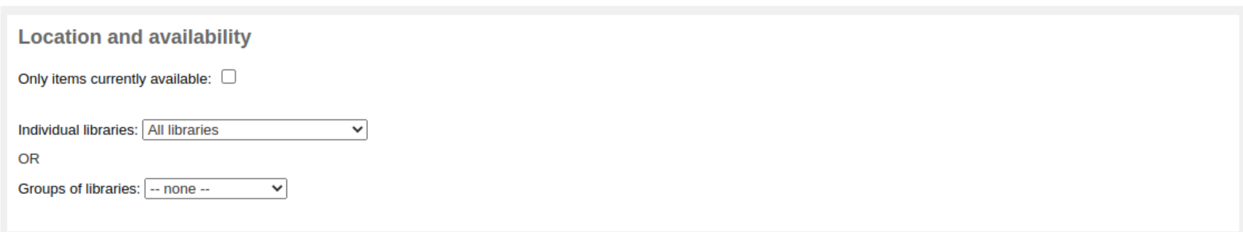
    Note

    This can be overridden with the edit_any_item permission (or the superlibrarian permission).

- Use for OPAC search groups: this will make the group visible in the library dropdown menu at the top of the OPAC (when the OpacAddMastheadLibraryPulldown system preference is set to 'Add') and on the advanced search page.



- Use for staff search groups: this will make the group visible in the library dropdown menu in the staff interface advanced search.

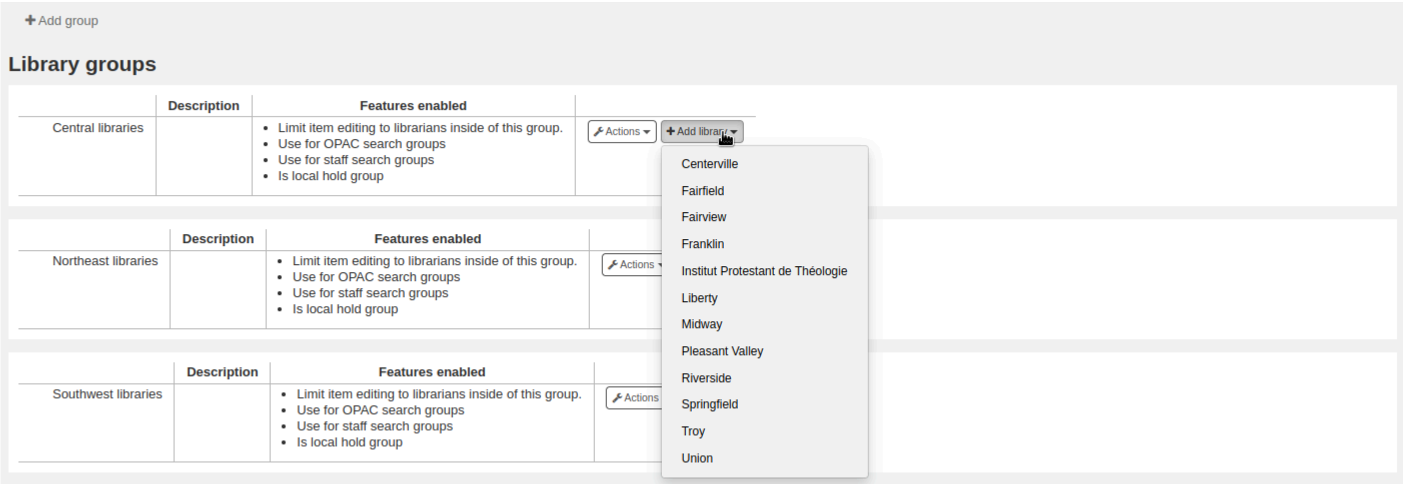


- Is local hold group: this will make this group a local hold group, which can be used to add hold policies in the circulation rules to limit patrons to placing holds on items within the group only.
- Is local float group: this will make this group a local float group, which can be used in a return policy or in a hold policy in circulation rules to determine if an item 'floats' (stays at the check-in library) or is transferred back to its home library.

- Click ‘Save’ to create the group.

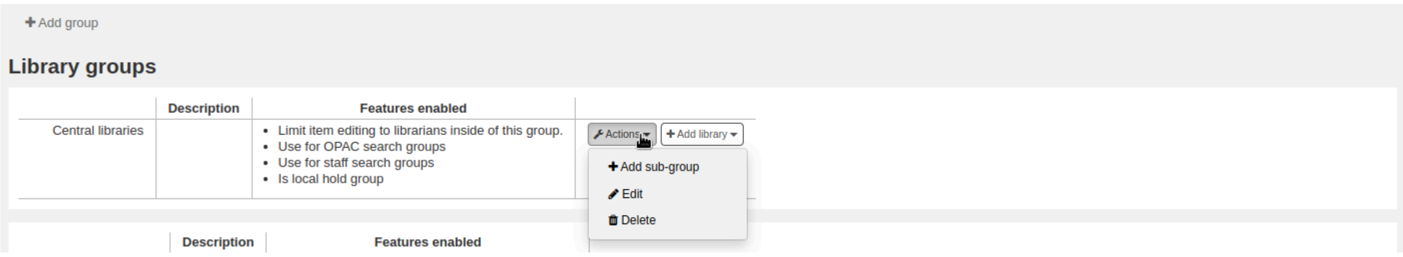
Adding a library to a group

Click on the ‘Add library’ button next to the group to add a library to this group. You will be presented with a list of the libraries that are not already in the group.

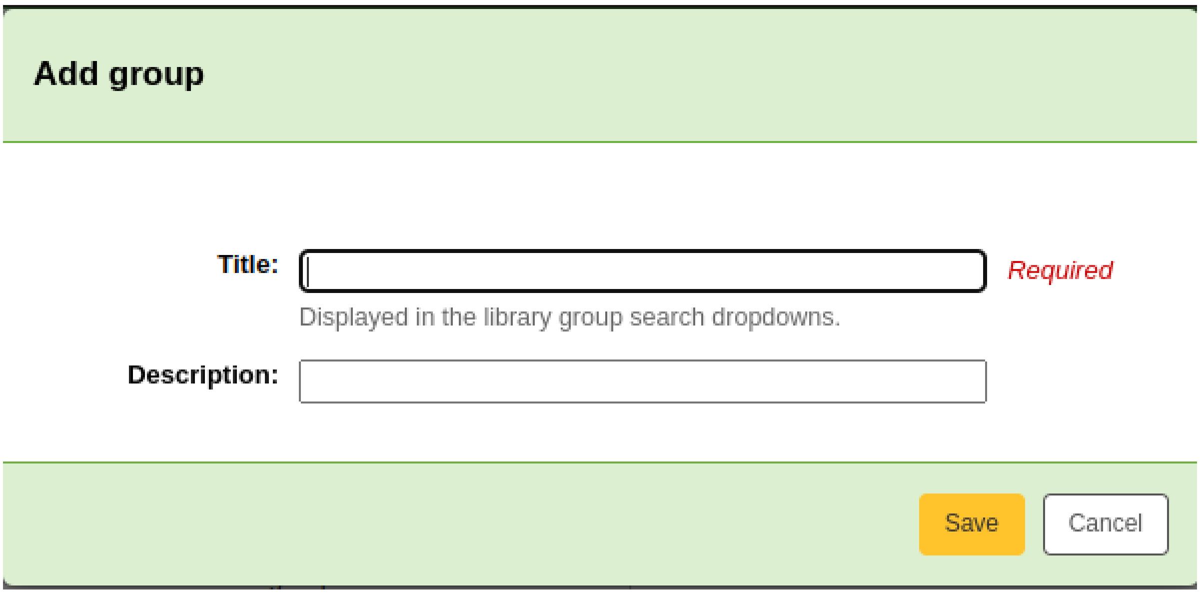


Adding a sub-group

If your system is very large, you can create sub-groups. Click on the ‘Actions’ button next to the group and select the ‘Add a sub-group’ option.

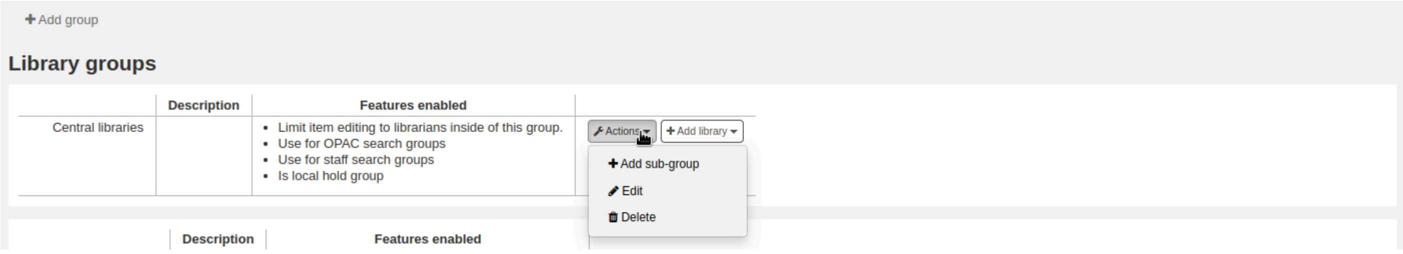


Fill in the title and the description (optional) of the sub-group. The features will be inherited from the parent group.

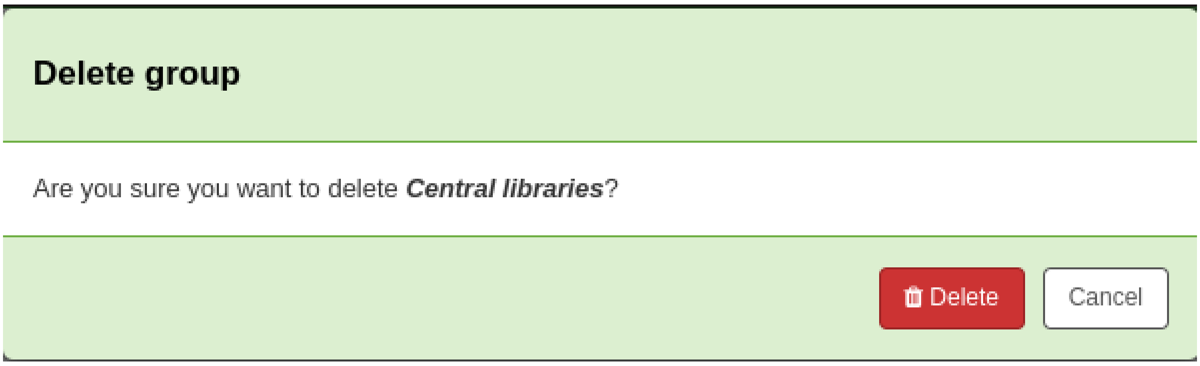


Deleting a group

To delete a group, click on the ‘Actions’ button next to the group and select the ‘Delete’ option.



The system will ask to confirm the deletion.



Click ‘Delete’ to confirm and delete the group.

Circulation desks

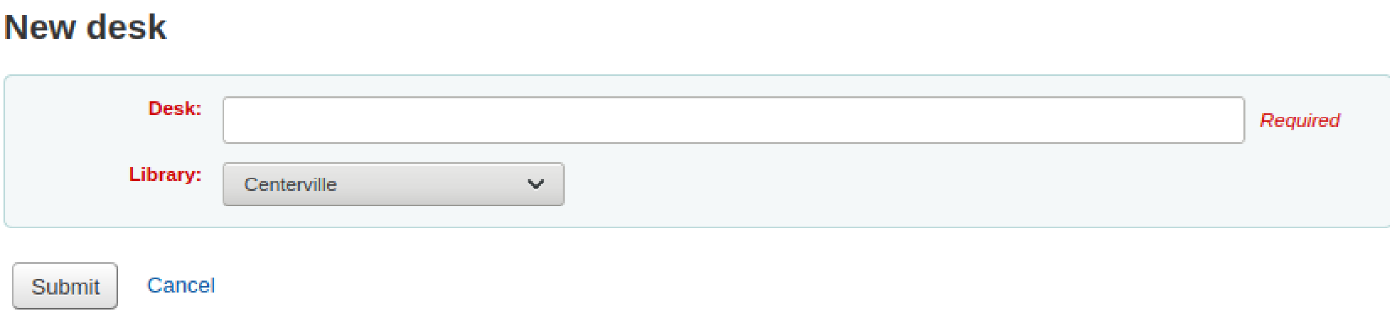
Koha allows you to define several circulation desks within a single library. For example, if you have an adult circulation desk and a children’s circulation desk, or if you have a different desk for each floor or each department.

Make sure to enable the UseCirculationDesks system preference to use this functionality.

- *Get there:* More > Administration > Patrons and circulation > Circulation desks

Adding circulation desks

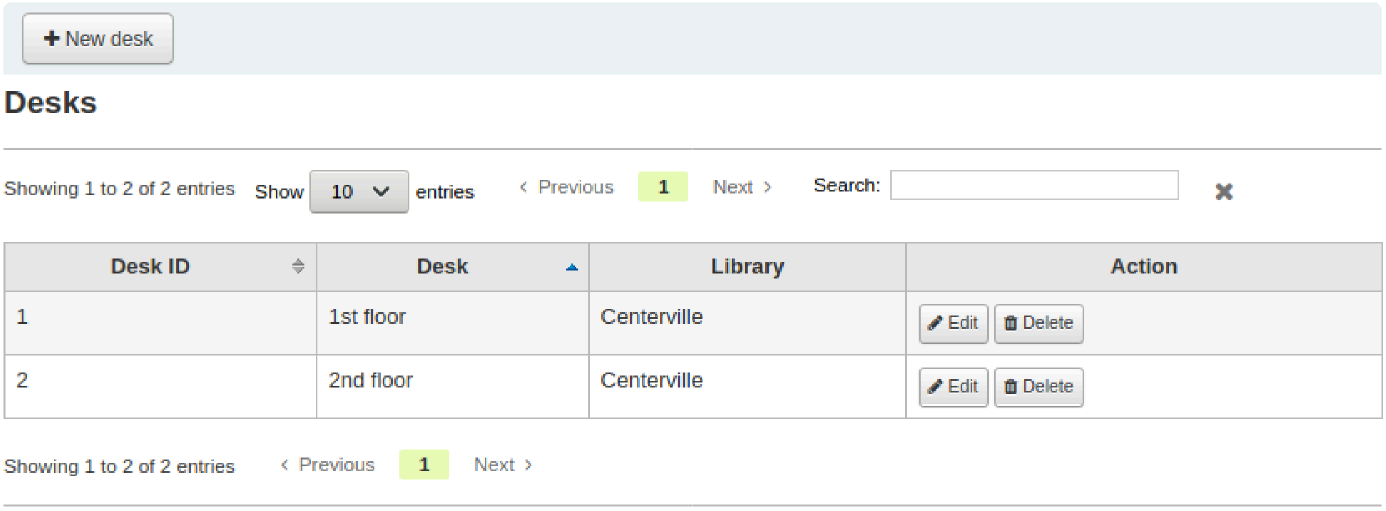
To add a new circulation desk, click on the ‘New desk’ button at the top of the page.



- In the ‘Desk’ field, enter a name for your desk.
- Choose the library in which this desk is.
- Click ‘Submit’.

Editing a circulation desk

To edit an existing circulation desk, click on the ‘Edit’ button to the right of the desk to modify.



+ New desk

Desks

Showing 1 to 2 of 2 entries Show 10 entries ‹ Previous 1 Next › Search:

Desk ID	Desk	Library	Action
1	1st floor	Centerville	Edit Delete
2	2nd floor	Centerville	Edit Delete

Showing 1 to 2 of 2 entries ‹ Previous 1 Next ›

From there, you can change the name and/or the library of the desk.

Deleting a circulation desk

To delete an existing circulation desk, click on the ‘Delete’ button to the right of the desk to remove.

Item types

Koha allows you to organize your collection by item types and collection codes.

- *Get there:* More > Administration > Basic parameters > Item types

Note

Only staff with the [manage_itemtypes permission](#) (or the [superlibrarian permission](#)) will have access to this section.

Item types typically refer to the material type (Book, CD, DVD, etc), but can be used in any way that works for your library.

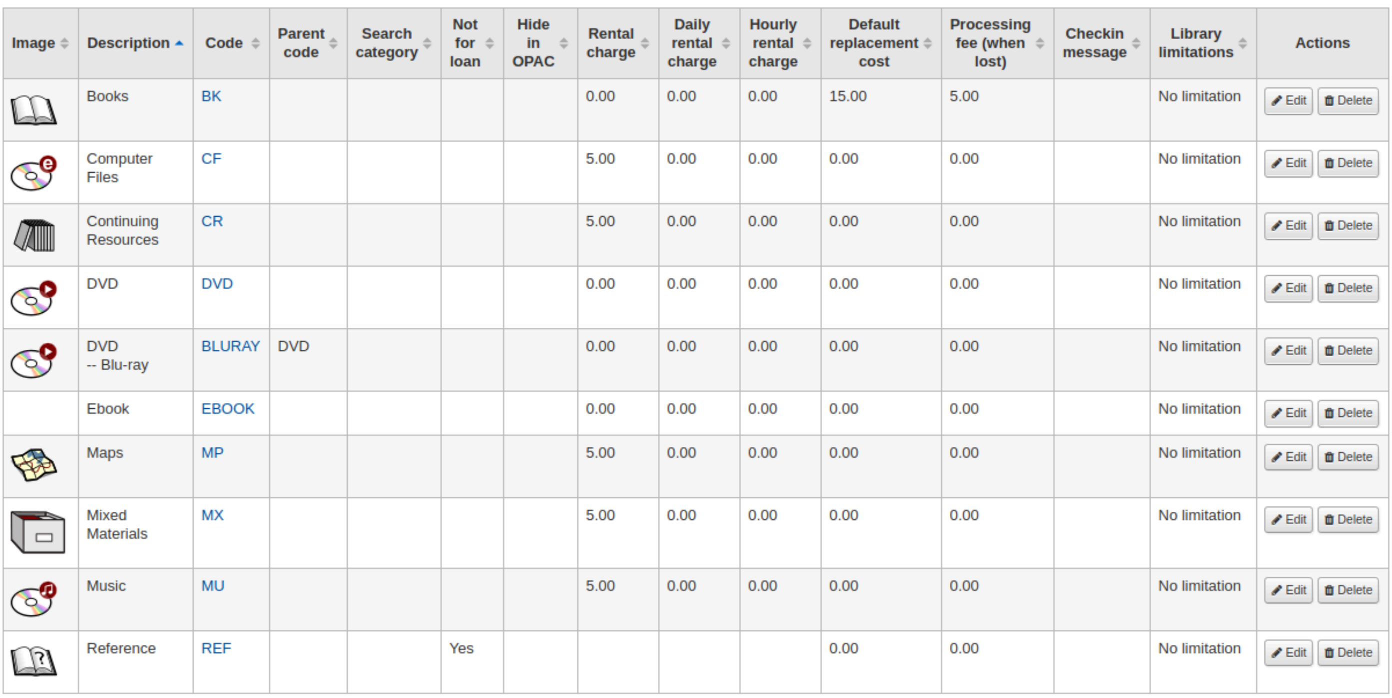


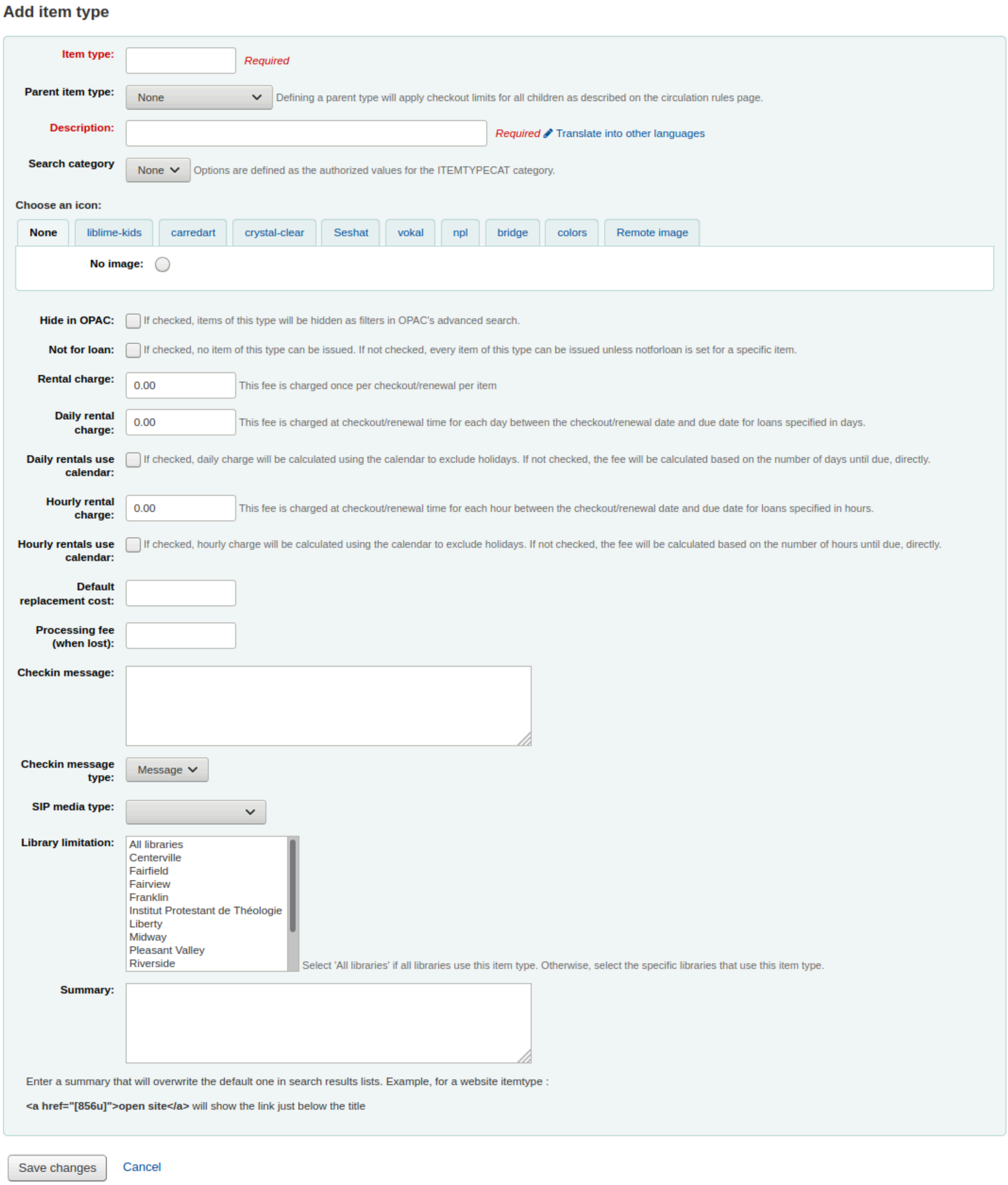
Image	Description	Code	Parent code	Search category	Not for loan	Hide in OPAC	Rental charge	Daily rental charge	Hourly rental charge	Default replacement cost	Processing fee (when lost)	Checkin message	Library limitations	Actions
	Books	BK					0.00	0.00	0.00	15.00	5.00		No limitation	Edit Delete
	Computer Files	CF					5.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	Continuing Resources	CR					5.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	DVD	DVD					0.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	DVD -- Blu-ray	BLURAY	DVD				0.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	Ebook	EBOOK					0.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	Maps	MP					5.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	Mixed Materials	MX					5.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	Music	MU					5.00	0.00	0.00	0.00	0.00		No limitation	Edit Delete
	Reference	REF			Yes					0.00	0.00		No limitation	Edit Delete

Note

- You can customize the columns of this table in the [‘Table settings’]() section of the Administration module (table id: table_item_type).

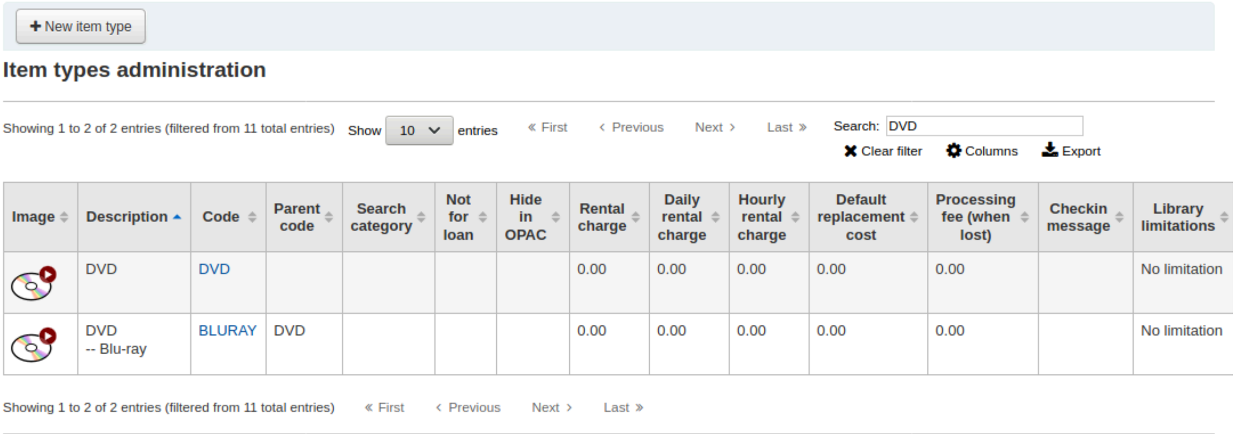
Adding item types

To add a new item type, simply click the ‘New item type’ button at the top of the Item types page.

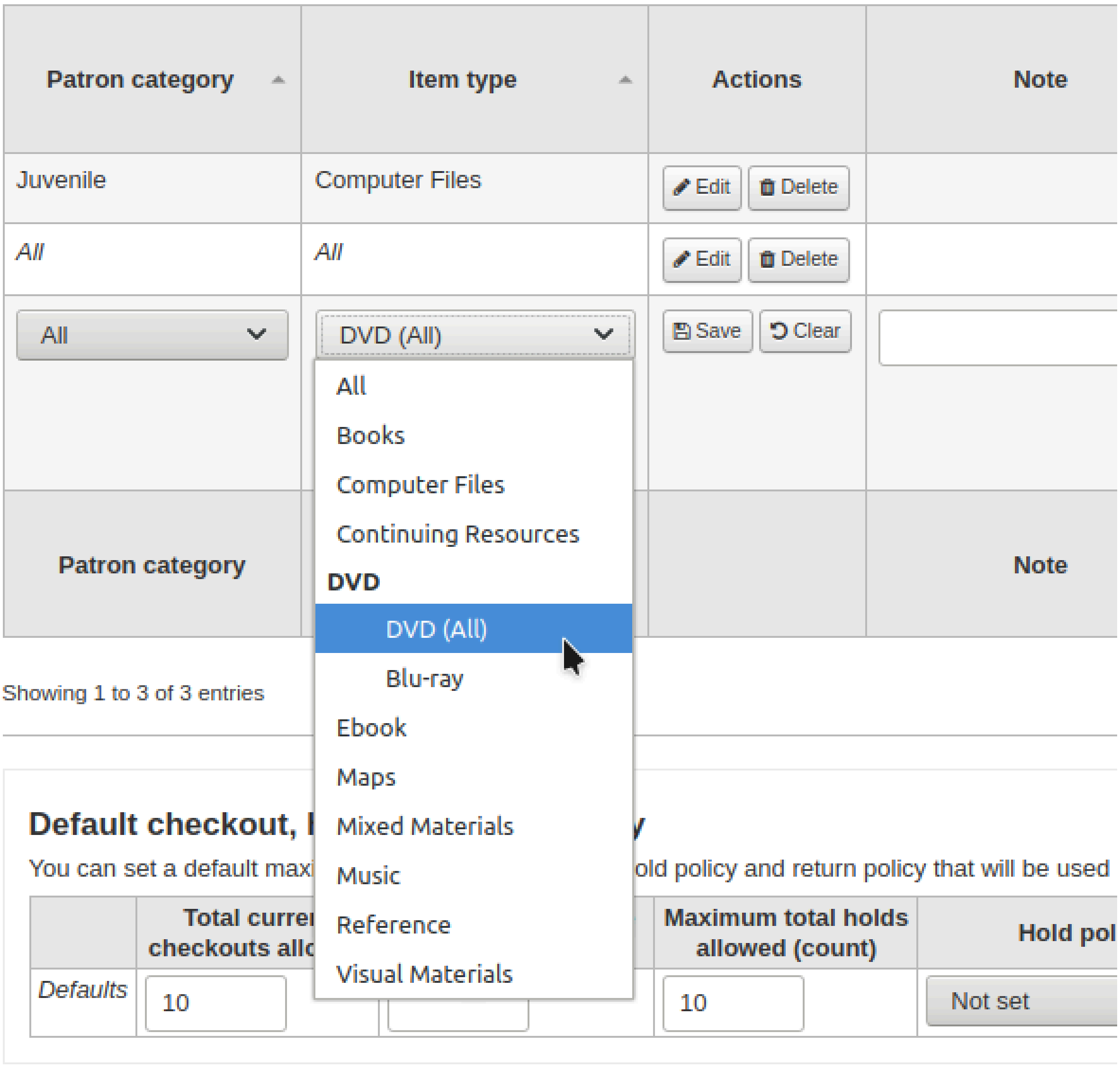


- In the ‘Item type’ field, enter a short code for your item type (maximum of 10 characters)

- The the ‘Parent item type’ field, you can choose an item type that will act as a parent category for this item type. You can then define [circulation rules](#) based on those parent item types.
  - For example, you could have DVD and Blu-ray item types, and the DVD would be the parent of the Blu-ray item type.



You can then create a [circulation rule](#) for either Blu-ray only or DVD and Blu-ray (DVD (All))



- The description is the plain text definition of the item type (for those with multiple languages installed you can translate the item type description in to all of those languages using the ‘Translate in to other languages’ link)

- Item types can be grouped together for searching at the same time. For example you can put DVDs and Blu-rays in to a group called Movie and then they can be searched together. These groups are defined in the ITEMTYPECAT authorized value category.
- You can choose to have an image associated with your item type
  - You can choose from a series of image collections
  - You can link to a remote image
  - Or you can just have no image associated with the item type

    Warning

    If this option is not enabled, you can change the setting of the noItemTypeImages or OPACNoItemTypeImages.

    Note

    To have your item type images appear in the OPAC you need to set OPACnoItemTypeImages to 'Show'.

- For items that you are suppressing from the OPAC you can hide their item type from being searched in the OPAC

  Note This will not prevent those items to appear in search results, it will simply remove the item type from the advanced search form.

  If you want to completely hide items from a certain item type, let's say that you have a professional library with books reserved for staff and you don't want those to appear in the OPAC, use the OpacHiddenItems system preference.

- For items that do not circulate, check the 'Not for loan' options
  - Items marked 'Not for loan' will appear in the catalog, but cannot be checked out to patrons
- For items that are not physical, but for which you still have circulation rules, such as museum passes or ebooks, you can set up automatic checkins.
  - Check the 'Automatic checkin' box
  - Schedule the cronjob misc/cronjobs/automatic_checkin.pl.
- For items that you charge a rental fee for, there are several ways that rental fees can be charged to a patron by item type. A flat rental charge (process fee) or a daily/hourly rental charge.
  - For items that a library would charge a flat rental charge (process fee) for, enter the total fee you charge in the 'Rental charge' field. This will charge the patron on checkout (and renewal).
  - For items that a rental charge will be charged by the number of days the item is checked out for, enter the daily fee in the 'Daily rental charge'. This will be charged to the patron upon checkout - the cost per day and how many days this item can be checked out to the patron. This daily rental charge will also be applied if/when a renewal occurs.
    - Check the 'Daily rentals use calendar', to exclude holidays from the rental fee calculation.

- For items that are loaned out hourly, enter the cost per hour in ‘Hourly rental charge’. Again, the total (hourly cost * number of hours loaned) will be charged to the patron upon checkout and renewal.

    - Check the ‘Hourly rentals use calendar’, to exclude holidays from the rental fee calculation.

- Each amount will charge the patron on checkout.

  Important

  Do not enter symbols in this field, only numbers and decimal points (ex. $5.00 should be entered as 5 or 5.00)

- You can add a default replacement cost for this type of item. This is the amount that will be charged to the patron when lost if the item doesn’t have a replacement cost. If the item has a replacement cost, that is the amount that will be charged to the patron.

  Important

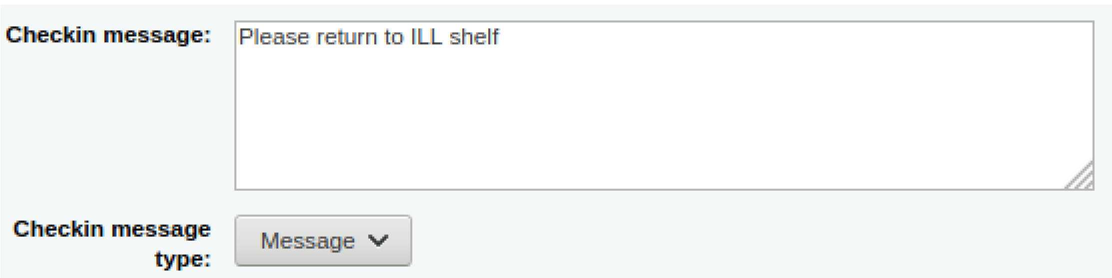
  Do not enter symbols in this field, only numbers and decimal points (ex. $5.00 should be entered as 5 or 5.00)

- You can also add a processing fee that will be added to the replacement cost.

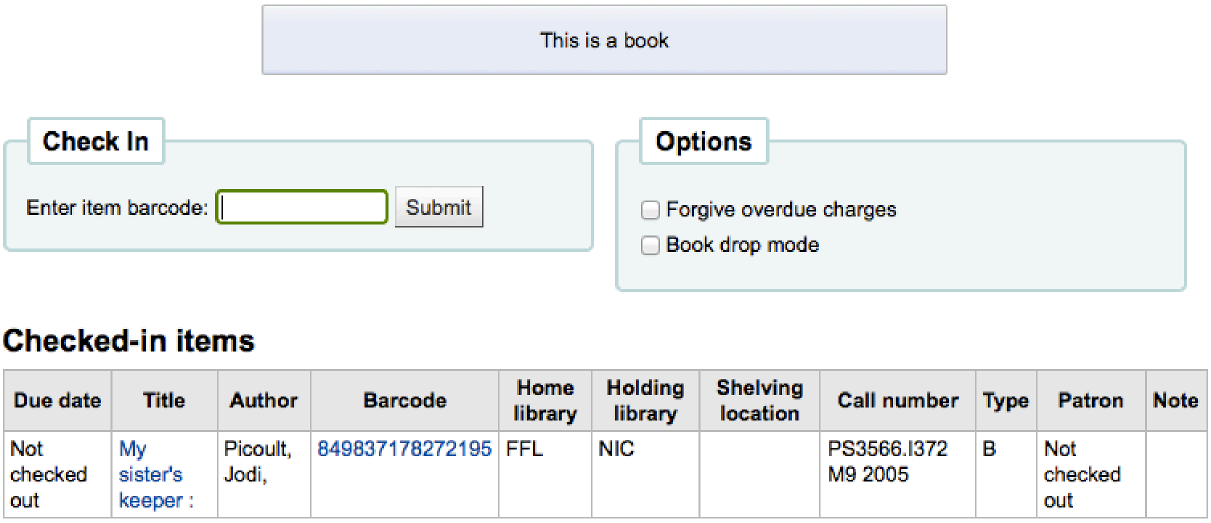
  Important

  Do not enter symbols in this field, only numbers and decimal points (ex. $5.00 should be entered as 5 or 5.00)

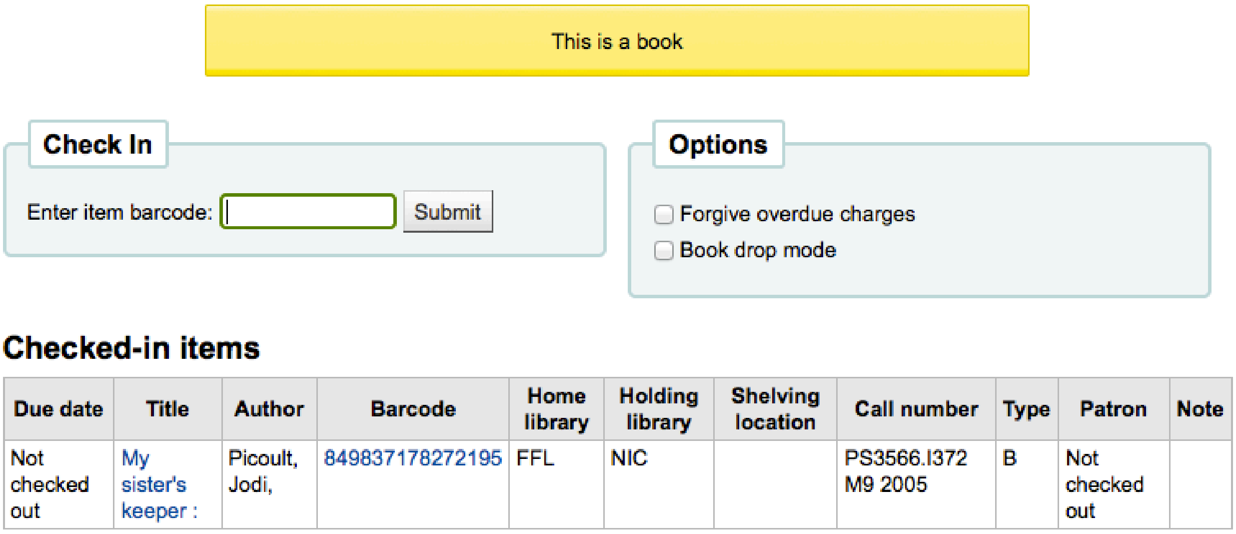
- If you would like a message or alert to appear when items of this type are checked in you can enter that in the ‘Checkin message’ box



  - The check-in message type can be a ‘message’ or an ‘alert’. The only difference between these two is the styling. By default a message is blue



and an alert is yellow.



- Some SIP devices need you to use a SIP-specific media type instead of Koha's item type (usually lockers and sorters need this media type). If you use a device like this you'll want to enter the SIP media type.
- If this item type is only to be used in certain libraries, you can select them here. Select 'All libraries' if this item type is used across the library system.

  Note

  If this is left blank, 'All libraries' is assumed.

  Note

  To select more than one library, hold the 'Ctrl' key while selecting the libraries.
- When finished, click 'Save changes'

  Note

  All fields, with the exception of the 'Item type' will be editable from the item types list
- Your new item type will now appear on the list

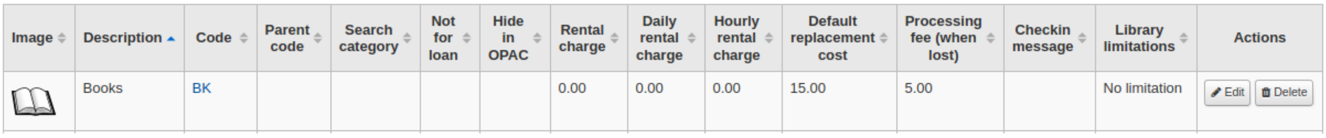


Image	Description	Code	Parent code	Search category	Not for loan	Hide in OPAC	Rental charge	Daily rental charge	Hourly rental charge	Default replacement cost	Processing fee (when lost)	Checkin message	Library limitations	Actions
	Books	BK					0.00	0.00	0.00	15.00	5.00		No limitation	Edit Delete

Editing item types

Each item type has an Edit button beside it. To edit an item simply click the ‘Edit’ button.

Important

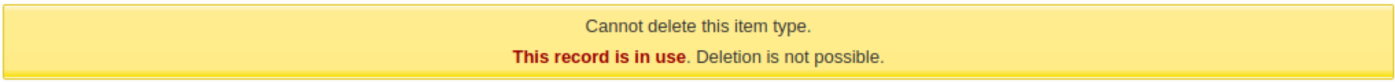
You will not be able to edit the code you assigned as the ‘Item type’ but you will be able to edit the description for the item.

Deleting item types

Each item has a Delete button beside it. To delete an item type, simply click the ‘Delete’ button.

Important

You will not be able to delete item types that are being used by items within your system.

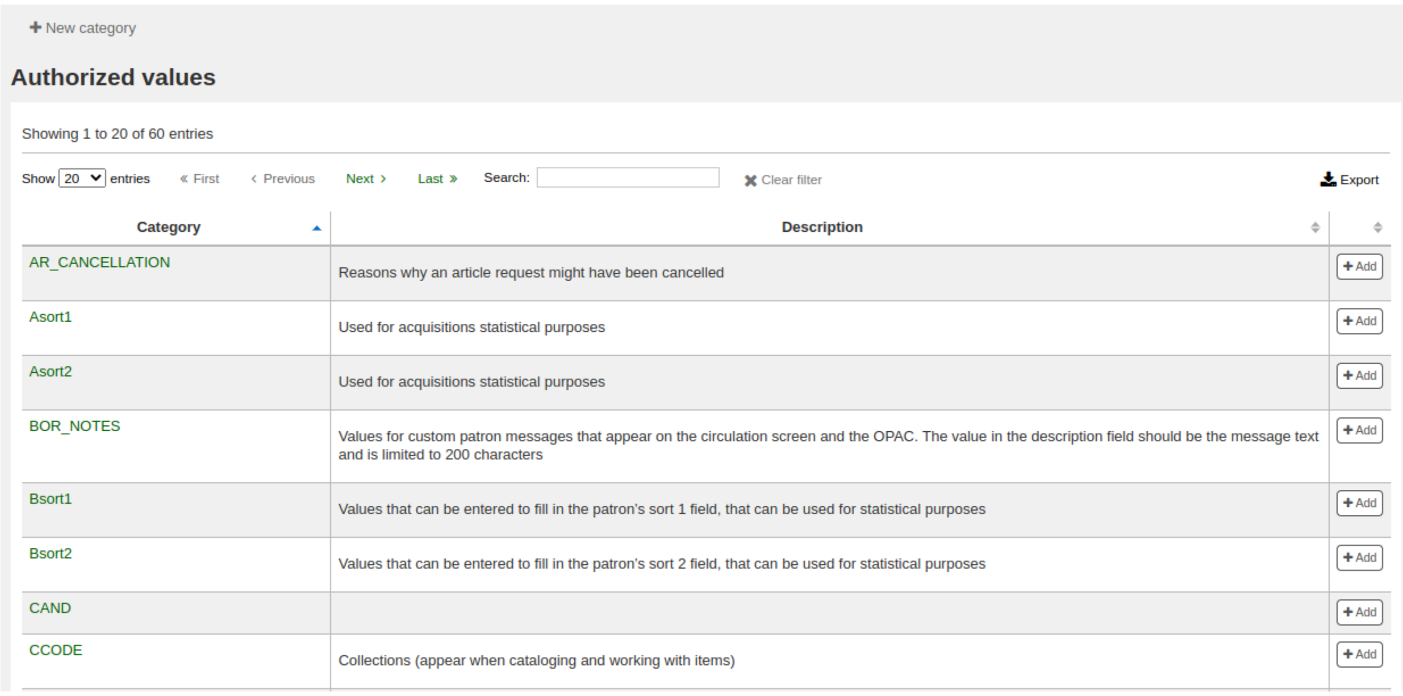


Authorized values

Authorized values can be used in several areas of Koha. They are lists of controlled terms, phrases or codes.

For example, one reason you would add an authorized value category would be to control the values that can be entered into MARC fields by catalogers.

- *Get there:* More > Administration > Basic parameters > Authorized values



Category	Description	
AR_CANCELLATION	Reasons why an article request might have been cancelled	Add
Asort1	Used for acquisitions statistical purposes	Add
Asort2	Used for acquisitions statistical purposes	Add
BOR_NOTES	Values for custom patron messages that appear on the circulation screen and the OPAC. The value in the description field should be the message text and is limited to 200 characters	Add
Bsort1	Values that can be entered to fill in the patron’s sort 1 field, that can be used for statistical purposes	Add
Bsort2	Values that can be entered to fill in the patron’s sort 2 field, that can be used for statistical purposes	Add
CAND		Add
CCODE	Collections (appear when cataloging and working with items)	Add

Note

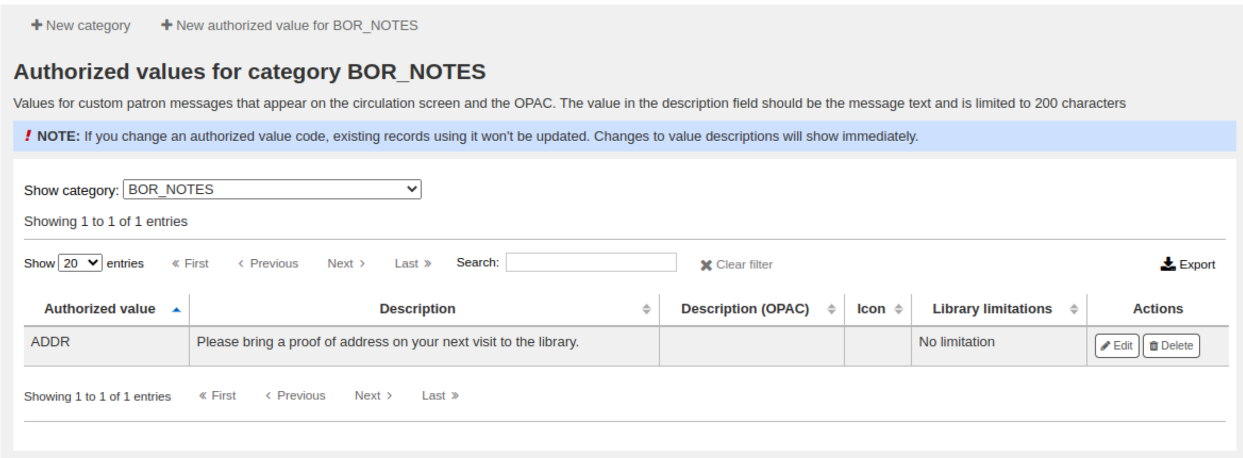
Only staff with the manage_auth_values permission (or the superlibrarian permission) will have access to this section.

Existing authorized values categories

Koha installs with pre-defined authorized values categories that your library is likely to use or that are used by the system.

- AR_CANCELLATION
  - Reasons why an article request might have been cancelled
  - If you chose to install the default values for this category, you will have
    - Item could not be located on shelves (NOT_FOUND)
    - Item was found to be too damaged to fill article request (DAMAGED)
    - Cancelled from the OPAC user page (OPAC)

    You can change those to suit your organization’s needs.
- Asort1
  - Used for acquisitions statistical purposes. You can use this as statistical categories when creating a fund in acquisitions.
- Asort2
  - Used for acquisitions statistical purposes. You can use this as statistical categories when creating a fund in acquisitions.
- BOR_NOTES
  - Values for pre-defined patron messages and circulation messages that appear on the circulation screen and the patron’s account on the OPAC.
  - Write the message you want to appear in the ‘Description’ field.

  - Note that this field is limited to 200 characters. However, the message field in the patron record can hold more than that. Write the first 200 characters in the description and write the rest when adding the message.
- Bsort1
  - Values that can be entered to fill in the patron’s sort 1 field

- Bsort2
  - Values that can be entered to fill in the patron's sort 2 field
- CAND
  - A list used in UNIMARC
- CCODE
  - Collection codes (appears when cataloging and working with items)
  - This is normally mapped to items.ccode in the Koha database.
  - If you chose to install the default values for this category, you will have
    - Fiction (FIC)
    - Non-fiction (NFIC)
    - Reference (REF)

    You can change those to suit your organization's needs.

    Warning

    For best results when searching, avoid using hyphens in location codes.
- CONTROL_NUM_SEQUENCE
  - Used to generate control numbers in the advanced cataloging editor. Enter a string ending with a number as the authorized value and use the description to describe the type of number. For example: 'sprLib0001' 'Springfield library'. In the advanced editor this will activate a new widget that will allow you to choose the type of number and generate the next number in the sequence.
- COUNTRY
  - A list of country names used in UNIMARC 102 $a
- DAMAGED
  - Descriptions for items marked as damaged (appears when cataloging and working with items).
  - This is normally mapped to items.damaged in the database.
  - If you chose to install the default values for this category, you will have
    - Damaged (1)

    You can change those to suit your organization's needs, but the values must be numerical.

  Warning

  The authorized values for DAMAGED must be numerical.
- DEPARTMENT
  - Departments are required by and are used in the course reserves module

- ERM_AGREEMENT_STATUS
  - Used to describe the status of an agreement record in the e-resources management module.
  - Can also be used in reporting.
  - Default values are
    - Active (active)
    - In negotiation (in_negotiation)
    - Closed (closed)

      Warning

      Do not change the authorized value for 'Closed' (the description can be changed), it is used to activate the 'Closure reason' drop-down menu.

- ERM_AGREEMENT_CLOSURE_REASON
  - Used to describe the closure reason for an agreement record once the has been marked as Closed in the e-resources management module.
  - Can also be used in reporting.
  - Default values are
    - Expired (expired)
    - Cancelled (cancelled)
- ERM_AGREEMENT_RENEWAL_PRIORITY
  - Used to describe the renewal priority for an agreement record in the e-resources management module, in order to flag up how important the renewal of that agreement is.
  - Can also be used in reporting.
  - Default values are
    - For review (for_review)
    - Renew (renew)
    - Cancel (cancel)
- ERM_AGREEMENT_USER_ROLES
  - Used to describe the role of a staff user who is attached to an agreement or license record in the e-resources management module.
  - Default values are
    - ERM librarian (librarian)
    - Subject specialist (subject_specialist)
- ERM_LICENSE_TYPE
  - Used to describe the type of license in the e-resources management module.
  - Can also be used in reporting.
  - Default values are
    - Local (local)
    - Consortial (consortial)
    - National (national)
    - Alliance (alliance)
- ERM_LICENSE_STATUS

- Used to describe the status of a license record in the e-resources management module. Helps staff flag up licenses in their life cycle. Can also be used in reporting.
- Can also be used in reporting.
- Default values are
  - In negotiation (in_negotiation)
  - Not yet active (not_yet_active)
  - Active (active)
  - Rejected (rejected)
  - Expired (expired)

- ERM_AGREEMENT_LICENSE_STATUS
  - Used to describe the status of a license linked to an agreement record in the e-resources management module. Helps staff flag licenses in their life cycle.
  - Can also be used in reporting.
  - Default values are
    - Controlling (controlling)
    - Future (future)
    - Historic (historic)

- ERM_AGREEMENT_LICENSE_LOCATION
  - Used to describe the physical location of an license record in the case where you may still have a paper copy of the license (rather than electronic)
  - Default values are
    - Filing cabinet (filing cabinet)
    - Cupboard (cupboard)

- ERM_PACKAGE_TYPE
  - Used to describe the types of package in the e-resources management module.
  - For local packages **only**
  - Default values are
    - Local (local)
    - Complete (complete)

- ERM_PACKAGE_CONTENT_TYPE
  - Used to describe the types of material found in a local package in the e-resources management module.
  - For local packages **only**
  - Default values are
    - Aggregated full (AggregatedFullText)
    - Abstract and index (AbstractAndIndex)
    - E-book (EBook)
    - E-journal (EJournal)
    - Mixed content (MixedContent)
    - Online reference (OnlineReference)
    - Print (Print)
    - Streaming media (StreamingMedia)
    - Unknown (Unknown)

- ERM_TITLE_PUBLICATION_TYPE
  - Used to describe the type of material of a title in the e-resources management module.
  - For local titles **only**
  - Default values are
    - AudioBook (audiobook)
    - Book (book)

    - Bookseries (bookseries)
    - Database (database)
    - E-book (ebook)
    - Journal (journal)
    - Newsletter (newsletter)
    - Newspaper (newspaper)
    - Proceedings (proceedings)
    - Report (report)
    - Streaming audio (streamingaudio)
    - Streaming video (streamingvideo)
    - Thesis/Dissertation (thesisdissertation)
    - Unspecified (unspecified)
    - Website (website)

- ETAT

  - Used in French UNIMARC installations in field 995 $o to identify item status. Similar to NOT_LOAN

- HINGS_AS

  - General holdings: acquisition status designator :: This data element specifies acquisition status for the unit at the time of the holdings report.

- HINGS_C

  - General holdings: completeness designator

- HINGS_PF

  - Physical form designators

- HINGS_RD

  - General holdings: retention designator :: This data element specifies the retention policy for the unit at the time of the holdings report.

- HINGS_UT

  - General holdings: type of unit designator

- HOLD_CANCELLATION

  - Reasons why a hold might have been canceled. These are used when [cancelling holds](#).

  - If you chose to install the default values for this category, you will have

    - Item could not be located on shelves (NOT_FOUND)
    - Item was found to be too damaged to fill hold (DAMAGED)

    You can change those to suit your organization's needs.

- HSBND_FREQ

  - Delivery frequencies used by the housebound module. They are displayed on the [housebound tab](#) in the patron's account in the staff interface.

  - If you chose to install the default values for this category, you will have

    - Every week (EW)

You can change those to suit your organization's needs.

- ILL_STATUS_ALIAS
  - Interlibrary loan (ILL) request statuses used in the ILL module.
- ITEMTYPECAT
  - Search categories for item types. These values allow multiple item types to be searched at the same time.
  - To combine item types in categories, choose the category in the item type settings.
  - For example, an ITEMTYPECAT value could be 'NEW'. This search category could be set for the item types 'NEW BOOKS' and 'NEW DVDS'. This will replace NEW BOOKS and NEW DVDS item types in the advanced search form by 'NEW'. When a patron chooses the searched for the category 'NEW', they will search multiple item types with a single search.
- LANG
  - A list of ISO 639-2 standard language codes.
- LOC
  - Shelving locations (usually appears when adding or editing an item).
  - This is normally mapped to items.location in the Koha database.
  - If you chose to install the default values for this category, you will have
    - Audio visual (AV)
    - Book cart (CART)
      - CART is used by UpdateItemLocationOnCheckin
    - Children's area (CHILD)
    - Fiction (FIC)
    - General stacks (GEN)
    - New materials shelf (NEW)
    - On display (DISPLAY)
    - Processing center (PROC)
      - PROC can be used with NewItemsDefaultLocation and UpdateItemLocationOnCheckin.
    - Reference (REF)
    - Staff office (STAFF)

    You can change those to suit your organization's needs.

    Warning

    For best results when searching, avoid using hyphens in location codes.
- LOST
  - Descriptions for the items marked as lost (appears when adding or editing an item).
  - This is normally mapped to items.itemlost in the Koha database.
  - If you chose to install the default values for this category, you will have
    - Lost (1)
    - Long overdue (lost) (2)

    - Lost and paid for (3)
    - Missing (4)
    - Missing from bundle (5)

    You can change those to suit your organization’s needs, but the values must be numerical.

  Warning

  The authorized values for LOST must be numerical.

- OPAC_SUG
  - A list of reasons displayed in the suggestion form on the OPAC.
  - If you chose to install the default values for this category, you will have
    - The copy on the shelf is damaged (damaged)
    - Upcoming title by popular author (bestseller)

    You can change those to suit your organization’s needs.
- NOT_LOAN
  - Reasons why a title is not for loan (appears when adding or editing an item)
  - This is normally mapped to items.notforloan in the Koha database.
  - If you chose to install the default values for this category, you will have
    - On order (-1)
    - Not for loan (1)
    - Staff collection (2)
    - Added to bundle (3)

    You can change those to suit your organization’s needs, but the values must be numerical.

  Warning

  The authorized values for NOT_LOAN must be numerical.

  - Negative number values will still allow holds (use for ‘on order’ statuses, for example)
  - Positive numbers will not allow holds or checkouts.
  - A value of 0 means ‘for loan’.
- ORDER_CANCELLATION_REASON
  - Reasons why an order might have been canceled, used in acquisitions
  - If you chose to install the default values for this category, you will have
    - No reason provided (0)
    - Out of stock (1)
    - Restocking (2)

    You can change those to suit your organization’s needs.
- PA_CLASS

- Values used to group patron attributes together in the patron add form

- PAYMENT_TYPE

  - Populates a dropdown list of custom payment types when paying fines

  - If you chose to install the default values for this category, you will have

    - Cash via SIP2 (SIP00)
    - Visa via SIP2 (SIP01)
    - Creditcard via SIP2 (SIP02)

    You can change those to suit your organization's needs.

- qualif

  - Function codes (author, editor, collaborator, etc.) used in UNIMARC 7XX $4 (French)

- RELTERMS

  - List of relator codes and terms
  - This list is based on the Library of Congress' MARC21 code list for relators [https://www.loc.gov/marc/relators/]
  - It can be linked to a subfield in a MARC bibliographic framework in order to create a dropdown menu for cataloguers to choose from instead of typing the relator code. In MARC21, relator codes are usually in subfield $4.

- REPORT_GROUP

  - A way to sort and filter your reports. These will appear as tabs in the saved reports page.

  - If you chose to install the default values for this category, you will have

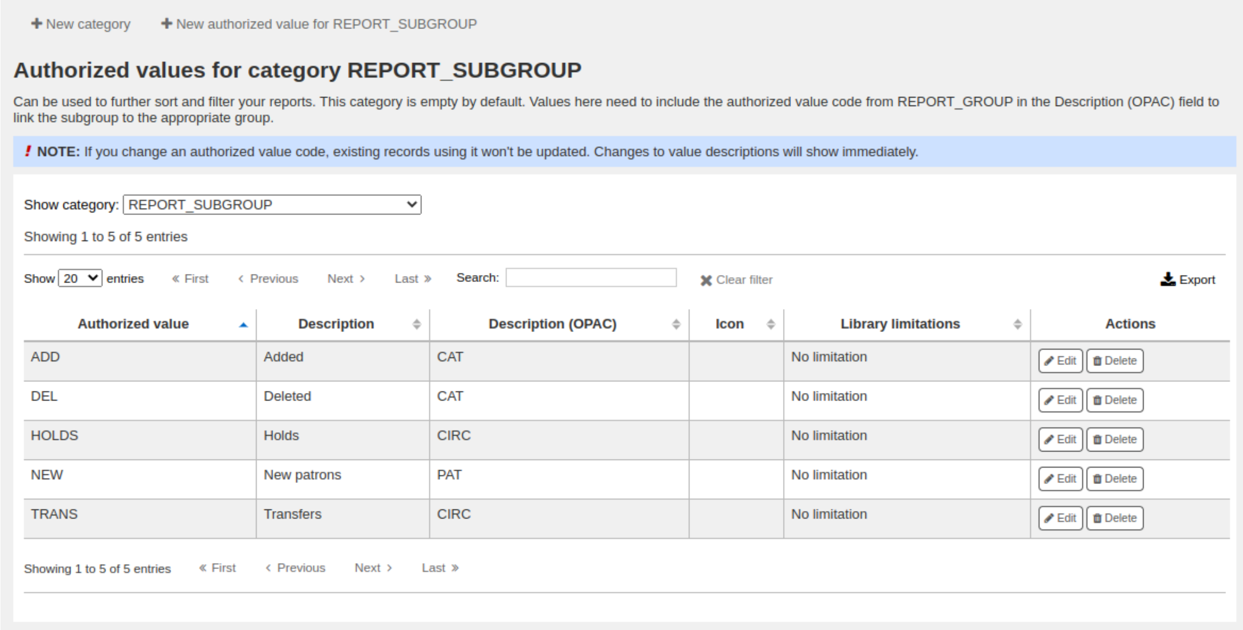
    - Account (ACC)
    - Acquisitions (ACQ)
    - Catalog (CAT)
    - Circulation (CIRC)
    - Patrons (PAT)
    - Serials (SER)

    You can change those to suit your organization's needs.

- REPORT_SUBGROUP

  - These values can be used to further sort and filter your reports.

  - Values here need to include the authorized value code from REPORT_GROUP in the Description (OPAC) field to link the subgroup to the appropriate group.



- RESTRICTED
  - Restricted status of an item (appears when adding or editing an item)
  - This is normally mapped to items.restricted in the Koha database.
  - If you chose to install the default values for this category, you will have
    - Restricted access (1)

    You can change those to suit your organization’s needs, but the values must be numerical.

    Warning

    The authorized values for this category must be numerical.

- RETURN_CLAIM_RESOLUTION
  - Reasons why a return claim has been resolved
  - If you chose to install the default values for this category, you will have
    - Returned by patron (RET_BY_PATRON)
    - Found in library (FOUND_IN_LIB)

    You can change those to suit your organization’s needs.

- ROADTYPE
  - Road types to be used in patron addresses (‘street type’ field in the patron form)
- SIP_MEDIA_TYPE
  - Used when creating or editing an item type to assign a SIP specific media type for devices like lockers and sorters.
  - If you chose to install the default values for this category, you will have
    - Other (000)
    - Book (001)
    - Magazine (002)

        - Bound journal (003)
        - Audio tape (004)
        - Video tape (005)
        - CD/CDROM (006)
        - Diskette (007)
        - Book with diskette (008)
        - Book with CD (009)
        - Book with audio tape (010)

    Warning

    SIP media types are limited to 3 characters. Make sure your authorized values for SIP_MEDIA_TYPE do not have more than 3 characters.

- STACK
    - Shelving control number (appears when adding or editing an item)
    - This is normally mapped to items.stack in the Koha database.

    Warning

    The authorized values for this category must be numerical.

- SUGGEST
    - Reasons for acceptance or rejection of suggestions in acquisitions (appears when managing suggestions)
    - If you chose to install the default values for this category, you will have
        - Available via ILL (AVILL)
        - Bestseller (BSELL)
        - Document not corresponding to our acquisition policy (Poldoc)
        - Document too expensive (Expensive)
        - Insufficient budget (Budget)
        - Library copy lost (LCL)
        - Shelf copy damaged (SCD)

      You can change those to suit your organization's needs.

- SUGGEST_FORMAT
    - List of item types to display in a drop down menu on the suggestion form on the OPAC.
    - If you chose to install the default values for this category, you will have
        - Audiobook (AUDIOBOOK)
        - Book (BOOK)
        - EBook (EBOOK)
        - DVD (DVD)
        - Large print (LP)

      You can change those to suit your organization's needs.

      Warning

Suggestion format types are limited to 30 characters. Make sure your authorized values for this category do not have more than 30 characters.

- SUGGEST_STATUS
  - A list of additional custom status values for suggestions that can be used in addition to the default values.

    Warning

    The suggestion status is limited to 10 characters. Make sure your authorized value does not have more than 10 characters.

    Warning

    The suggestion status must **not** contain any spaces.

- TERM
  - Terms to be used in Course Reserves module. Enter terms that will show in the drop down menu when setting up a Course reserve. (For example: Spring, Summer, Winter, Fall).
- UPLOAD
  - Categories to be assigned to file uploads. Without a category, an upload is considered temporary and may be removed during automated cleanup.
- VENDOR_INTERFACE_TYPE
  - Values used as types of interfaces for vendor interfaces in the acquisitions module.
- VENDOR_ISSUE_TYPE
  - Values used as a type of issue with a vendor when adding an issue in the acquisitions module.
- VENDOR_TYPE
  - Values used to categorize vendors in the acquisitions module.
- WITHDRAWN
  - Description of a withdrawn item (appears when adding or editing an item)
  - This is normally mapped to items.withdrawn in the Koha database.
  - If you chose to install the default values for this category, you will have
    - Withdrawn (1)

    You can change those to suit your organization’s needs, but the values must be numerical.

  Warning

  The authorized values for this category must be numerical.

- YES_NO
    - A generic authorized value field that can be used anywhere you need a simple yes/no pull down menu.
    - If you chose to install the default values for this category, you will have
        - Yes (1)
        - No (0)

Warning

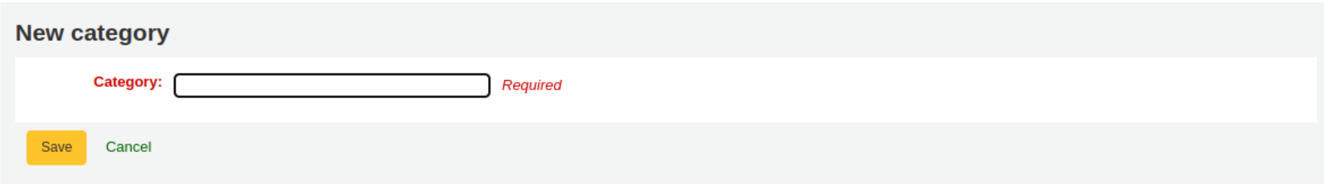
In general, binary fields require a 1 or 0 value. If you change these values, make sure the field you intend to attach it to can take other values than 0 or 1.

Adding new authorized value categories

In addition to the existing categories that come by default with Koha, librarians can add their own authorized value categories to control data that is entered into the system.

To add a new category:

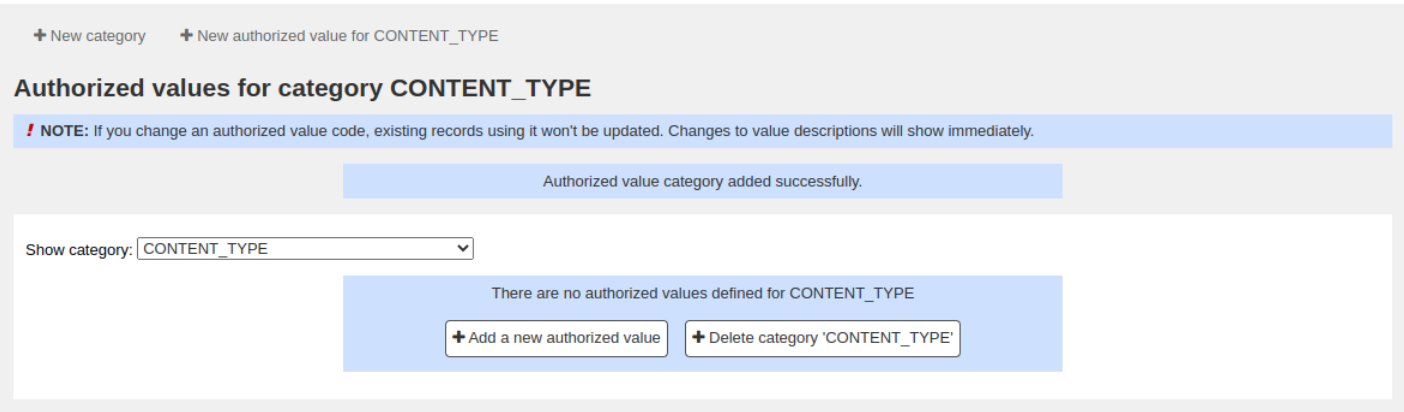
- Click ‘New category’



- Limit your category code to 32 characters (something short to make it clear what the category is for)

Warning

A category code cannot have spaces or special characters other than underscores and hyphens in it.



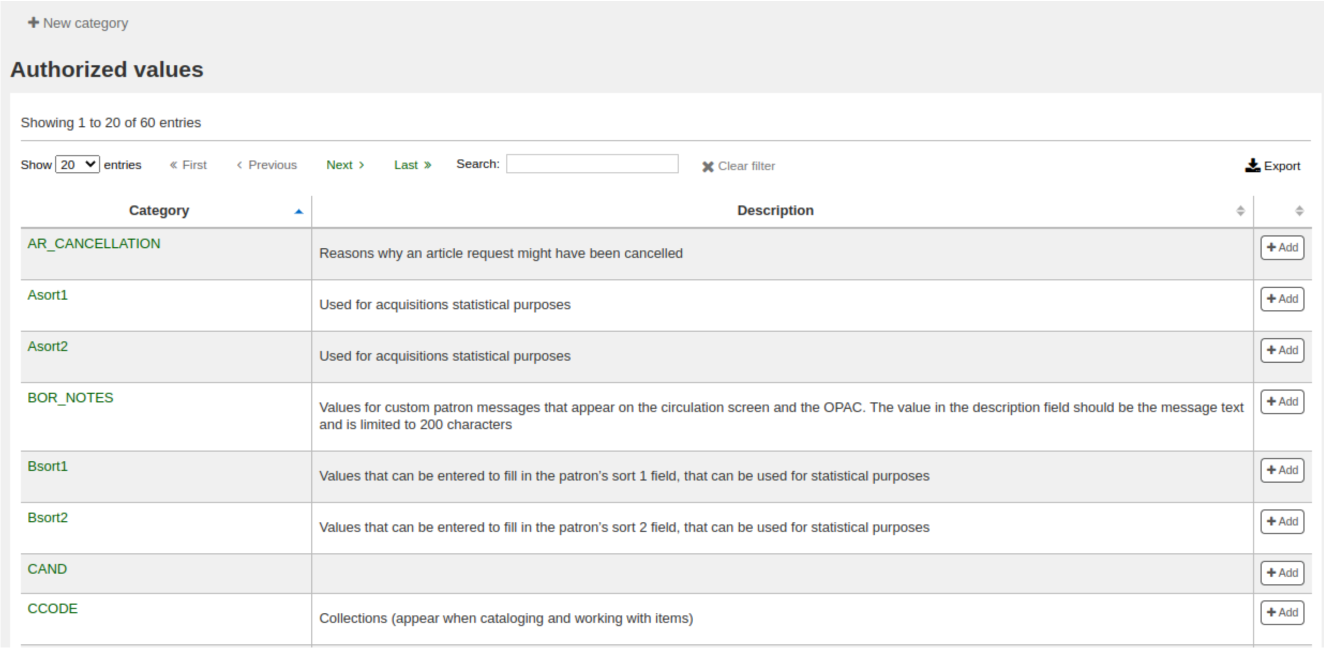
Proceed to [add a new authorized value to the category](#).

Adding new authorized values

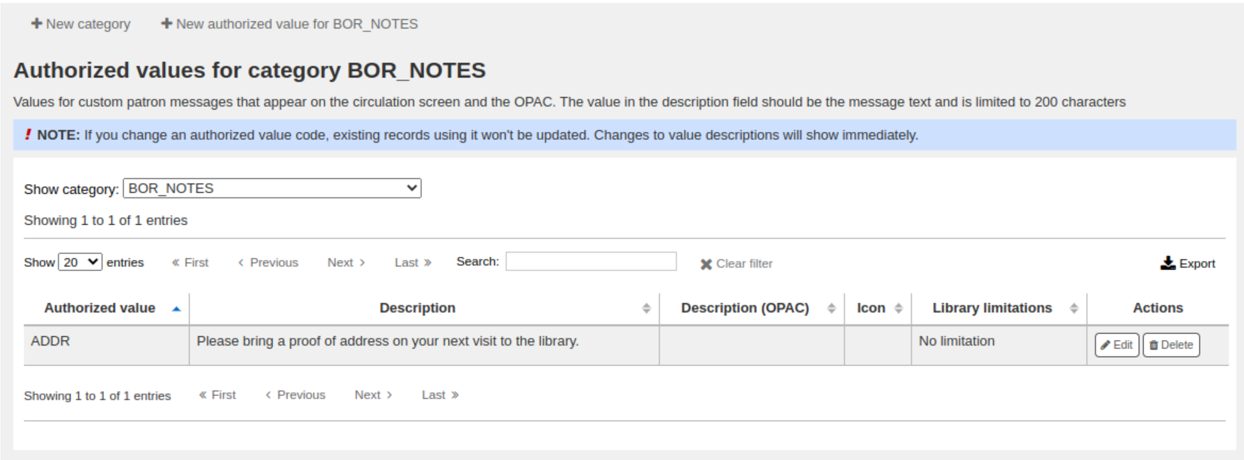
New authorized values can be added to any existing or new category.

To add a value:

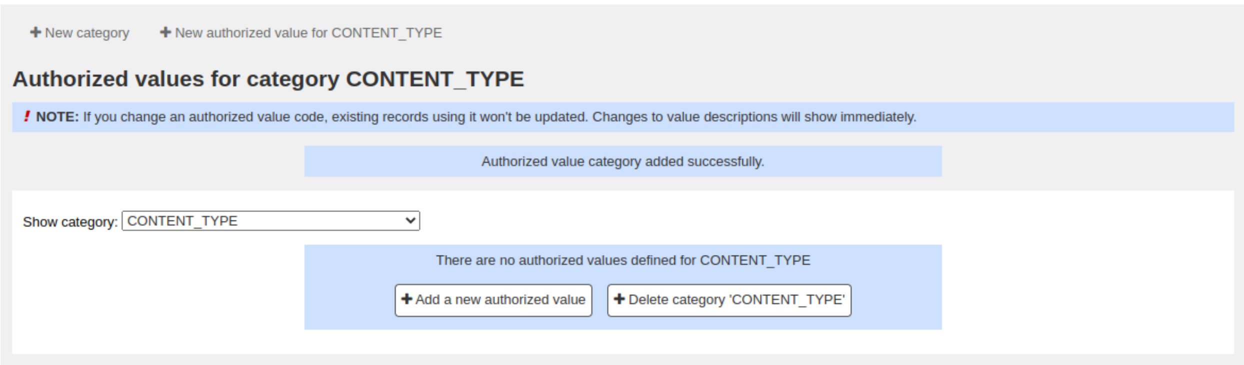
- From the categories list, click the ‘Add’ button on the right of the category



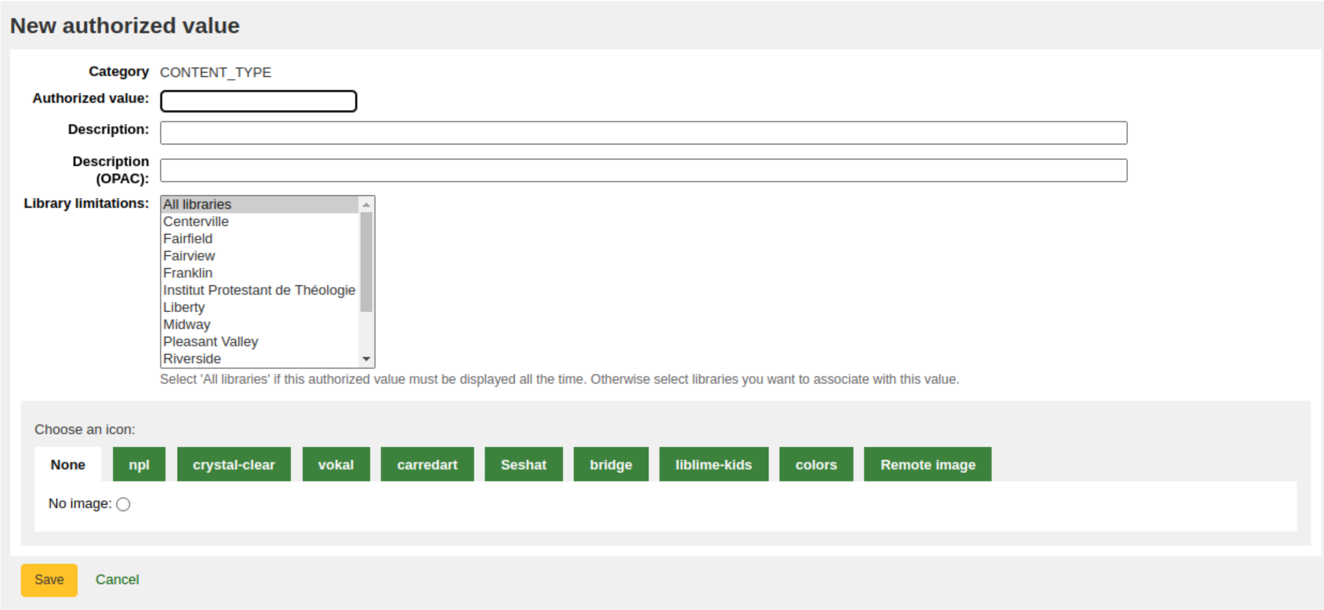
  - Alternatively, click on the category name, and then click ‘New authorized value for …’



  - If the category has no values yet, click on the ‘Add a new authorized value’ button at the bottom of the page



- Fill out the form



- Authorized value: enter a code for your authorized value

  Note

  Authorized value is limited to 80 characters and cannot have spaces or special characters other than underscores and hyphens in it.

  Some categories, such as SUGGEST_STATUS, may have stricter limits. Refer to the [Existing authorized values categories](#) section above for specified limits.

- Description: use this field for the actual value that will be displayed.

- Description (OPAC): if you want a different description to show in the OPAC, enter it here. If this field is empty, the ‘Description’ will be used in both the staff interface and the OPAC.

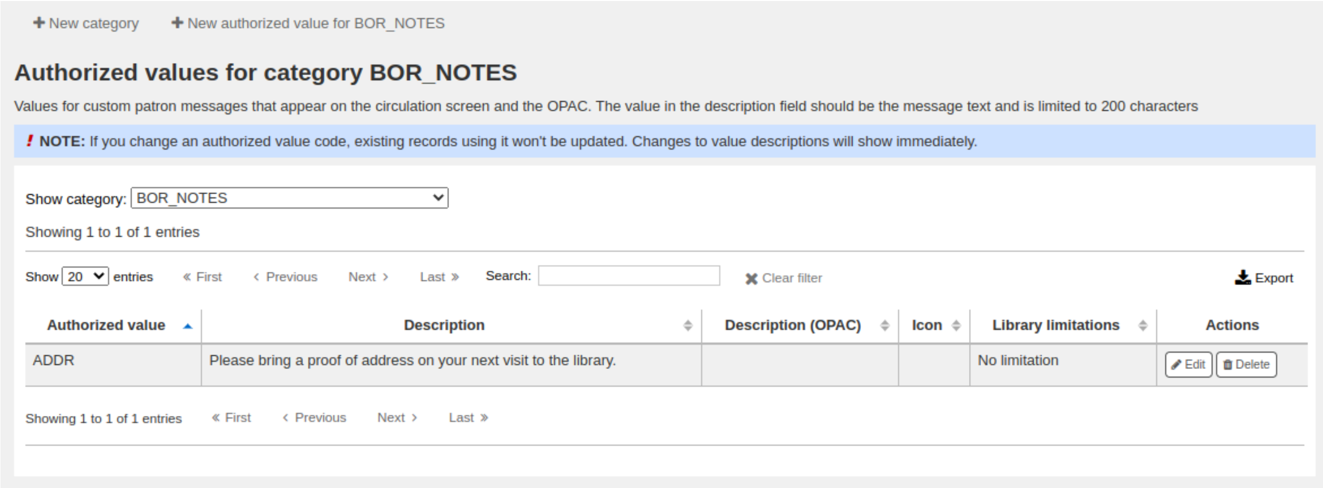
- Library limitations: if you would like to limit this authorized value to only specific libraries, you can choose them from this menu. To have it available to all libraries just choose ‘All libraries’ at the top of the list.

- Choose an icon: you can choose an image that will appear next to the value in the staff interface and OPAC.

  Note

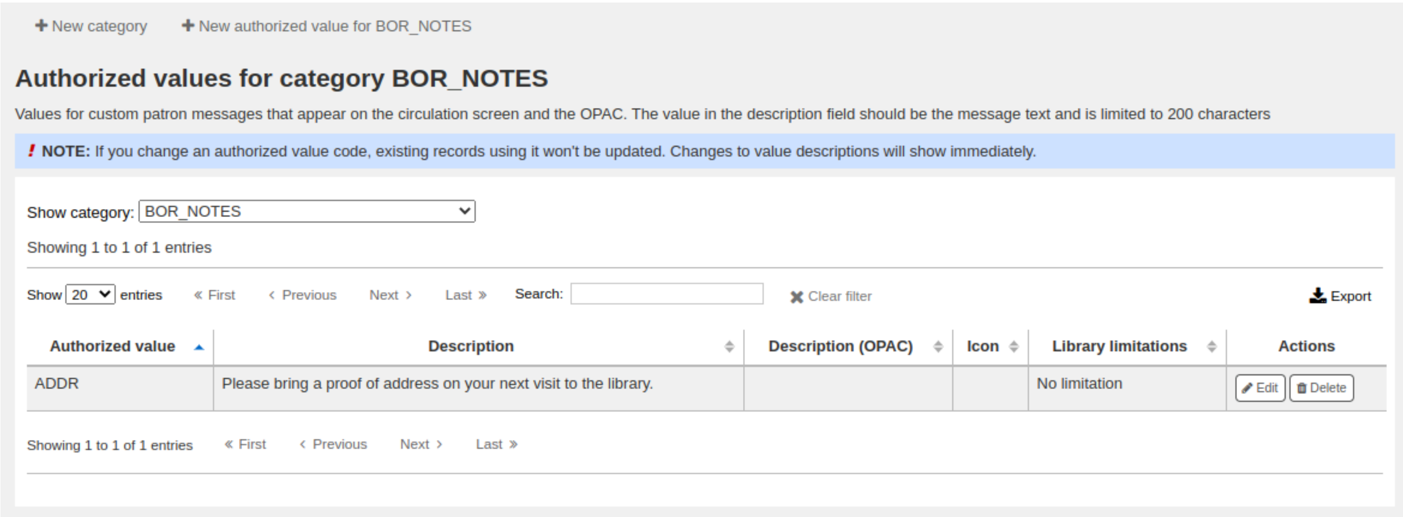
  This feature doesn’t work everywhere. It’s mostly for item locations (LOC) and collections (CCODE) in the advanced search.

* Click ‘Save’
* The new value will appear in the list along with existing values

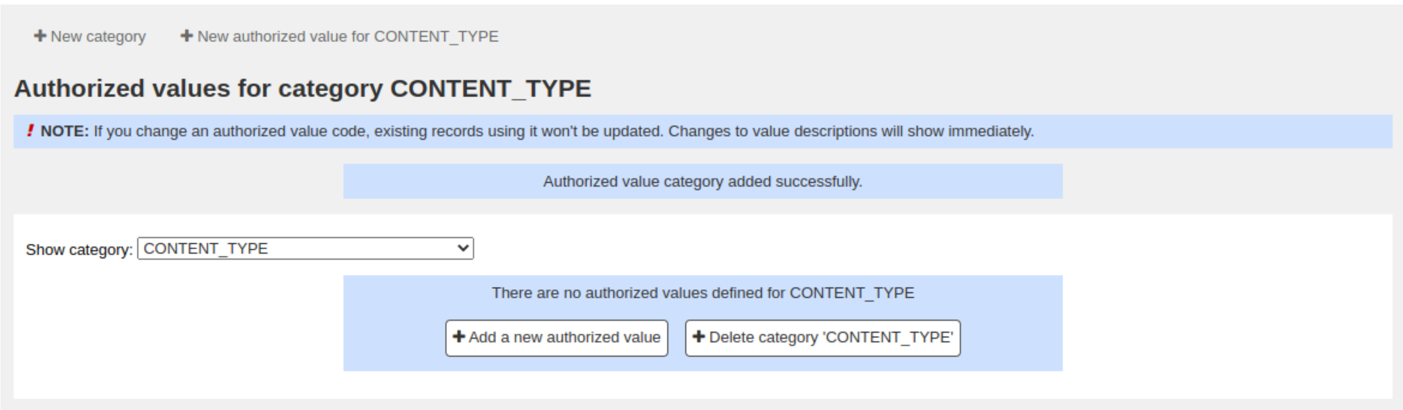


Deleting authorized values

To delete an authorized value, click on the 'Delete' button at the right of the authorized value.



Once there are no authorized values left in an authorized value category, you can delete the category.



Patrons and circulation

Settings for controlling circulation and patron information.

Patron categories

Patron categories allow you to organize your patrons into different roles, age groups, and patron types.

- *Get there:* More > Administration > Patrons and circulation > Patron categories

+ New category

Patron categories

Showing 1 to 12 of 12 entries Show 20 entries « First ‹ Previous Next › Last » Search: ✖ Clear filter Columns Export

Code	Category name	Type	Enrollment period	Age required	Upper age limit	Enrollment fee	Overdue	Lost items	Hold fee	Messaging	Library limitations	Default privacy	Actions
B	Board	Prof.	99 months	5 years	17 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
HB	Home Bound	Adult	99 months	18 years	999 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
IL	Inter-Library Loan	Org.	99 months	18 years	999 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
J	Juvenile	Child	99 months	5 years	17 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
K	Kid	Child	99 months	5 years	17 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
L	Library	Org.	99 months	18 years	999 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
PT	Patron	Adult	99 months	18 years	999 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
SC	School	Org.	99 months	18 years	999 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
S	Staff	Staff	99 months	18 years	999 years	-	No	Shown	-	None	No limitation	Default	Edit Delete
ST	Student	Adult	99 months	18 years	999 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete
T	Teacher	Prof.	99 months	18 years	999 years	-	No	Shown	-	None	No limitation	Default	Edit Delete
YA	Young Adult	Child	99 months	5 years	17 years	-	Yes	Shown	-	None	No limitation	Default	Edit Delete

Showing 1 to 12 of 12 entries « First ‹ Previous Next › Last »

Note

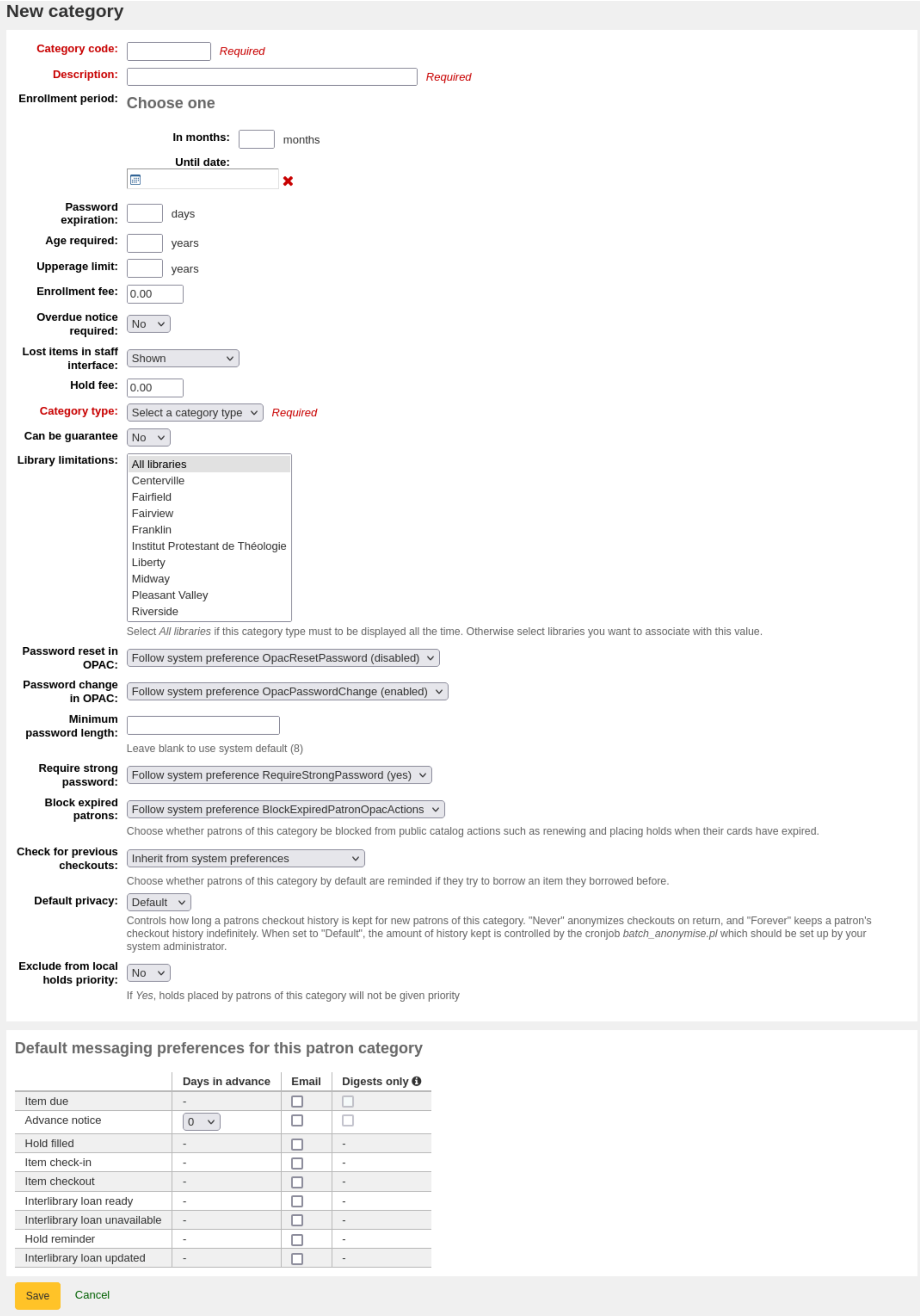
You can customize the columns of this table in the 'Table settings' section of the Administration module (table id: patron_categories).

Note

Only staff with the manage_patron_categories permission (or the superlibrarian permission) will have access to this section.

Adding a patron category

To add a new patron category click 'New category' at the top of the page



- Category code: an identifier for your new category.

    - The category code is limited to 10 characters (numbers and letters) and must be unique.
    - This field is required in order to save your patron category. If left blank you will be presented with an error.
- Description: a plain text version of the category.
    - The description will be visible throughout Koha.
    - This field is required in order to save your patron category. If left blank you will be presented with an error.
- Enrollment period:
    - In months: should be filled in if you have a limited enrollment period for your patrons. For example, student cards expire after 9 months
    - Until date: you can choose a date when the cards will expire
    - This field is required in order to save your patron category. If left blank you will be presented with an error.

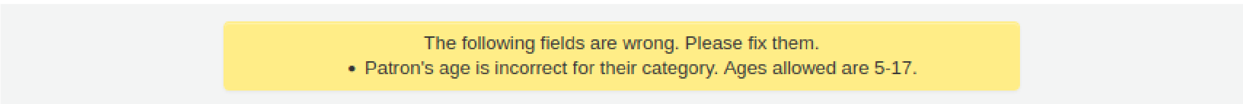
Warning

You cannot enter both a month limit and a date until for one category. Choose to enter either one or the other.

- Password expiration: enter the number of days after which a patron has to change their password.

- Age required: minimum age (in years) requirement associated with the category. For example, an 'Adult' patron category could have a minimum age of 18 years; this means patrons must be at least 18 to be in the patron category.

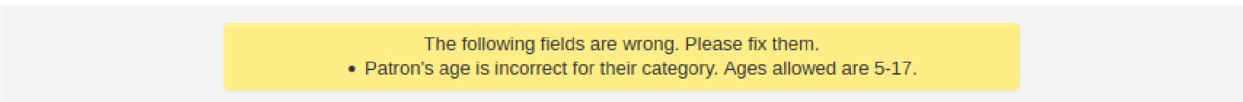
    - When creating or updating a patron, a warning will appear if the patron is too young for this category.



    - This value is used by the update_patrons_category.pl cron job to change the category of patrons who are too young.

- Upper age limit: maximum age (in years) associated with the category. For example, a 'Children' patron category could have an upper age limit of 18, meaning patrons can have children cards until they turn 18.

    - When creating or updating a patron, a warning will appear if the patron is too old for this category.



    - This value is used by the update_patrons_category.pl cron job to change the category of patrons who are too old.

- Enrollment fee: enter the amount if you charge a membership fee for your patrons (such as those who live in another region).

Warning

Only enter numbers and decimals in this field.

Note

Depending on your value for the FeeOnChangePatronCategory system preference, this fee will be charged on patron renewal as well as when they are first enrolled.

- Overdue notice required: choose 'Yes' if you want patrons from this category to receive overdue notices. This will enable you to set the overdue notice triggers in the Tools module.
- Lost items in staff interface: decide on a patron category basis if lost items are shown in the staff interface.
  - Shown: lost items are shown in the staff interface.
  - Hidden by default: lost items are hidden, but staff members can click 'Show all items' to see them.

Note

This is only applicable in the staff interface, so changing this value on patron categories who do not have access to the staff interface won't make any difference.

- Hold fee: enter the fee amount if you charge patrons from this category a fee for placing holds on items.

Warning

Only enter numbers and decimals in this field.

- Category type: choose one of the six main parent categories

    - Adult: most common patron type, usually used for a general 'Patron' category.
    - Child: another common patron type.
    - Staff: library staff
    - Organizational: organizations can be used as guarantors for Professional patrons.
    - Professional: professional patrons can be linked to Organizational patrons.
    - Statistical: this patron type is used strictly for statistical purposes, such as in-house use of items.

  - This field is required in order to save your patron category. If left blank you will be presented with an error.

- Can be guarantee: if the patrons of this category can have guarantors, choose yes. This will make the 'Patron guarantor' and 'Non-patron guarantor' sections appear in the patron form.

- Branch limitations: if necessary, limit this patron category to only some branches in your library system. Select 'All branches' if you would like any library to be able to use this category.

  - To select more than one branch, hold the Ctrl key while making your selection.

- Password reset in OPAC: decide whether patrons of this category are allowed to reset their password through the OPAC's 'Forgotten password' function. By default, it will follow the rule set in the OpacResetPassword system preference.

  - Follow system preference OpacResetPassword.
  - Allowed: patrons of this category will be able to reset their password through the OPAC regardless of the setting in OpacResetPassword.

    - Not allowed: patrons of this category will *not* be able to reset their password through the OPAC regardless of the setting in OpacResetPassword.

- Password change in OPAC: decide whether patrons of this category are allowed to change their password through the OPAC. By default, it will follow the rule set in the OpacPasswordChange system preference.

    - Follow system preference OpacPasswordChange.
    - Allowed: patrons of this category will be able to change their password through the OPAC regardless of the setting in OpacPasswordChange.
    - Not allowed: patrons of this category will be *not* able to change their password through the OPAC regardless of the setting in OpacPasswordChange.

- Minimum password length: enter the minimum password length for patrons of this category. Leave blank to use the default length set in the minPasswordLength system preference.

- Require strong password: decide whether to enforce a strong password policy (at least one uppercase letter, one lowercase letter and one digit) for patrons of this category. By default, it will follow the rule set in the RequireStrongPassword system preference.

    - Follow the system preference RequireStrongPassword.
    - Yes: patrons of this category will be required to have a strong password regardless of the setting in RequireStrongPassword.
    - No: patrons of this category will *not* be required to have a strong password regardless of the setting in RequireStrongPassword.

- Block expired patrons: decide if this patrons from this category are blocked from performing actions in the OPAC if their card is expired. By default it will follow the rule set in the BlockExpiredPatronOpacActions preference.

    - Follow the system preference BlockExpiredPatronOpacActions.
    - Block: patrons of this category whose membership has expired will be blocked from renewing and placing holds in the OPAC, regardless of the setting in BlockExpiredPatronOpacActions.
    - Don’t block: patrons of this category whose membership has expired will *not* be blocked from renewing and placing holds in the OPAC, regardless of the setting in BlockExpiredPatronOpacActions.

- Check for previous checkouts: if the CheckPrevCheckout system preference is set to either ‘Unless overridden by patron category’ options, you will be able to set the value for this particular patron category here.

    - Yes and try to override system preferences: Koha will check if the patron already checked out this item, unless the patron’s personal settings prevent it.
    - No and try to override system preferences: Koha will not check in the patron already checked out this item, unless the patron’s personal settings permit it.
    - Inherit from system preferences: the setting of the CheckPrevCheckout system preference will be followed.

- Can place ILL in OPAC: if the ILLModule system preference is enabled, this setting determines if patrons of this category can place ILL requests from the OPAC.

    Version

    This option was added to Koha in version 23.11. In previous versions, all patrons can place ILL requests from the OPAC.

- Default privacy: choose the default privacy settings for patrons of this category.

- Default: checkout history will be kept indefinitely, until either the batch_anonymize.pl script is run or there is a manual batch anonymization which is performed.
    - Never: checkout history is anonymized upon return. Statistics are kept, but the link between the checkout, the item and the patron is removed.
    - Forever: checkout history is never anonymized for patrons of this category, regardless of the cron job or manual anonymization.
    - This setting can be edited by the patron via the OPAC if you allow it with the OPACPrivacy system preference.

- Exclude from local holds priority: choose whether holds for patrons of this category are given a priority.

    - Yes: holds for patrons of this category are not given special priority, regardless of the setting in LocalHoldsPriority.
    - No: holds for patrons of this category are subjected to the setting in LocalHoldsPriority.

- Default messaging preferences for this patron category: assign advanced messaging preferences by default to the patron category

    - These default preferences can be changed on an individual basis for each patron. This setting is just a default to make it easier to set up messages when creating new patrons.

  Note

  This requires that you have EnhancedMessagingPreferences system preference set to 'Allow'.

  Warning

  These defaults will only be applied to new patrons that are added to the system. They will not edit the preferences of the existing patrons.

  If you need to apply the default preferences to existing patrons, you can force those changes by running the borrowers-force-messaging-defaults script found in the misc/maintenance folder. Ask your system administrator for assistance with this script.

Circulation and fine rules

These rules define how your items are circulated, how and when fines are calculated and how holds are handled.

- *Get there:* More > Administration > Patrons and circulation > Circulation and fine rules

Note

Only staff with the manage_circ_rules permission (or the superlibrarian permission) will have access to this section.

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

- same library, same patron category, same item type
- same library, same patron category, all item types
- same library, all patron categories, same item type
- same library, all patron categories, all item types
- default (all libraries), same patron category, same item type
- default (all libraries), same patron category, all item types

- default (all libraries), all patron categories, same item type
- default (all libraries), all patron categories, all item types

The CircControl and HomeOrHoldingBranch also come in to play when figuring out which circulation rule to follow.

- If CircControl is set to "the library you are logged in at" circulation rules will be selected based on the library you are logged in at

- If CircControl is set to "the library the patron is from" circulation rules will be selected based on the patron's library

- If CircControl is set to "the library the item is from" circulation rules will be selected based on the item's library where HomeOrHoldingBranch chooses if the item's home library or its holding library is used.

- If IndependentBranches is set to 'Prevent' then the value of HomeOrHoldingBranch is used in figuring out if the item can be checked out. If the item's home library does not match the logged in library, the item cannot be checked out unless you have the superlibrarian permission.

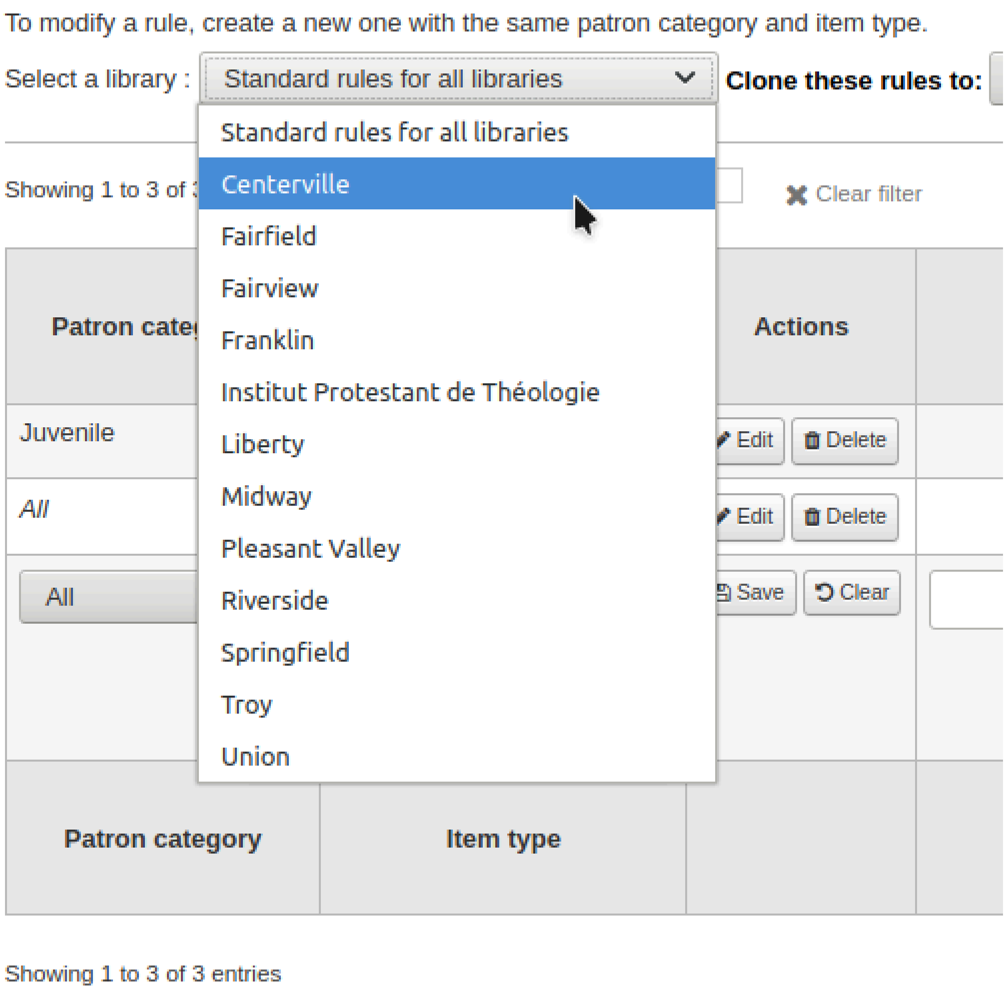
> **Important**
>
> At the very least you will need to set a default circulation rule. This rule should be set for all item types, all libraries and all patron categories. That will catch all instances that do not match a specific rule. When checking out if you do not have a rule for all libraries, all item types and all patron categories then you may see patrons getting blocked from placing holds.

Defining circulation rules

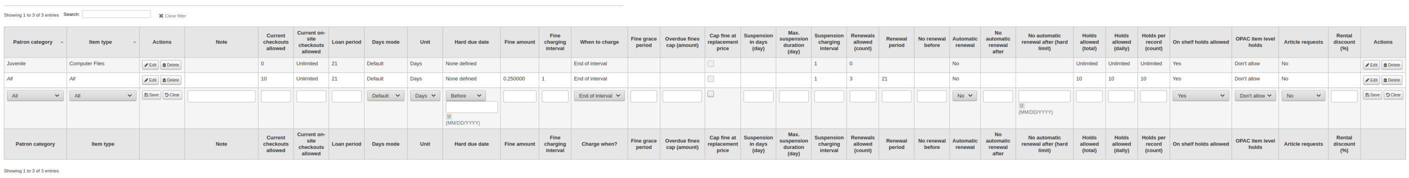
Using the issuing rules matrix you can define rules that depend on patron category/item type combos.

> **Note**
>
> The matrix being very wide, you can export the existing rules in Microsoft Excel or CSV format, to look at them, using the 'Export' button at the top of the table.

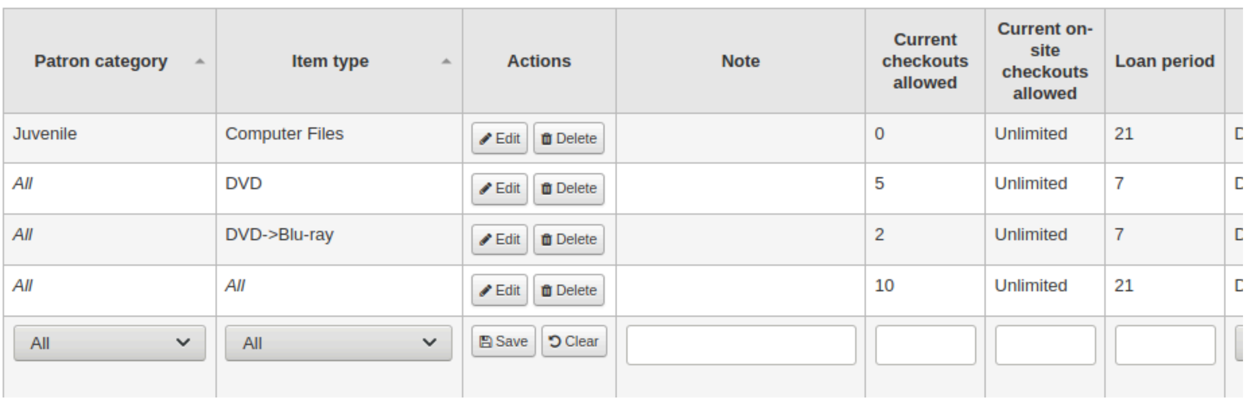
To set your rules, choose a library from the pull down (or 'Standard rules for all libraries' if you want to apply these rules to all branches):



From the matrix you can choose any combination of patron categories and item types to apply the rules to



- First choose which patron category you'd like the rule to be applied to. If you leave this to 'All' it will apply to all patron categories
- Choose the item type you would like this rule to apply to. If you leave this to 'All' it will apply to all item types for this patron category
  - If an item type has a parent item type, the rule will be displayed as Parent -> Child. The number of current checkouts will be limited to either the maximum for the parent (including sibling types) or the specific type's rule, whichever is less.



Patron category	Item type	Actions	Note	Current checkouts allowed	Current on-site checkouts allowed	Loan period
Juvenile	Computer Files	Edit Delete		0	Unlimited	21
All	DVD	Edit Delete		5	Unlimited	7
All	DVD->Blu-ray	Edit Delete		2	Unlimited	7
All	*All*	Edit Delete		10	Unlimited	21
All	All	Save Clear				

In the example above, there is a rule for the DVD item type with a maximum of 5 checkouts and a rule for Blu-ray, a child of DVD, with a maximum of 2 checkouts. A patron at this library will be able to check out a maximum of 2 Blu-rays in a total of 5 items of either DVD or Blu-ray types.

To summarize, a patron at this library would be able to take either : - 0 Blu-ray and a maximum of 5 DVDs - 1 Blu-ray and a maximum of 4 DVDs - 2 Blu-ray and a maximum of 3 DVDs

- Add notes about your circulation rule into the notes field. This can be helpful to remember why and when something was last changed.
- Limit the number of items of this type a patron of this category can have checked out at the same time by entering a number in the 'Current checkouts allowed' field.
- If you're allowing on-site checkouts then you may also want to set a limit on the number of items of this type patrons of this category can have on-site.
  - **Note**

    This setting also depends on the ConsiderOnSiteCheckoutsAsNormalCheckouts preference
- Define the period of time an item of this type can be checked out to a patron of this category by entering the number of units (days or hours) in the 'Loan period' box.
- Define if the loan period should include closed days or not in the 'Days mode' column. The option chosen here will override the useDaysMode system preference for this particular rule.
  - The 'Default' option will take the option defined in the useDaysMode system preference
  - Choose the 'Calendar' option if you want to use the calendar to skip the days when the library is closed
  - Choose the 'Datedue' option if you want to push the due date to the next open day
  - Choose the 'Days' option if you want to ignore the calendar and calculate the due date directly
  - Choose the 'Dayweek' option if you want to use the calendar to push the due date to the next open matching weekday for weekly loan periods, or the next open day otherwise
- Choose which unit of time, days or hours, that the loan period and fines will be calculated in in the 'Unit' column

  Note

  If using 'hours', you can set library opening hours for each library and determine how the due time is calculated should it fall outside of opening hours.

- You can also define a hard due date for a specific patron category and item type. The hard due date offers three options:
  - Exactly on: The due date of any item checked out with this rule will be set to the hard due date.
  - Before: Koha will calculate the normal loan period. If the calculated due date would be after or on the hard due date, the hard due date will be used instead.
  - After: Koha will calculate the normal loan period. If the calculated due date would be before the hard due date, the hard due date will be used instead.
- 'Fine amount' should have the amount you would like to charge for overdue items.

  Important

  Enter only numbers and decimal points (no currency symbols).

- Enter the ‘Fine charging interval’ in the unit you set (ex. charge fines every 1 day, or every 2 hours). The finesCalendar system preference controls whether the days the library is closed will be taken into account or not.
- ‘When to charge’ is most handy in libraries that have a fine charging interval of more than 1 day.
  - End of interval: Given a grace period of 2 days and a fine interval of 7 days, the first fine will appear 7 days after the due date, it will always take one fine interval (7 days), before the first fine is charged.
  - Start of interval: Given a grace period of 2 days and a fine interval of 7 days, the first fine will appear 2 days after the due date and the second fine 7 days after the due date.
- The ‘Fine grace period’ is the period of time an item can be overdue before you start charging fines. The FinesIncludeGracePeriod system preference controls if the grace period will be included when calculating the fine or not.

  Important

  This can only be set for the ‘Day’ unit, not in ‘Hours’
- The ‘Overdue fines cap’ is the maximum fine per item for this patron and item type combination.

  Important

  If this field is left blank then Koha will not put a limit on the fines this item will accrue. A maximum fine amount for all overdues can be set using the MaxFine system preference.
- If you would like to prevent overcharging patrons for a lost items, you can check the box under ‘Cap fine at replacement price.’ This will prevent the patron’s fines from going above the replacement price on the item.

  Note

  If the ‘Overdue fines cap’ is also set, the fine will be the lesser of the two, if both apply to the given overdue checkout.
- If your library ‘fines’ patrons by suspending their account you can enter the number of days their fine should be suspended in the ‘Suspension in days’ field.

  Important

  This can only be set for the ‘Day’ unit, not in ‘Hours’
- You can also define the maximum number of days a patron will be suspended in the ‘Max suspension duration’ setting
- The ‘Suspension charging interval’ option is just like the ‘Fin charging interval’. For example, you could ‘fine’ a patron one day suspension for every two days overdue.
- Next decide if the patron can renew this item type and if so, enter how many times they can renew it in the ‘Renewals allowed’ box.
- If you allow unseen renewals (see UnseenRenewals), enter how many ‘unseen’ renewals patrons can make. This is *not* in addition to the regular renewals, but rather how many ‘unseen’ renewals can be made *among* the total number of renewals.
- If you’re allowing renewals you can control how long the renewal loan period will be (in the units you have chosen) in the ‘Renewal period’ box.

- If you're allowing renewals you can control how soon before the due date patrons can renew their materials with the 'No renewals before' box.
  - Items can be renewed at any time if this value is left blank. Otherwise items can only be renewed if the item is due after the number in units (days/hours) entered in this box.
  - To control this value on a more granular level please set the NoRenewalBeforePrecision preference.
- If you enable automatic renewals (see below), enter how much time before the due date the automatic renewal takes place.

  Version

  This option was added to Koha in version 23.11.

  In previous versions, automatic renewals use the 'no renewals before' value, which applies to both regular and automatic renewals.

- You can enable automatic renewals for certain items/patrons if you'd like. This will renew automatically following your circulation rules unless there is a hold on the item.

  Important

  You will need to enable the automatic renewal cron job for this to work.

  Important

  This feature needs to have the "no automatic renewal before" column filled in or it will auto renew every day after the due date.

- If you are using automatic renewals, you can use the 'No automatic renewals after' to limit the time a patron can have the item. For example: don't allow automatic renewals after a checkout period of 80 days.
- Similar to the hard due date setting, you can also stop automatic renewals after a specific date using the 'No automatic renewal after (hard limit)' setting.
- If patrons of this category can place holds on items of this type, enter the total numbers of items (of this type) that can be put on hold in the 'Holds allowed' field.
  - Leave empty to have unlimited holds.
  - If you'd rather put a hold limit per patron category, independent of the item type, see the default checkout and hold policy by patron category section below.
  - If you want to have a hard hold limit, independent of patron category and item type, for this particular library, see the Default checkout, hold, and return policy section below.
  - If you want to have a hard hold limit, independent of patron category, item type, and across all libraries, see the maxreserves system preference.
- You can also set a daily limit on the number of holds a patron can place.
- While the two settings before limit the holds that can be placed across various records, the next setting is used to limit the number of holds that can be placed on one record at the same time. For example, for fiction books you might want to allow only one item to be placed on hold at the same time by the same user. But for serials where items represent different issues more than one hold at the same time is fine.

Note

If this is set to a number that is greater than 1, but not Unlimited, then staff will have the option of placing multiple holds at once when placing a hold on the next available item in the staff interface

- Next you can decide how the availability of items influences the ability to place a hold. The 'On shelf holds allowed' option has three settings:

  - Yes: This will allow to place holds on items at all times. It doesn't matter if they are available or checked out.
  - If any unavailable: This will allow to place a hold as soon as one or more items of the record are checked out. It doesn't matter if there are still one or more items available on the shelf.
  - If all unavailable: This will allow to place a hold as soon as all items on the record are checked out that could fill the hold. This is especially useful for libraries that don't offer the service of getting items placed on hold off the shelf for patrons.

- Under 'OPAC item level hold' you can decide if patrons are allowed to place item specific holds on the item type in question. The options are:

  - Allow: Will allow patrons the option to choose next available or a specific item.
  - Don't allow: Will only allow patrons to choose next available item.
  - Force: Will only allow patrons to choose a specific item.

- You can set the number of days patrons have to come pick up their holds in the 'Holds pickup period (day)' column. This value will set the hold's 'expiration date'. After that period, holds will be marked as problematic and will appear in the 'Holds waiting past their expiration date' tab in the Holds awaiting pickup report.

  - The default period is set in the ReservesMaxPickUpDelay system preference, but this column allows to have more granular rules for various library, patron category, and item type combinations.

  Version

  This circulation rule option was added to Koha in version 23.11.

- If you want to allow patrons of this category to be able to place article requests on items of this type, choose an option in the 'Article requests' column

  - No: patrons of this category will not be able to place article requests on items of this type
  - Yes: patrons of this category will be able to place article requests on items of this type, either on specific items (for example in the case of serial issues) or on entire records (for example in the case of monographs)
  - Record only: patrons of this category will be able to place article requests on records of this type, but not on specific items
  - Item only: patrons of this category will be able to place article requests on items of this type, but not on entire records

  Warning

  This column will only appear if the ArticleRequests system preference is enabled.

  If you want to use the article request functionality you need to enable it using the ArticleRequests system preference and configure the form using the other related preferences.

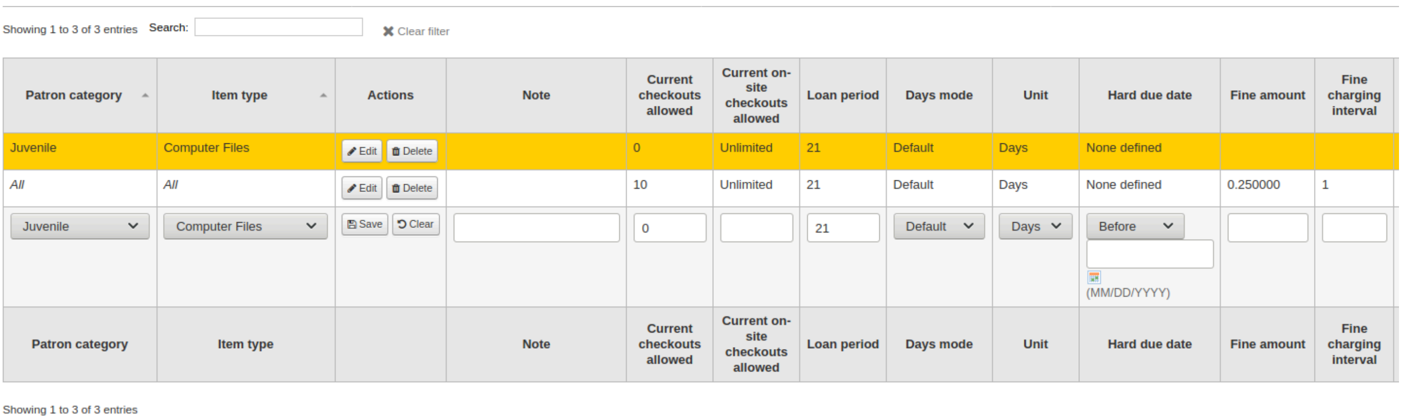
- If you charge a rental fee for the item type and want to give this specific patron category a discount on that fee, enter the percentage discount (without the % symbol) in the 'Rental discount' field

- If the UseRecalls system preference is enabled, you will have several options to control recalls.
  - Recalls allowed (total): enter the number of current recalls a patron of this category can have on items or records of this item type.
  - Recalls per record (count): enter the number of current recalls a patron of this category can have on any one record of this item type.
  - On shelf recalls allowed: choose if patrons can recall items on records that have available items
    - If any unavailable: if a record has more than one item and at least one is unavailable, the patron will be able to recall items from this record
    - If all unavailable: all items of a record must be unavailable in order for a patron to recall an item from this record
  - Recall due date interval (day): enter the number of days a patron has to return an item that has been recalled
  - Recall overdue fine amount: enter the fine amount a patron will be charged if they don't return the recalled item by the due date
  - Recall pickup period: enter the number of days a patron has to come pick up the item they have recalled, once it has been marked as awaiting pickup.

    Note

    This value supersedes the value in the RecallsMaxPickUpDelay system preference.

When finished, click 'Save' to save your changes. To modify a rule, simply click the 'Edit' button either at the beginning or at the end of the row. The row of the rule being edited will be highlighted in yellow and the values will appear filled in at the bottom of the table. Edit the values at the bottom and click save.



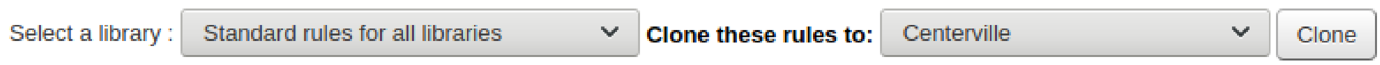
Note

If, while editing a rule, you change either the patron category or the item type, it will create a new rule. You can do this to duplicate rules instead of creating new ones if the values are similar.

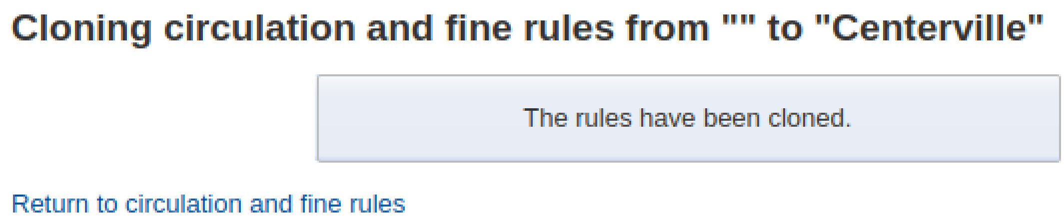
Alternatively, you can create a rule with the same patron category and item type and it will edit the existing one, as there can only be one rule per library- patron category-item type combination.

If you would like to delete your rule, click the 'Delete' button at the beginning or at the end of the rule row.

To save time you can clone rules from one library to another by choosing the clone option above the rules matrix. Please note that this will overwrite all rules already configured for that library.



After choosing to clone you will be presented with a confirmation message.



Default checkout, hold, and return policy

You can set a default maximum number of checkouts, a default maximum number of holds and a hold policy that will be used if none is defined below for a particular item type or category. This is the fall back rule for defaults.

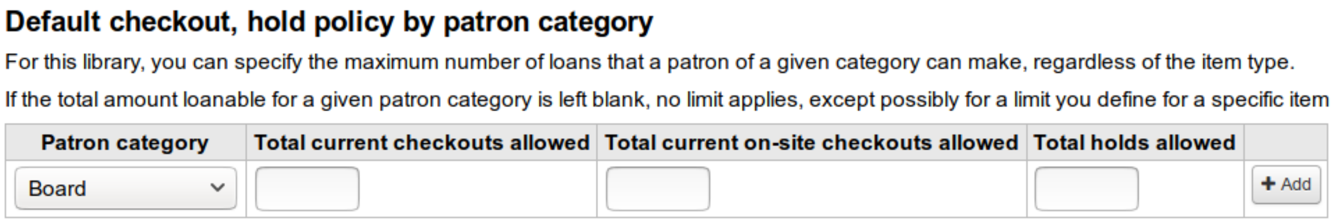
From this menu you can set a default to apply to all item types and patrons in the library if no other option is set in the forms below.

- In ‘Total current checkouts allowed’ enter the total number of items patrons can have checked out at one time
- In ‘Total current on-site checkouts allowed’ enter the total number of items patrons can have checked out on site at a time (OnSiteCheckouts needs to be set to ‘Enable’)
- In ‘Maximum total holds allowed (count)’ enter the total number of pending holds patrons can have at the same time.
- Control where patrons can place holds from using the ‘Hold Policy’ menu
  - From Any Library: Patrons from any library may put this item on hold. (default if none is defined)
  - From Local Hold Group: Only patrons from a library in the item home library’s local hold group may put this book on hold.
  - From Home Library: Only patrons from the item’s home library may put this book on hold.
  - No Holds Allowed: No patron may put this book on hold.
- Control where patron can pick up holds using the “Hold Pickup Library Match” menu
  - any library
  - item’s hold group
  - patron’s hold group
  - item’s home library
  - item’s holding library
- Control where the item returns to once it is checked in
  - Item returns home
  - Item returns to issuing branch
  - Item floats
    - When an item floats it stays where it was checked in and does not ever return ‘home’
  - Item floats by library group: The item will not be transferred and will stay at the library it was checked in at, if the check-in library is within the same ‘float group’ in library groups as the item’s home library. If the library is not in the same float group, the item will be transferred back to its home library.

- Once your policy is set, you can unset it by clicking the 'Unset' link to the right of the rule

Default checkout and hold policy by patron category

For this library, you can specify the maximum number of checkouts, on-site checkouts and holds that a patron of a given category can have, regardless of the item type.



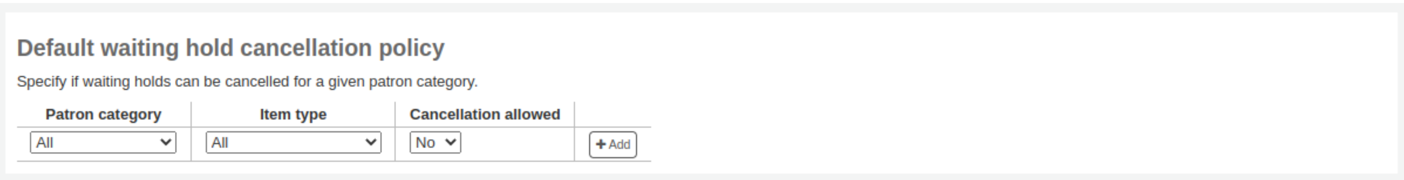
Note

If the total amount of checkouts, on-site checkout and holds for a given patron category is left blank, no limit applies, except possibly for a limit you define in the circulation rules above.

For example, if you have a rule in the matrix that says Board patrons are allowed 10 books and 5 DVDs but you want to make it so that Board patrons only have a total of 12 things checked out at once. If you enter 12 here and the patron has 10 books out already they will only be allowed 2 DVDs to equal the 12 total they're allowed.

Default waiting hold cancellation policy

For this library, you can specify if patrons can cancel holds that are already awaiting pickup.

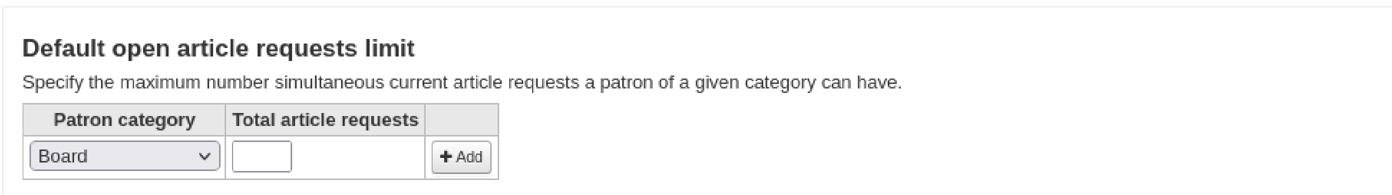


For each patron category and item type combination, choose if these patrons can cancel holds that are already waiting for pickup.

Just like the circulation rules, the more specific rules will apply before the more generic rules (i.e. the "all" patron categories / "all" item types rule will apply only if no other rule exists for this combination).

Default open article requests limit

If ArticleRequests is enabled, you can set a maximum number of open article requests a patron of a category can have at one time.



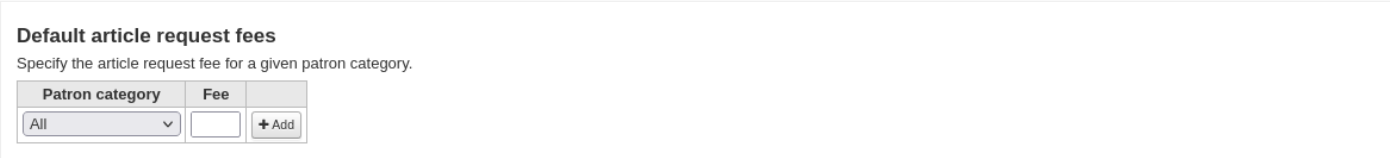
Note

This will only appear if the ArticleRequests system preference is enabled.

- Choose the patron category you want to limit.
- Enter the number of open article requests a patron of this category can have at one given time
- Click 'Add'

Default article request fees

If ArticleRequests is enabled, you can set the fee a patron from a given category (or any category) needs to pay in order to request the article.



Note

This will only appear if the ArticleRequests system preference is enabled.

- Choose the patron category for which you want to add a fee, or choose 'All' to set an overall fee for all patrons

  Note

  The fee specific to a patron category will supersede the fee for all categories.

  For example, if you set a fee for all categories to 2$ and a fee for Faculty to 3$, Faculty members will be charged 3$ and any other patron will be charged 2$.

- Enter the fee amount (use a period as the decimal and don't enter any symbols, e.g. enter 5.00 for 5$)

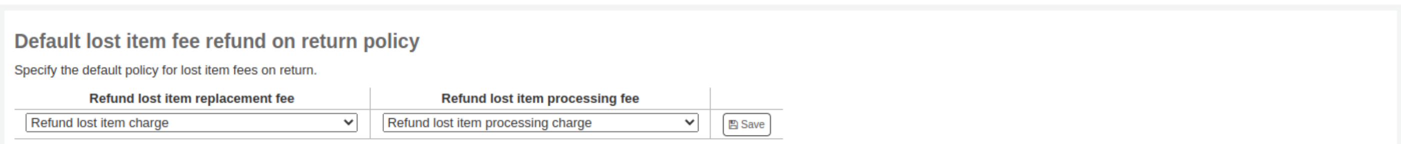
- Click 'Add'

The fee is charged to the patron when the request is placed.

When placing the request, either through the staff interface or the OPAC, a message appears to inform the staff member or the patron that the patron will be charged for every request and the amount of the fee.

Default lost item fee refund on return policy

Here, you can specify the default policy for lost item fees on return.



- Refund lost item replacement fee: choose whether or not the item's replacement cost is refunded when the lost item is returned.
  - Refund lost item charge: the replacement cost is refunded. This might create a credit to be paid out to the patron if they had already paid the fee.
  - Refund lost item charge (only if unpaid): the replacement cost is refunded only if it hasn't yet been paid.
  - Refund lost item charge and charge new overdue fine: the replacement cost is refunded and overdue fines are calculated as of today.

- Refund lost item charge and restore overdue fine: the replacement cost is refunded and fines are restored as of the day the item was declared lost.
- Leave lost item charge: the replacement cost stays in the patron’s account.

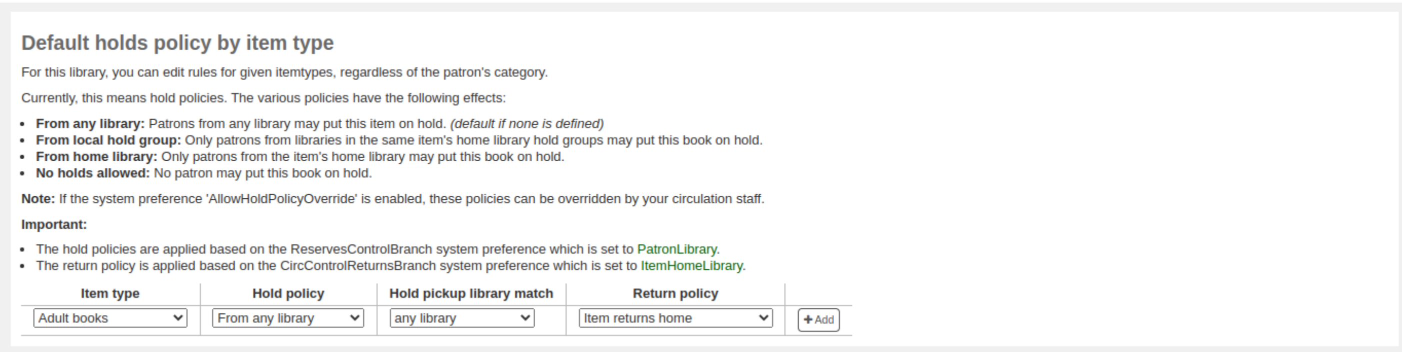
- Refund lost item processing fee: choose whether or not the item’s processing fee is refunded when the lost item is returned.
  - Refund lost item processing charge: the processing fee is refunded. This might create a credit to be paid out to the patron if they had already paid the fee.
  - Refund lost item processing charge (only if unpaid): the processing fee is refunded only if it hasn’t yet been paid.
  - Leave lost item processing charge: the processing fee stays in the patron’s account.

This policy will apply to this library. This rule is to be used with the RefundLostOnReturnControl system preference.

You can limit the number of days during which a lost item is refundable using the NoRefundOnLostReturnedItemsAge system preference.

Default holds policy by item type

For this library, you can edit hold and return policies for a given item type, regardless of the patron’s category.



The various hold policies have the following effects:

- From any library: Patrons from any library may put this item on hold. (default if none is defined)
- From local hold group: Only patrons from libraries in the same item’s home library hold groups may put this book on hold.
- From home library: Only patrons from the item’s home library may put this book on hold.
- No holds allowed: No patron may put this book on hold.

> **Important**
>
> Note that if the system preference AllowHoldPolicyOverride set to ‘allow’, these policies can be overridden by your circulation staff.

> **Important**
>
> These policies are applied based on the ReservesControlBranch system preference.

Control where patron can pick up holds using the “Hold Pickup Library Match” menu

- any library
- item’s hold group
- patron’ hold group
- item’s home library

- item’s holding library

The various return policies have the following effects:

- Item returns home: The item will prompt the librarian to transfer the item to its home library
  - **Important**

    If the AutomaticItemReturn preference is set to automatically transfer the items home, then a prompt will not appear

- Item returns to issuing branch: The item will prompt the librarian to transfer the item back to the library where it was checked out
  - **Important**

    If the AutomaticItemReturn preference is set to automatically transfer the items home, then a prompt will not appear

- Item floats: The item will not be transferred from the branch it was checked in at, instead it will remain there until transferred manually or checked in at another branch

- Item floats by library group: The item will not be transferred and will stay at the library it was checked in at, if the check-in library is within the same ‘float group’ in library groups as the item’s home library. If the library is not in the same float group, the item will be transferred back to its home library.

For example you might allow holds at your libraries but not what New items or DVDs to be placed on hold by other branches so you can set the ‘Hold policy’ to ‘From home library’ so that those items can only be placed on hold if the items’ owning library and the patron’s home library are the same. You can also block holds completely on specific item types from this form. This is also how you can set up floating item types and types that remain with their home library.

Note

The library whose return policy is used is determined by the CircControlReturnsBranch system preference.

Patron attribute types

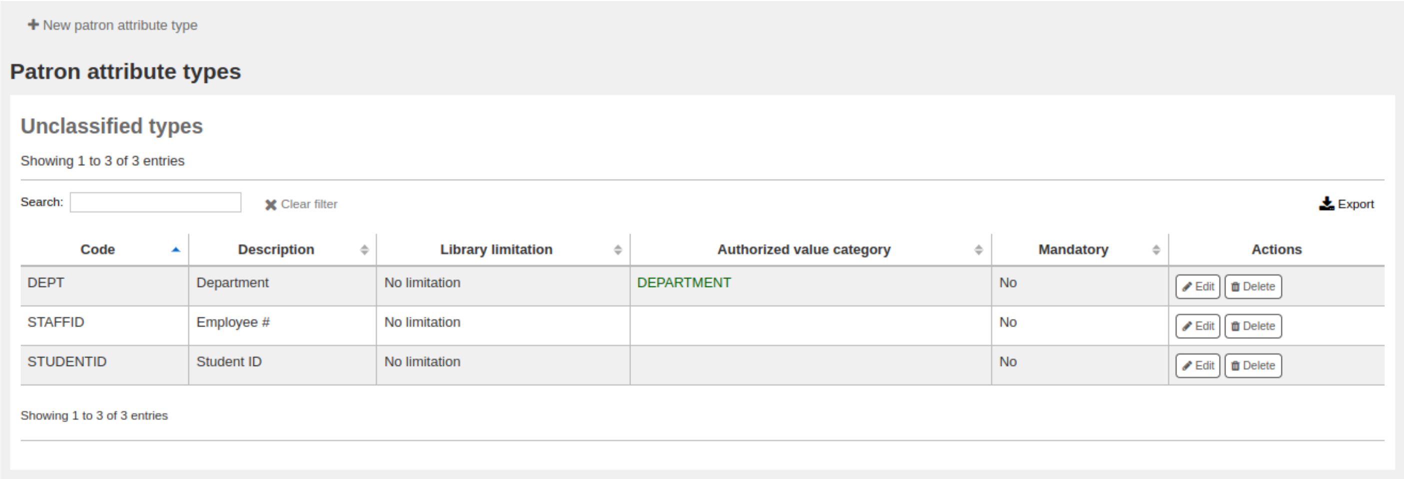
- *Get there:* More > Administration > Patrons and circulation > Patron attribute types

Note

Only staff with the manage_patron_attributes permission (or the superlibrarian permission) will have access to this section.

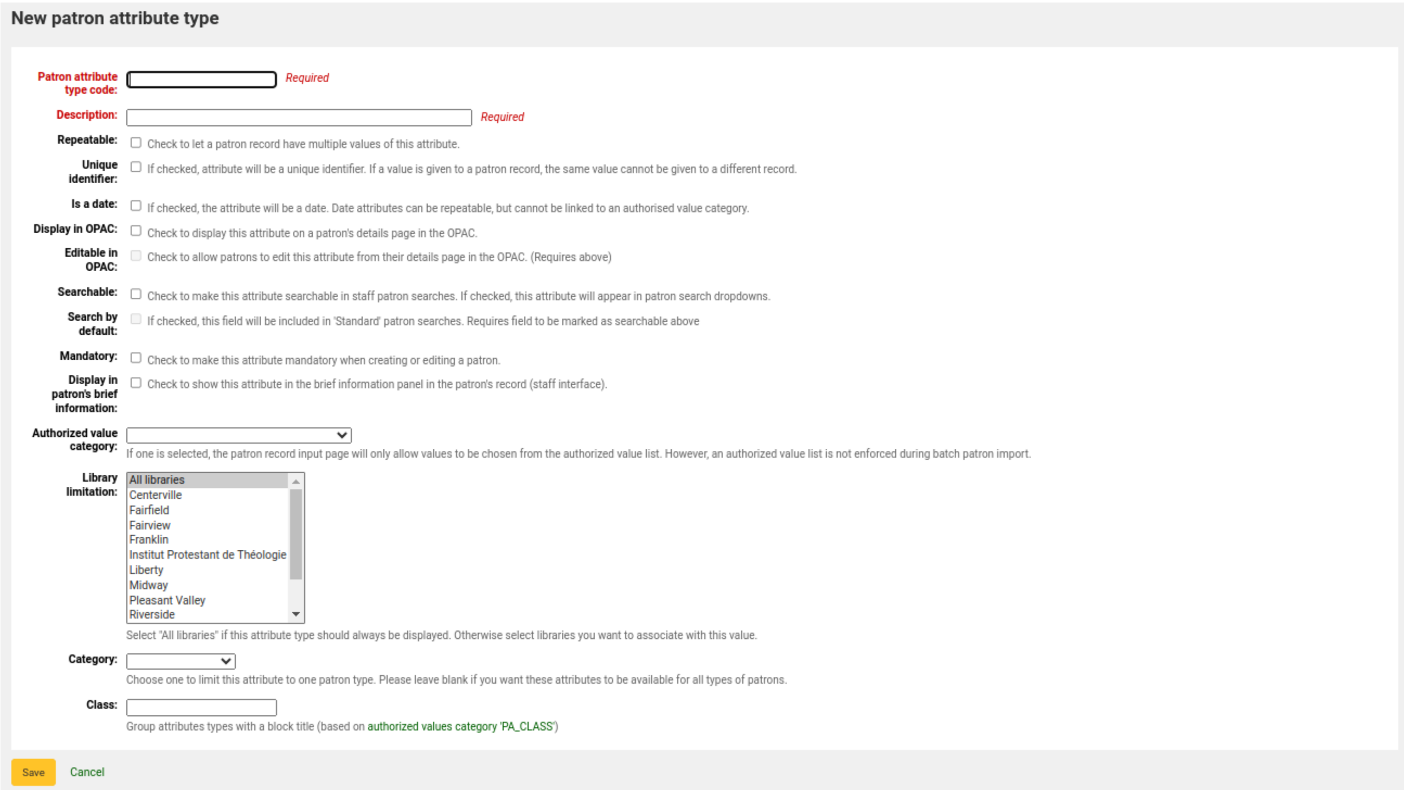
Patron attributes can be used to define custom fields to associate with your patron records. In order to enable the use of custom fields you need to set the ExtendedPatronAttributes system preference.

A common use for this field would be for a student ID number or a Driver’s license number.



Adding patron attribute types

To add a new patron attribute type, click the ‘New patron attribute type’ button at the top of the page



- Patron attribute type code: enter a short code to identify this field

  Warning

  This setting cannot be changed after an attribute is defined

- Description: enter a longer (plain text) explanation of what this field will contain
- Repeatable: check this box if a patron record can have multiple values of this attribute.

  Warning

  This setting cannot be changed after an attribute is defined

- Unique identifier: check this box if a value is given to a patron record, the same value cannot be given to a different record.
  - Unique attributes can be used as match points on the patron import tool

  Warning

  This setting cannot be changed after an attribute is defined

- Is a date: check this box if the attribute value should be a date. A date picker will be available.

  Important

  Date attribute types cannot be linked to authorized value categories.

  Version

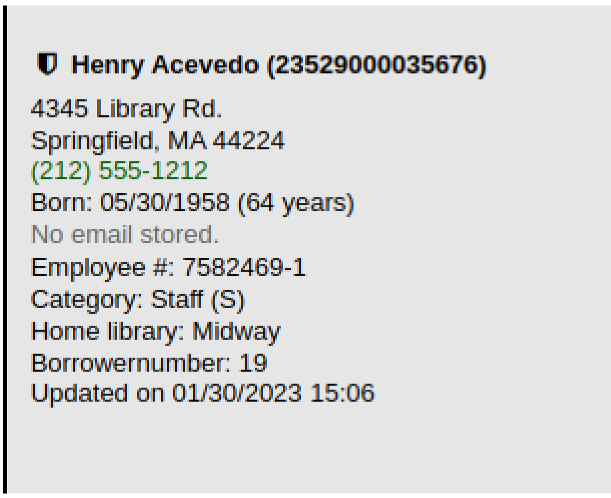
  The date option was added to Koha in version 24.05.

- Display in OPAC: check this box to display this attribute on a patron's details page in the OPAC.
- Editable in OPAC: check this box to enable patrons to edit this information in the OPAC.
- Searchable: check this box to make this attribute searchable in the staff interface's patron search.
- Search by default: check this box to make this attribute searchable in the staff interface's 'standard' patron search, i.e., not a search on a particular field.
  - This option requires that the attribute type be searchable (see previous option).

  Version

  This option was added to Koha in version 23.11.

- Mandatory: check this box if the attribute must be filled for every patron
- Display in patron's brief information: check this box to make this attribute visible in the patron's short detail display on the left of the checkout screen and other patron pages



- Authorized value category: if one is selected, the patron record input page will only allow values to be chosen from the authorized value list.
    - You will first need to add an authorized value list for it to appear in this menu

  Warning

  An authorized value list is not enforced during batch patron import.

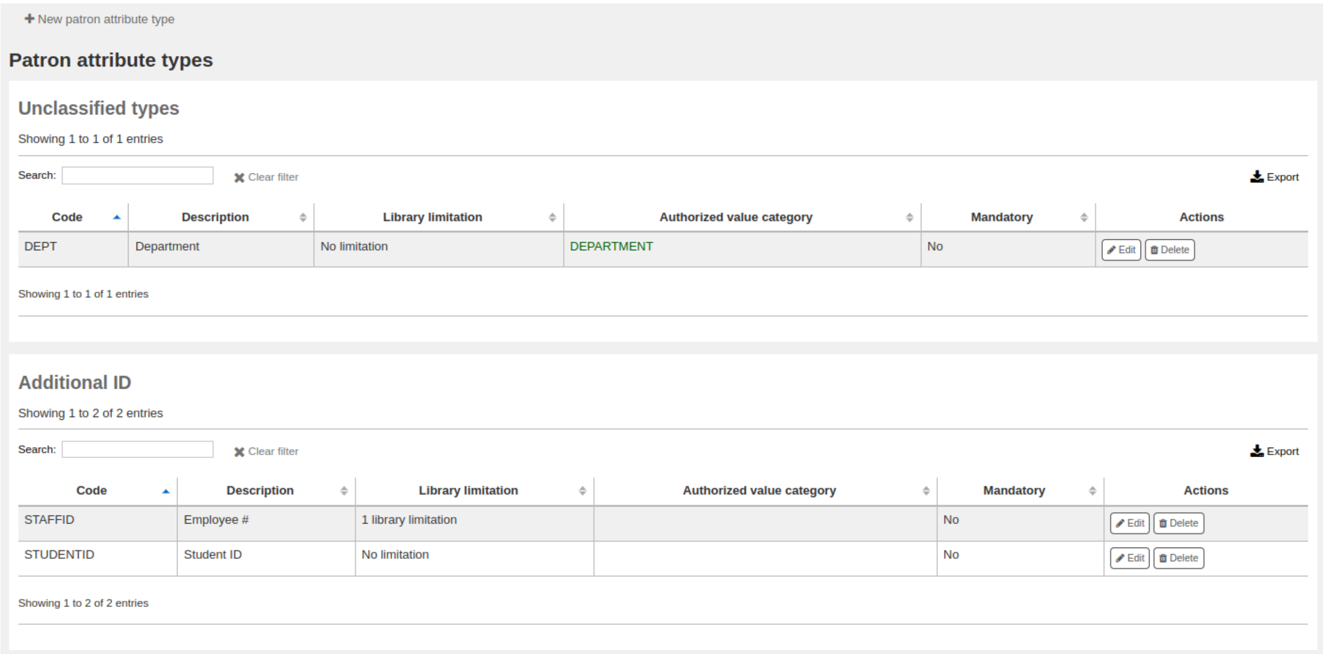
- Library limitations: if you would like this attribute to only be used by specific branches you can choose those branches from this list. Choose ‘All branches’ to show it for all libraries.

  Warning

  Patrons with attributes already set for them will not be altered. The branch limitation only limits the field based on the library at which the current staff is logged in.

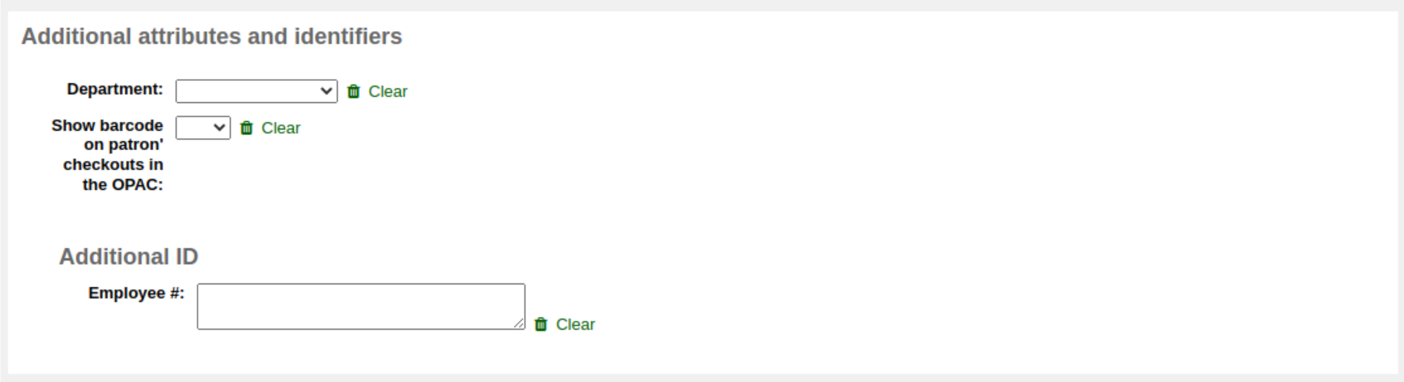
  If an attribute is set for a patron, it will be displayed in their file to all staff. However, only staff from the selected branches will be able to edit it.

- Category: if you’d like to only show this attribute on patrons of one type choose that patron category here
- Class: if you have a lot of attributes it might be handy to group them so that you can easily find them for editing. If you create an authorized value for PA_CLASS it will show in the ‘Class’ drop-down menu and you can then change your attributes page to have sections of attributes



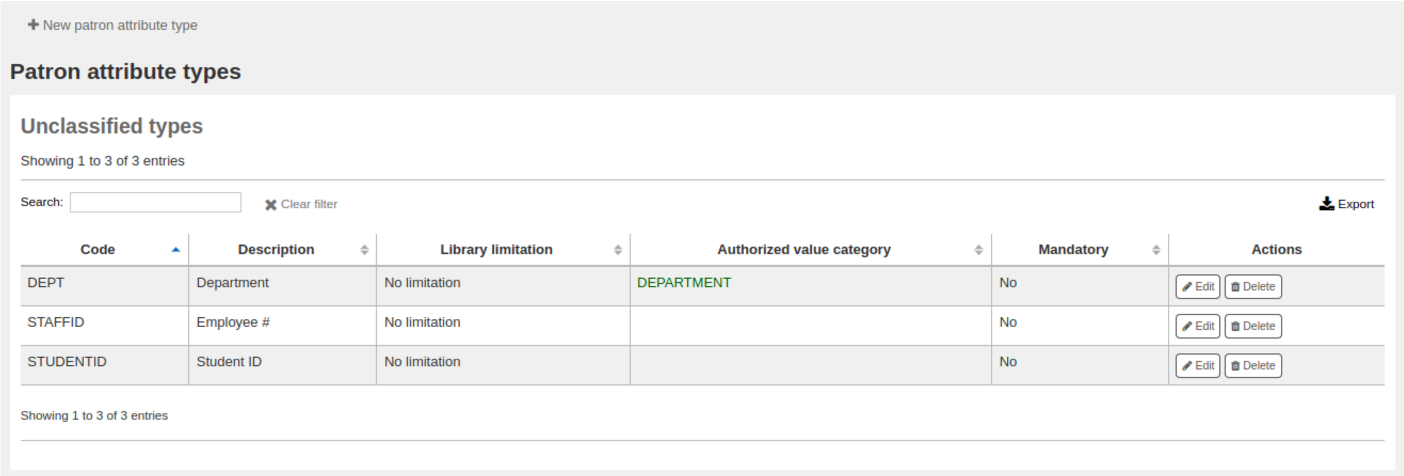
Click ‘Save’ to save your new attribute.

Once added, your attribute will appear on the list of attributes and also on the patron record add/edit form



Editing/deleting patron attribute types

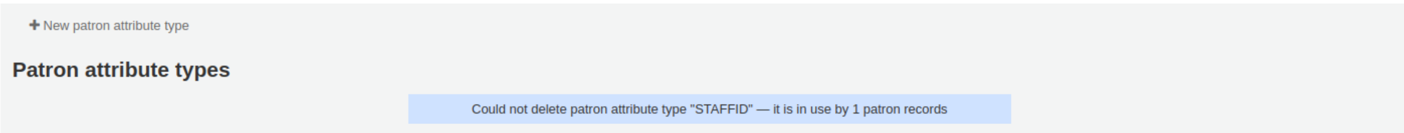
Each patron attribute has an edit and a delete button beside it on the list of attributes.



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.



Library transfer limits

Limit the ability to transfer items between libraries based on the library sending, the library receiving, and the collection code involved.

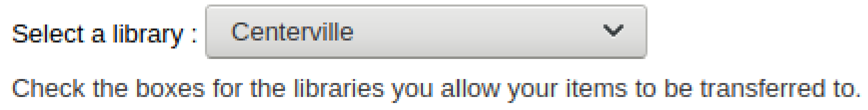
- *Get there:* More > Administration > Patrons and circulation > Library transfer limits

Note

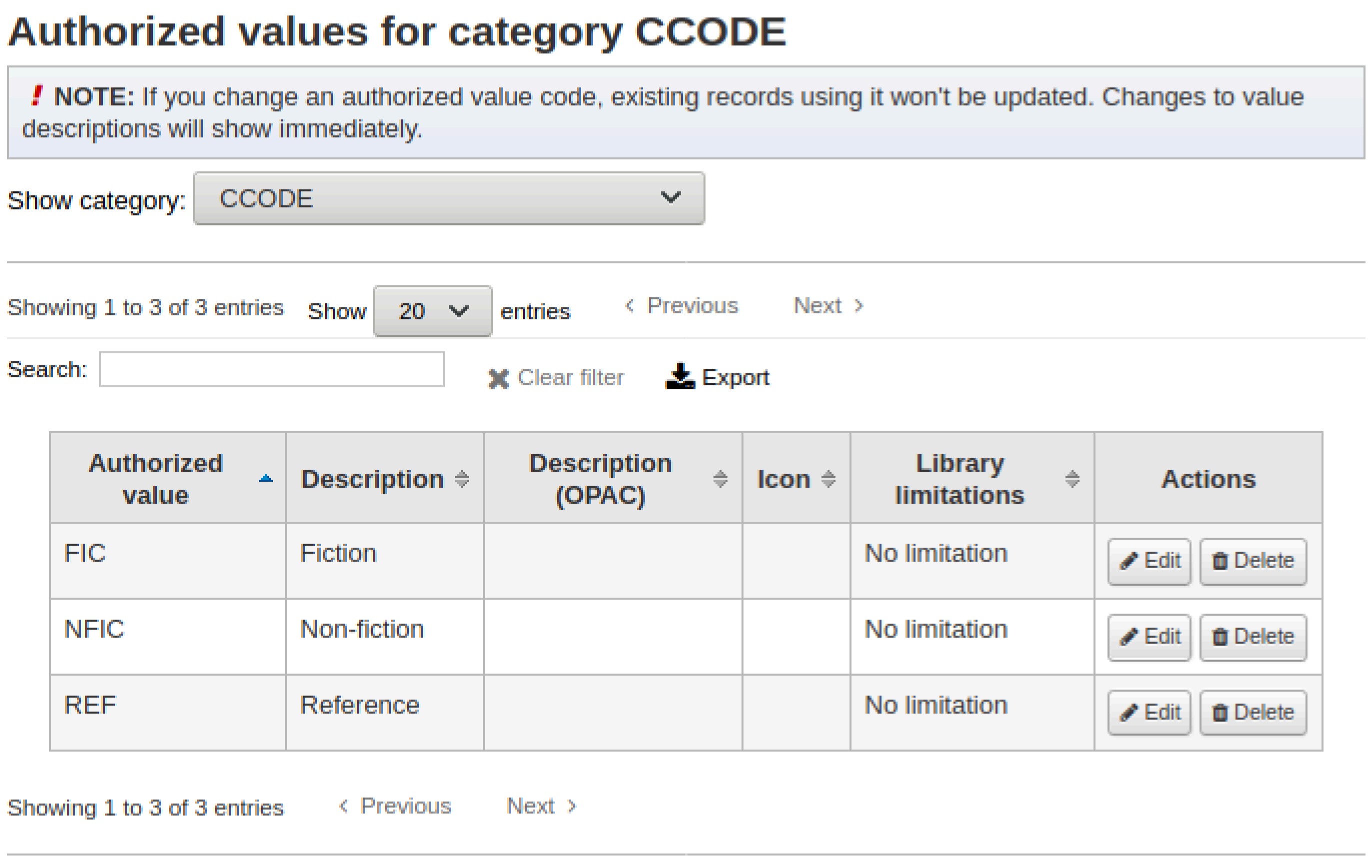
Only staff with the manage_transfers permission (or the superlibrarian permission) will have access to this section.

These rules only go into effect if the preference UseBranchTransferLimits is set to 'enforce'.

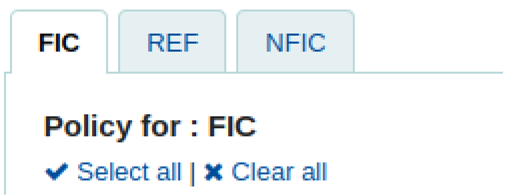
Before you begin you will want to choose which library you are setting these limits for.



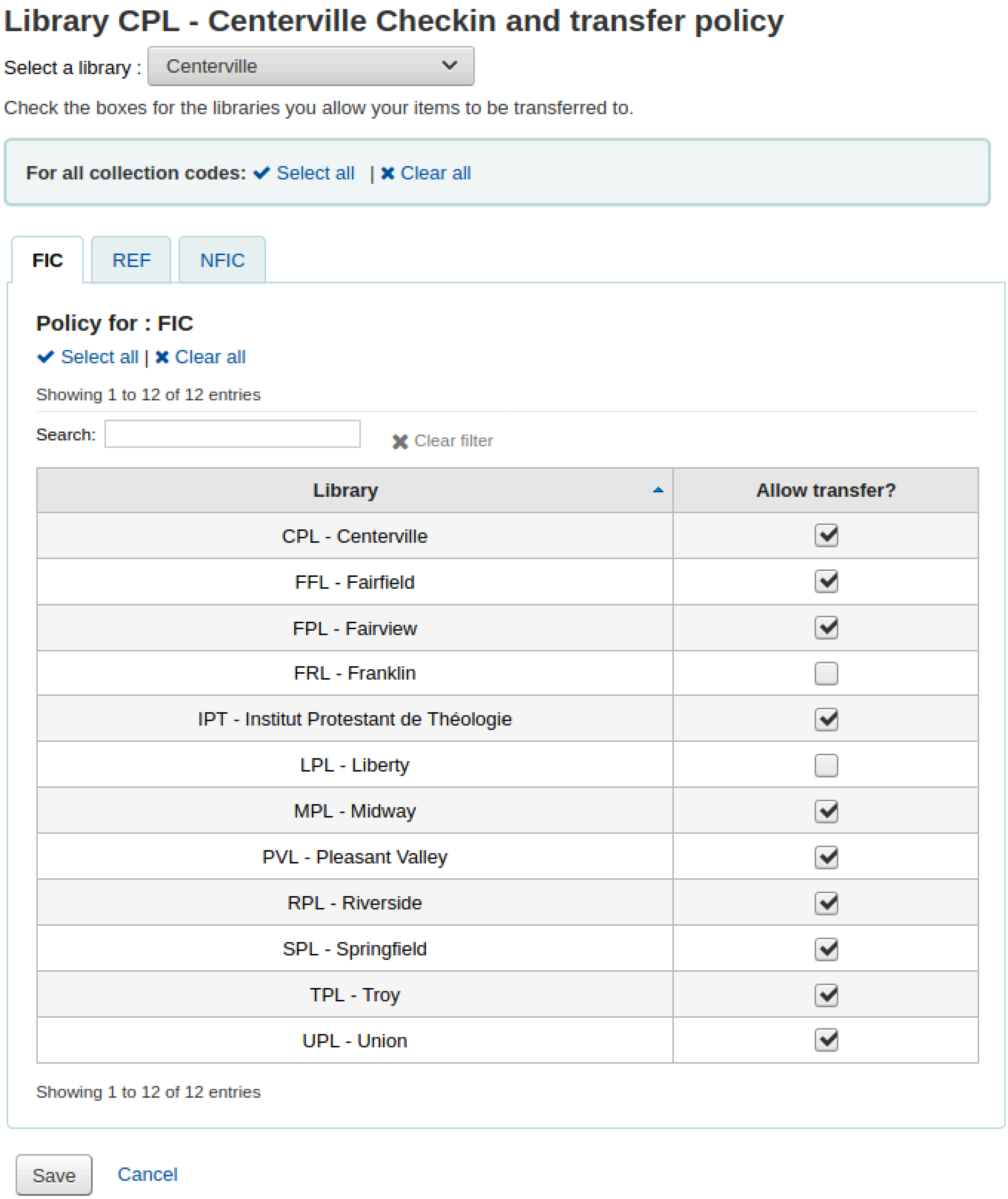
Transfer limits are set based on the collections codes you have applied via the [Authorized values](#) administration area.



Collection codes will appear as tabs above the checkboxes:



Check the boxes for the libraries you allow your items to be transferred to for the collection code you have selected at the top (in the example below - FIC)



In the above example, Centerville library will allow patrons from all libraries except Liberty and Franklin to request items from their branch.

Transport cost matrix

The transport cost matrix lets a library system define relative costs to transport books to one another.

Note

Only staff with the manage_transfers permission (or the superlibrarian permission) will have access to this section.

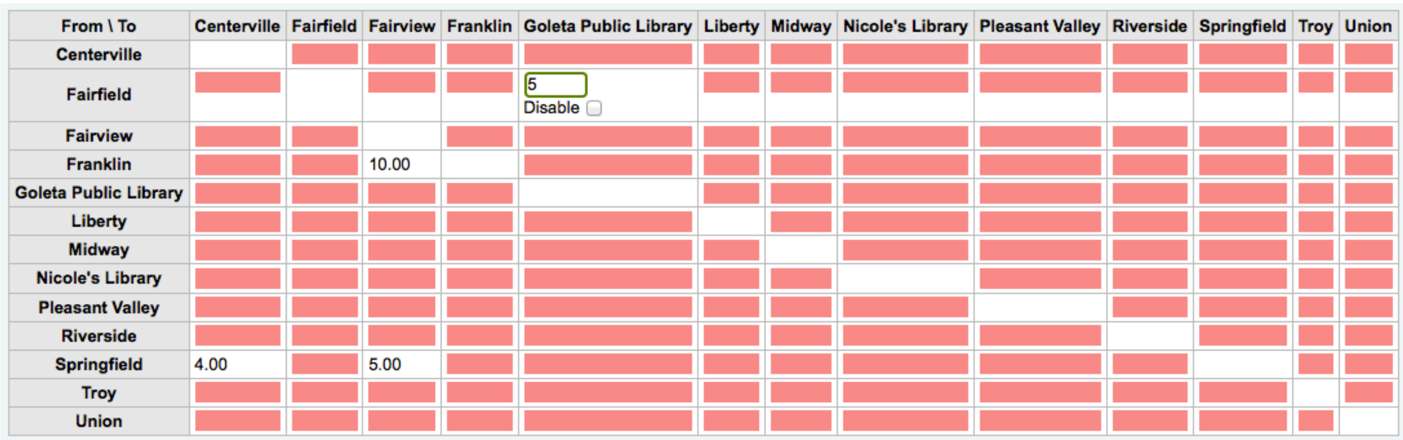
In order for the system to use this matrix you must first set the UseTransportCostMatrix preference to ‘Use’.

Important

The transport cost matrix takes precedence in controlling where holds are filled from, if the matrix is not used then Koha checks the StaticHoldsQueueWeight.

Costs are decimal values between some arbitrary maximum value (e.g. 1 or 100) and 0 which is the minimum (no) cost. For example, you could just use the distance between each library in miles as your ‘cost’, if that would accurately reflect the cost of transferring them. Perhaps post offices would be a better measure. Libraries sharing a post office would have a cost of 1, adjacent post offices would have a cost of 2, etc.

To enter transport costs simply click in the cell you would like to alter, uncheck the ‘Disable’ box and enter your ‘cost’



From \ To	Centerville	Fairfield	Fairview	Franklin	Goleta Public Library	Liberty	Midway	Nicole's Library	Pleasant Valley	Riverside	Springfield	Troy	Union
Centerville													
Fairfield					5 Disable								
Fairview													
Franklin			10.00										
Goleta Public Library													
Liberty													
Midway													
Nicole's Library													
Pleasant Valley													
Riverside													
Springfield	4.00		5.00										
Troy													
Union													

After entering in your cost, hit ‘Enter’ on your keyboard or click the ‘Save’ button at the bottom of the matrix to save your changes.

Note

A NULL value will make no difference where the From and To libraries are the same library. However, as a best practice, you should put a 0 in there. For all other To/From combinations, a NULL value will cause that relationship to act as if it has been disabled. So, in summary, don’t leave any of the values empty. It’s best to always put a number in there (even if you choose to disable that given To/From option).

Item circulation alerts

Libraries can decide if they want to have patrons automatically notified of circulation events (check ins and check outs).

- *Get there:* More > Administration > Patrons and circulation > Item circulation alerts

Note

Only staff with the manage_item_circ_alerts permission (or the superlibrarian permission) will have access to this section.

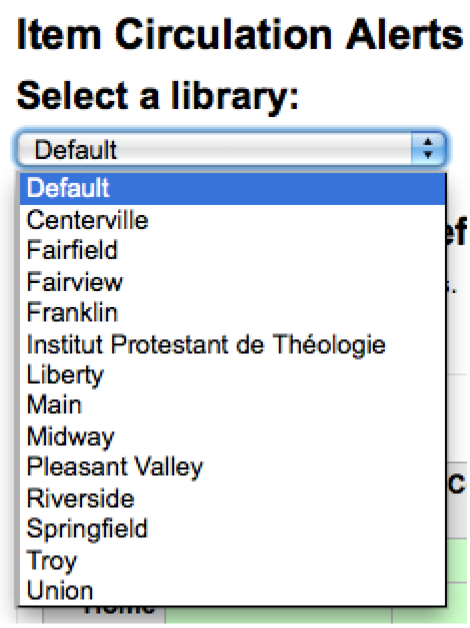
These preferences are set based on patron types and item types.

Important

These preference can be overridden by changes in the individual patron’s messaging preferences.

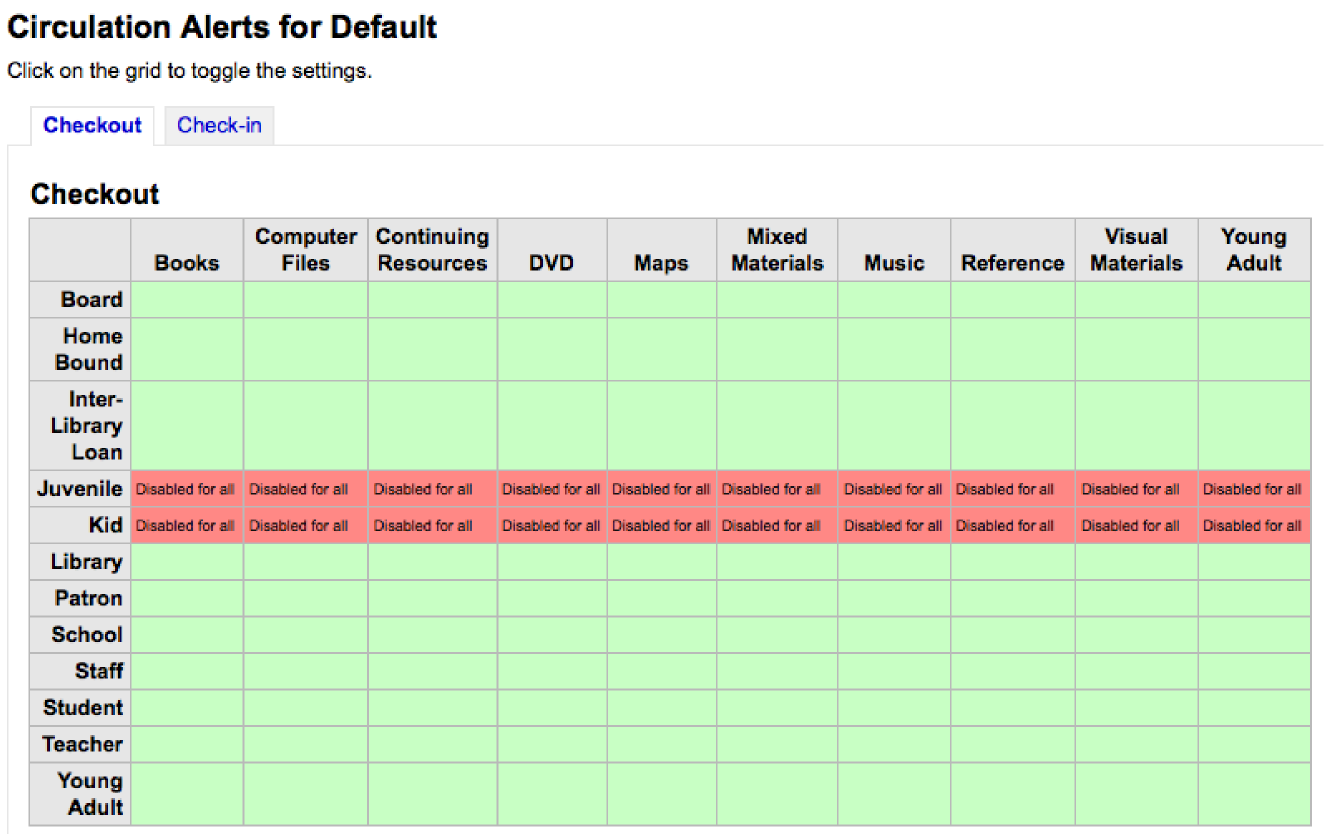
To set up circulation alerts:

- Choose your library from the pull down at the top of the screen



  - To set preferences for all libraries, keep the menu set to ‘Default’

- By default all item types and all patrons are notified of check ins and check outs. To change this, click on the item/patron type combo that you would like to stop notices for.



Circulation Alerts for Default

Click on the grid to toggle the settings.

Checkout | Check-in

Checkout

	Books	Computer Files	Continuing Resources	DVD	Maps	Mixed Materials	Music	Reference	Visual Materials	Young Adult
Board										
Home Bound										
Inter-Library Loan										
Juvenile	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all
Kid	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all	Disabled for all
Library										
Patron										
School										
Staff										
Student										
Teacher										
Young Adult										

  - In the above example, Juveniles and Kids will not receive check out notices.

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.

- *Get there:* More > Administration > Patrons and circulation > Cities and towns

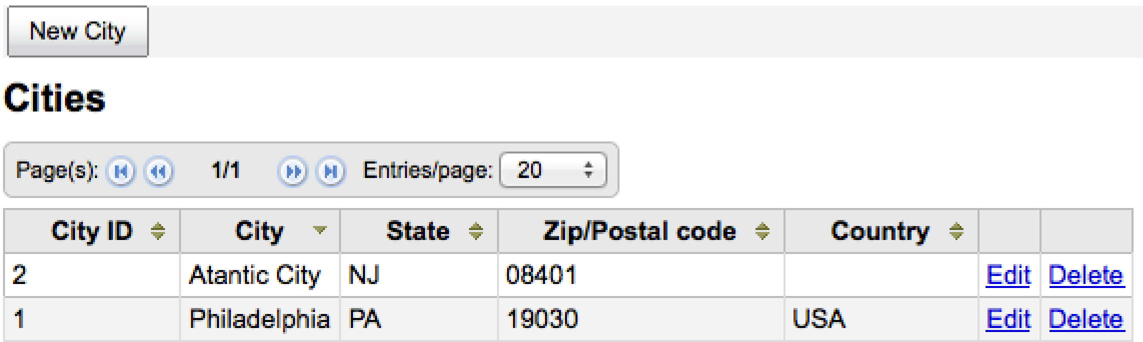
Note

Only staff with the manage_cities permission (or the superlibrarian permission) will have access to this section.

Adding a city

To add a new city, click the ‘New city’ button at the top of the page and enter the city name, state, zip/postal code and country.

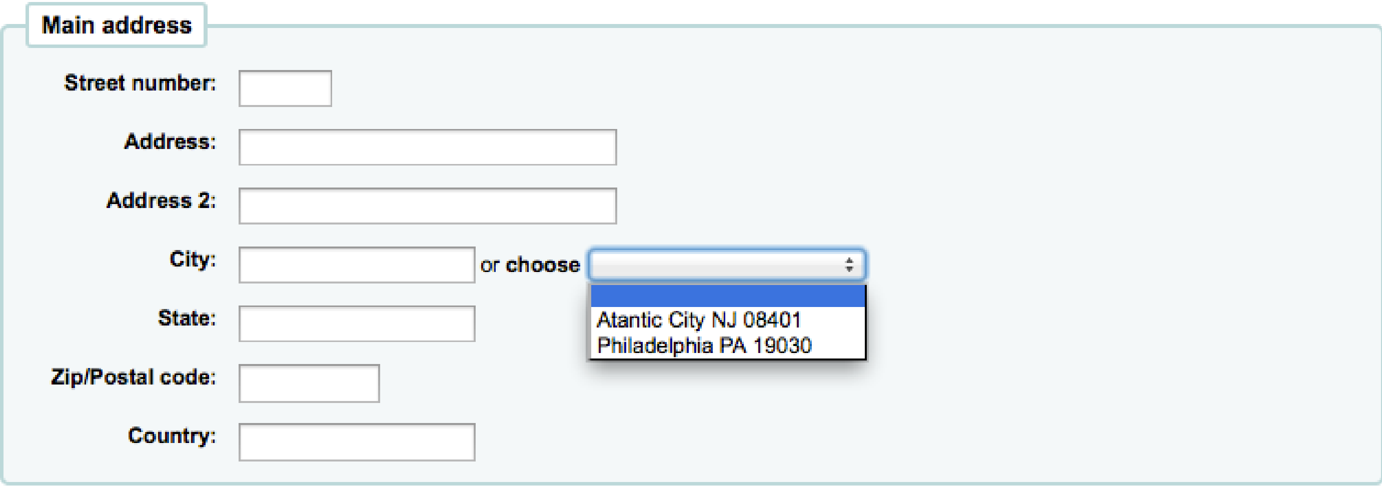
One you click Submit, your city will be saved and will be listed on the Cities and towns page



Cities can be edited or deleted at any time.

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.



This will allow for easy entry of local cities into the patron record without risking the potential for typos or mistaken zip/postal codes.

Curbside pickup

The curbside pickup feature is used to set up appointments with patrons for them to pick up their holds. This section is used to configure the pickup windows

- *Get there:* More > Administration > Patrons and circulation > Curbside pickup

Note

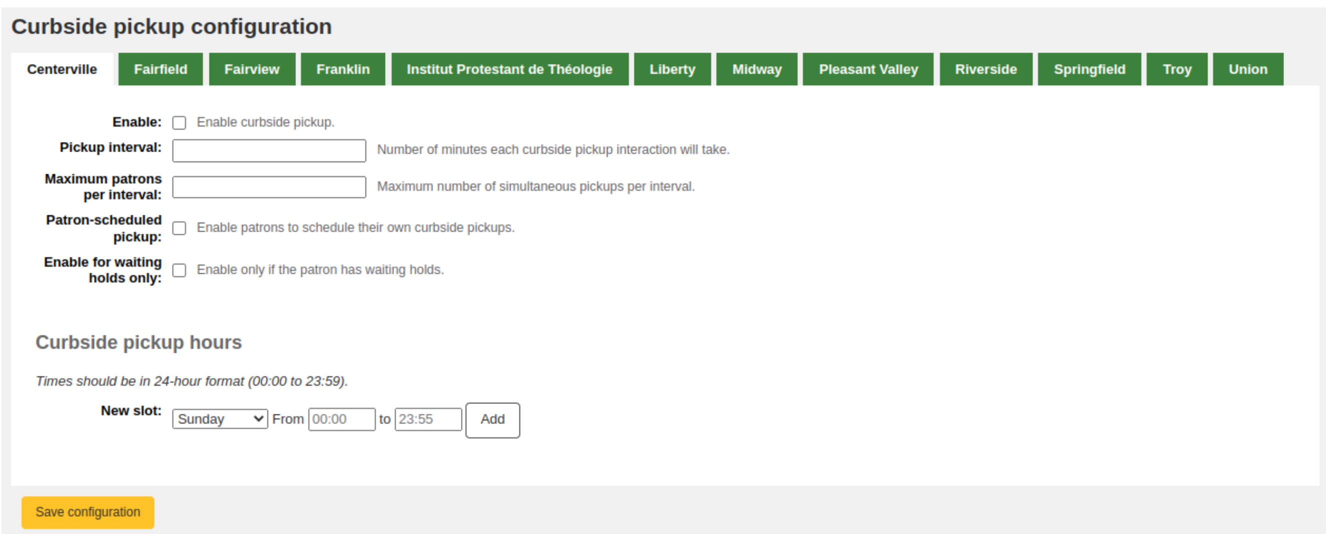
In order to use this module, you must enable it with the CurbsidePickup system preference.

Note

Only staff with the manage_curbside_pickups permission (or the superlibrarian permission) will have access to this section.

Setting up curbside pickup

- From the configuration page, click the tab corresponding to the library for which you're setting up curbside pickup



- Fill out the form
  - Enable: check this box to enable curbside pickup at this library
  - Pickup interval: enter the number of minutes each curbside pickup interaction will take
  - Maximum patrons per interval: enter the number of patrons who can pickup in the same interval
  - Patron-scheduled pickup: check this box if you want to allow patrons to set up their own curbside pickup appointment through the OPAC
  - Enable for waiting holds only: check this box if curbside pickup should be limited to patrons who have holds awaiting pickup
- Create curbside pickup slots
  - For each slot, enter the day of the week, the starting and ending hours of the time slot in which patrons can come
    - these can be your opening hours, if you allow curbside pickup throughout the day, or specific time slots in which you allow patrons to come by
    - For the hours, the format must be XX:XX (numbers with a colon) and it must be in 24-hour format (e.g. 1 PM is 13:00)
  - Click ‘Add’
- Click ‘Save configuration’

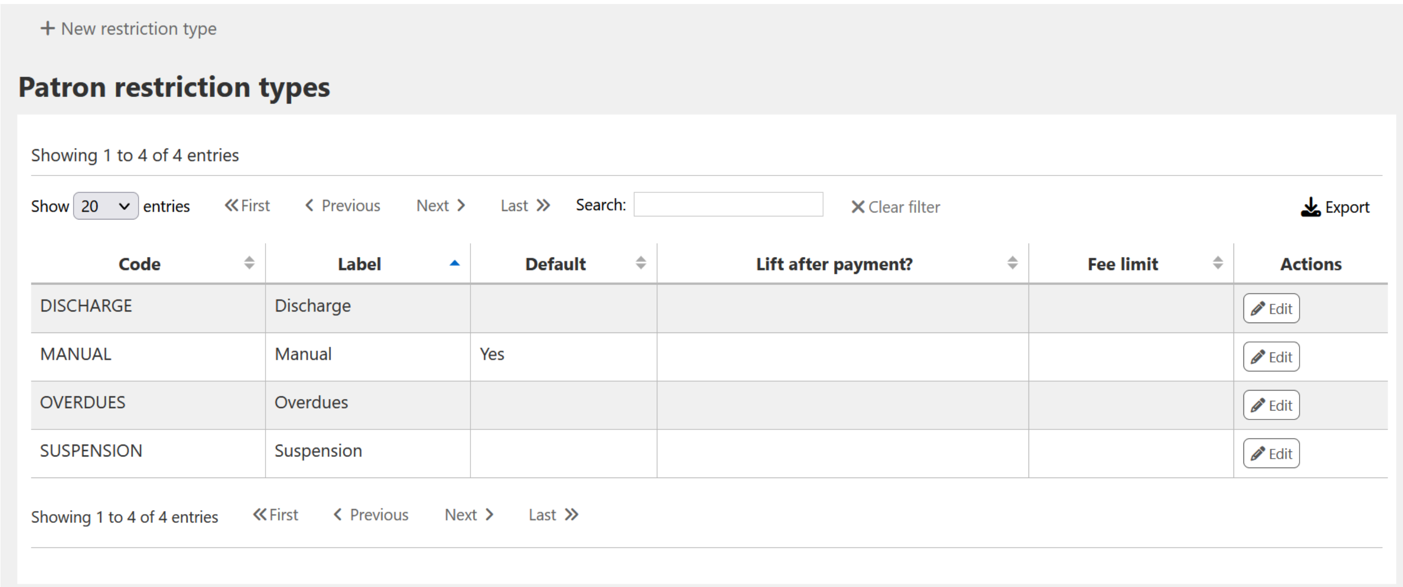
Do this for every library that offers curbside pickup.

Patron restriction types

If you are using patron restriction types, you can manage the restriction types available from here.

Patron restriction types are enabled by the PatronRestrictionTypes system preference.

- *Get there:* More > Administration > Patrons and circulation > Patron restriction types



Note

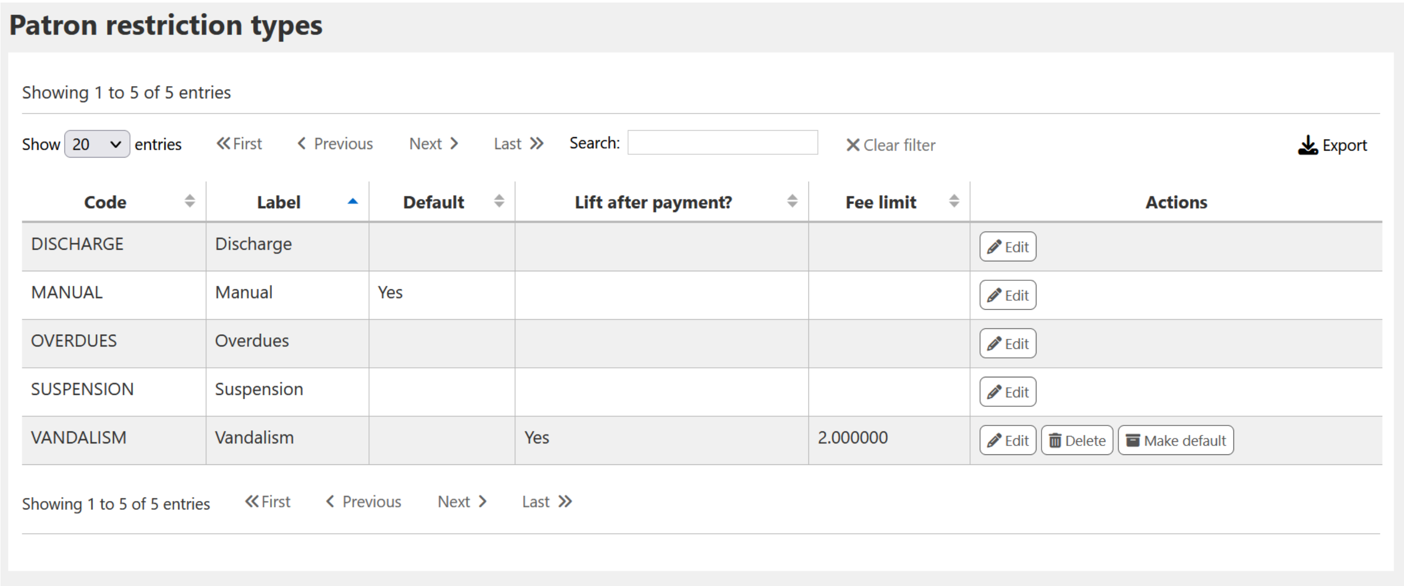
Only staff with the manage_patron_restrictions permission (or the superlibrarian permission) will have access to this section.

Adding a restriction type

To add a new restriction type, click the ‘New restriction type’ button at the top of the page.

- Code: enter a code for the restriction. Codes are limited to 50 characters and should not contain spaces, diacritics, or special characters.
- Label: enter the label for the restriction. The label will be the one displayed throughout Koha.
- Lift after payment: if set to ‘Yes’, restrictions using this type will be automatically lifted after payments equal to or exceeding the amount defined in ‘Fee Limit’.
- Fee Limit: enter the amount that must be paid in order to lift a restriction of this type. This field is only used if ‘Lift after payment’ is set to ‘Yes’.

Once you click ‘Save’, your restriction type will be saved and will be listed in the table of restriction types.


Patron restriction types

Showing 1 to 5 of 5 entries

Show 20 entries « First ‹ Previous Next › Last » Search: ✕ Clear filter Export

Code	Label	Default	Lift after payment?	Fee limit	Actions
DISCHARGE	Discharge				Edit
MANUAL	Manual	Yes			Edit
OVERDUES	Overdues				Edit
SUSPENSION	Suspension				Edit
VANDALISM	Vandalism		Yes	2.000000	Edit Delete Make default

Showing 1 to 5 of 5 entries « First ‹ Previous Next › Last »

Locally created restriction types can be set to set as the default restriction type to use when manually adding a restriction to a patron account. This can be achieved using the ‘Make default’ button.

You can also delete any locally created restriction types using the ‘Delete’ so long as they have not been assigned as the default.

Accounting

- *Get there:* More > Administration > Accounting

This section deals with the parameters used in managing the patron accounts.

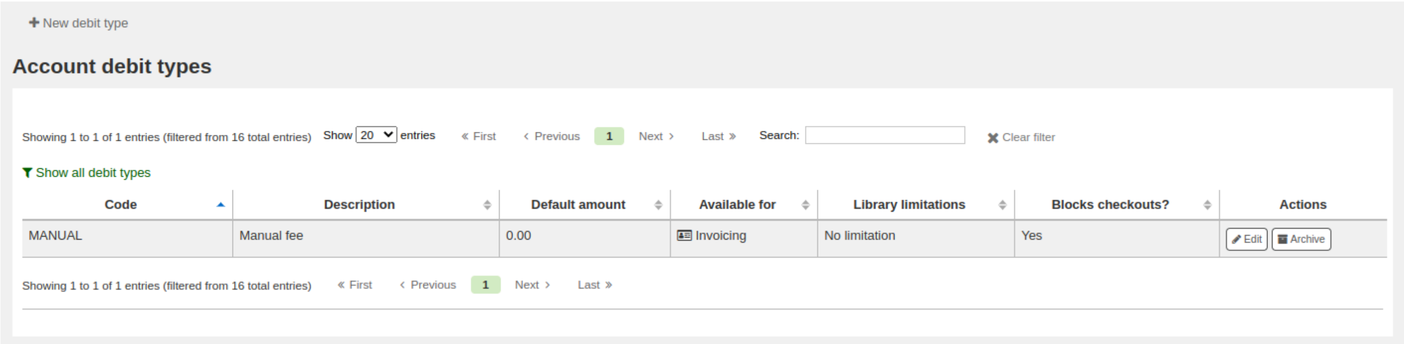
Debit types

- *Get there:* More > Administration > Accounting > Debit types

Note

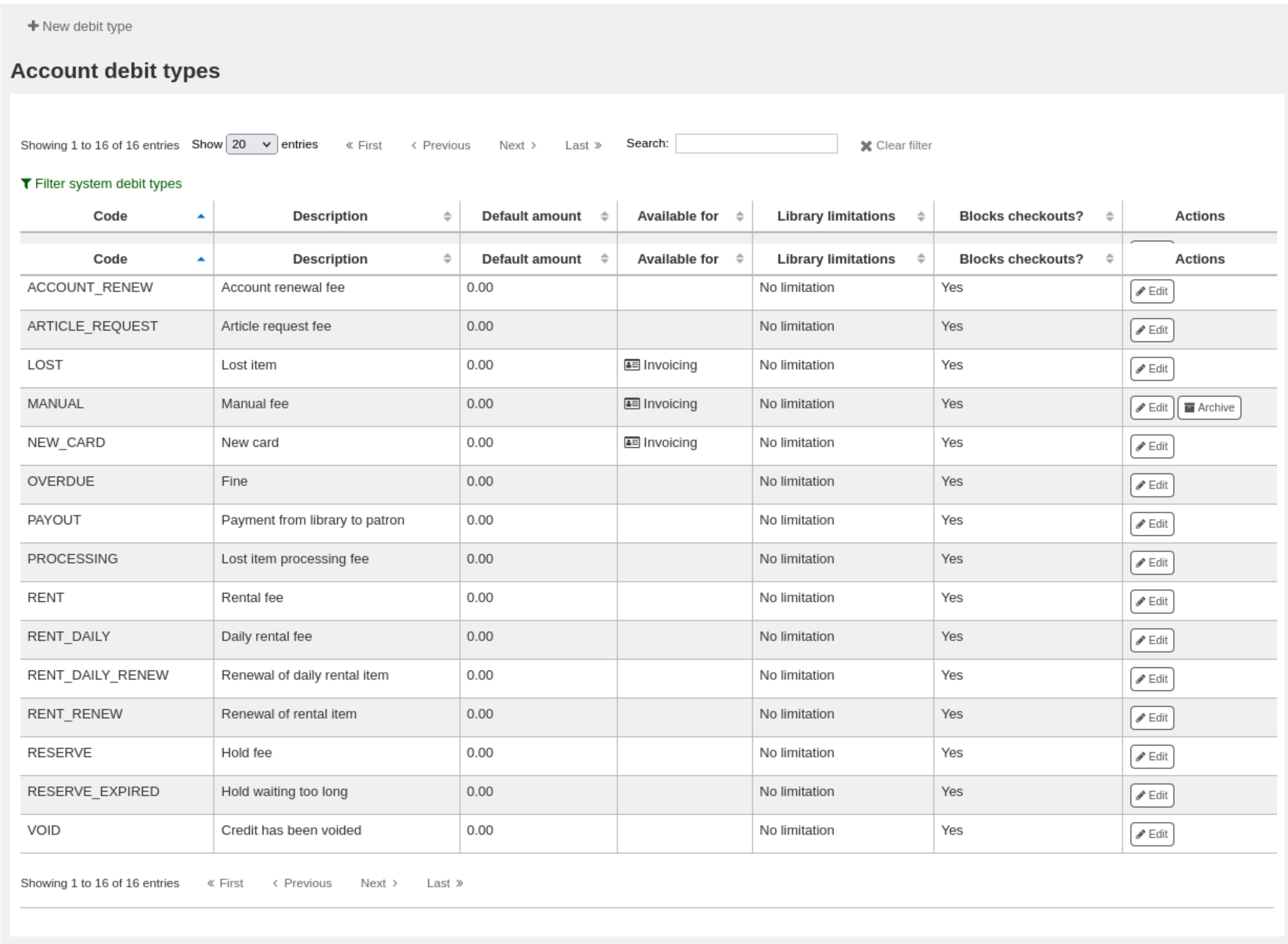
Only staff with the [manage_accounts permission] (or the [superlibrarian permission]) will have access to this section.

This is where you define the manual fees you can charge patrons.



When you first get to the page, you will only see the manual fees that are already defined in your system.

You can see the default system fees by clicking “Show all debit types”.



You can go back to seeing only the manual fees by clicking “Filter system debit types”.

System debit types

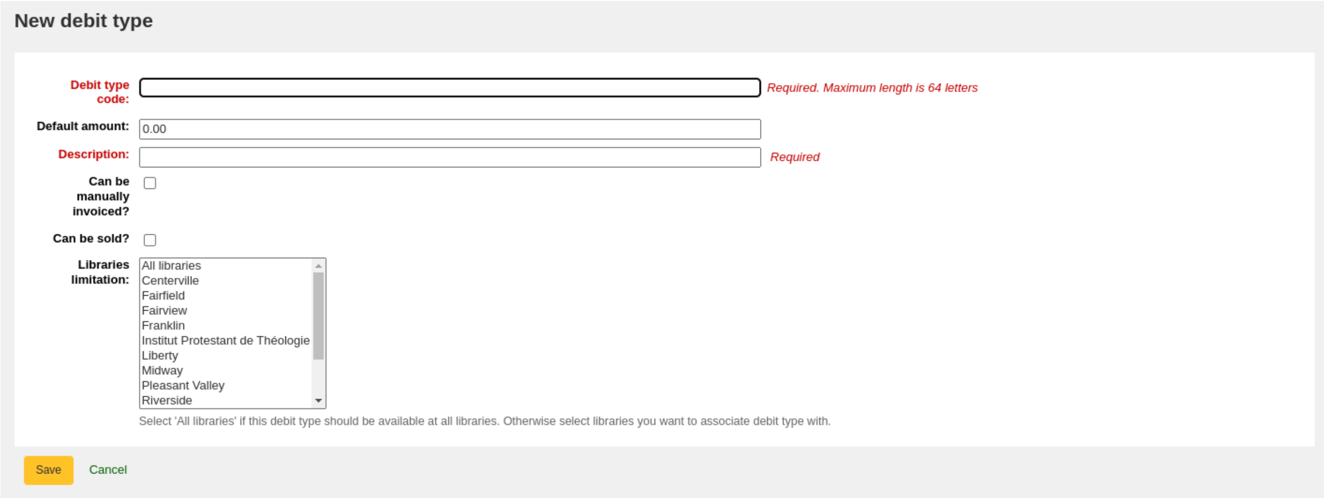
Several debit types come installed with Koha. Most of them are automatic fees that are added according to the policies you set up elsewhere in Koha.

- ACCOUNT (Account creation fee): this is charged to the patron’s account upon registration. The fee can be changed in the patron category settings under ‘Enrollment fee’.
- ACCOUNT_RENEW (Account renewal fee): this is charged to the patron’s account when their account is renewed. Like the ACCOUNT debit type above, this can be changed in the patron category settings under ‘Enrollment fee’.
- LOST (Lost item): this is charged to the patron’s account when an item in their file is declared lost. The amount depends on the item’s ‘replacement cost’ field or on the item type’s default replacement cost. It can also be added manually in the manual invoices tab.
- MANUAL (Manual fee): this is the default manual fee installed with Koha. This is not charged automatically by Koha, but can be added to a patron’s account manually in the manual invoices tab.
- NEW_CARD (New card fee): this is another default manual fee installed with Koha. This will not be charged automatically by Koha, but can be added to a patron’s account manually in the manual invoices tab.
- OVERDUE (Overdue fine): this is charged automatically to the patron’s account when they have overdue items. The amount for overdue fines are set in the circulation and fines rules.
- PAYOUT (Payment from library to patron): this is used when the library reimburses the patron (for an over payment for example).
- PROCESSING (Lost item processing fee): this is charged automatically to the patron’s account when an item in their file is declared lost. The amount is set by item type under ‘Processing fee (when lost)’.
- RENT (Rental fee): this is charged automatically to the patron’s account upon checkout if the item type has a rental charge.
- RENT_DAILY (Daily rental fee): this is charged automatically to the patron’s account upon checkout if the item type has a daily rental charge.
- RENT_DAILY_RENEW (Renewal of daily rental item): this is charged automatically to the patron’s account upon renewal if the item type has a daily rental charge.
- RENT_RENEW (Renewal of rental item): this is charged automatically to the patron’s account upon renewal if the item type has a rental charge.
- RESERVE (Hold fee): this is charged automatically to the patron’s account upon placing a hold. The amount depends on the ‘Hold fee’ amount in the patron’s category settings.
- RESERVE_EXPIRED (Hold waiting too long): this is charged automatically to the patron’s account if they haven’t picked up their hold after the number of days defined in the ExpireReservesMaxPickUpDelay system preference. The amount is set in the ExpireReservesMaxPickUpDelayCharge system preference.

Adding a new debit type

To add a new debit type:

- Click ‘New debit type’



- Debit type code: enter a code (limited to 64 letters).

  Warning

  Codes should be limited to letters, numbers, and underscores (_).

  Avoid spaces, diacritics, and special characters.

- Default amount: enter the default amount.

  Note

  Staff will be able to change this amount when adding the charge to the patron’s account, if necessary.

  Important

  Do not enter currency symbols. Only write the amount with a decimal point (for example, 5 or 5.00 instead of $5).

- Description: write a description, this description will be used in the drop-down menu when adding a new charge to a patron’s account or when making a sale in the point of sale as well as in their transaction history.
- Can be manually invoiced: check this box if this debit type can be added manually by staff to a patron’s account via the manual invoices.
- Can be sold: check this box if this debit type can be used in the point of sale.
- Included in noissuescharge: check this box if this debit type should be included when calculating the amount owed by the patron for the noissuescharge system preference. This system preference is used to block checkouts when a patron owes over a certain amount of money to the library.
- Libraries limitation: if necessary, select the libraries where this debit type can be used. Choosing ‘All libraries’ will make the debit type available everywhere.

  Note

You can select more than one library by pressing the ‘Ctrl’ key while selecting.

- Click ‘Save’

Editing an existing debit type

You can only modify the debit types you have added, as well as the ‘Manual fee’.

To edit a debit type:

- Click the ‘Edit’ button to the right of the debit type
- Modify any field
- Click ‘Save’

Archiving a debit type

If there is a debit type you don’t need anymore, you can archive it.

> **Note**
>
> There is no way to delete a debit type since they are used in the patron’s accounting section.

To archive a debit type, simply click the ‘Archive’ button to the right of the debit type.

Restoring an archived debit type

If you need to use an archived debit type again, simply click on the ‘Restore’ button to the right of the debit type.

This will make it available again.

Credit types

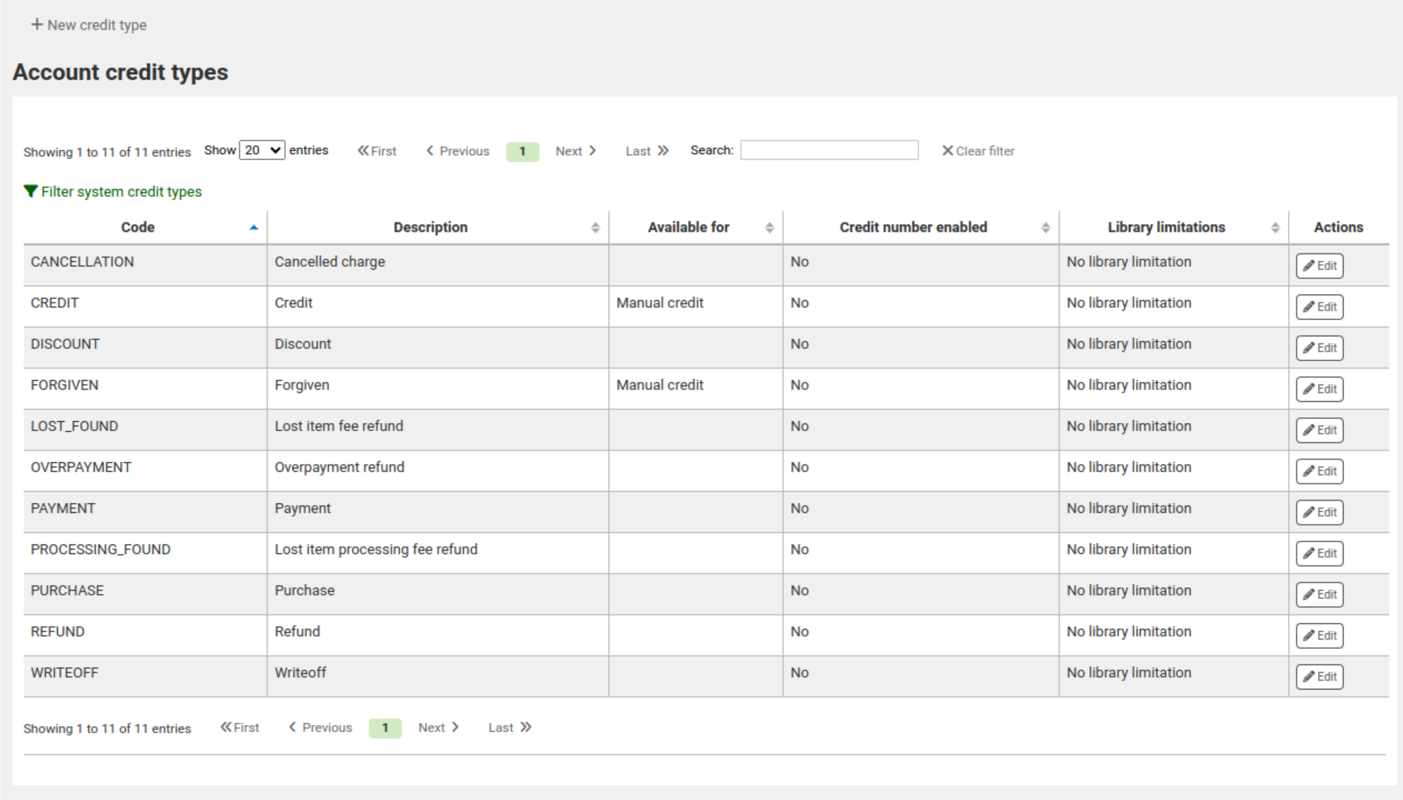
- *Get there:* More > Administration > Accounting > Credit types

> **Note**
>
> Only staff with the manage_accounts permission (or the superlibrarian permission) will have access to this section.

This is where you define the manual credits you can give patrons.

When you first get to the page, you will only see the credits that are already defined in your system.

You can see the default system credit types by clicking “Show all credit types”.



+ New credit type

Account credit types

Showing 1 to 11 of 11 entries Show 20 entries « First ‹ Previous 1 Next › Last » Search: ✕ Clear filter

Filter system credit types

Code	Description	Available for	Credit number enabled	Library limitations	Actions
CANCELLATION	Cancelled charge		No	No library limitation	Edit
CREDIT	Credit	Manual credit	No	No library limitation	Edit
DISCOUNT	Discount		No	No library limitation	Edit
FORGIVEN	Forgiven	Manual credit	No	No library limitation	Edit
LOST_FOUND	Lost item fee refund		No	No library limitation	Edit
OVERPAYMENT	Overpayment refund		No	No library limitation	Edit
PAYMENT	Payment		No	No library limitation	Edit
PROCESSING_FOUND	Lost item processing fee refund		No	No library limitation	Edit
PURCHASE	Purchase		No	No library limitation	Edit
REFUND	Refund		No	No library limitation	Edit
WRITEOFF	Writeoff		No	No library limitation	Edit

Showing 1 to 11 of 11 entries « First ‹ Previous 1 Next › Last »

You can go back to seeing only the manual credit types by clicking “Filter system credit types”.

System credit types

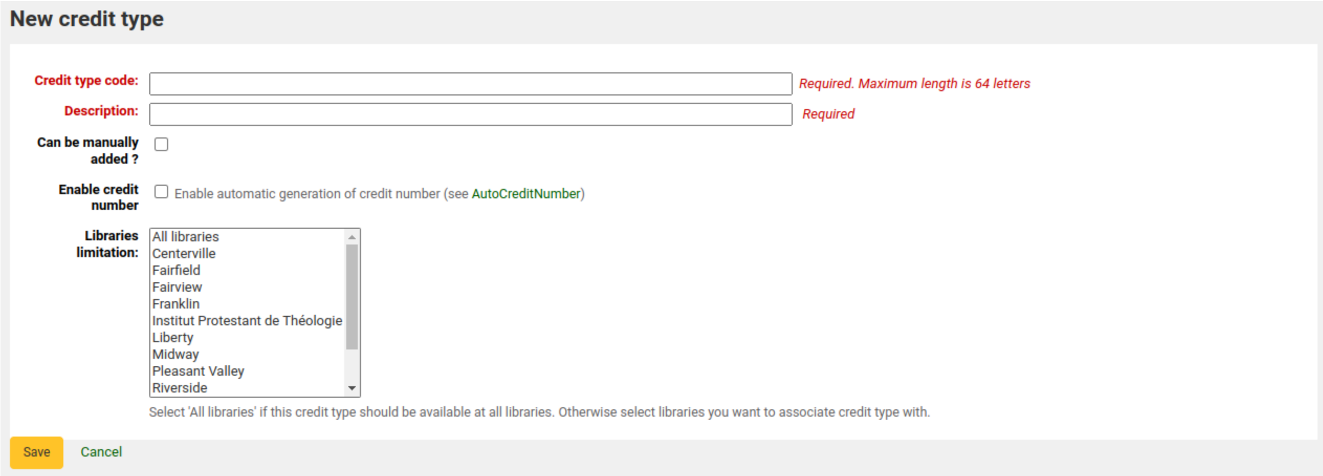
Several credit types come installed with Koha. Most of them are automatic credits that are added according to the policies you set up elsewhere in Koha. They can not be deleted.

- CANCELLATION (Canceled charge): this is used when cancelling a charge in a patron’s account
- CREDIT (Credit): this is used for manual credits to give to your patrons.
- DISCOUNT (A discount applied to a patrons fine): this is used to discount fines and charges.
- FORGIVEN (Forgiven): this is used for manual credits to give to your patrons.
- LOST_FOUND (Lost item fee refund): this is used when a previously lost item is returned. If you refund the lost fees (see Default lost item fee refund on return policy), this credit will be applied to refund the fee.
- OVERPAYMENT (Over payment refund): this is automatically applied to a patron’s account when they paid too much for a fee. This is mostly used when backdating check-ins where the patron has already paid the full fine.
- PAYMENT (Payment): as the name states, this is used to indicate fee payments.
- PURCHASE (Purchase): this is used when a payment is made through the point of sale module.
- REFUND (A refund applied to a patrons fine): this is used when refunding the payment of a fine or charge.
- WRITEOFF (Writeoff): this is used when writing off a fine or charge.

Adding a new credit type

To add a new credit type:

- Click ‘New credit type’



- Enter a code (limited to 64 letters)

  Warning

  Codes should be limited to letters, numbers, and underscores (_).

  Avoid spaces, diacritics, and special characters.

- Write a description

  This description will be used in the drop-down menu when adding a new credit to a patron's account as well as in their transaction history

- If this credit type can be added manually by staff to a patron's account via the manual credit, check the 'Can be added manually?' check box

- If you need this credit type to be sequentially numbered, check the 'Enable credit number'. The format of the number is defined in the AutoCreditNumber system preference.

- If this credit type is only to be used in specific branches, you can select the libraries in 'Libraries limitation'

  Note

  You can select more than one library by pressing the 'Ctrl' key while selecting.

- Click 'Save'

Editing an existing credit type

You can only modify the credit types you have added.

To edit a credit type:

- Click the 'Edit' button to the right of the credit type
- Modify any field
- Click 'Save'

Archiving a credit type

If there is a credit type you don't need anymore, you can archive it.

Note

There is no way to delete a credit type since they are used in the patron's accounting section.

To archive a credit type, simply click the 'Archive' button to the right of the credit type.

Restoring an archived credit type

If you need to use an archived credit type again, simply click on the 'Restore' button to the right of the credit type.

This will make it available again.

Cash registers

- *Get there:* More > Administration > Accounting > Cash registers

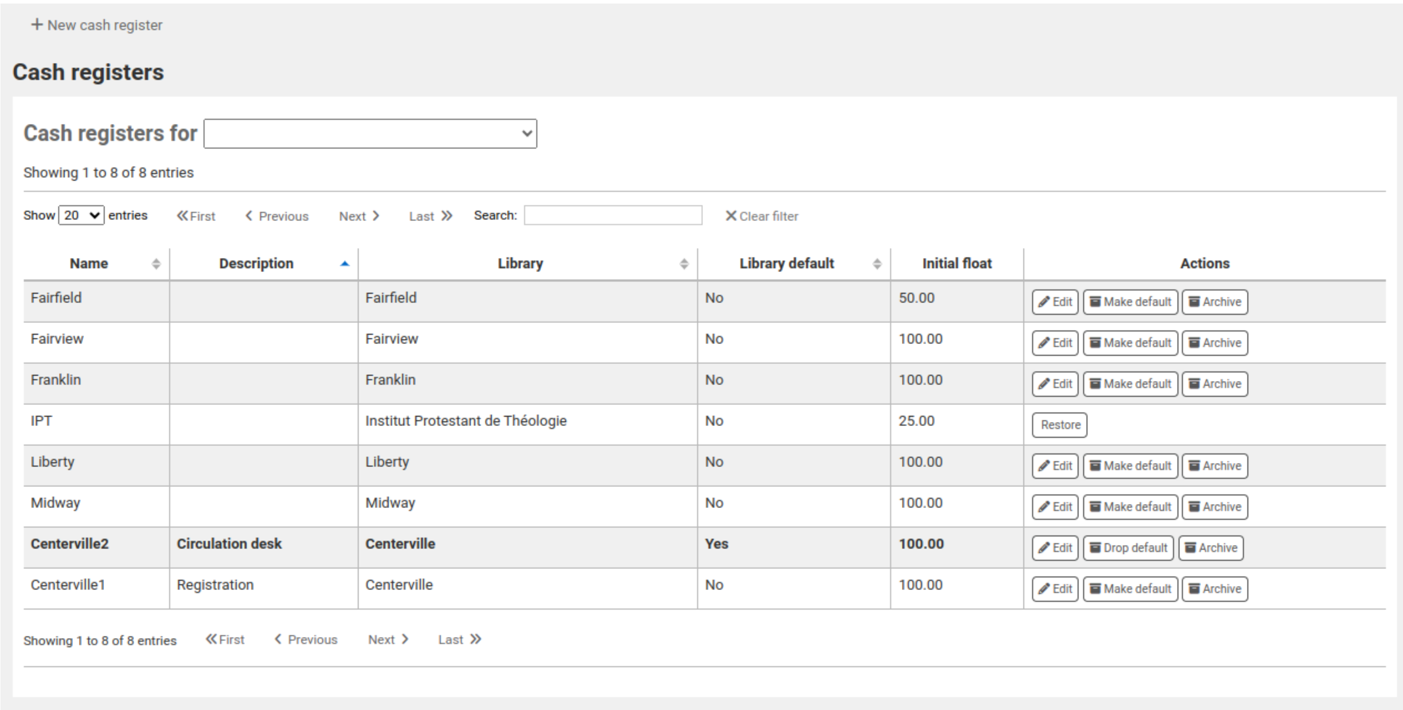
This feature is enabled through the UseCashRegisters system preference.

Note

Only staff with the manage_cash_registers permission (or the superlibrarian permission) will have access to this section.

If you have no cash registers already defined, you will be invited to create one.

Otherwise, you will see the list of all your cash registers.



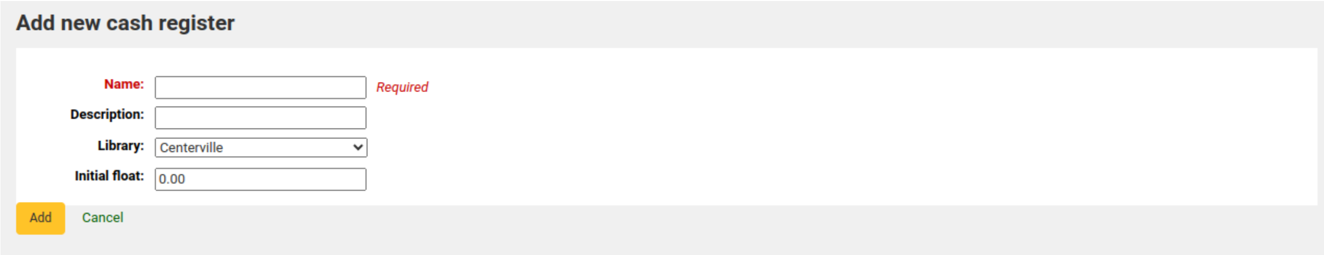
Name	Description	Library	Library default	Initial float	Actions
Fairfield		Fairfield	No	50.00	Edit Make default Archive
Fairview		Fairview	No	100.00	Edit Make default Archive
Franklin		Franklin	No	100.00	Edit Make default Archive
IPT		Institut Protestant de Théologie	No	25.00	Restore
Liberty		Liberty	No	100.00	Edit Make default Archive
Midway		Midway	No	100.00	Edit Make default Archive
Centerville2	**Circulation desk**	**Centerville**	**Yes**	**100.00**	Edit Drop default Archive
Centerville1	Registration	Centerville	No	100.00	Edit Make default Archive

In the 'Actions' columns, you can choose to edit your cash registers, make one of them default or remove the default status, and archive or restore an archived register.

The default status is only useful in libraries that have more than one register per branch. The default register will be pre-selected when entering a payment. If there is only one cash register per branch, the branch's cash register will be selected when paying.

Adding a new cash register

- Click on ‘New cash register’



- Give your cash register a name
- Optionally you can also add a description
- Choose in which library this cash register is located
- And finally, enter the initial float, i.e. the amount in the cash register
- Click ‘Add’

Plugins

This section is used to manage all types of plugins.

Important

Before using plugins, make sure that they are enabled in the configuration file.

Note

Only staff with the manage permission, the configure permission, or the admin permission (or the superlibrarian permission) will see this section.

See also the tool plugins and report plugins sections.

- *Get there:* More > Administration > Plugins

If there are any administrative plugins installed, they will appear under this section.

Note

Only staff with the admin permission (or the superlibrarian permission) will be able to use administrative plugins.

Managing plugins

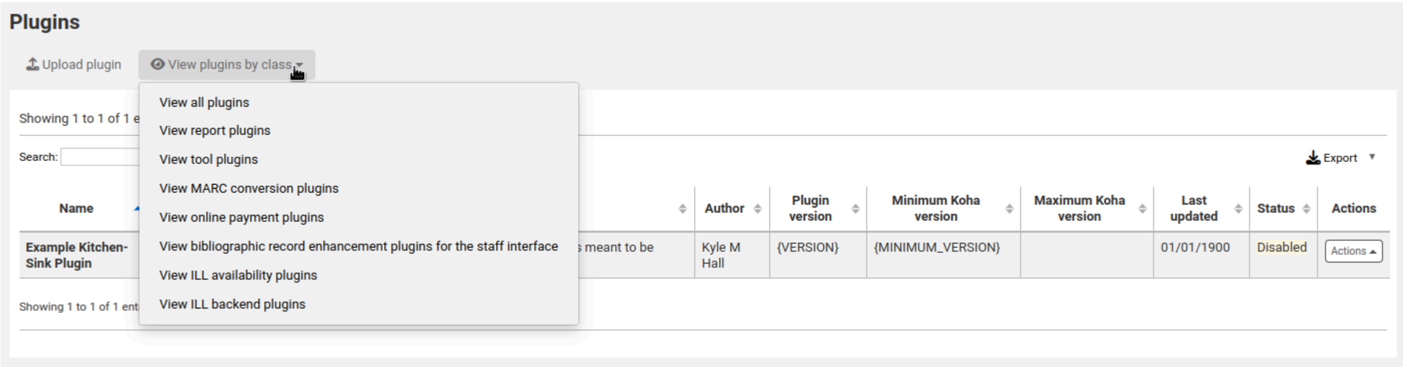
This section is used to view, manage and configure all types of plugins.

Note

Only staff with the manage permission (or the superlibrarian permission) will be able to install and uninstall plugins.

The page will show all currently installed plugins.

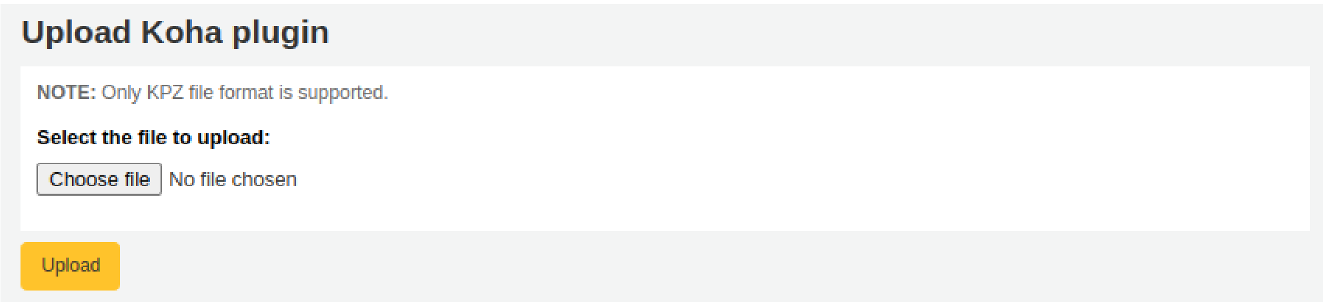
If you have a lot of plugins, you can view a subset by clicking ‘View plugins by class’.



Installing a plugin

To install a new plugin manually,

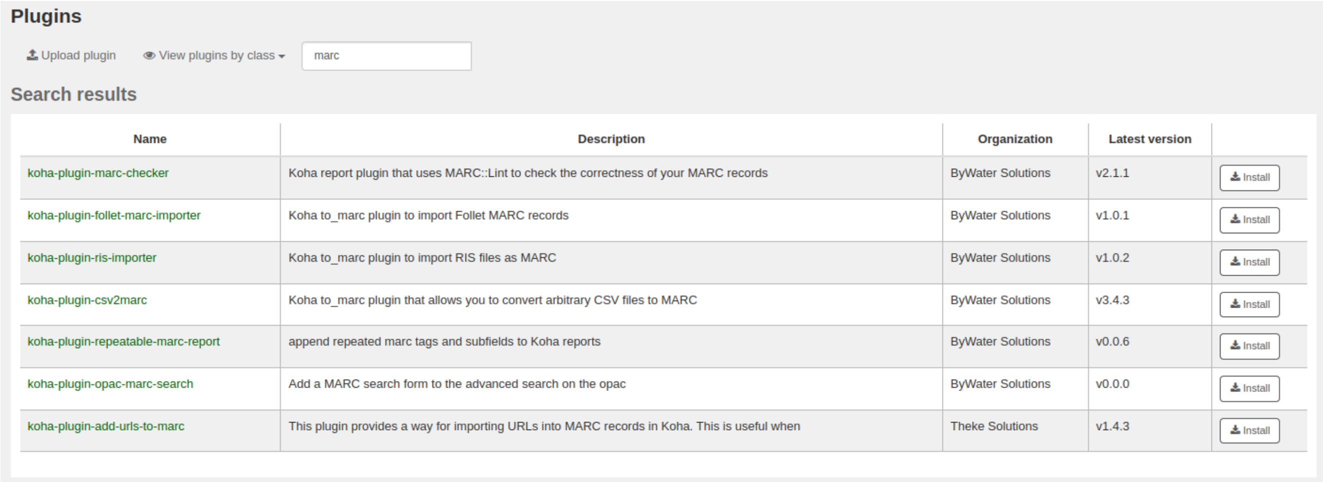
- Click ‘Upload plugin’.



- Choose the KPZ file on your computer and click ‘Upload’.

If you configured external plugin repositories, you will have a search box at the top of the page to search these repositories and install directly from there without having to download and upload the KPZ file. To install a plugin from a repository,

- Enter a search term in the search box.

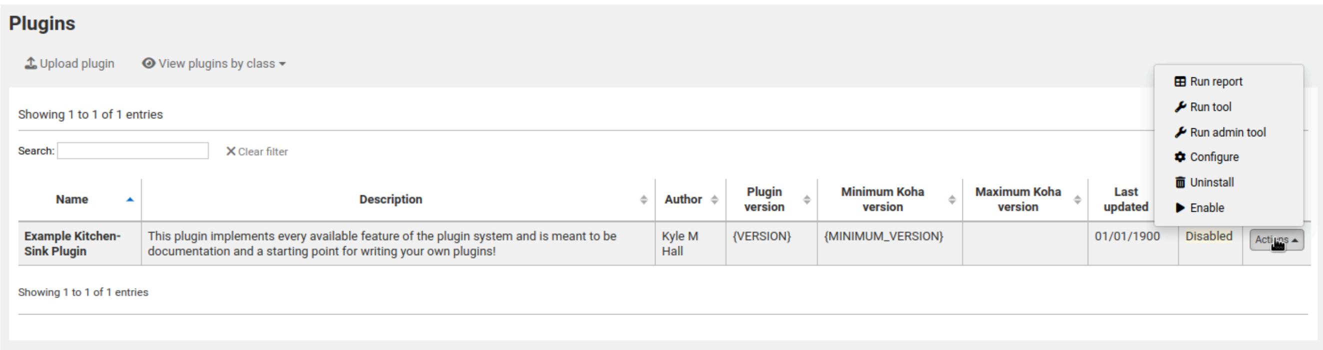


- Click 'Install' to the right of the plugin.

Some plugins might need to be enabled before usage.

To enable a plugin,

- Click the 'Actions' button to the right of the plugin and choose 'Enable'



Using a plugin

All plugins are different. Some might need configuration before usage, others are simply run.

- Click the 'Actions' button and choose 'Configure' or 'Run'.
- Follow the instructions issued by the plugin's creator.

Note

Only staff with the configure permission (or the superlibrarian permission) will be able to access plugin configuration.

Disabling a plugin

If you need to temporarily stop the plugin from taking effect, you can disable it.

- Click the 'Actions' button to the right of the plugin and choose 'Disable'

This will not uninstall the plugin. It will remain installed, but will not have any effect on your Koha installation.

Deleting a plugin

To delete or uninstall a plugin,

- Click the ‘Actions’ button to the right of the plugin and choose ‘Delete’

This will remove the plugin from your Koha installation. Any action or effect it had will stop. If you need to, you can reinstall it later, provided it is still available.

Jobs

This section is used to manage background jobs. Jobs are tasks that are queued in the system to be treated when the server has the resources to do it, such as batch record modification and others.

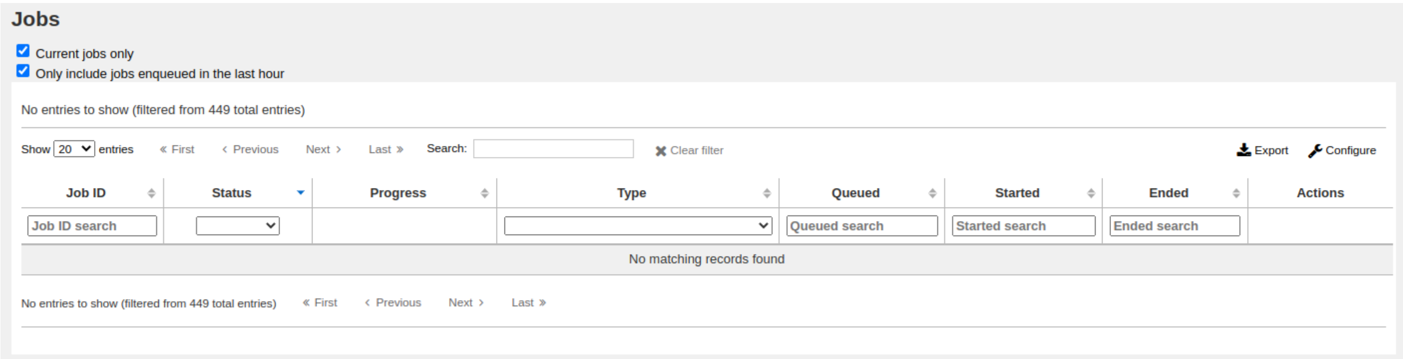
- *Get there:* More > Administration > Jobs

Note

Only staff with the manage_background_jobs permission (or the superlibrarian permission) will have access to this section.

Managing jobs

By default, when accessing the page, you will only see current jobs and jobs enqueued in the last hour.



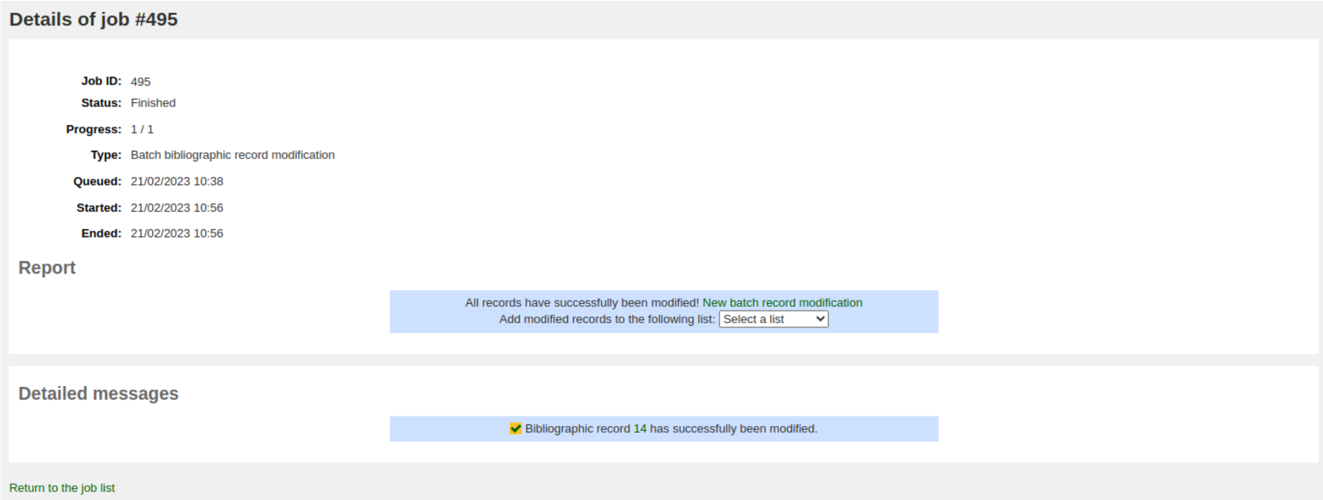
To see all jobs, uncheck the boxes at the top of the page.

- Current jobs only: uncheck this to include finished jobs
- Only include jobs enqueued in the last hour: uncheck this to include jobs enqueued earlier

You can search for jobs using the search boxes under the table headings.

To the right of each job, there are action buttons.

- View: this will display the details of the job, including, but not limited to:



  - Job ID: this is the identifier of the job in the Koha database, an incremental number
  - Status: the status of the job
    - New: the job has been queued
    - Cancelled: the job was cancelled by a user
    - Finished: the job was successfully carried out
    - Started: the job was started, but it is not yet finished
    - Running: the job is currently being executed
    - Failed: the job was started, but failed for some reason
  - Progress: indicates how much of the job is done
  - Type: indicates the type of job
    - Batch bibliographic record modification: batch of bibliographic records to be modified.
    - Batch bibliographic record deletion: batch of bibliographic records to be deleted.
    - Batch authority record modification: batch of authority records to be modified.
    - Batch authority record deletion: batch of authority records to be deleted.
    - Batch item record modification: batch of items to be modified.
    - Batch item record deletion: batch of items to be deleted.
    - Batch hold cancellation: a batch of holds to be cancelled (when using the ‘Cancel selected’ button).
    - Create eHoldings titles: titles to be created from a list in the ERM module.
    - Update Elasticsearch index: bibliographic or authority records, or items to be updated in the Elasticsearch index. Any changes to a bibliographic or authority record, or item trigger an update of the index, including changes in circulation status.
    - Holds queue update: when the RealTimeHoldsQueue system preference is enabled, changes to holds trigger an update of the holds queue.
    - Staged MARC records for import: bibliographic or authority records to be staged for import.
    - Import MARC records: staged bibliographic or authority records to be imported in the catalog.
    - Revert import MARC records: imported bibliographic or authority records to be unimported.
  - Queued: date and time when the job was queued
  - Started: date and time when the job was started
  - Ended: date and time when the job was finished
  - Report: this section will contain messages specific to the type of job (for example, number of records modified, in the case of batch record modification)
  - Detailed messages: this section will contain messages specific to the type of job (for example, which records were modified, in the case of batch record modification)

- Cancel: for jobs that are still new or have started, it’s possible to cancel them

Catalog administration

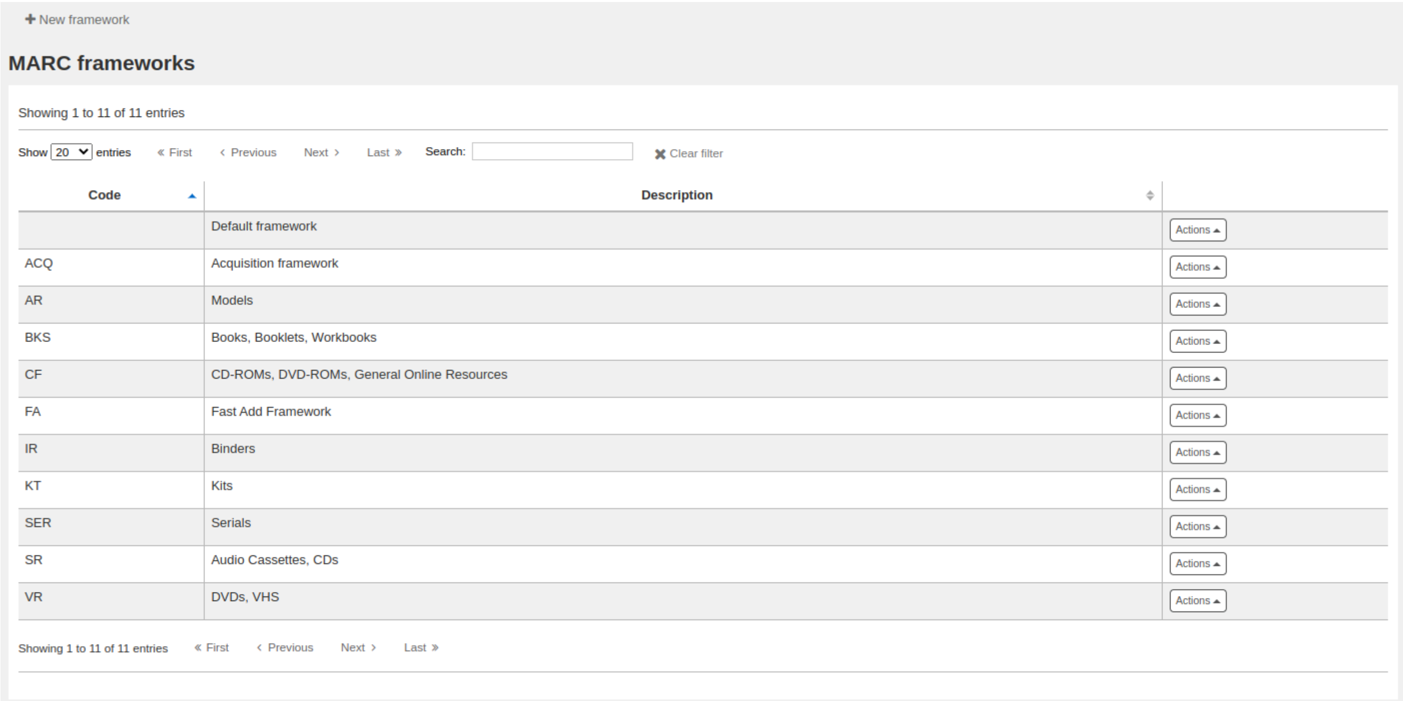
Set these controls before you start cataloging on your Koha system.

- *Get there:* More > Administration > Catalog

MARC bibliographic frameworks

Think of frameworks as templates for creating new bibliographic records. Koha comes with some predefined frameworks that can be edited or deleted, and librarians can create their own frameworks for content specific to their libraries.

- *Get there:* More > Administration > Catalog > MARC bibliographic frameworks



Note

Only staff with the [manage_marc_frameworks permission] (or the [superlibrarian permission]) will have access to this section.

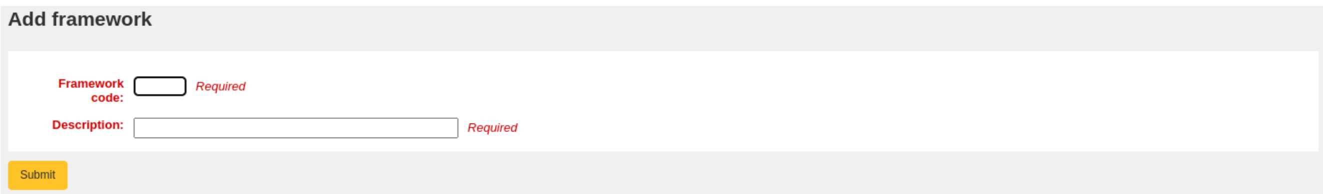
Important

Do not delete or edit the Default framework since this will cause problems with your cataloging records - always create a new template based on the Default framework, or alter the other frameworks.

Adding a new framework

To add a new framework

- Click ‘New framework’

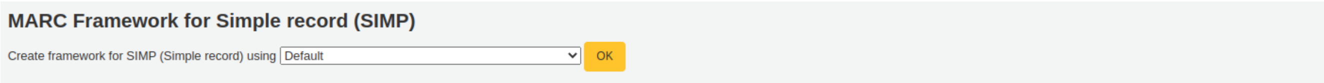


    - Code: enter a code of 4 or fewer characters, avoiding spaces, diacritics, or other special characters.
    - Description: enter a more detailed definition of your framework, this is what will be displayed in Koha.

- Click ‘Submit’

- Once your framework is added click ‘Actions’ to the right of it on the list of frameworks and choose ‘MARC structure’

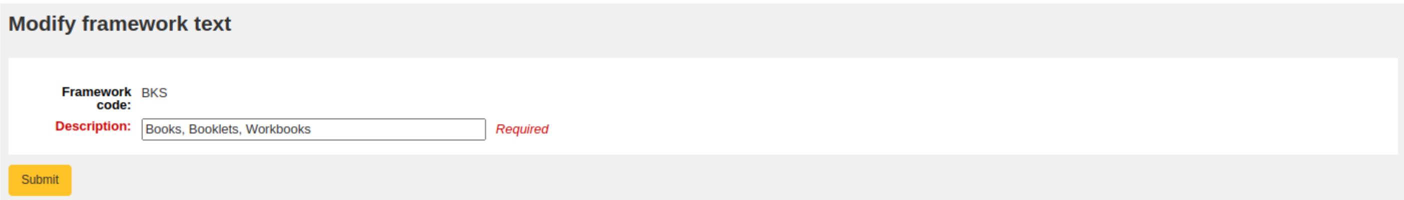
    - You will be asked to choose a framework to base your new framework on, this will make it easier than starting from scratch



- Once your framework appears on the screen you can edit or delete each field by following the instructions for editing fields and subfields

Editing existing frameworks

Clicking ‘Actions’ and then ‘Edit’ to the right of a framework will only allow you to edit the description for the framework.



Editing framework fields and subfields

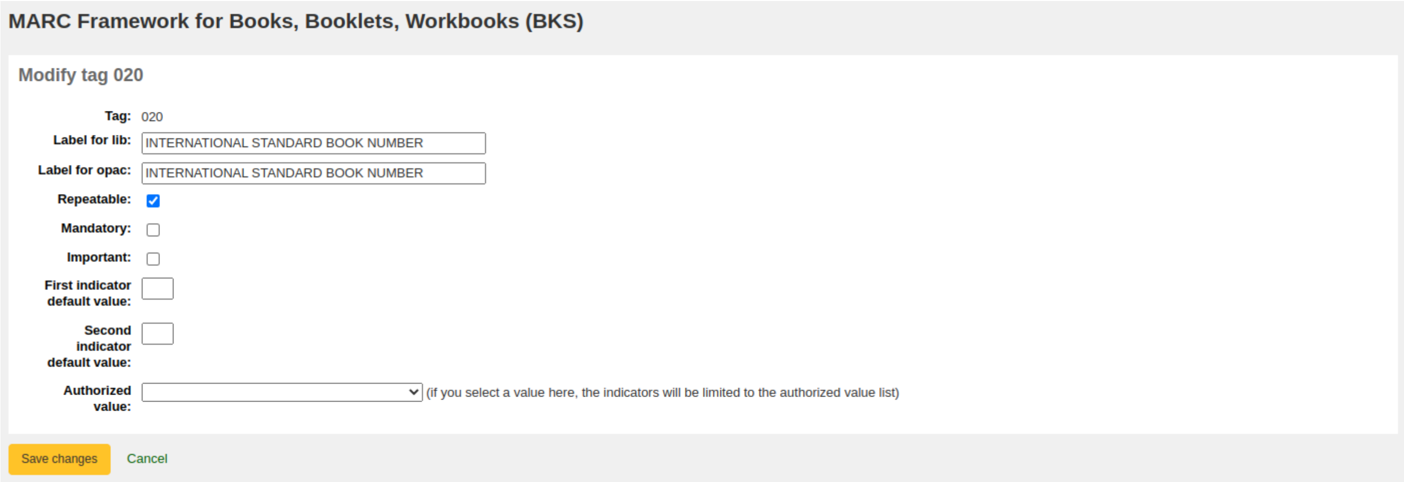
Frameworks are made up of MARC fields (tags) and subfields. To make edits to the fields and subfields associated with the framework you must click on ‘Actions’ and then ‘MARC structure’.

Important

Whenever you make changes to the framework fields and subfields, make sure to run the MARC bibliographic framework test.

Editing a MARC field (tag)

After clicking on ‘MARC structure’ you will be taken to a screen listing all the available tags for that framework and you can search for the tag you need. To make edits to a MARC **field** click on ‘Actions’ on the right of the field and choose ‘Edit tag’.



The next screen shows details of the tag.

- Tag: the MARC tag, or field number, is uneditable.
- Label for lib: text that will show in the staff interface MARC view, and in the basic editor if the advancedMARCeditor system preference is set to display labels.

  Note

  If you use XSLT (see the XSLTDetailsDisplay system preference), the labels for the 'Normal' view are defined in the XSLT stylesheet.

  This will not affect the 'Normal' view unless you don't use XSLT.

- Label for OPAC: text that will show on the MARC view in the OPAC.

  Note

  If you use XSLT (see the OPACXSLTDetailsDisplay system preference), the labels for the 'Normal' view are defined in the XSLT stylesheet.

  This will not affect the 'Normal' view unless you don't use XSLT.

- Repeatable: when checked, the field will have an icon next to it in the basic editor, allowing you to add multiples of that tag.
- Mandatory: when checked, the record cannot be saved unless the field has a value. In the basic editor, a 'Required' flag will display as a prompt.
- Important: when checked, the field will generate a warning if it is not filled, but unlike 'Mandatory', you will still be able to save your record nonetheless. In the basic editor, an 'Important' flag will display as a prompt.
- Indicator default values: add default values for indicators here so that they will be pre-filled to save time when cataloging, but can still be edited if required.
- Authorized value: define an authorized value pull down list for the catalogers

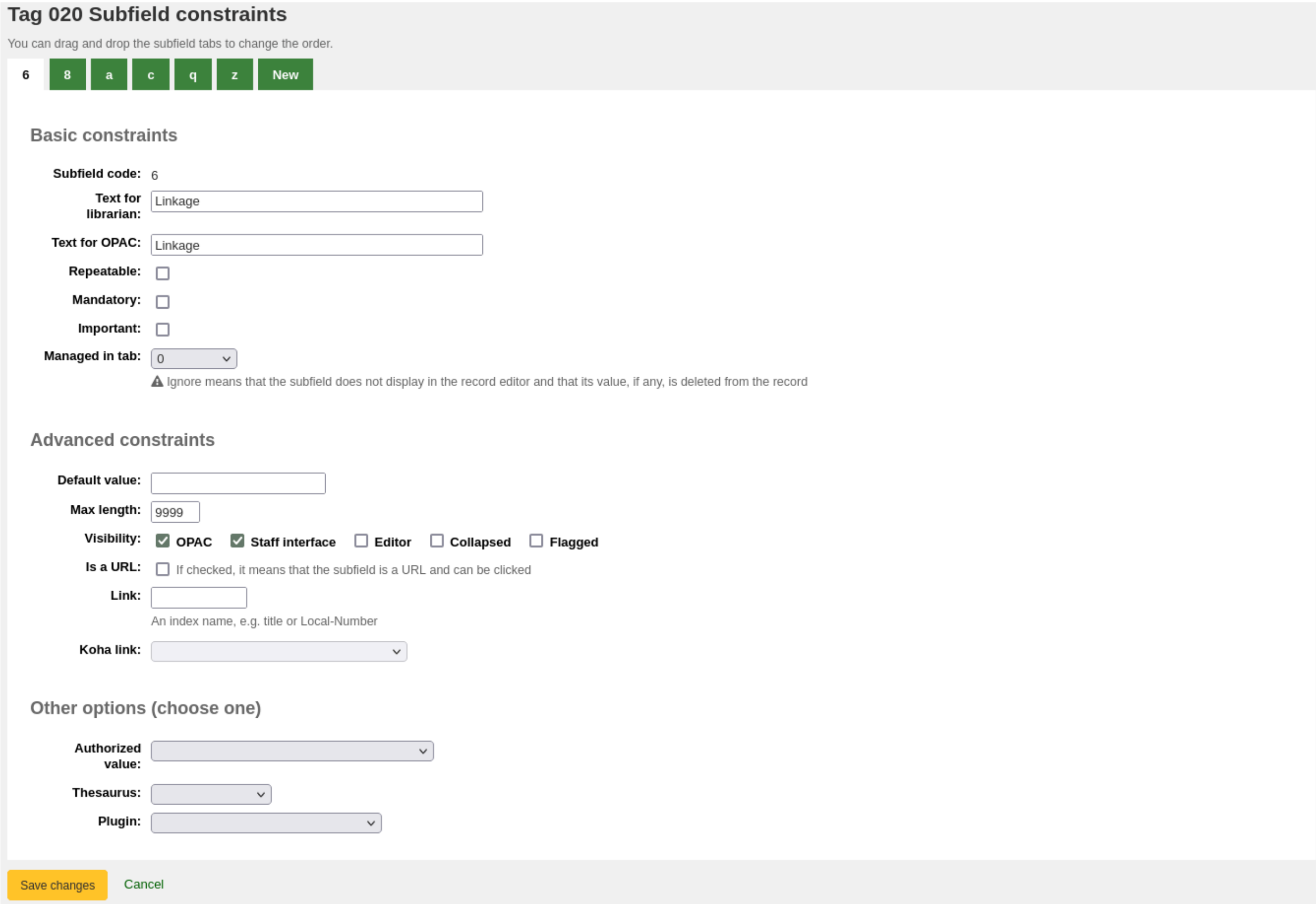
  Warning

The authorized value option at field level does not work.

Click 'Save changes' to save any modification.

Editing a MARC subfield

To edit the **subfields** associated with the tag, click 'Actions' then 'Edit subfields' to the right of the tag on the framework field list. Each subfield has its own tab which contains three sections - Basic constraints, Advanced constraints and Other options.



- For each subfield you can set the following basic constraint options
  - Subfield code: this is the MARC subfield code, this wouldn't normally be changed.
  - Text for librarian: text that will show in the staff interface MARC view, and in the basic editor if the advancedMARCeditor system preference is set to display labels.

    Note

    If you use XSLT (see the XSLTDetailsDisplay system preference), the labels for the 'Normal' view are defined in the XSLT stylesheet.

    This will not affect the 'Normal' view unless you don't use XSLT.

  - Text for OPAC: text that will show on the MARC view in the OPAC.

    Note

If left empty, the ‘Text for librarian’ is used instead

Note

If you use XSLT (see the OPACXSLTDetailsDisplay system preference), the labels for the ‘Normal’ view are defined in the XSLT stylesheet.

This will not affect the ‘Normal’ view unless you don’t use XSLT.

  - Repeatable: when checked, the field will have an icon next to it in the basic editor, allowing you to add multiples of this subfield.
  - Mandatory: when checked, the record cannot be saved unless the subfield has a value. In the basic editor, a ‘Required’ flag will display as a prompt.
  - Important: when checked, the field will generate a warning if it is not filled, but unlike ‘Mandatory’, you will still be able to save your record nonetheless. In the basic editor, an ‘Important’ flag will display as a prompt.
  - Managed in tab: defines the tab where the subfield is shown.

    Important

    All subfields of a given field must be in the same tab or ignored. Ignore means that the subfield is not managed.

    Warning

    When importing records, or editing existing records, subfields that are managed in tab ‘ignore’ will be deleted. If you still wish to keep the subfields, but hide them, use the ‘Visibility’ options below.

- For each subfield you can set the following advanced constraint options
  - Default value: defines what you want to appear in the field by default, this will be editable, but it saves time if you use the same text over and over or the same value in a field often.

    Note

    There are several values that you can use here that will be replaced automatically when a new record is created:

      - <<MM>> - the current month, 2 digits
      - <<DD>> - the current day of month, 2 digits
      - <<YY>> - the current year, 2 digits
      - <<YYYY>> - the current year, 4 digits
      - <<USER>> - the username of the currently logged in user

    For example: a default of “<<MM>>/<<DD>>/<<YYYY>>” (without quotes) will print the current date in the form of “01/21/2021”

    Note

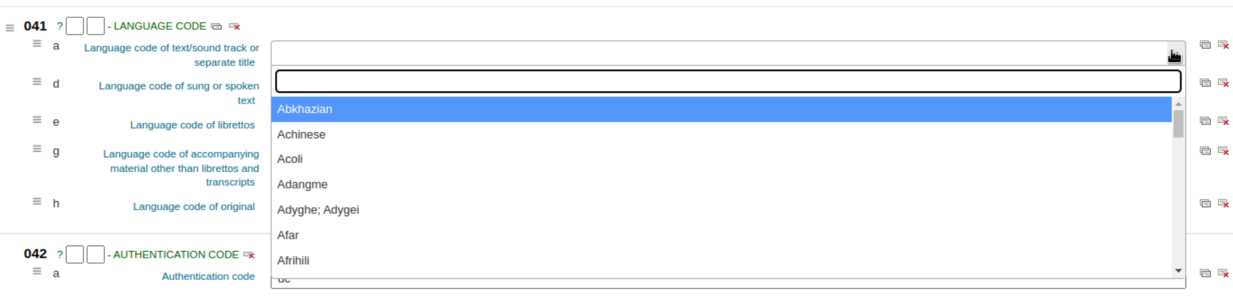
  When those default values are filled depends on the ApplyFrameworkDefaults system preference.

  - Max length: enter a value here to limit the number of characters that can be entered in the subfield.
  - Visibility: allows you to select from where this subfield is visible or hidden. Check the boxes where you would like the field to show, and uncheck the boxes where you would like it hidden.
    - OPAC: when checked, this will make the subfield available for display in the OPAC. For non-XSLT views, the field will be displayed. For XSLT views, it will depend on the stylesheet.
    - Staff interface: when checked, this will make the subfield available for display in the staff interface. For non-XSLT views, the field will be displayed. For XSLT views, it will depend on the stylesheet.
    - Editor: when checked, this will make the subfield available for modification in the basic editor.
    - Collapsed: when checked, the subfield will be hidden in the basic editor, but will display when the field label is clicked to expand all subfields.
    - Flagged: when checked, the subfield will be unavailable and hidden from all views (equivalent to all boxes being unchecked).
  - Is a URL: if checked, it means that the subfield is a URL and can be clicked.
  - Link: if you enter an index name here, a link appears after the subfield in the MARC detail view in the staff interface. If the librarian clicks on the link, a catalog search is done using the index and the content of the subfield.
  - Koha link: this field is used to create a link between the MARC subfield and a column in the items, biblioitems, and biblio database tables. The mappings can be changed from the Koha to MARC mapping page.
- For each subfield you can set the following Other option values
  - Authorized value: means the value must be chosen from a drop-down menu generated from the authorized value list.

    In the example below, the LANG authorized value category has been set to 041$a.

    This creates a drop-down menu in the basic editor.

  - Thesaurus: means that the value is linked to the authority catalog of the selected category. Authority categories are managed in the Authority types section.

- Plugin: means the value is calculated or managed by a cataloguing plugin. Cataloguing plugins, or value builders, can do almost anything.
    - Examples:
        - For call numbers there is an option to add a call number browser next to the call number subfield so that you can identify which call numbers are in use and which are not. Simply choose the cn_browser.pl plugin. Learn more in the cataloging section of this manual.
        - If you'd like to let file uploads via cataloging you can choose the upload.pl plugin and this will allow you to upload files to Koha to link to your records.
        - In UNIMARC there are plugins for every 1xx fields that are coded fields. The plugin is a huge help for cataloger! There are also two plugins (unimarc_plugin_210c and unimarc_plugin_225a that can "magically" find the editor from an ISBN, and the collection list for the editor)
        - If you would like to enable an autocomplete search for publishers in 260b and 264b you can set the plugin to marc21_field_260b.pl. When you start typing in a publisher name you will be given search results based on publisher names already in the catalog.

- To save your changes, click 'Save changes'.

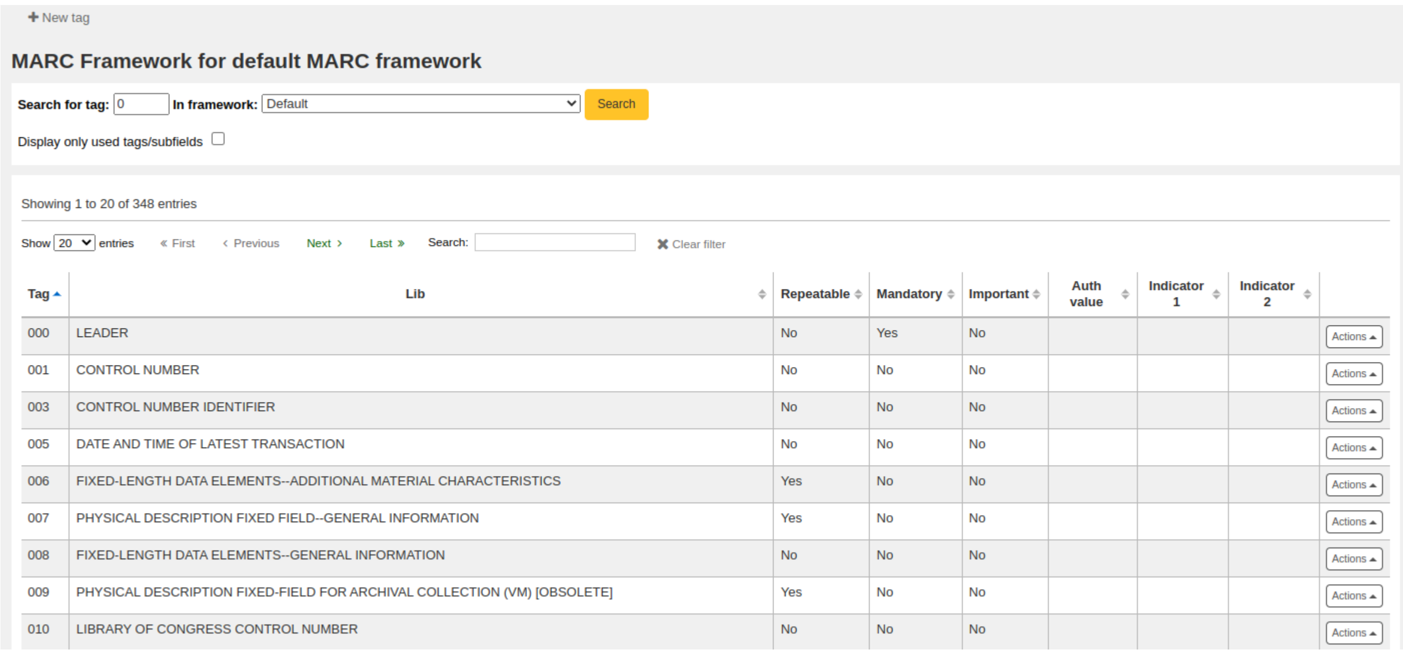
Tip

You can drag and drop the subfield tabs to change the order in which they appear when cataloging with the basic editor.

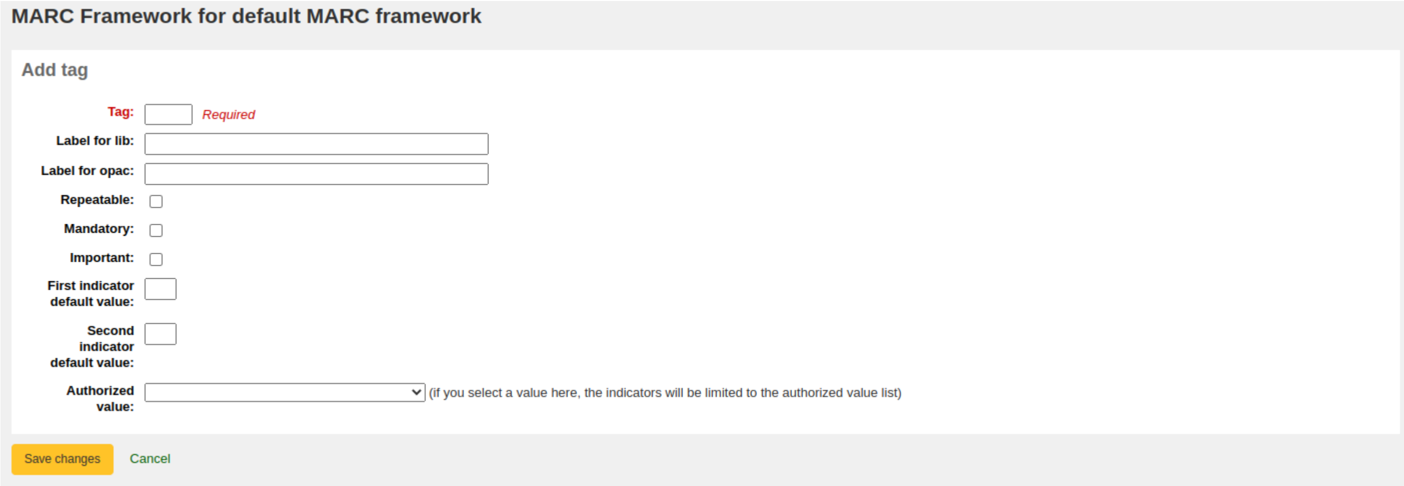
By default, they will appear in alphanumeric order (0-9, then a-z).

Adding fields to frameworks

If a framework doesn't contain a field that you require, you may need to add it. To add a field to a framework click the 'New tag' button at the top of the framework definition.



This will open up a blank form for entering MARC field data



Enter the field number for your new tag. The process for entering the remainder of the settings for the new tag is the same as those found in the [editing fields and subfields in frameworks] section of this manual.

When you're finished, click 'Save changes' and your new tag will be displayed in the framework field list.

You will need to add at least one subfield to your new tag before it will appear in your framework when you are cataloging.

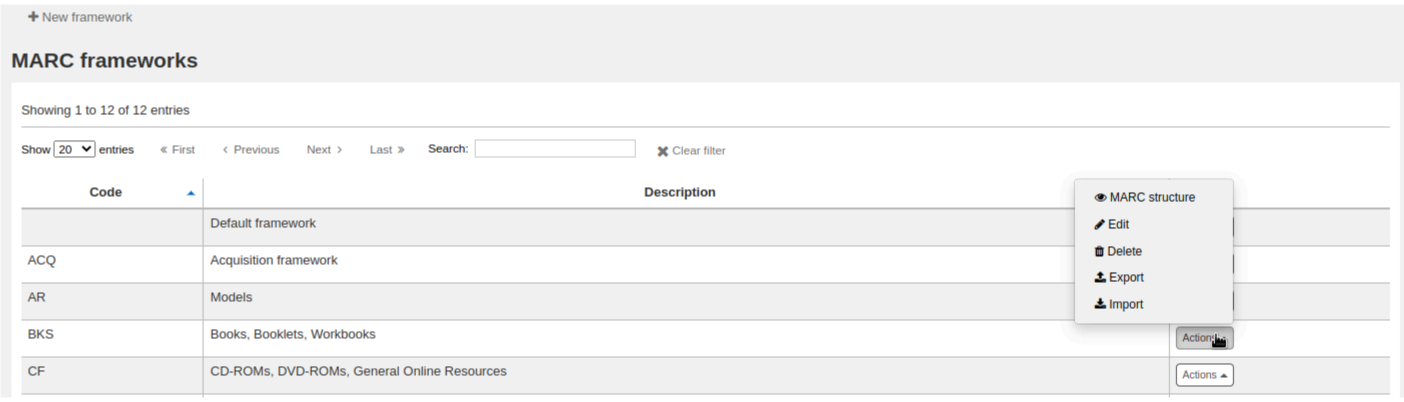
Click on the 'Actions' button for your new tag and then 'Edit subfields'. Click on the 'New' tab and enter your subfield code. The process for entering the remainder of the settings for the new subfield is the same as those found in the [editing fields and subfields in frameworks] section of this manual.

Importing and exporting frameworks

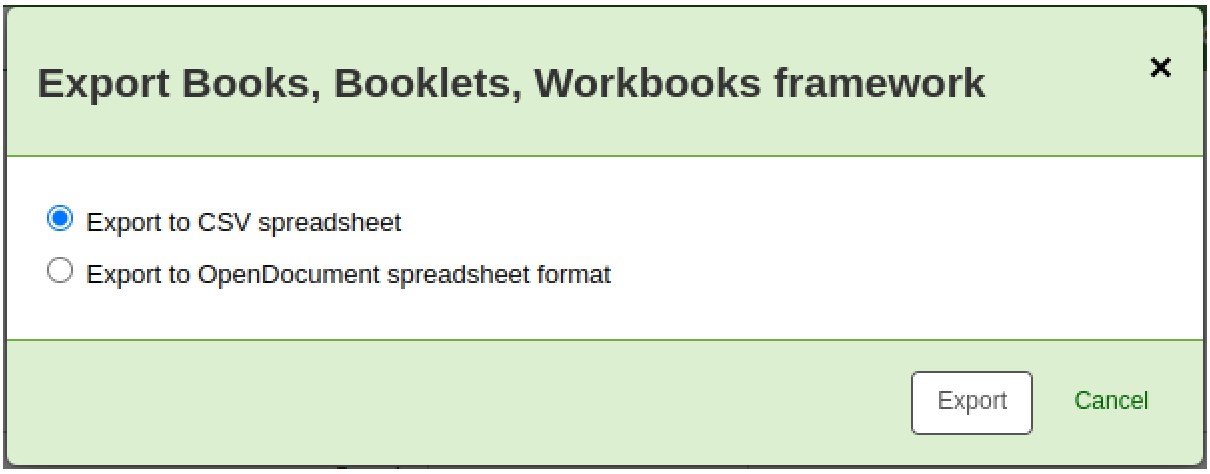
Next to each framework is a link to either import or export the framework.

Export framework

To export a framework, click the 'Export' option in the 'Actions' button to the right of the framework title.



When you click 'Export' you will be prompted to choose what format to export the file in.

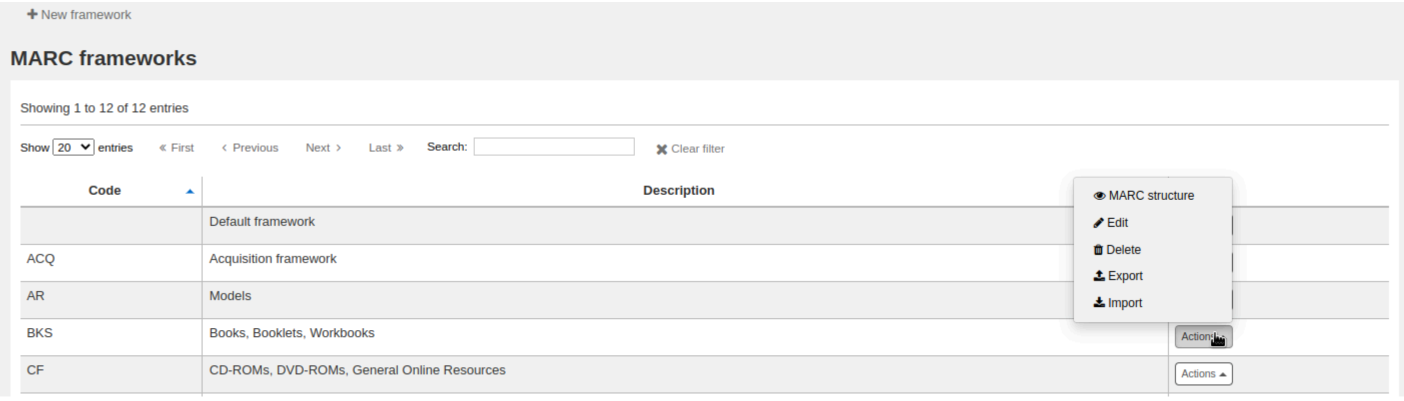


A framework exported this way can be imported into any other Koha installation using the import framework option.

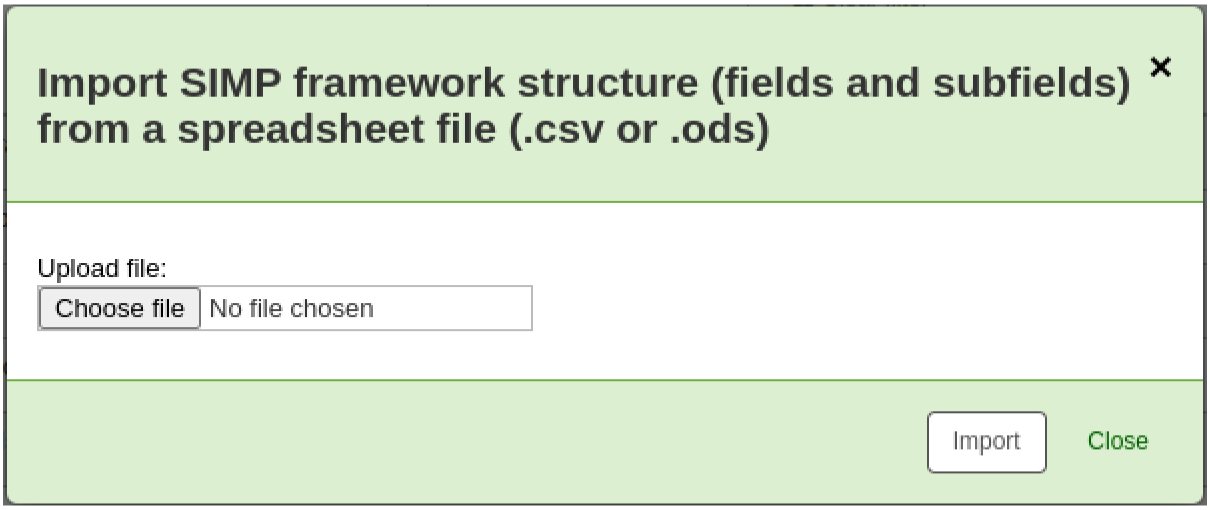
Import framework

An easy way to create a new framework is to import one created for your or another Koha installation. This framework would need to be exported from the other system using the instructions above to be available for import here.

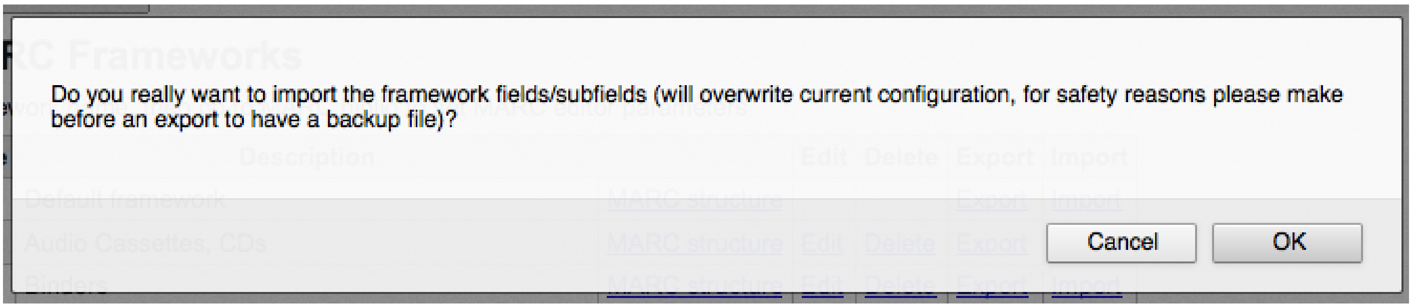
To import a framework you first need to create a new framework. Once you have that framework, click 'Actions' then 'Import' to the right of the new framework.



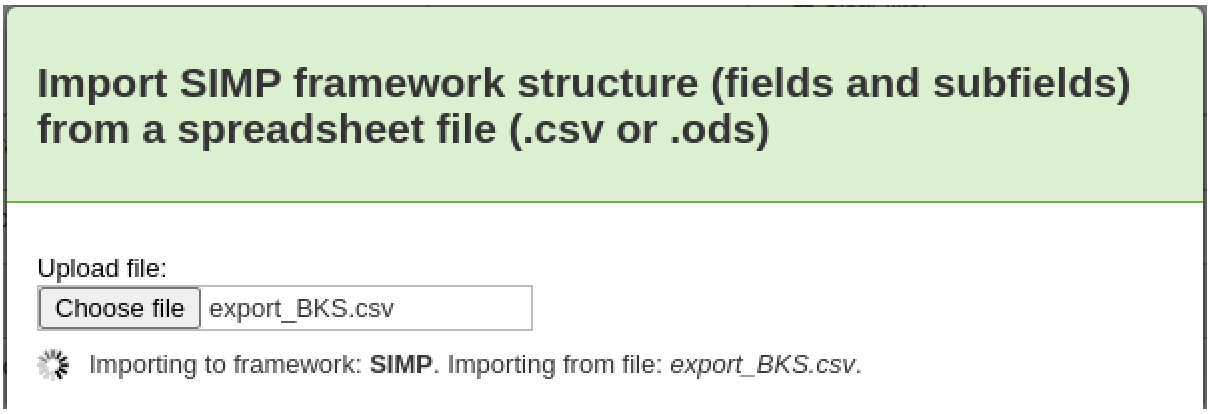
You will be prompted to find a file on your computer to import into the framework.



You will be asked to confirm your actions before the file is imported.



As your file is uploaded, you will see a spinning icon to indicate that the system is working.



Once your import is complete you will be brought to the framework edit tool where you can make any changes you need to the framework you imported.

Koha to MARC mapping

While Koha stores the entire MARC record, it also stores common fields for easy access in various tables in the database (mainly the items, biblioitems, and biblio tables). Koha to MARC mapping is used to tell Koha where to find these values in the MARC record. Whenever a record is added or changed, this mapping will be used to update the linked database column. The information from the database columns is used as a way to quickly look up important information without having to parse the full MARC record. It is used for displaying information in a lot of pages and can also be used in reports.

In many cases, you will not have to change the default values set at the time of the installation, but it is important to know that the tool is here and can be used at any time.

Warning

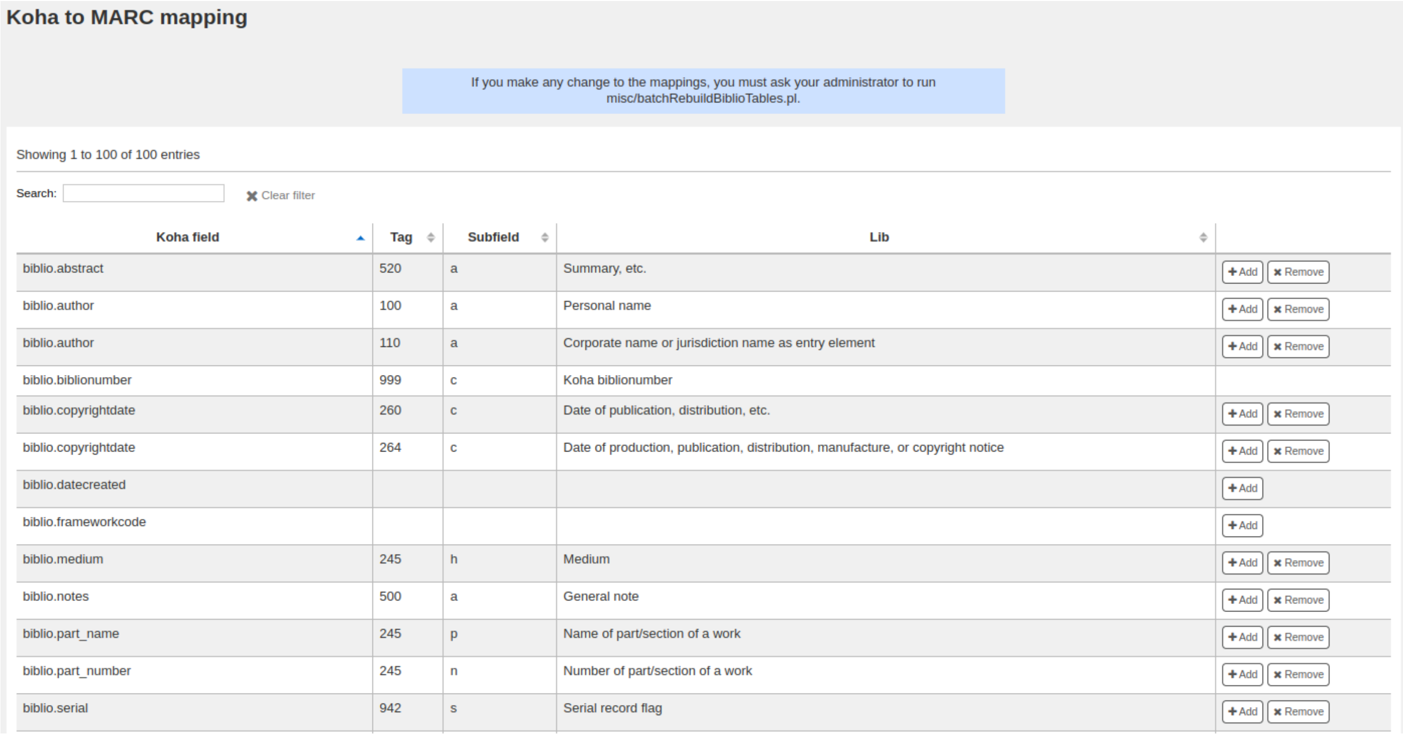
If you change mappings after data has been added to your catalog, ask your system administrator to run misc/batchRebuildBiblioTables.pl. This will update the values in the database columns for all your records.

- *Get there:* More > Administration > Catalog > Koha to MARC mapping

Note

Only staff with the manage_marc_frameworks permission (or the superlibrarian permission) will have access to this section.

The table shows all the database fields that can be mapped to MARC fields.



Koha to MARC mapping

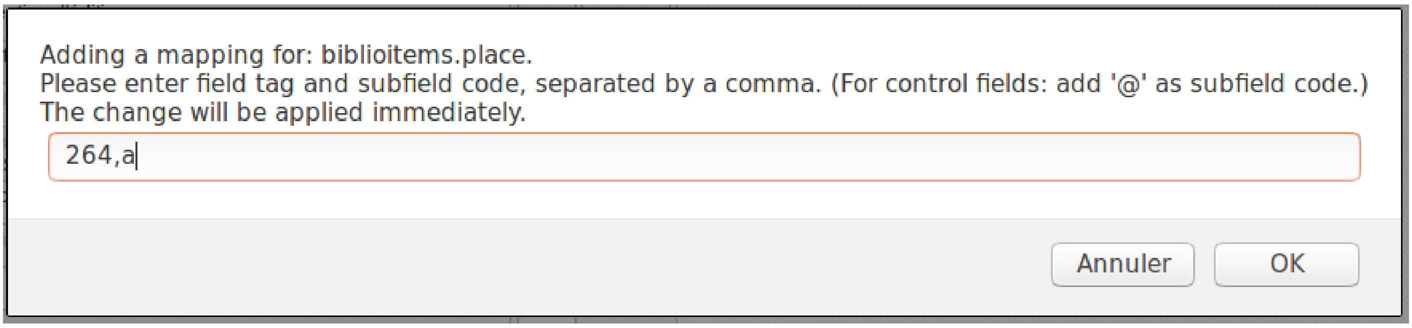
If you make any change to the mappings, you must ask your administrator to run misc/batchRebuildBiblioTables.pl.

Showing 1 to 100 of 100 entries

Search: Clear filter

Koha field	Tag	Subfield	Lib	
biblio.abstract	520	a	Summary, etc.	Add Remove
biblio.author	100	a	Personal name	Add Remove
biblio.author	110	a	Corporate name or jurisdiction name as entry element	Add Remove
biblio.biblionumber	999	c	Koha biblionumber	
biblio.copyrightdate	260	c	Date of publication, distribution, etc.	Add Remove
biblio.copyrightdate	264	c	Date of production, publication, distribution, manufacture, or copyright notice	Add Remove
biblio.datecreated				Add
biblio.frameworkcode				Add
biblio.medium	245	h	Medium	Add Remove
biblio.notes	500	a	General note	Add Remove
biblio.part_name	245	p	Name of part/section of a work	Add Remove
biblio.part_number	245	n	Number of part/section of a work	Add Remove
biblio.serial	942	s	Serial record flag	Add Remove

To add a new mapping, click on the 'Add' button to the right of the appropriate field.



Write in the MARC field and subfield you would like to map, separated by a comma, to this Koha field (for example, "264,a") and click the 'OK' button.

Note

It is possible to link more than one MARC field to a database field. For example, you could link both 260$a and 264$a to the biblioitems.place field.

If you would like to clear the mapping for a database field, click the 'Remove' button.

Note

All changes are immediate. Records created or edited after the change will immediately have the new mappings. However, if you want to update the mappings for records already in the catalog, ask your system administrator to run misc/batchRebuildBiblioTables.pl. This will update the values in the database columns for all your records.

MARC bibliographic framework test

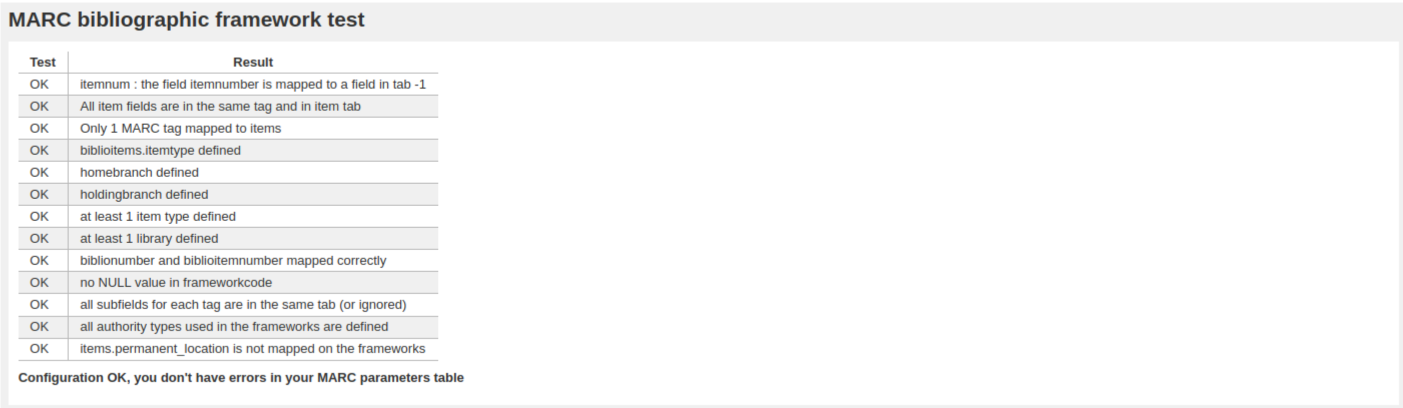
The tool checks the MARC structure of bibliographic frameworks.

- *Get there:* More > Administration > Catalog > MARC bibliographic framework test

Note

Only staff with the manage_marc_frameworks permission (or the superlibrarian permission) will have access to this section.

If you change your MARC bibliographic framework, it's recommended that you run this tool to test for errors in your definition.



MARC bibliographic framework test

Test	Result
OK	itemnum : the field itemnumber is mapped to a field in tab -1
OK	All item fields are in the same tag and in item tab
OK	Only 1 MARC tag mapped to items
OK	biblioitems.itemtype defined
OK	homebranch defined
OK	holdingbranch defined
OK	at least 1 item type defined
OK	at least 1 library defined
OK	biblionumber and biblioitemnumber mapped correctly
OK	no NULL value in frameworkcode
OK	all subfields for each tag are in the same tab (or ignored)
OK	all authority types used in the frameworks are defined
OK	items.permanent_location is not mapped on the frameworks

Configuration OK, you don't have errors in your MARC parameters table

Authority types

Authority types are basically MARC frameworks for authority records and because of that they follow the same editing rules found in the MARC bibliographic frameworks section of this manual. Koha comes with many of the necessary authority frameworks already installed. To learn how to add and edit authority types, simply review the MARC bibliographic frameworks section of this manual.

- *Get there:* More > Administration > Catalog > Authority types

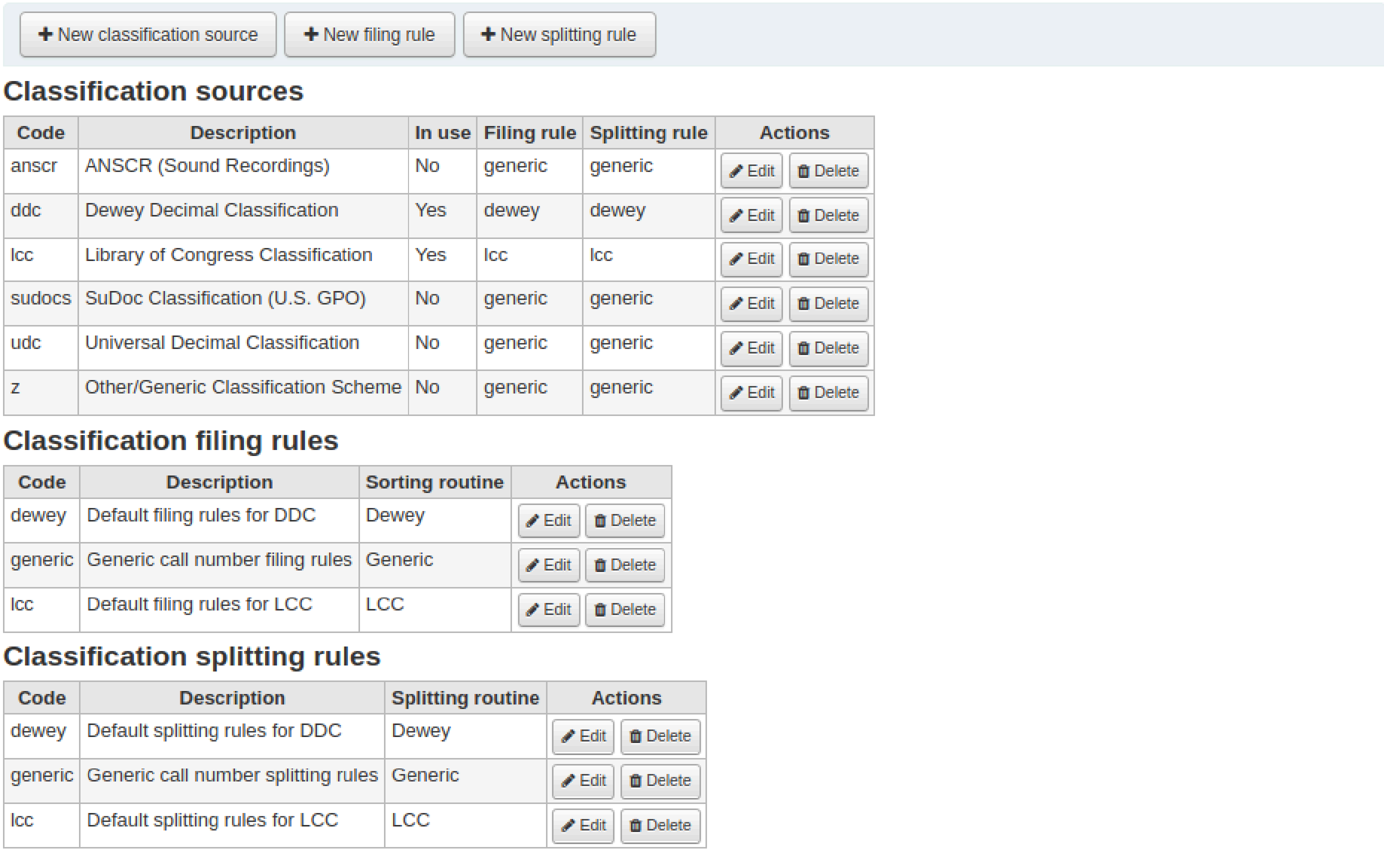
Note

Only staff with the manage_marc_frameworks permission (or the superlibrarian permission) will have access to this section.

Classification sources

Source of classification or shelving scheme are mapped to field 952$2 and 942$2 in Koha's MARC bibliographic frameworks and stored in the items.cn_source and biblioitems.cn_source fields in the database.

- *Get there:* More > Administration > Catalog > Classification sources



Code	Description	In use	Filing rule	Splitting rule	Actions
anscr	ANSCR (Sound Recordings)	No	generic	generic	Edit Delete
ddc	Dewey Decimal Classification	Yes	dewey	dewey	Edit Delete
lcc	Library of Congress Classification	Yes	lcc	lcc	Edit Delete
sudocs	SuDoc Classification (U.S. GPO)	No	generic	generic	Edit Delete
udc	Universal Decimal Classification	No	generic	generic	Edit Delete
z	Other/Generic Classification Scheme	No	generic	generic	Edit Delete

Code	Description	Sorting routine	Actions
dewey	Default filing rules for DDC	Dewey	Edit Delete
generic	Generic call number filing rules	Generic	Edit Delete
lcc	Default filing rules for LCC	LCC	Edit Delete

Code	Description	Splitting routine	Actions
dewey	Default splitting rules for DDC	Dewey	Edit Delete
generic	Generic call number splitting rules	Generic	Edit Delete
lcc	Default splitting rules for LCC	LCC	Edit Delete

Note

Only staff with the manage_classifications permission (or the superlibrarian permission) will have access to this section.

Commonly used classification sources are:

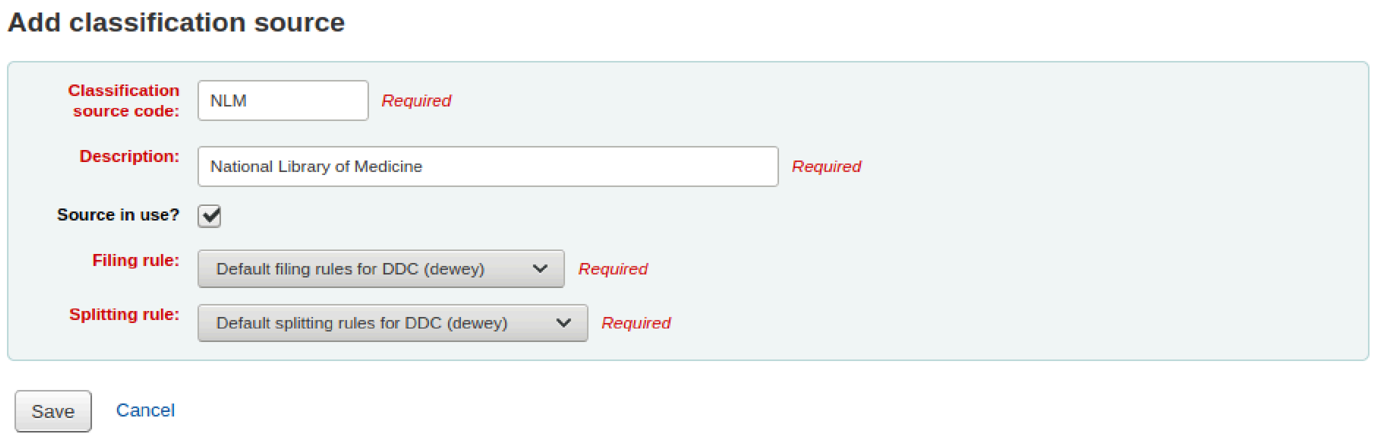
- ddc - Dewey Decimal Classification
- lcc - Library of Congress Classification

If you chose to install classification sources during Koha's installation, you would see other values too:

- ANSCR (sound recordings)
- SuDOC classification
- Universal Decimal Classification
- Other/Generic Classification

Adding/editing classification sources

You can add your own source of classification by using the 'New classification source' button. To edit use the 'Edit' button.



When creating or editing:

- Enter a code. The code is limited to 10 characters and must be unique.

Note

The code is not editable once it has been created.

- Enter a description. The description is used in the drop-down lists in the cataloging module.
- Check the 'Source in use?' checkbox if you want the value to appear in the drop-down list for this category.
- Select the appropriate filing rule from the drop-down list.
- Select the appropriate splitting rule from the drop-down list.

Classification filing rules

Filing rules determine the order in which items are placed on shelves. Filing rules normalize call numbers in order for Koha to be able to compare them and sort them in the right order.

For example, a Dewey call number such as '636.8/07 SHAW' will become '636_800000000000000_07_SHAW' in order to be sorted.

The sorted call number is saved in the items.cn_sort or biblioitems.cn_sort fields in the database

Values that are pre-configured in Koha are:

- Dewey
- LCC
- Generic

Filing rules are mapped to Classification sources. You can setup new filing rules by using the 'New filing rule' button. To edit, use the 'Edit' button.

When creating or editing:

- Enter a code. The code is limited to 10 characters and must be unique.

Note

The code is not editable once it has been created.

- Enter a description. The description is used in the drop-down list when creating or editing a classification source.
- Choose an appropriate filing routine - dewey, generic or lcc
  - The Dewey filing routine generates a sorted call number by following these rules:
    - Concatenates classification and item parts.
    - Converts to uppercase.
    - Removes any leading or trailing white spaces, and forward slashes (/)
    - Separates alphabetic prefix from the rest of the call number
    - Splits into tokens on white spaces and periods.
    - Leaves first digit group as is.
    - Converts second digit group to 15-digit long group, padded on right with zeroes.
    - Converts each whitespace to an underscore.
    - Removes any remaining non-alphabetical, non-numeric, non-underscore characters.
  - The generic filing routine generates a sorted call number by following these rules:
    - Concatenates classification and item parts.
    - Removes any leading or trailing white spaces.
    - Converts each whitespace to an underscore.
    - Converts to uppercase.
    - Removes non-alphabetical, non-numeric, non-underscore characters.
  - The LCC filing routine generates a sorted call number by following these rules:

Classification splitting rules

Splitting rules determine how call numbers are split when printed on a spine label.

Note

Splitting rules are only used if your label layout specifies to split call numbers.

For example, a Dewey call number such as '636.8/07 SHAW' will become

```
636.807
SHAW
```

once printed on a spine label.

Values that are pre-configured in Koha are:

- Dewey
- LCC
- Generic

Splitting rules are mapped to Classification sources. You can setup new splitting rules by using the 'New splitting rule' button. To edit, use the 'Edit' button.

When creating or editing:

- Enter a code. The code is limited to 10 characters and must be unique.

Note

The code is not editable once it has been created.

- Enter a description. The description is used in the drop-down list when creating or editing a classification source.

- Choose an appropriate splitting routine - Dewey, Generic, LCC or RegEx
    - The Dewey splitting routine looks for the three digits and the decimal, puts it on one line with the other parts (Cutter, prefix, etc.) each on a separate line (generally split on spaces).
    - The Generic splitting routine splits on spaces.
    - The LCC splitting routine puts each component on a separate line.
    - The RegEx splitting routine allows you to create a custom splitting routine.
        - Some examples of RegEx splitting routines:
            - Split on spaces:

              ```
              s/\s/\n/g
              ```

            - Split on equal signs (=):

              ```
              s/(\s?=)/\n=/g
              ```

            - Split on forward slashes (/):

              ```
              s/(\s?\/)/\n/g
              ```

            - Remove first split if call number starts with J or K:

              ```
              s/^(J|K)\n/$1 /
              ```

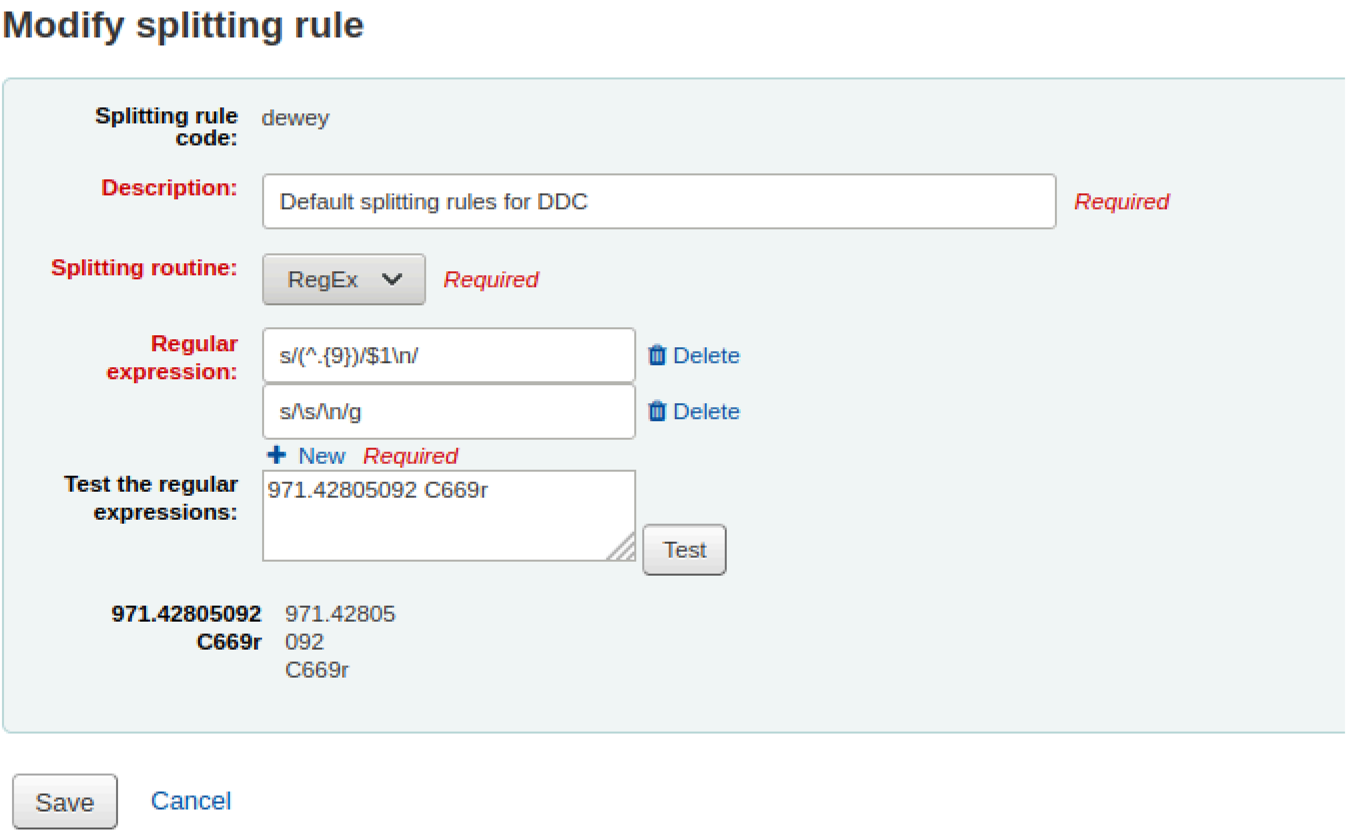
            - Cut after 9 characters:

              ```
              s/(^.{9})/$1\n/
              ```

It is possible to mix and match RegEx splitting routines by clicking the 'New' link just under the RegEx input box.

For example, if you want to cut after nine characters AND split on spaces, you can write both and the call number '971.42805092 C669r' will be split

```
971.42805
092
C669r
```



Record matching rules

Record matching rules are used when importing MARC records into Koha.

- *Get there:* More > Administration > Catalog > Record matching rules

Note

Only staff with the [manage_matching_rules permission](#) (or the [superlibrarian permission](#)) will have access to this section.

The rules that you set up here will be referenced with you [Stage MARC records for import](#).

It is important to understand the difference between 'Match points' and 'Match checks' before adding new matching rules to Koha.

Match points are the criteria that you enter that must be met in order for an incoming record to match an existing MARC record in your catalog. You can have multiple match points on an import rule each with its own score. An incoming record will be compared against your existing records ('one record at a time') and given a score for each match point. When the total score of the match points matches or exceeds the threshold given for the matching rule, Koha assumes a good match and imports/overlays according your specifications in the import process. An area to watch out for here is the sum of the match points. Double check that the matches you want will add up to a successful match.

Example:

Threshold of 1000

Match point on 020$a 1000

Match point on 022$a 1000

Match point on 245$a 500

Match point on 100$a 100

In the example above, a match on either the 020$a or the 022$a will result in a successful match. A match on 245$a title and 100$a author (and not on 020$a or 022$a) will only add up to 600 and not be a match. And a match on 020$a and 245$a will result in 1500 and while this is a successful match, the extra 500 point for the 245$a title match are superfluous. The incoming record successfully matched on the 020$a without the need for the 245$a match. However, if you assigned a score of 500 to the 100$a Match Point, a match on 245$a title and 100$a author will be considered a successful match (total of 1000) even if the 020$a is not a match.

Match checks are not commonly used in import rules. However, they can serve a couple of purposes in matching records. First, match checks can be used as the matching criteria instead of the match points if your indexes are stale and out of date. The match checks go right for the data instead of relying on the data in the indexes. (If you fear your indexes are out of date, a rebuild of your indexes would be a great idea and solve that situation!) The other use for a match check is as a 'double check' or 'veto' of your matching rule. For example, if you have a matching rule as below:

Threshold of 1000

Match point on 020$a 1000

Match check on 245$a

Koha will first look at the 020$a tag/subfield to see if the incoming record matches an existing record. If it does, it will then move on to the Match Check and look directly at the 245$a value in the incoming data and compare it to the 245$a in the existing 'matched' record in your catalog. If the 245$a matches, Koha continues on as if a match was successful. If the 245$a does not match, then Koha concludes that the two records are not a match after all. The Match Checks can be a really useful tool in confirming true matches.

When looking to create matching rules for your authority records the following indexes will be of use:

Index name	Matches MARC tag
LC-cardnumber	010$a
Personal-name	100$a
Corporate-name-heading	110$a
Meeting-name	111$a
Title-uniform	130$a
Chronological-term	148$a
Subject-topical	150$a
Name-geographic	151$a

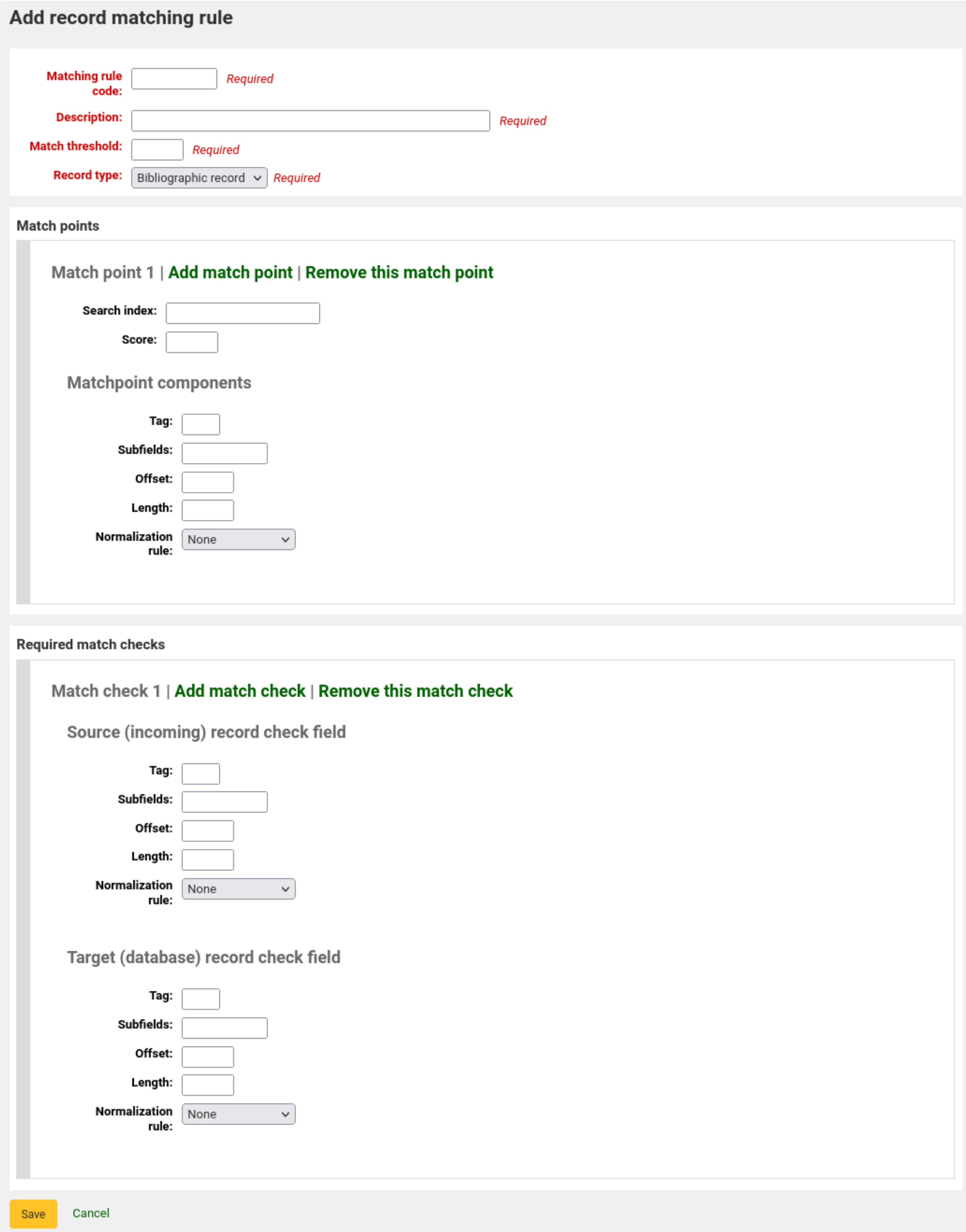
Index name	Matches MARC tag
Term-genre-form	155$a

Table: Authority indexes

Adding matching rules

To create a new matching rule :

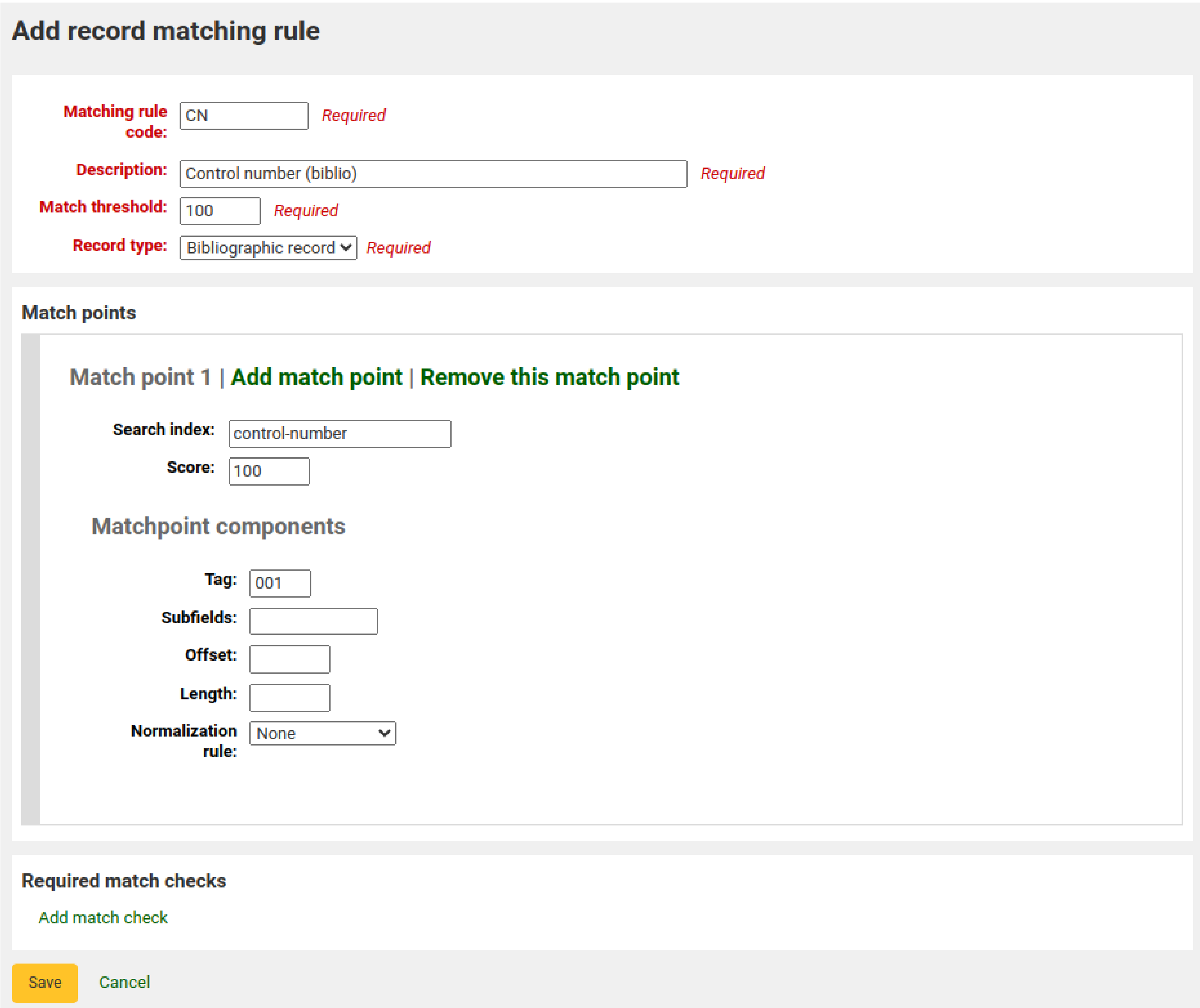
- Click ‘New record matching rule’



- Choose a unique name and enter it in the 'Matching rule code' field
- 'Description' can be anything you want to make it clear to you what rule you're picking
- 'Match threshold' is the total number of 'points' a biblio must earn to be considered a 'match'
- 'Record type' is the type of import this rule will be used for - either authority or bibliographic
- Match points are set up to determine what fields to match on
- 'Search index' can be found by looking at the index configuration on your system. For Zebra you might find the right index names in your ccl.properties file. You can also find useful information in the Koha search indexes chapter of this manual.
- 'Score' - The number of 'points' a match on this field is worth. If the sum of each score is equal or greater than the match threshold, the incoming record is a match to the existing record.

- Enter the MARC tag you want to match on in the 'Tag' field.
- Enter the MARC tag subfield you want to match on in the 'Subfields' field. For matching on controlfields like 001 the subfields input field can be left empty.
- 'Offset' - For use with control fields, 001-009
- 'Length' - For use with control fields, 001-009
- There are currently several options for 'Normalization rules':
  - None - no normalization rule will be applied
  - Remove spaces
  - Uppercase
  - Lowercase
  - Legacy default - this option was added to maintain the behavior form before the other normalization rules became available.
  - ISBN - using this option will improve matching on ISBN. If your incoming records ISBN fields contain extra text, like '9780670026623 (alk. paper)', they will still match correctly.
- 'Required match checks' - While match points work on the search index, match checks work directly on the data and can be used as the matching criteria instead of the match points or in addition to them to confirm true matches.

Sample bibliographic record matching rule: Control number



- Match threshold: 100
- Record type: Bibliographic record

Note

In order to match on the 001 in authority records, you will need to create a second rule, repeating all of these values and change just the record type to 'Authority record'.

- Matchpoints (just the one):
- Search index: control-number
- Score: 100
- Tag: 001

Note

In MARC21, this field is for the control number assigned by the organization creating, using, or distributing the record.

- Subfields: empty
- Offset: 0 or empty
- Length: 0 or empty
- Normalization rule: None
- Required match checks: none (click 'Remove this match check')

Record sources

Version

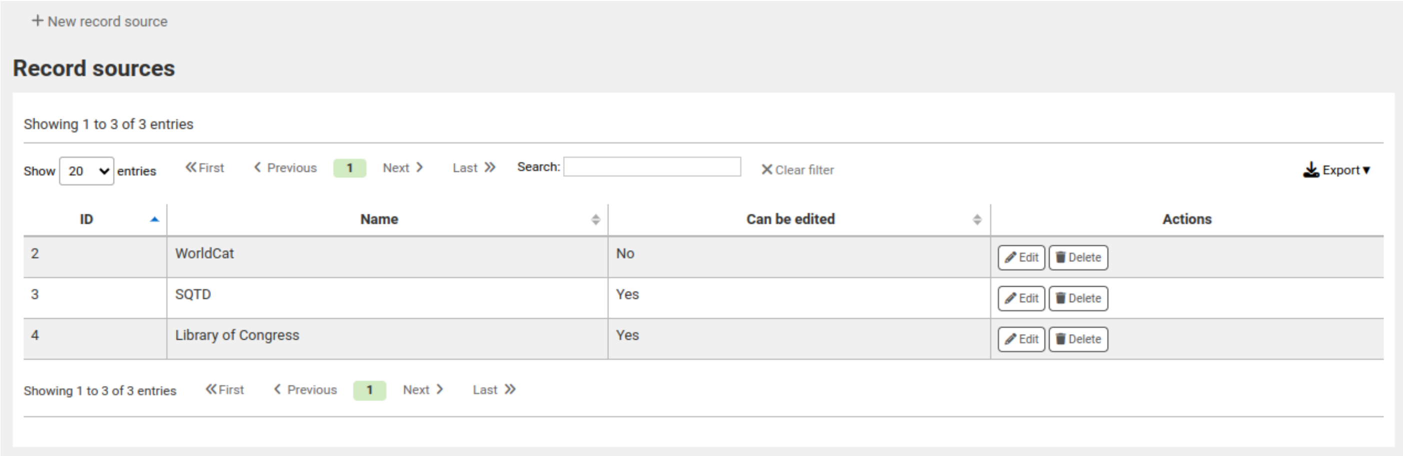
This section was added to Koha in version 24.05.

Record sources are used to indicate where records come from and optionally prevent records from specific sources to be edited in Koha.

This is particularly useful in instances where records are catalogued in another system and pushed to Koha. Sometimes, in those cases, it's best to edit the records in the source system rather than in Koha.

Note

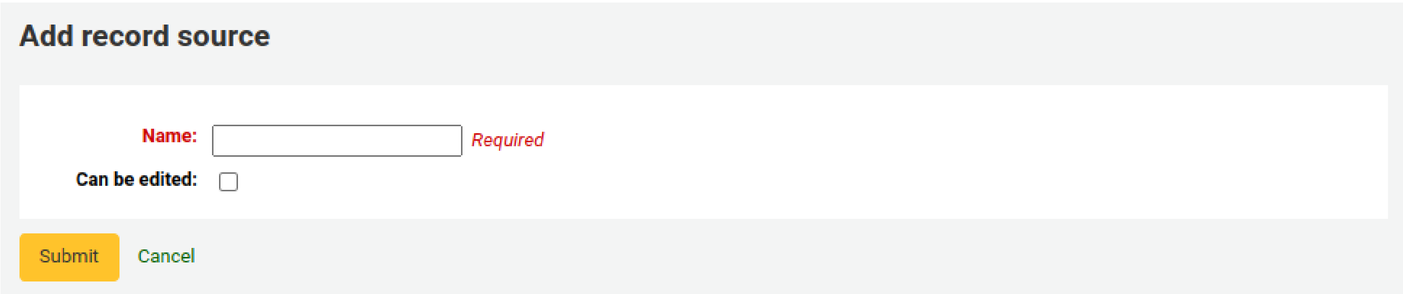
Only staff with the manage_record_sources permission (or the superlibrarian permission) will have access to this section.



Adding a record source

To add a record source,

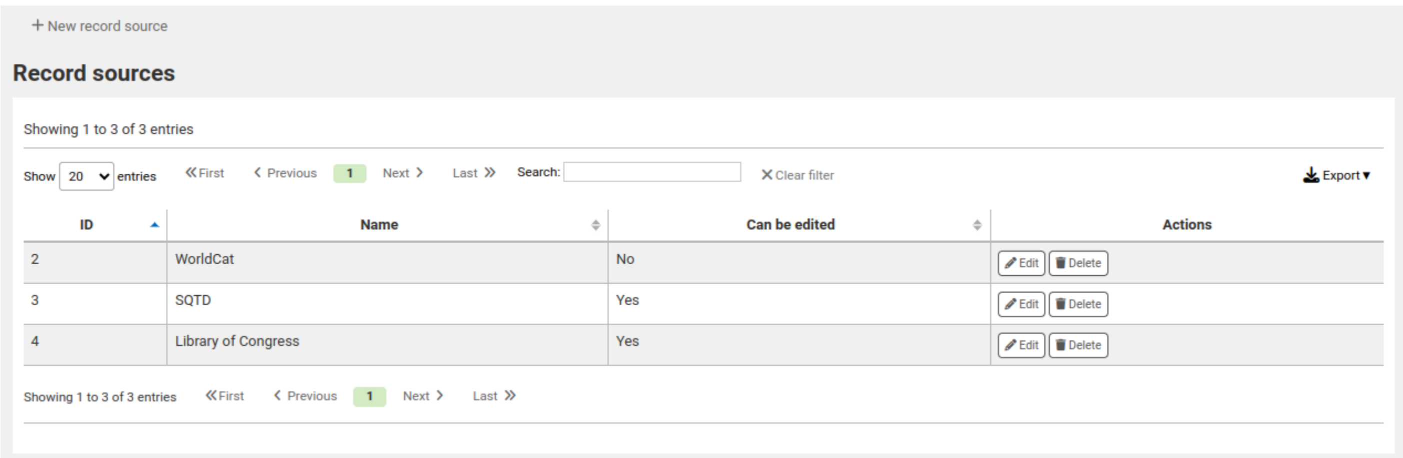
- Click ‘New record source’



- Fill out the form
  - Name: enter the name of the source
  - Can be edited: if this box is checked, records from this source will be editable in Koha. If it is not checked, only staff members with the [edit_locked_records permission](#) will be able to edit the records.
- Click ‘Submit’

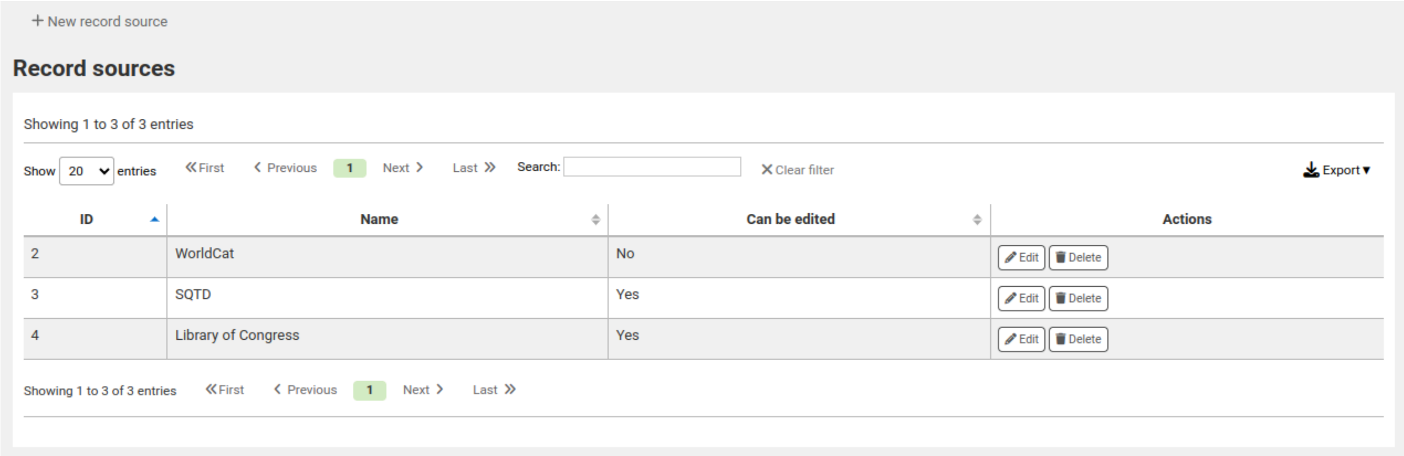
Editing a record source

To edit a record source, click the ‘Edit’ button next to the source.



Deleting a record source

To delete a record source, click the ‘Delete’ button next to the source and confirm.



Record overlay rules

Record overlay rules allow for defining rules for how incoming and original MARC records should be merged on a field tag and context basis when a MARC record is updated.

Note

Only staff with the manage_marc_overlay_rules permission (or the superlibrarian permission) will have access to this section.

Contexts

Let’s first focus on understanding the concept of contexts.

Contexts are defined by “module” and “filter” enabling separate rule sets for different contexts.

By setting different filter values for these modules, rules are applied only when the filter value matches for a particular module. A wildcard; “*”, can be used to match all possible filter values.

There are three different context modules:

borrower
: Allows for defining rules that will be applied if the currently logged in user’s borrower number matches the filter condition.

categorycode
: Allows for defining rules that will be applied if the currently logged in users’s category code matches the filter condition.

source
: Allows for defining rules that will be applied if the record is updated in a particular part of Koha. The following update methods are supported:

- batchimport
- z39.50
- intranet
- bulkmarcimport
- import_lexile
- batchmod

A context is really nothing but a module and filter combination. Every time a record is updated i Koha, a context is set an filter values populated with context dependent values.

Examples of two different contexts are saving record in the staff client or the currently logged in user having a particular borrower number, for example “12”.

These two contexts are define as:

```
Module: source, filter: intranet
Module: borrower, filter: 12
```

Only the rules of one context, that is a module and filter combination, are applied. If multiple contexts matches they are *not* merged together.

If we have the following rules:

```
Module: source, filter: *, tag: 650, preset: Protect
Module: source, filter: *, tag: 500, preset: Protect
Module: borrower, filter: 12, tag: *, preset: Overwrite
```

And the context of the update where the rules are applied is:

```
source => "intranet" (wildcard match)
borrower => 1 (no match)
```

Only the first two rules will be applied.

If instead the context of rule evaluation was:

```
source => "intranet" (wildcard match)
borrower => 12 (an exact match, which is considered more specific than a wildcard match)
```

Only the second rule would be applied, even though the first two rules also matches they will be discarded since the context match of that rule set is of lower specificity because of the wildcard.

Context specificity is ranked in the following way:

- First all the rules are grouped into rule sets identified by a unique filter and module combination.
- If one or more contexts have a non wildcard filter condition match, the rule set of the context with the module of highest specificity is selected. (The modules are listed in order of specificity above).
- If no exact context match is found, but one or more wildcard matches are, the rule set of the context with the module of highest specificity is selected.
- If no context matches the default behavior is to overwrite, the original record with the incoming record.

Rules

A rule consists of a three different parts:

Context
: A module and filter to match against as described above.

Tag
: A field tag expression for defining which tag(s) the rule should be applied on. Three different tag expressions are supported:

  - An exact tag, for example “650”.
  - A regular expression, for example “6..” matching all 6XX tags.
  - A wildcard, “*”, matching all tags

When rules for a specific context are evaluated, the most specific match is selected. The tag expressions above are listed in order of specificity.

Actions

Each rule defines a set of actions to take depending on the type of update. There are four types of update events: Added, Appended, Removed and Deleted. For each event an action is specified, whether to perform the update, or to skip it.

By enabling/disabling updates for these different events 16 different update behaviors can be defined. There are presets available for the most common/useful combinations:

Preset	Added	Appended	Removed	Deleted
Protect	Skip	Skip	Skip	Skip
Overwrite	Add	Append	Remove	Delete
Add new	Add	Skip	Skip	Skip
Add and append	Add	Append	Skip	Skip
Protect from deletion	Add	Append	Remove	Delete

Protect

```
Added: Skip, Appended: Skip, Removed: Skip, Deleted: Skip
```

The “Protect” preset will prevent all updates on matching fields, protecting them from being overwritten.

Given this rule:

```
Module: source, filter: *, Tag: 650, Preset: Protect
```

And the following original and incoming records:

```
100 1#$aTerrace, Vincent,$d1948-
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

The 650 field of the original record will retain its original value after the update (but since the default behavior if no rule matches is to overwrite, the 500 field will be added):

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

Overwrite

```
Added: Add, Appended: Append, Removed: Remove, Deleted: Delete
```

The “Overwrite” preset will allow all updates on matching fields.

Since the default behavior is to overwrite if no rule matches, adding a rule with the overwrite preset only makes sense if there is some other rule with a lower tag specificity with a different behavior, for example a wildcard tag rule.

So given these two rules:

```
Module: source, filter: *, Tag: *, Preset: Protect
Module: source, filter: *, Tag: 650, Preset: Overwrite
```

And the following original and incoming records:

```
500 ##$aIncludes index.
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

Incoming record:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

All fields but 650 will be protected on the original record, and the resulting record will be:

```
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

Add new

```
Added: Add, Appended: Skip, Removed: Skip, Deleted: Skip
```

The “Add new” allow updates only if the incoming field is new, that is there exists no fields with this tag in the original record.

Given this rule:

```
Module: source, filter: *, Tag: 650, Preset: Add
```

And the following original and incoming records:

```
100 1#$aTerrace, Vincent,$d1948-
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

The 650 in the incoming record will not overwrite the 650 field in the original record since the original record contains one or more 650 fields. The 500 field will be added since the default rule is to overwrite. The resulting record will be:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

On the other hand, if the original record was:

```
100 1#$aTerrace, Vincent,$d1948-
```

The resulting record will be:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

This is because there were no 650 fields in the original record, so adding new ones is permitted.

Add and append

```
Added: Add, Appended: Append, Removed: Skip, Deleted: Skip
```

In the “Add and append” preset, appending is also permitted, but not removing or deleting.

So if we have the following rule:

```
Module: source, filter: *, Tag: 650, Preset: Add and append
```

And the following original and incoming records:

```
100 1#$aTerrace, Vincent,$d1948-
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

The resulting record will be:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision serials$zUnited States$vCatalogs.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

Note that the “old” 650 field from the original record was not removed since we only allow adding or appending new values.

If we instead used the “Overwrite” preset the resulting record would instead be:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

with the 650 field of the original record removed.

Protect from deletion

```
Added: Add, Appended: Append, Removed: Remove, Deleted: Skip
```

The preset “Protect from deletion” will allow all update operations except deletion. Deletion is defined as when there are no fields of the matching tag in the incoming record so that all of the fields with this tag would be removed on the original record.

So given the following rule:

```
Module: source, filter: *, Tag: 650, Preset: Protect from deletion
```

And the following original and incoming records:

```
100 1#$aTerrace, Vincent,$d1948-
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
```

```
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

The resulting record will be:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision pilot programs$zUnited States$vCatalogs.
```

On the other hand, if the incoming record was:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
```

In this case the deletion of 650 would not be permitted and the value of the field on the original record would be protected. The resulting record would instead be:

```
100 1#$aTerrace, Vincent,$d1948-
500 ##$aIncludes index.
650 #0$aTelevision serials$zUnited States$vCatalogs.
```

Custom presets

To work with custom presets, a more complete understanding of the update events is required:

Added
: For a matching rule with a tag, the action configured for the "Added" event is applied for new fields in the incoming record if the original record has no fields with that tag. If the action is "Add" they will be added to the original record, if "Skip" they will be thrown away.

Appended
: If the two record have common fields with the rule tag, that is one or more fields with identical subfield and identifier values, the action configured for the "Appended" event is applied for fields found in incoming record but not in original record. If the action is "Append" they will be added to the original record, if "Skip" they will be thrown away.

Removed
: If the two records have common fields with the rule tag, the action configured for the "Removed" action is applied for fields found in original record but not in incoming record. If the action is "Remove" they will removed from the original record, if "Skip" they will be kept.

Deleted
: If the original record have fields with the rule tag, but no fields with this tag is found in the incoming record, the action configured for the "Deleted" event is applied for the fields in the incoming record. If the action is "Delete" the fields will be removed from the original record, if "Skip" they will be kept.

OAI sets configuration

On this page you can create, modify and delete OAI-PMH sets

Note

Only staff with the manage_oai_sets permission (or the superlibrarian permission) will have access to this section.

Create a set

To create a set:

- Click on the link ‘Add a new set’
- Fill the mandatory fields ‘setSpec’ and ‘setName’
- Then you can add descriptions for this set. To do this click on ‘Add description’ and fill the newly created text box. You can add as many descriptions as you want.
- Click on ‘Save’ button’

Modify/delete a set

To modify a set, just click on the link ‘Modify’ on the same line of the set you want to modify. A form similar to set creation form will appear and allow you to modify the setSpec, setName and descriptions.

To delete a set, just click on the link ‘Delete’ on the same line of the set you want to delete.

Define mappings

Here you can define how a set will be build (what records will belong to this set) by defining mappings. Mappings are a list of conditions on record content.

- Fill the fields ‘Field’, ‘Subfield’ and ‘Value’. For example if you want to include in this set all records that have a 999$9 equal to ‘XXX’. Fill ‘Field’ with 999, ‘Subfield’ with 9 and ‘Value’ with XXX.
- If you want to add another condition, click on ‘Add’ button and repeat step 1. You can choose between ‘and’ or ‘or’ Boolean operators to link your conditions.
- Click on ‘Save’

To delete a condition, just leave at least one of ‘Field’, ‘Subfield’ or ‘Value’ empty and click on ‘Save’.

> **Note**
>
> Actually, a condition is true if value in the corresponding subfield is strictly equal to what is defined if ‘Value’. A record having 999$9 = ‘XXX YYY’ will not belong to a set where condition is 999$9 = ‘XXX’.

And it is case sensitive : a record having 999$9 = ‘xxx’ will not belong to a set where condition is 999$9 = ‘XXX’.

Build sets

Once you have configured all your sets, you have to build the sets. This is done by calling the script misc/migration_tools/build_oai_sets.pl.

Item search fields

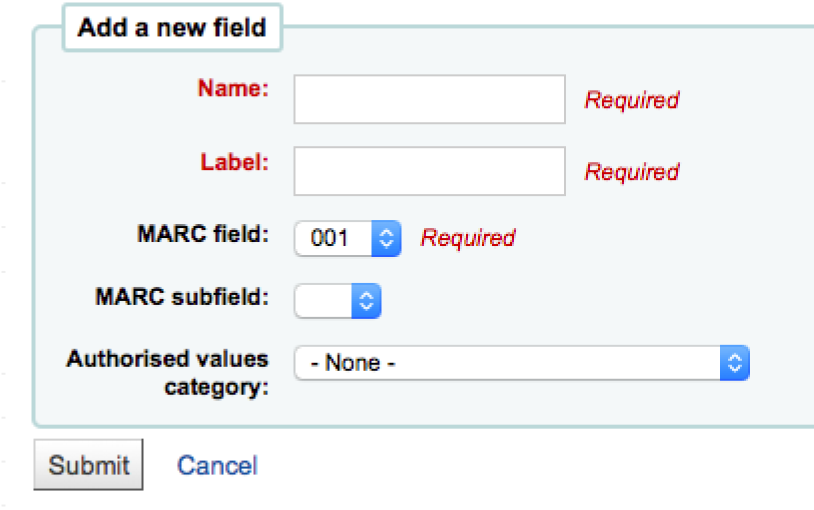
From here you can add custom search fields to the item search option in the staff client.

Name	Label	MARC field	MARC subfield	Authorised values category	Actions
Subject	Subject	650	a		Edit Delete

Note

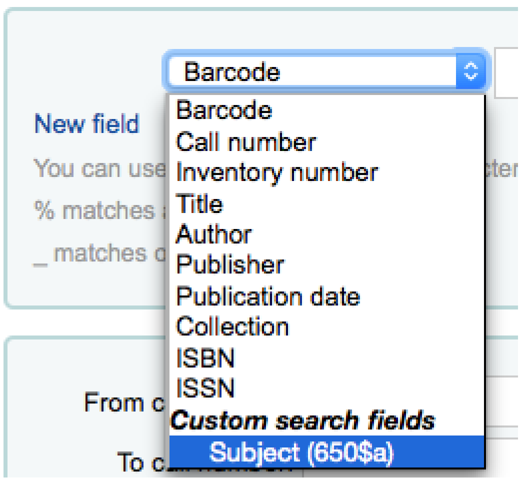
Only staff with the manage_item_search_fields permission (or the superlibrarian permission) will have access to this section.

To add a new search term simply click the 'New search field' button



- Name is a field for you to identify the search term
- Label is what will appear on the item search page
- MARC field allows you to pick which field you'd like to search in
- MARC subfield is the subfield you'd like to search in
- Authorized values category can be used to turn this search field in to a pull down instead of a free text field

Once your new field is added it will be visible at the top of this page and on the item search page



Search filters

Search filters are custom searches or filters that can be applied to search results.

This functionality is enabled on using the SavedSearchFilters system preference.

Note

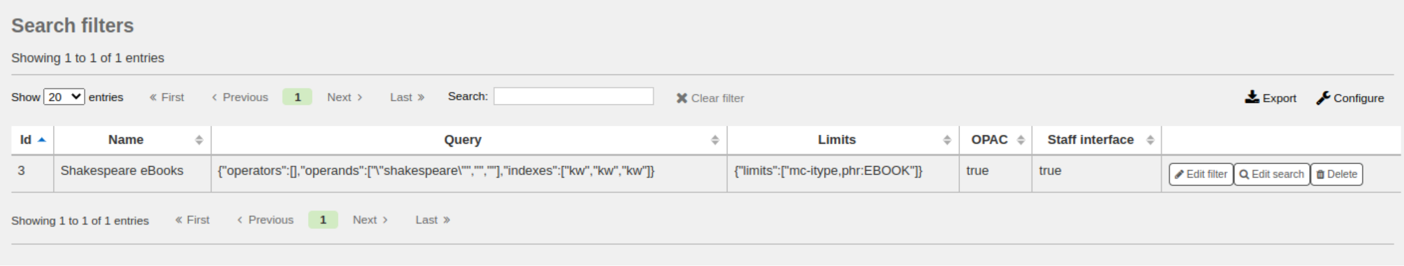
This section will only be visible if the SavedSearchFilters system preference is enabled.

Note

Only staff with the manage_search_filters permission (or the superlibrarian permission) will have access to this section.

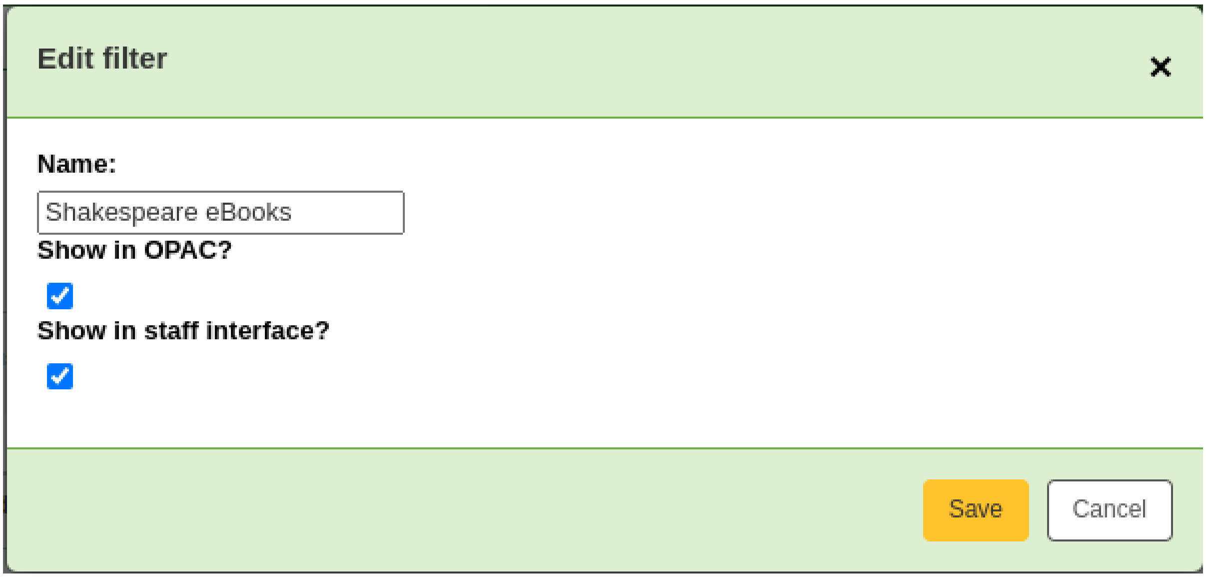
Search filters are added by searching the catalog through the staff interface.

This page is used to manage existing search filters.

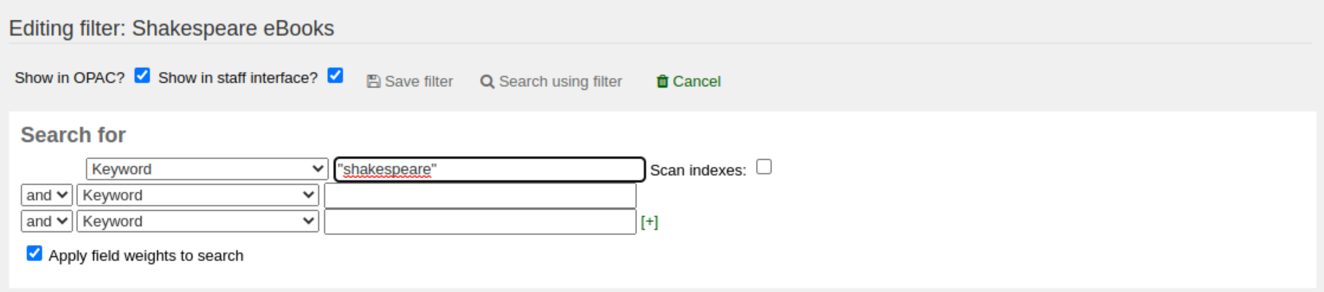


You can make changes to each search filter by clicking on the action buttons on the right.

- Edit filter: change the name of the filter, and its availability in the OPAC or staff interface



- Edit search: clicking this button will bring you to the advanced search form, with the filter already applied. You can change the search parameters, and click 'Save filter' at the top of the page.



- Delete: clicking this button will delete the filter.

Warning

There is no confirmation when deleting a search filter. Once you click 'Delete', the filter will be deleted immediately.

Note

Search filters can be used as pre-defined search URLs that you can use on your website or in HTML customizations.

Search filters are available through relatively short links.

```
<OPACBaseURL>/cgi-bin/koha/opac-search.pl?limit=search_filter:<Id of filter>
```

Use this URL anywhere to link directly to the search.

Search engine configuration

Once you have switched to Elasticsearch in your SearchEngine system preference, you'll see a new link for Search engine configuration in the Catalog section of Administration. Here you will manage indexes, facets, and their mappings to MARC fields and subfields.

Note

Only staff with the manage_search_engine_config permission (or the superlibrarian permission) will have access to this section.

Acquisitions

The Koha Acquisitions module provides a way for the library to record orders placed with vendors and manage purchase budgets.

Before using the Acquisitions Module, you will want to make sure that you have completed all of the set up.

- *Get there:* More > Administration > Acquisitions

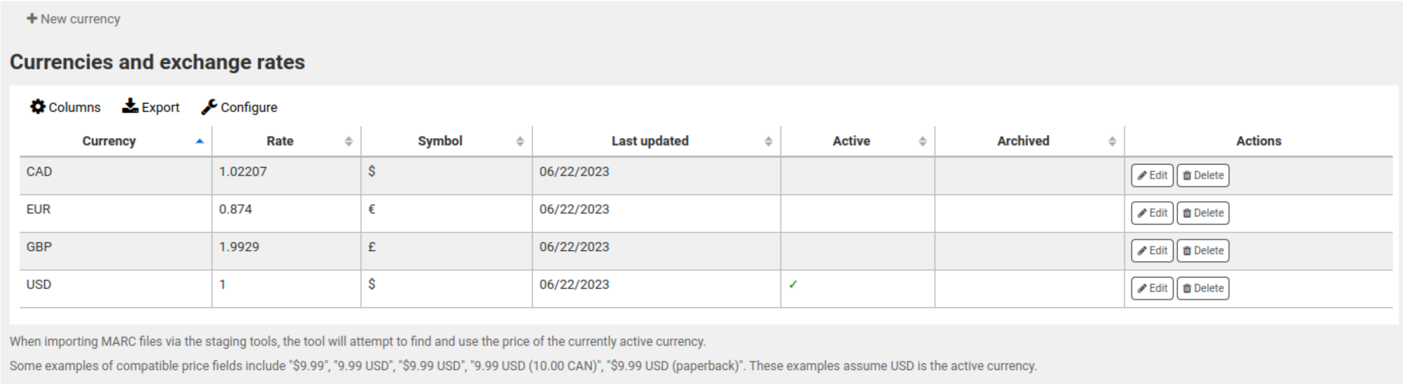
Currencies and exchange rates

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.

Note

Only staff with the currencies_manage permission (or the superlibrarian permission) will have access to this section.

- *Get there:* More > Administration > Acquisitions > Currencies and exchange rates



+ New currency

Currencies and exchange rates

Columns Export Configure

Currency	Rate	Symbol	Last updated	Active	Archived	Actions
CAD	1.02207	$	06/22/2023			Edit Delete
EUR	0.874	€	06/22/2023			Edit Delete
GBP	1.9929	£	06/22/2023			Edit Delete
USD	1	$	06/22/2023	✓		Edit Delete

When importing MARC files via the staging tools, the tool will attempt to find and use the price of the currently active currency.

Some examples of compatible price fields include "$9.99", "9.99 USD", "$9.99 USD", "9.99 USD (10.00 CAN)", "$9.99 USD (paperback)". These examples assume USD is the active currency.

Note

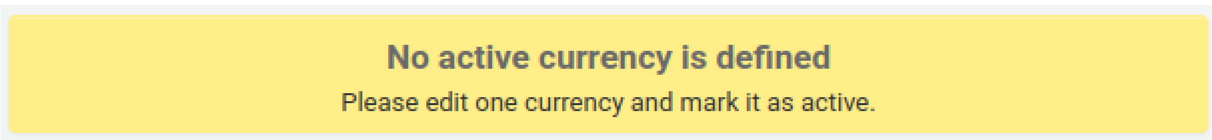
You can customize the columns of this table in the 'Table settings' section of the Administration module (table id: currency).

- Currency: this is the code for the currency. For default currencies, the ISO code is used as currency code (for example 'USD' for the US dollar). The ISO code will be used when importing MARC files via the staging tools. The tool will attempt to find and use the price of the currently active currency.
- Rate: the rate will be used to calculate the price in the active currency.

  #### Note

  This data is not automatically updated, so be sure to keep it up to date so that your accounting is kept correct.

- Symbol: this is the symbol for the currency (for example, $ for USD, or € for EUR).
- Last updated: this is the date when the currency was last updated in Koha.
- Active: the active currency is the main currency you use in your library. The active currency will have a check mark in the 'Active' column. If you don't have an active currency you will see an error message telling you to choose an active currency.

  The active currency must have a rate of 1. There can only be one active currency.

- Archived: archived currencies will have 'Yes' in this column. Archived currencies cannot be used in the acquisitions module.

  #### Note

  It is currently not possible to manually archive currencies. Currencies will be archived if Koha is updated and a currency that was used previously in the acquisitions module was deleted.

- Actions: use the buttons to edit or delete currencies.

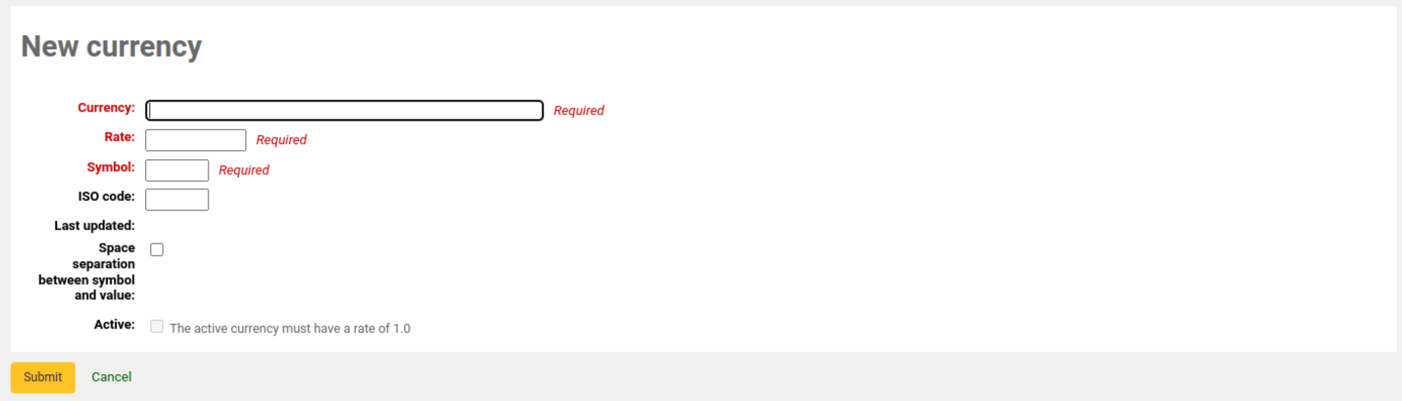
  #### Note

If a currency was used at least once, it will not be possible to delete it.

Adding a new currency

If a currency that you use is not already in your system, you can create it.

- Click ‘New currency’.



- Fill out the form.
  - Currency: enter a code for the currency, this can be the ISO code, or another code. This is what will be displayed in the [acquisitions module](#).

    Note

    If you decide to use a custom code here, make sure to fill out the ISO code with the correct code for the currency. This will ensure that prices are calculated according to the rate.

    Note

    This field is limited to 10 characters.

  - Rate: enter the rate of this currency relative to your active currency.
  - Symbol: enter the symbol for the currency (for example, $ for USD, or € for EUR).
  - ISO code: enter the ISO code for the currency (for example ‘USD’ for the US dollar). This field is optional. If this field is empty, Koha will use the currency code (above) as the ISO code for price calculations.
  - Last updated: this will be filled automatically with today’s date, it is not possible to manually change this date.
  - Space separation between symbol and value: if checked, Koha will display the price with a space before the currency symbol (for example, 10.99 $ rather than 10.99$).
  - Active: check this box if this currency is the default currency used in the acquisitions module. Note that there can only be one active currency and that the active currency’s rate must be 1.
- Click ‘Submit’.

Editing a currency

If you often order from other countries, it will be necessary to update the exchange rate regularly in order to calculate the prices precisely.

To edit an existing currency,

- Click the 'Edit' button to the right of the currency in the currencies table.
- Change the rate, or other value.

  Note

  Note that the currency code and the last updated date cannot be edited.

- Click 'Submit'.

Deleting a currency

If there are currencies that you never use, it is possible to delete them.

From the currencies table, click the 'Delete' button to the right of the currency.

Warning

Currencies that have been used at least once in the acquisitions module cannot be deleted.

Budgets

Budgets are used for tracking accounting values related to acquisitions. For example you could create a budget for the current year (ex. 2015) and then break that into funds for different areas of the library (ex. Books, Audio, etc).

- *Get there:* More > Administration > Acquisitions > Budgets

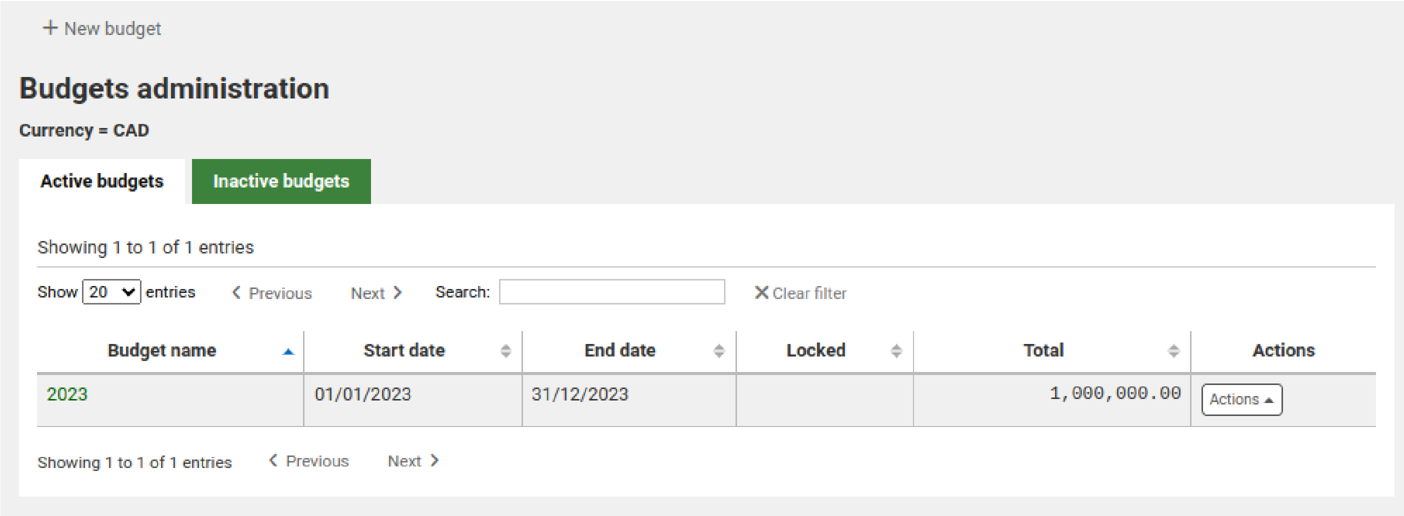
Note

Staff members must have the period_manage permission (or the superlibrarian permission) in order to access the budgets administration page.

It is recommended to minimally give the following permissions to staff members who need to manage budgets, since these are interdependent:

- budget_add_del
- budget_manage
- budget_modify
- period_manage

When visiting the main budget administration you will see two tabs, one for active and one for inactive budgets.



Adding budgets

Budgets can either be created [from scratch](#) or by [duplicating the previous year's budget](#).

Note

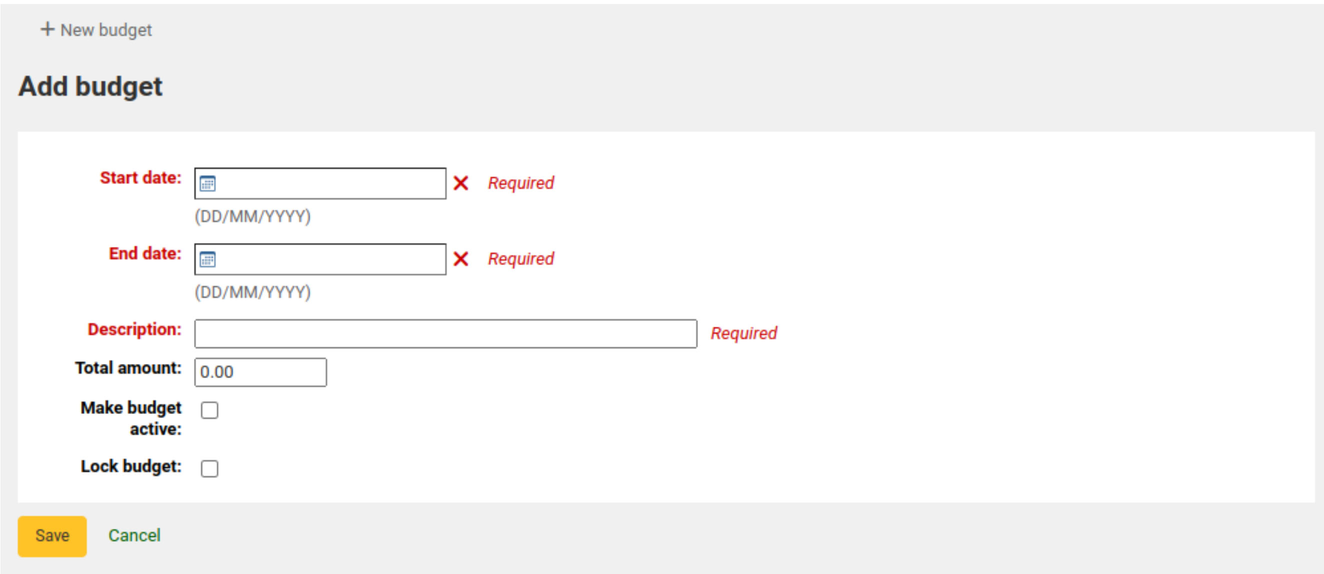
Staff members must have the [period_manage permission](#) (or the [superlibrarian permission](#)) in order to create new budgets or duplicate existing budgets.

Adding a new budget

If you haven't used Koha before for acquisitions, you'll need to start fresh with a new budget.

To add a new budget,

- Click the 'New budget' button.



- Fill out the form:
  - Start date (mandatory): choose the starting date for the time period this budget is for. This can be the start of the calendar year, fiscal year, academic year, quarter, etc.
  - End date (mandatory): choose the ending date for the time period this budget is for.

  - Description (mandatory): enter a description for this budget. The description should be something that will help you identify the budget when ordering.
  - Total amount: enter the amount for the budget. Do not use any symbols, simply enter the amount of the budget with numbers and decimals.
  - Make budget active: marking a budget as active makes it usable when placing orders in the acquisitions module, even if the order is placed after the budget end date. This will allow you to record orders that were placed in a previous budget period.
  - Lock budget: locking a budget means that you will not be able to add funds or add sub funds to this budget, and you will not be able to plan spending. Lock the budget once it is set as you wish.

- Click ‘Save’.

You will be brought back to the list of existing budgets.

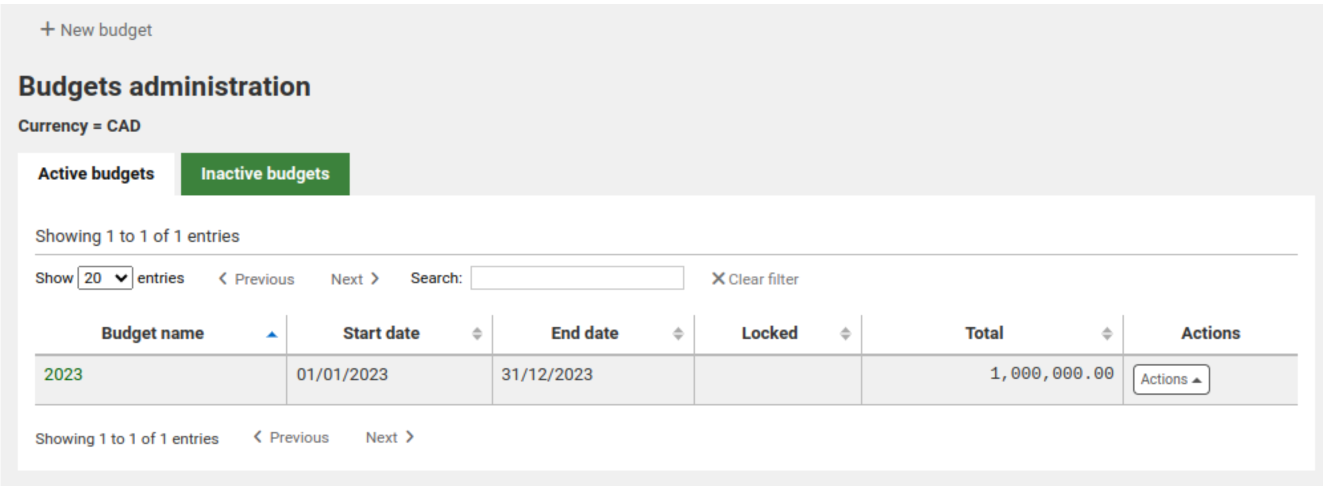
Proceed to add funds to the budget.

Duplicating a budget

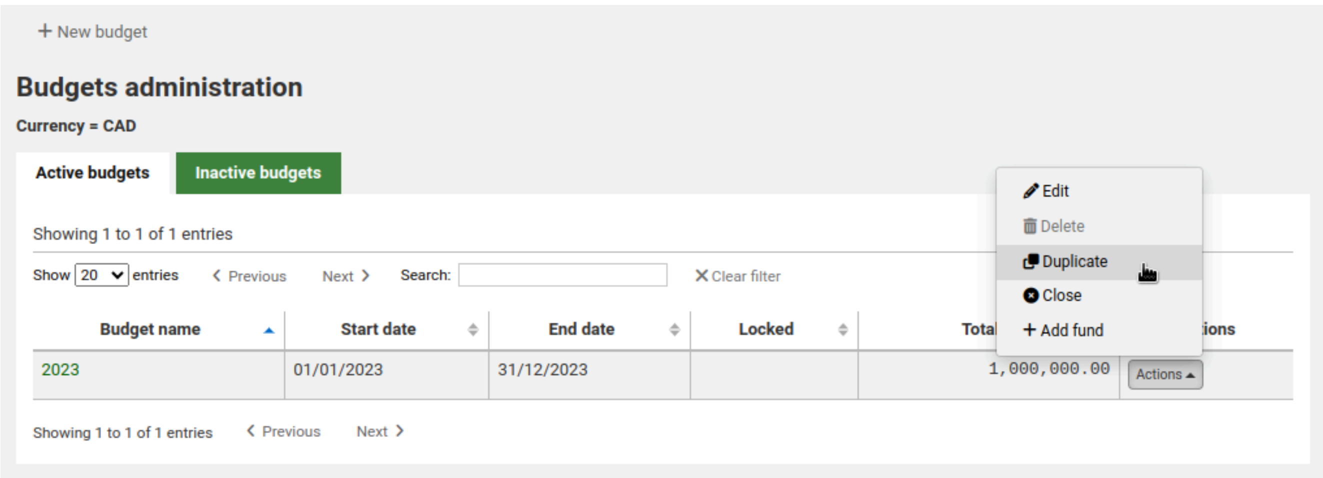
At the end of the year, or the end of your budget period, you can duplicate the current budget. This will also duplicate all funds, so you don’t have to start from scratch each year or period.

To duplicate a budget,

- From the list of budgets, click the ‘Actions’ button on the right.

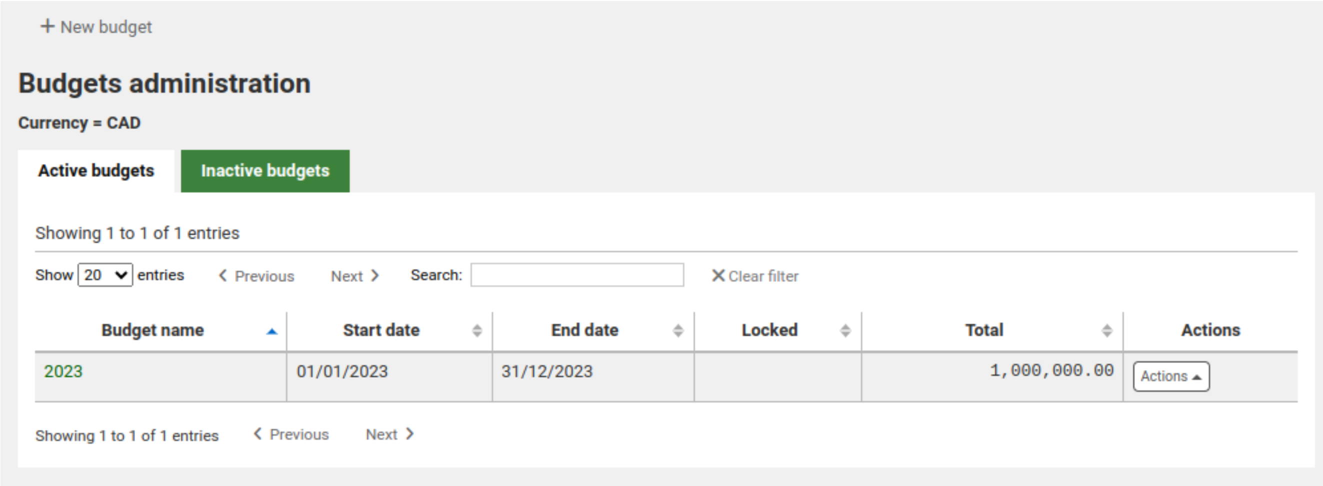


- Choose ‘Duplicate’.

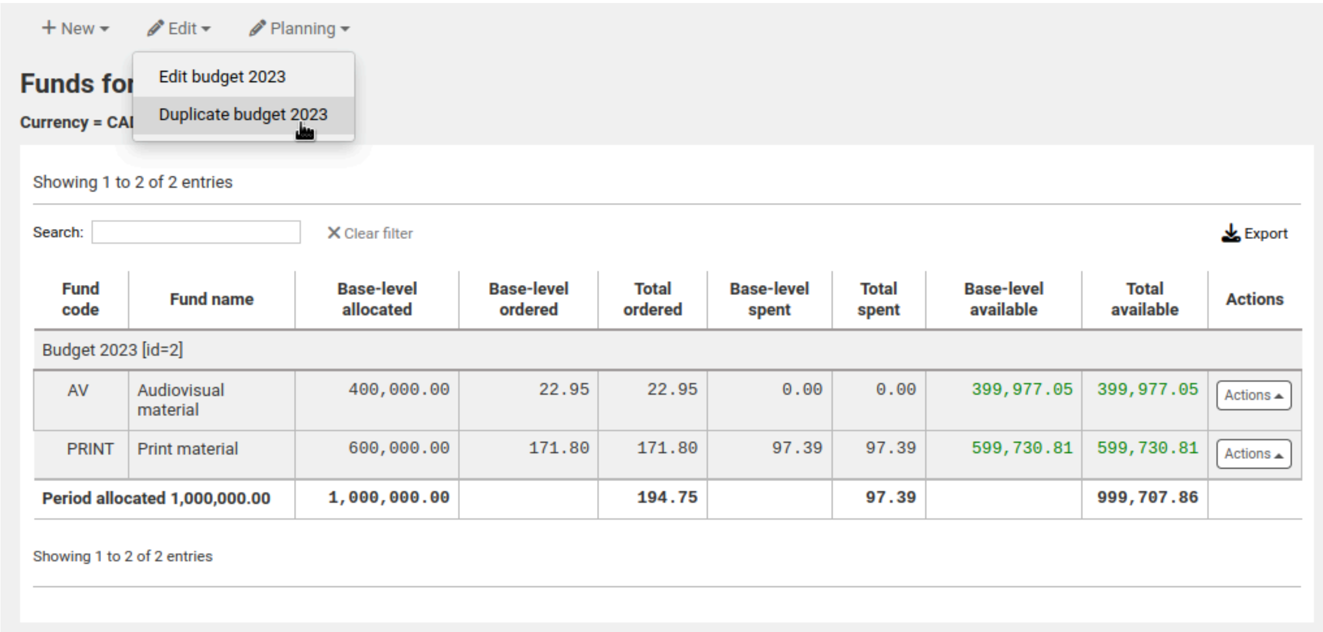


Alternatively,

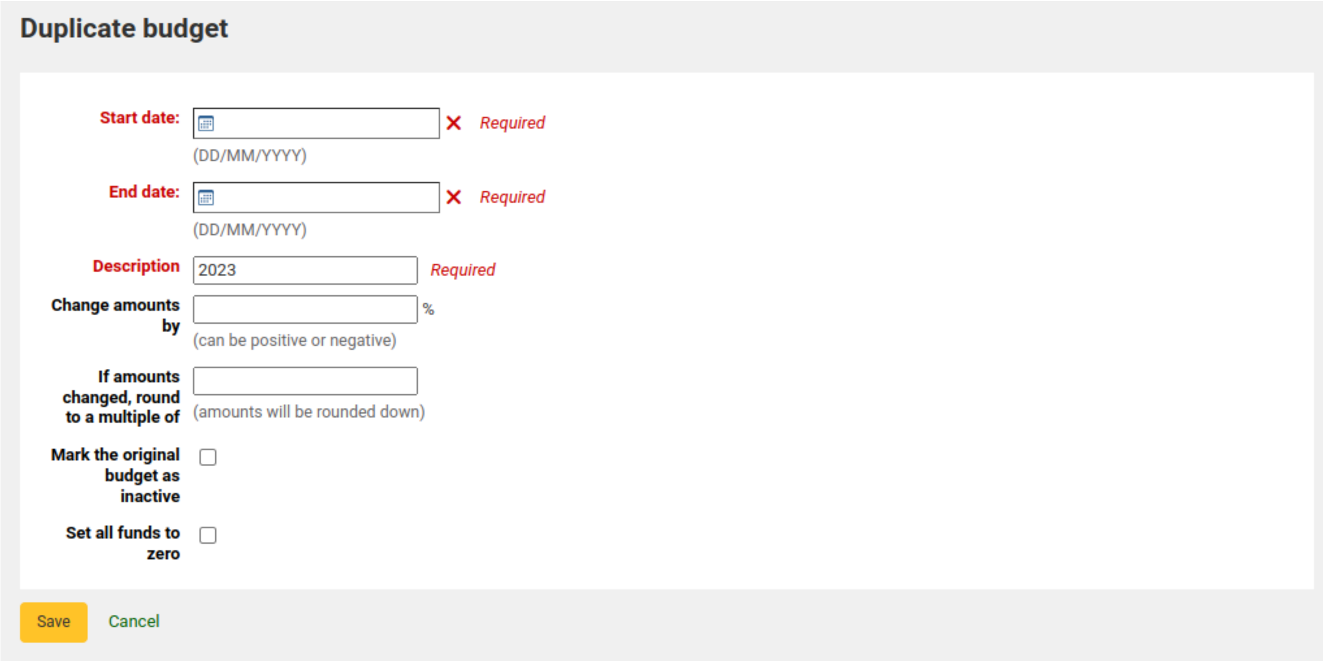
- From the list of budgets, click on the budget name.



- On the screen listing the budget breakdown, click the 'Edit' button at the top and choose to 'Duplicate budget'.



- In both cases, you will be presented with a form to duplicate the budget.



- Start date (mandatory): choose the starting date for the time period this new budget is for.
- End date (mandatory): choose the ending date for the time period this budget is for.
- Description (mandatory): enter a description for this new budget.
- Change amounts by: by default, the total amount from the duplicated budget and the original amounts for each fund will be used. However, if needed, you can indicate to change the amounts by a percentage, that can be positive or negative. For example, if your new budget was increased by 2%, enter 2. Inversely, if your new budget was decreased by 2%, enter -2.
- If amounts changed, round to a multiple of: if you entered a value in ‘Change amounts by’, Koha will calculate the amounts automatically. You can force it to round down the amounts. For example, entering ‘100’, will round down the amounts to the hundreds (5542 will become 5500).
- Mark the original budget as inactive: check this box if the original budget should no longer be used, effective immediately. You can always edit the budget later to make it inactive.
- Set all funds to zero: check this box if you wish the new budget to contain all the same fund structures as the previous budget but no allocations until you manually enter an amount in the fund.

This will not only duplicate the budget, but all of the funds associated with that budget so that you can reuse budgets and funds from year to year.

When the time comes, you can close the previous budget to move unreceived orders, and, if desired, unspent funds to the new budget.

Editing a budget

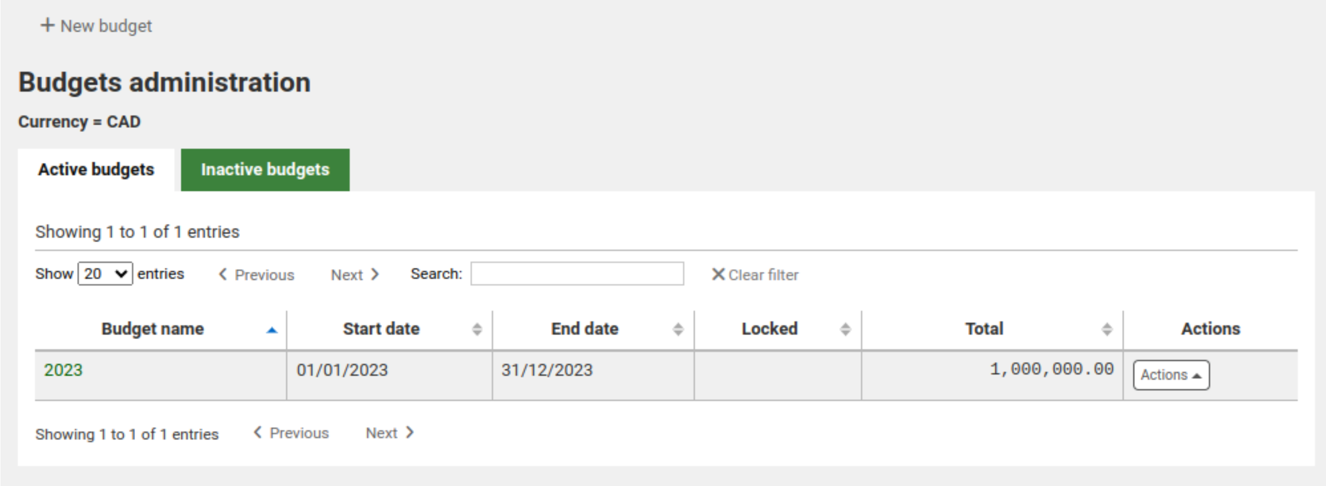
Note

Staff members must have the period_manage permission (or the superlibrarian permission) in order to edit existing budgets.

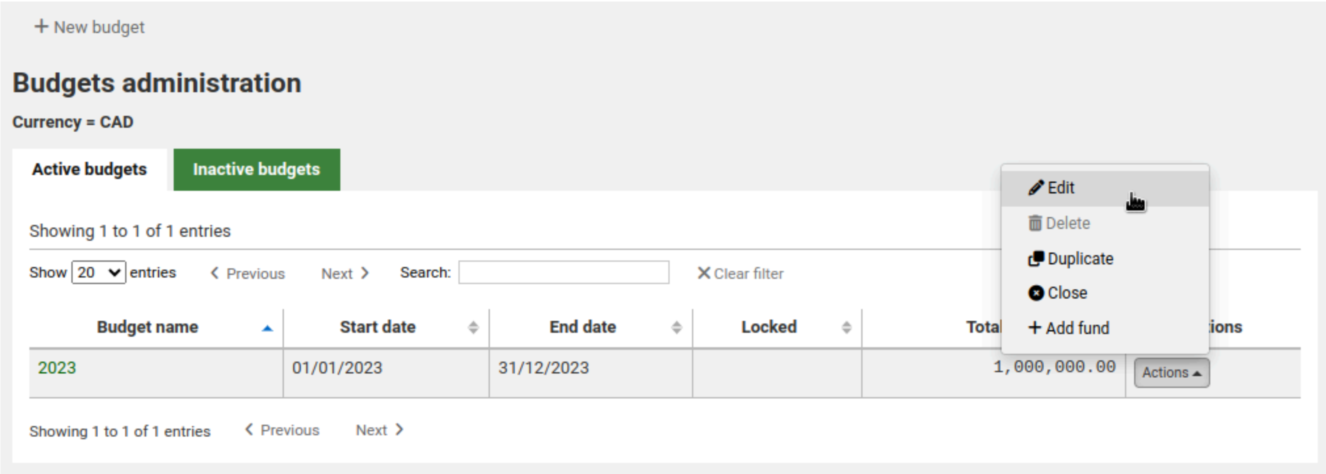
You can edit existing budgets to make them inactive or lock them to prevent fund changes, for example.

To edit a budget,

- From the list of budgets, click the ‘Actions’ button on the right.

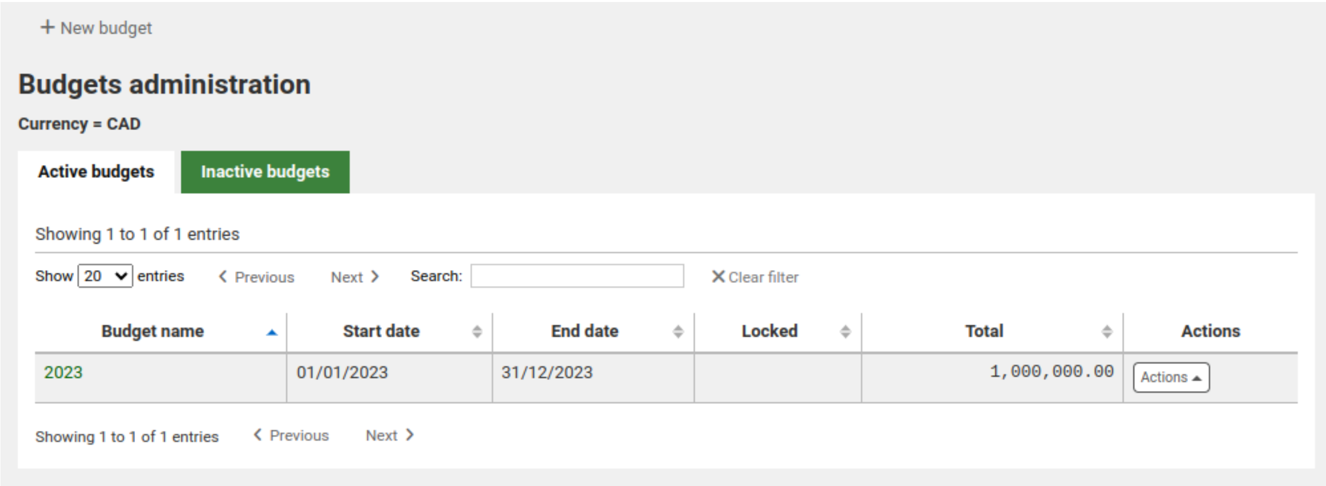


- Choose 'Edit'.

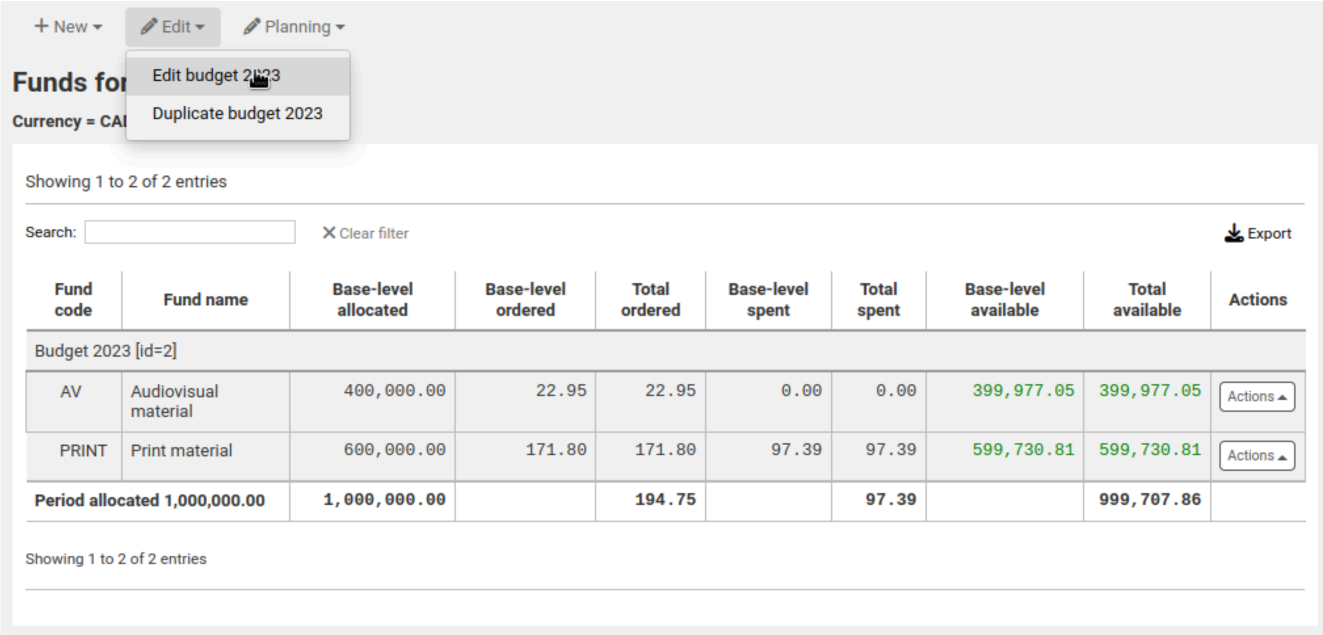


Alternatively,

- From the list of budgets, click on the budget name.



- On the screen listing the budget breakdown, click the 'Edit' button at the top and choose to 'Edit budget'



- In both cases, you will be presented with a form to duplicate the budget.
- Make your changes (see the field descriptions above).
- Click 'Save'.

Closing a budget

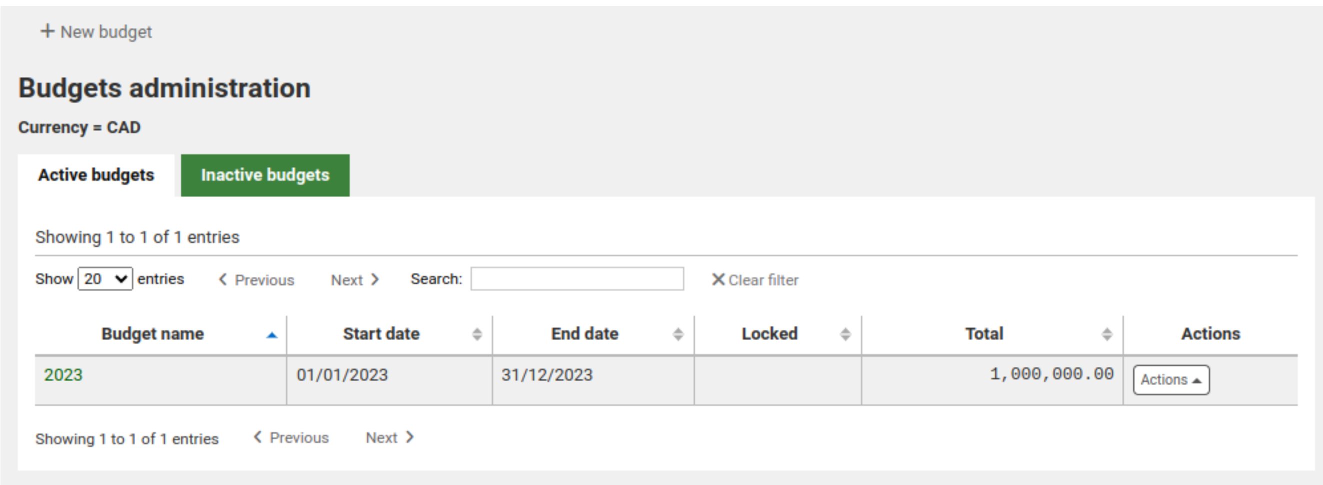
Close a budget to move or roll over unreceived orders and if desired unspent funds from a previous budget to a new budget. Before closing your budget you might want to duplicate the previous year's budget so that you have somewhere for the unreceived orders to roll to.

Note

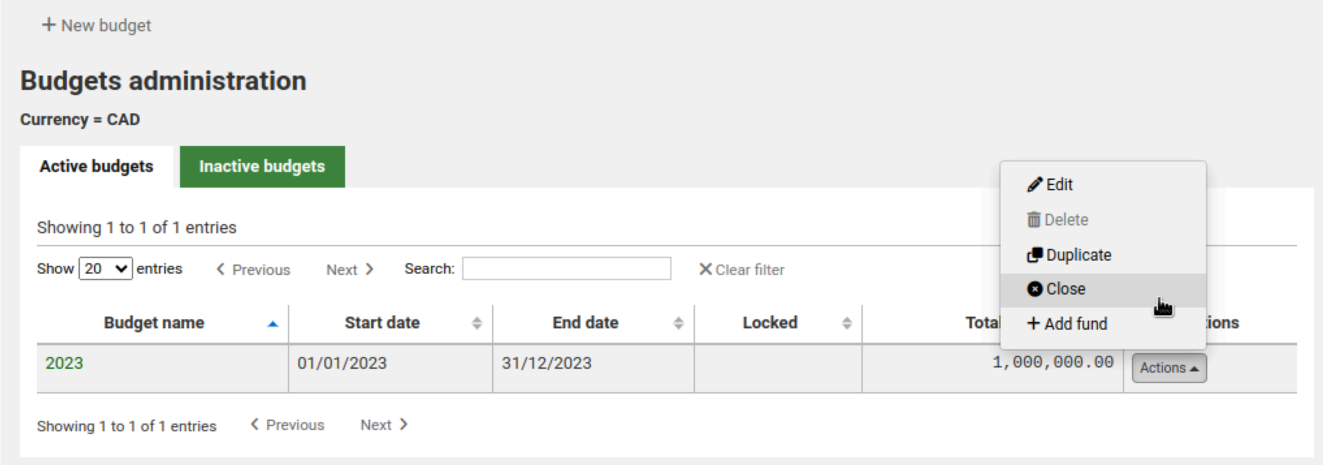
Staff members must have the period_manage permission (or the superlibrarian permission) in order to close existing budgets.

To close a budget,

- From the list of budgets, click the 'Actions' button on the right.

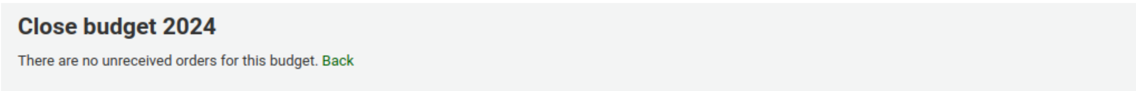


- Choose 'Close'

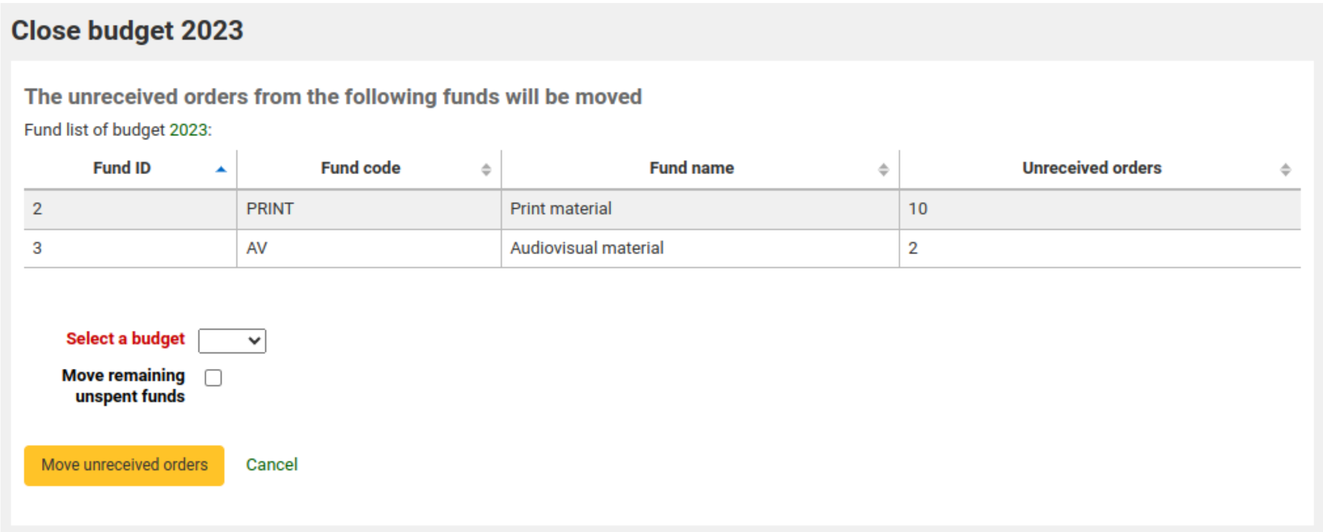


Note

Budgets without unreceived orders cannot be closed.



- Fill out the form.



  - Select a budget: choose the new budget for the unreceived orders from the dropdown.

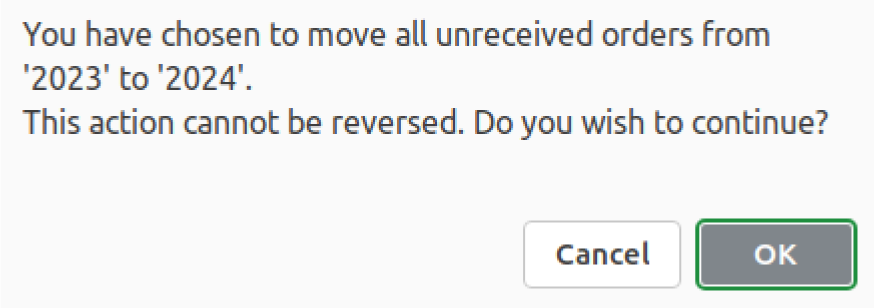
    ### Note

    In order for the unreceived orders to be automatically moved to the new budget, the fund structures in the previous budget must exist in the new budget.

  - Move remaining unspent funds: check this box to move the unspent amounts from the funds of the budget being closed to the selected budget.

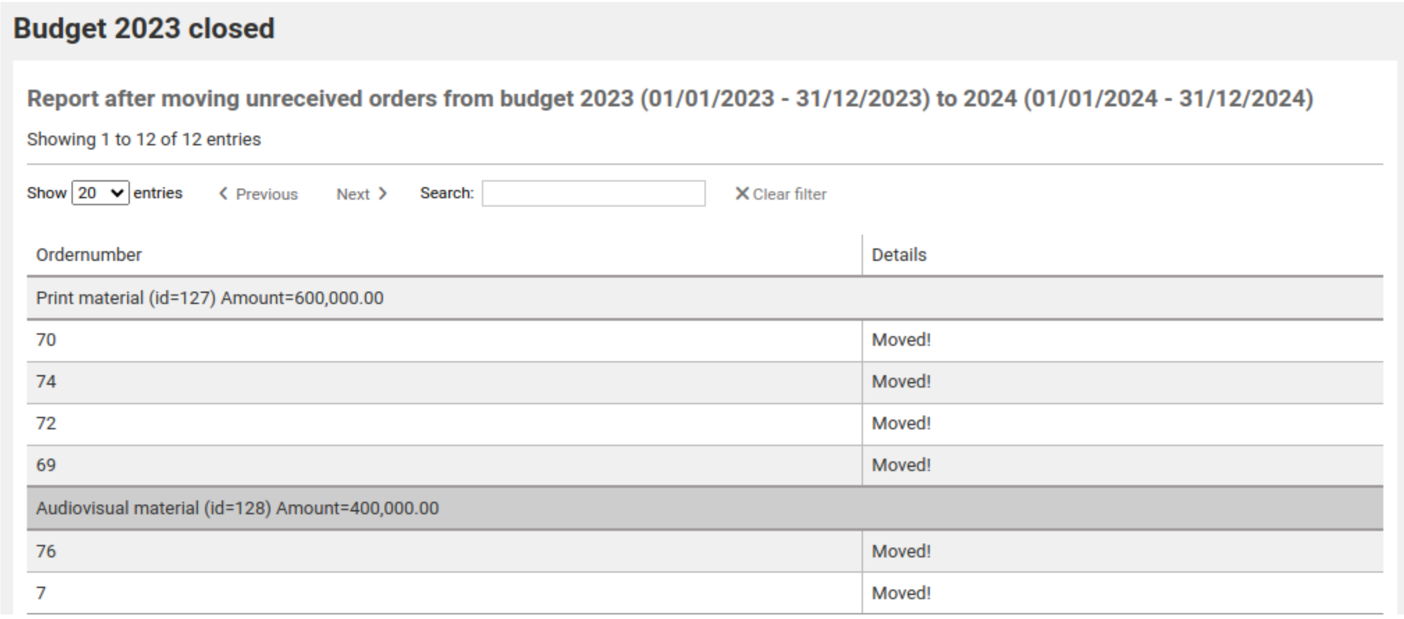
- Click the ‘Move unreceived orders’ button.

You will be presented with a dialog box that says ‘You have chosen to move all unreceived orders from ‘Budget X’ to ‘Budget Y’. This action cannot be reversed. Do you wish to continue?’ Budget X is the budget to be closed and Budget Y is the selected budget.



If everything seems correct click ‘OK’ and the unreceived orders and, if selected, unspent funds will be moved.

Wait until the ‘Report after moving unreceived orders from budget X to Y’ displays. This will list the order numbers which have been impacted (grouped by fund) and detail if the unreceived order was moved or if there was a problem. For example, if the new budget does not contain a fund with the same name as the previous budget, the order will not be moved.



Budget 2023 closed

Report after moving unreceived orders from budget 2023 (01/01/2023 - 31/12/2023) to 2024 (01/01/2024 - 31/12/2024)

Showing 1 to 12 of 12 entries

Show 20 entries ‹ Previous Next › Search: ✕ Clear filter

Ordernumber	Details
Print material (id=127) Amount=600,000.00	
70	Moved!
74	Moved!
72	Moved!
69	Moved!
Audiovisual material (id=128) Amount=400,000.00	
76	Moved!
7	Moved!

Deleting a budget

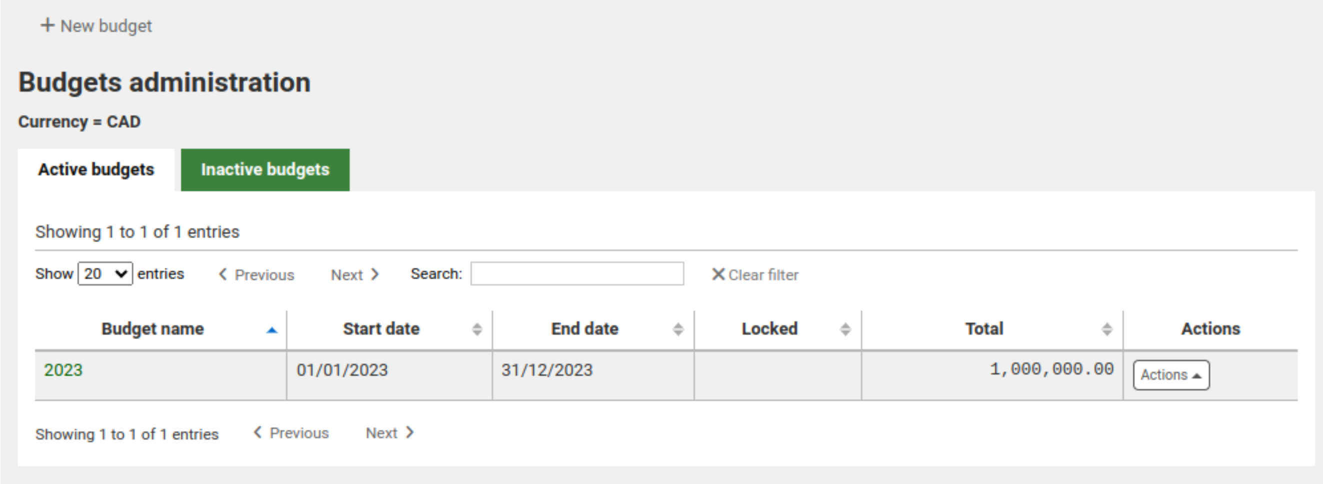
In order to delete a budget, it must not have funds. Start by deleting the funds.

Warning

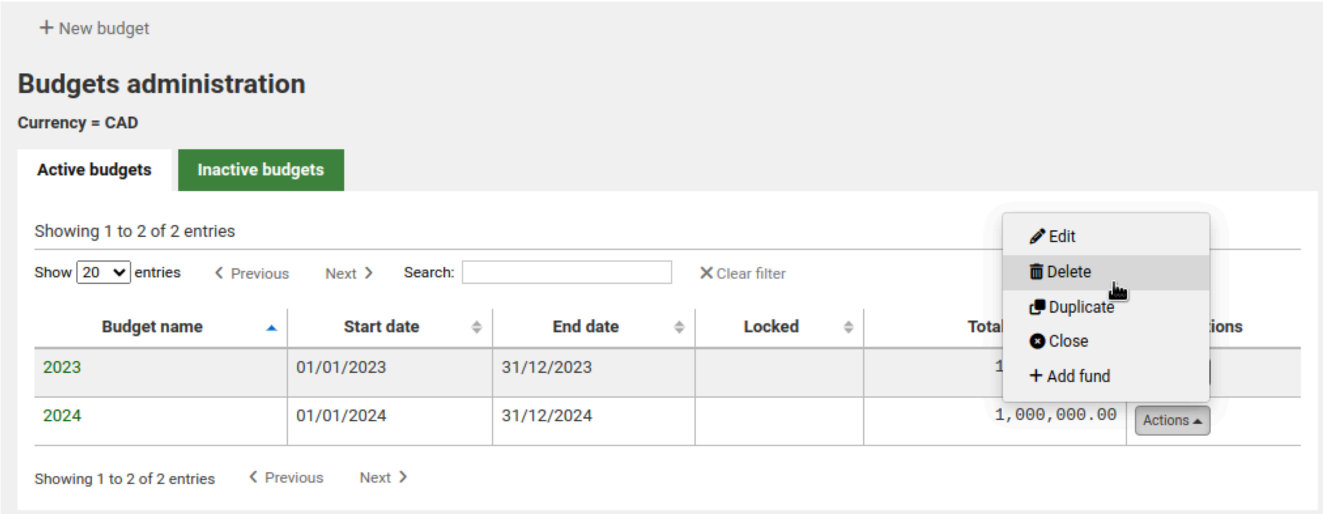
This cannot be undone. Make sure you are certain this budget needs to be deleted. You can make it inactive or close it, instead.

To delete a budget,

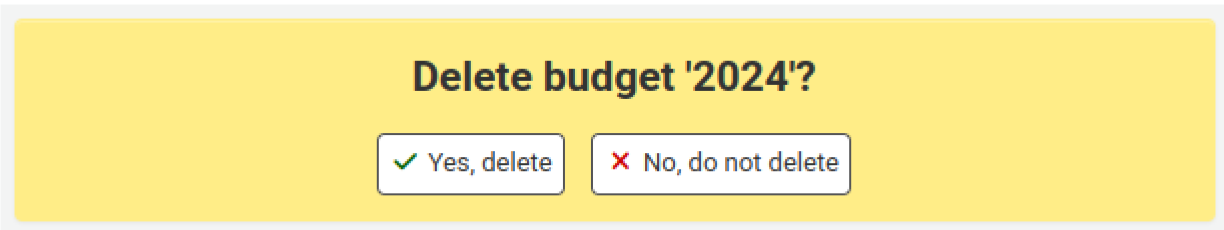
- From the list of budgets, click the ‘Actions’ button on the right.



- Choose ‘Delete’.



- Click ‘Yes, delete’.



Funds

Funds are divisions of a budget. For example you could have a budget for the current year (ex. 2015) and then break that into funds for different areas of the library (ex. Books, Audio, etc).

- *Get there:* More > Administration > Acquisitions > Funds

Adding a fund to a budget

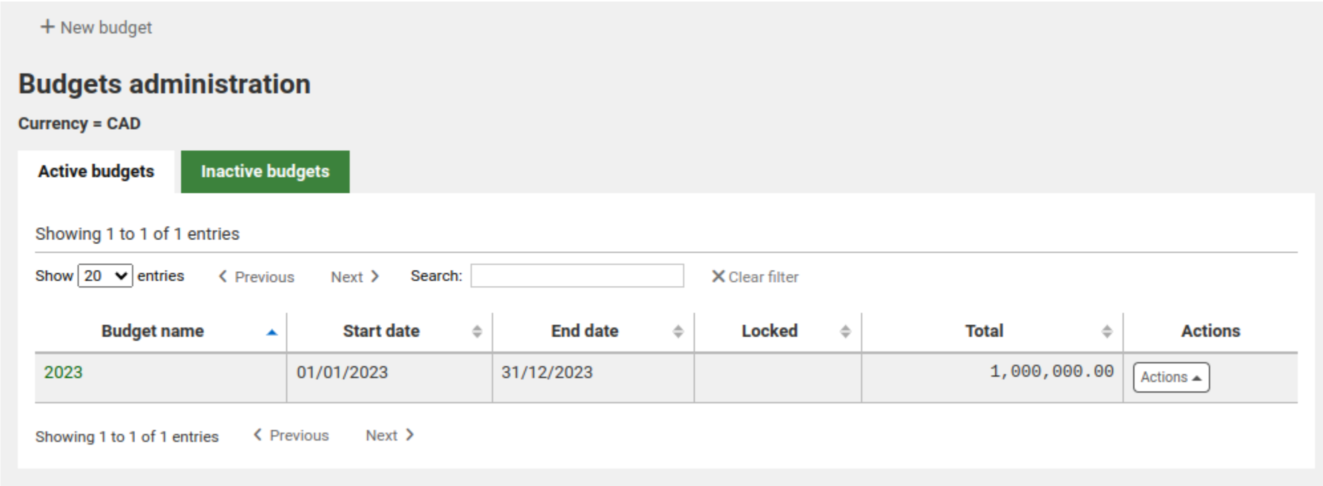
A fund is added to a budget. Make sure to [add a budget] before adding funds.

Note

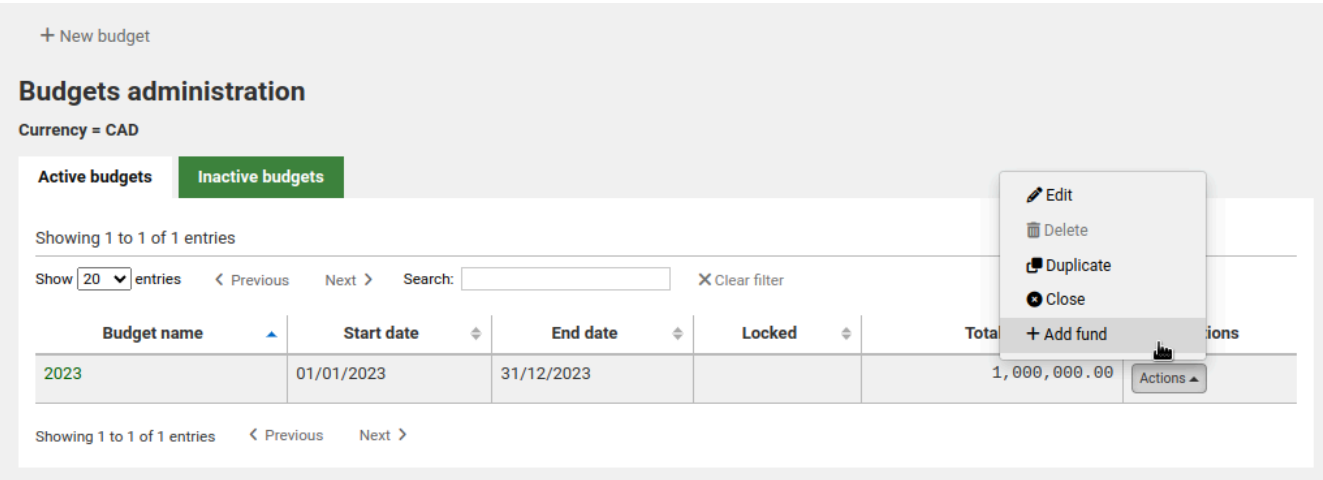
If a budget is locked, it will not be possible to add funds.

To add a new fund,

- From the list of budgets, click the ‘Actions’ button on the right.

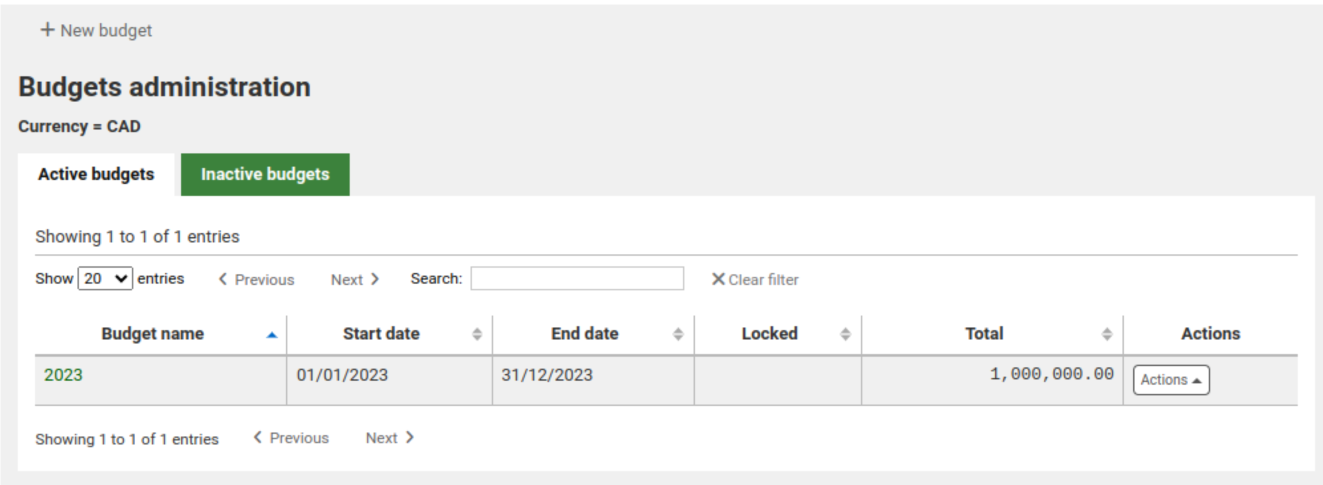


- Choose ‘Add fund’.

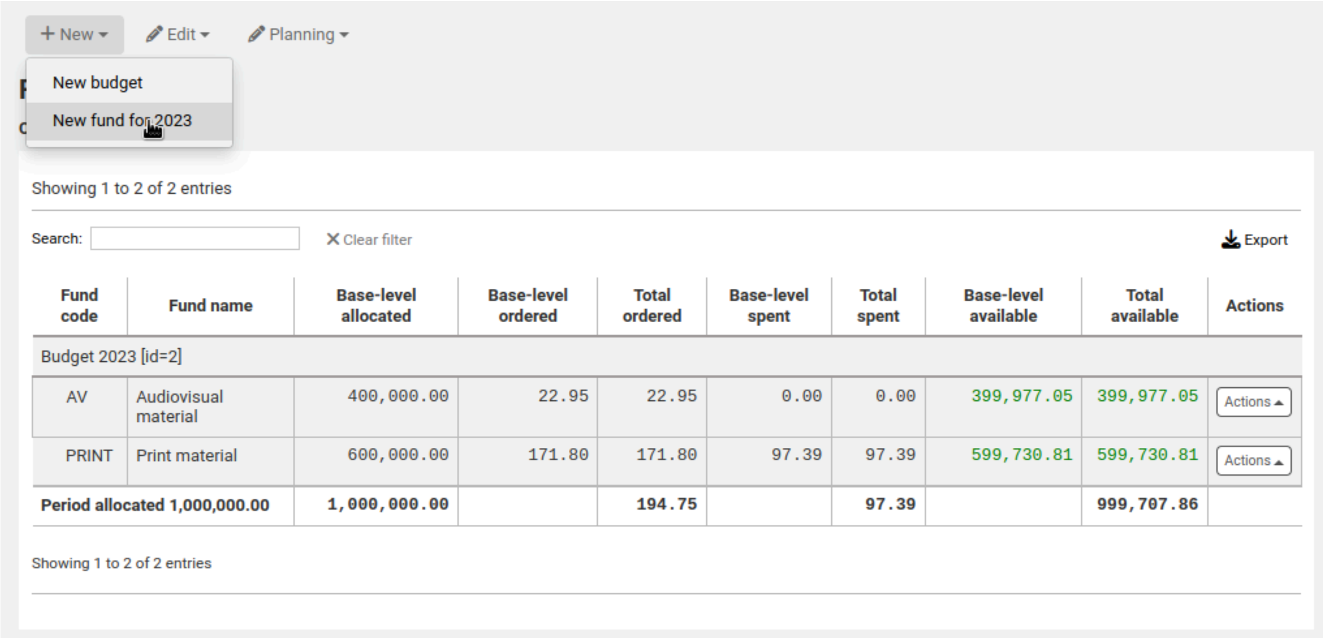


Alternatively,

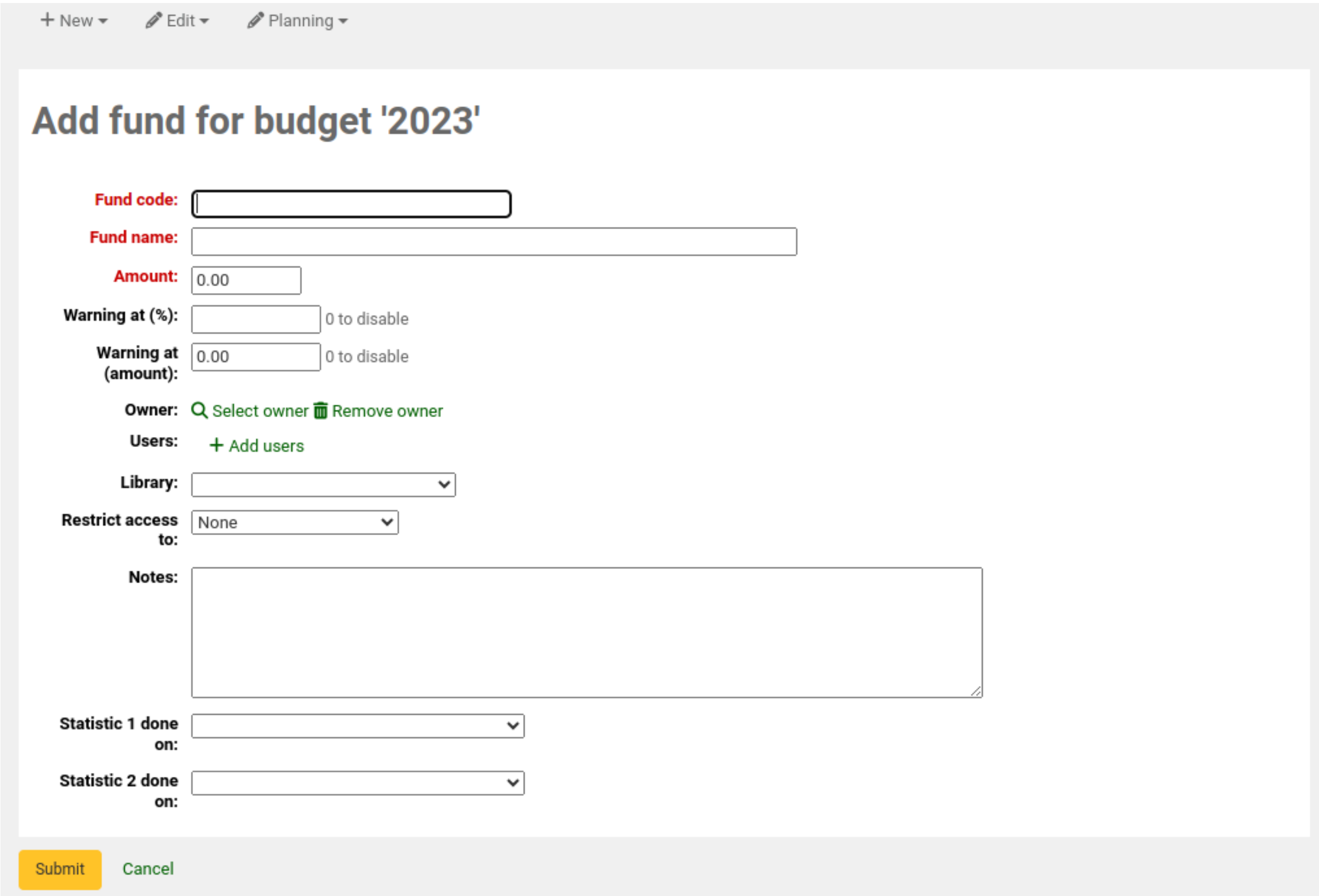
- From the list of budgets, click on the budget name.



- On the screen listing the budget breakdown, click the ‘New’ button at the top and choose the ‘New fund for…’ option.



- In both cases, you will be presented with a form to create the new fund.



  - Fund code (mandatory): enter a unique identifier for your fund.
  - Fund name (mandatory): enter a name for the fund. This should be something that staff will understand, as this is what will be displayed when ordering.
  - Amount (mandatory): enter the amount with only numbers and decimals, no other characters.
  - Warning at (%): enter a percentage value to have Koha warn you when you have spent this percentage of the fund, to prevent overspending. For example, if you enter 90%, Koha will warn you for each order after 90% of the fund is spent.

- Warning at (amount): same as above but for a specific amount of money spent. For example, if you enter 5000, Koha will warn you for each order after 5000 is spent in the fund.
- Owner: you can choose to assign this fund to a staff member.
  - Click 'Select owner'.
  - Search for the staff member in the patron search form.

    Note

    Only staff with the budget_modify permission (or the superlibrarian permission) are returned in the search results.

  - Click 'Select' to the right of the staff member's result.

  Note

  A fund can only have one owner.

  Note

  In order to limit the use of this fund to the owner, you must choose either 'Owner', 'Owner and users' or 'Owner, users and library' in the 'Restrict access to' field below. Otherwise, adding users will not have any restricting effect.

  Note

  Staff members with the order_manage_all permission (or the superlibrarian permission) will be able to use funds regardless of restrictions.

  Make sure your staff doesn't have that permission if you want to restrict access to funds.

- Users: you can also add users who will be able to spend in that fund.

  Note

  In order to limit the use of this fund to the users, you must choose either 'Owner and users' or 'Owner, users and library' in the 'Restrict access to' field below. Otherwise, adding users will not have any restricting effect.

  Note

  Staff members with the order_manage_all permission (or the superlibrarian permission) will be able to use funds regardless of restrictions.

  Make sure your staff doesn't have that permission if you want to restrict access to funds.

  - Click 'Add users'
  - Search for the staff member in the patron search form.

Note

Only staff with the budget_modify permission (or the superlibrarian permission) are returned in the search results.

- Click 'Add' to the right of the staff member's result.

Note

You can add as many users as you need.

- Click 'Close' once all the users have been added.

- Library: If this fund is for a specific library, choose it here.

Note

In order to limit the use of this fund to the library, you must choose 'Owner, users and library' in the 'Restrict access to' field below. Otherwise, choosing a library will not have any restricting effect.

Note

Staff members with the order_manage_all permission (or the superlibrarian permission) will be able to use funds regardless of restrictions.

Make sure your staff doesn't have that permission if you want to restrict access to funds.

- Restrict access to: you can restrict who can order from this fund by choosing either the 'owner', 'owner and users' or 'owner, users and library'.

Warning

Without an owner, the access restriction will be ignored, be sure to enter an owner as well as choose a restriction.

Note

Staff members with the order_manage_all permission (or the superlibrarian permission) will be able to use funds regardless of restrictions.

Make sure your staff doesn't have that permission if you want to restrict access to funds.

- Notes: any descriptive notes about this fund.

Note

Notes will only appear on this screen (when editing the fund).

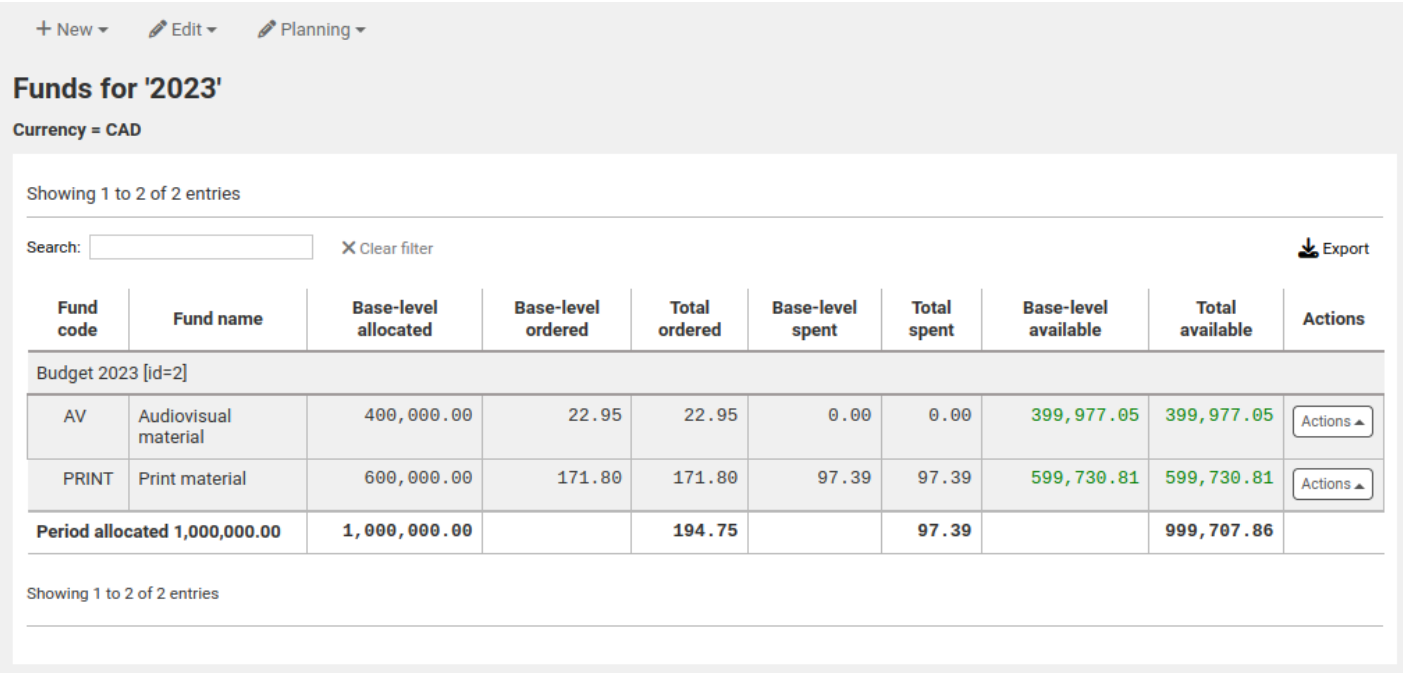
- Statistic 1 done on: this is used for statistical purposes. Choose an authorized value category from which to choose values when placing orders using this fund. You will then be able to plan spending and report on spending according to those categories. The default authorized value category Asort1 is created specifically for this purpose, but you can use any authorized value category in this field (CCODE for example to plan spending according to collections).
- Statistic 2 done on: same as above, for a second statistical category. The default authorized value category Asort2 is created specifically for this purpose, but you can use any authorized value category.

  Note

  To learn more about planning categories, check out the Planning category FAQ.

- Click ‘Submit’.

You will be brought to a list of all of the funds for the budget.


+ New Edit Planning

Funds for '2023'

Currency = CAD

Showing 1 to 2 of 2 entries

Search: Clear filter Export

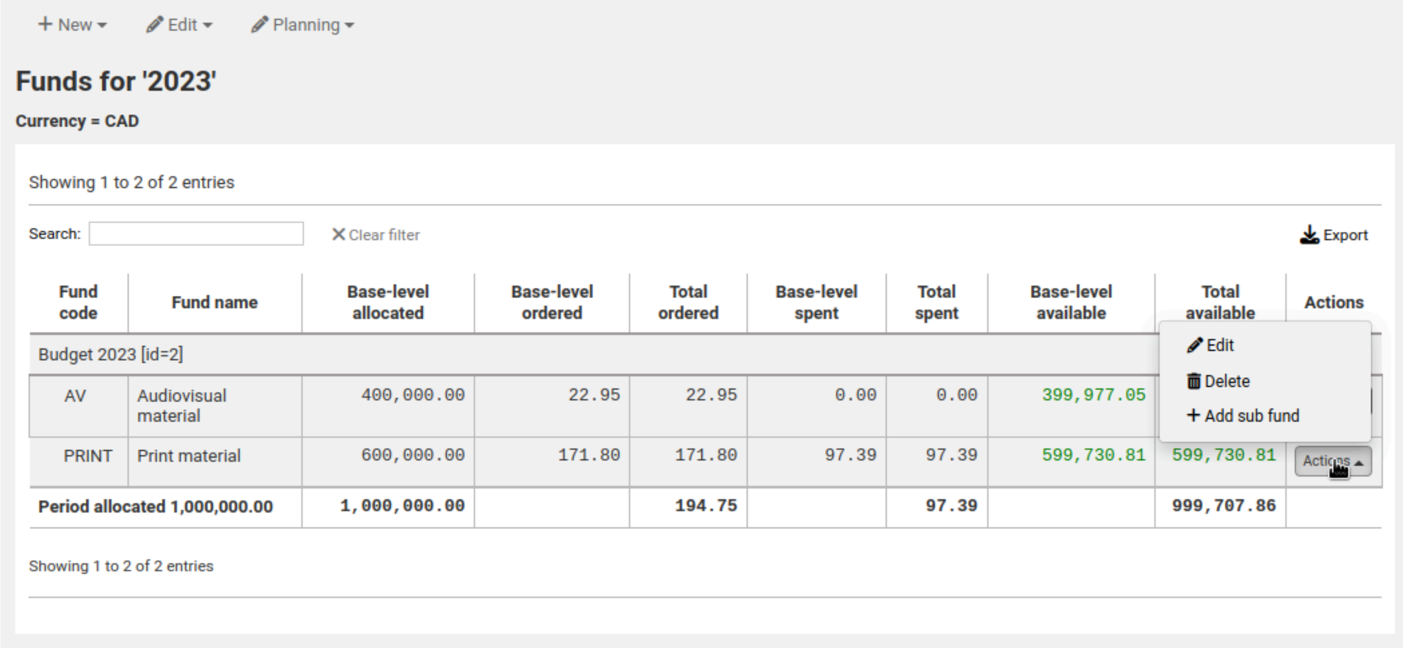
Fund code	Fund name	Base-level allocated	Base-level ordered	Total ordered	Base-level spent	Total spent	Base-level available	Total available	Actions
Budget 2023 [id=2]									
AV	Audiovisual material	400,000.00	22.95	22.95	0.00	0.00	399,977.05	399,977.05	Actions
PRINT	Print material	600,000.00	171.80	171.80	97.39	97.39	599,730.81	599,730.81	Actions
Period allocated 1,000,000.00		1,000,000.00		194.75		97.39		999,707.86	

Showing 1 to 2 of 2 entries

The monetary columns in the fund table break down as follows:

1. Base-level allocated is the ‘Amount’ value you defined when creating the fund
2. Base-level ordered is the ordered amount for this fund (without child funds)
3. Total ordered is the base-level ordered for this fund and all its child funds
4. Base-level spent is the spent amount for this fund (without child funds)
5. Total spent is the base-level spent for this fund and all its child funds
6. Base-level available is 1 - 2
7. Total available is 1 - 3

To the right of each fund you will find the ‘Actions’ button under which you will find the ‘Edit,’ ‘Delete,’ and ‘Add sub fund’ options.



Adding a sub fund

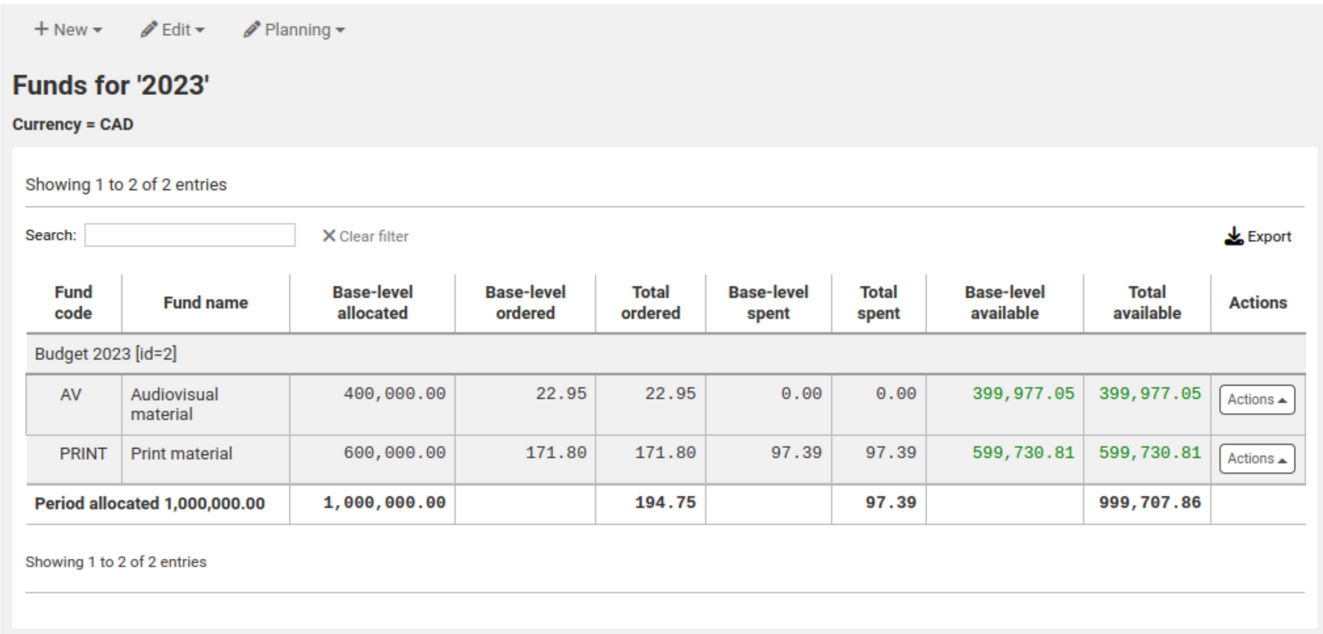
A sub fund is a more granular division of the fund. An example would be to have a fund for 'Fiction' and under that have a fund for 'New releases' and a fund for 'Science Fiction.' It is an optional way to further organize your finances.

Note

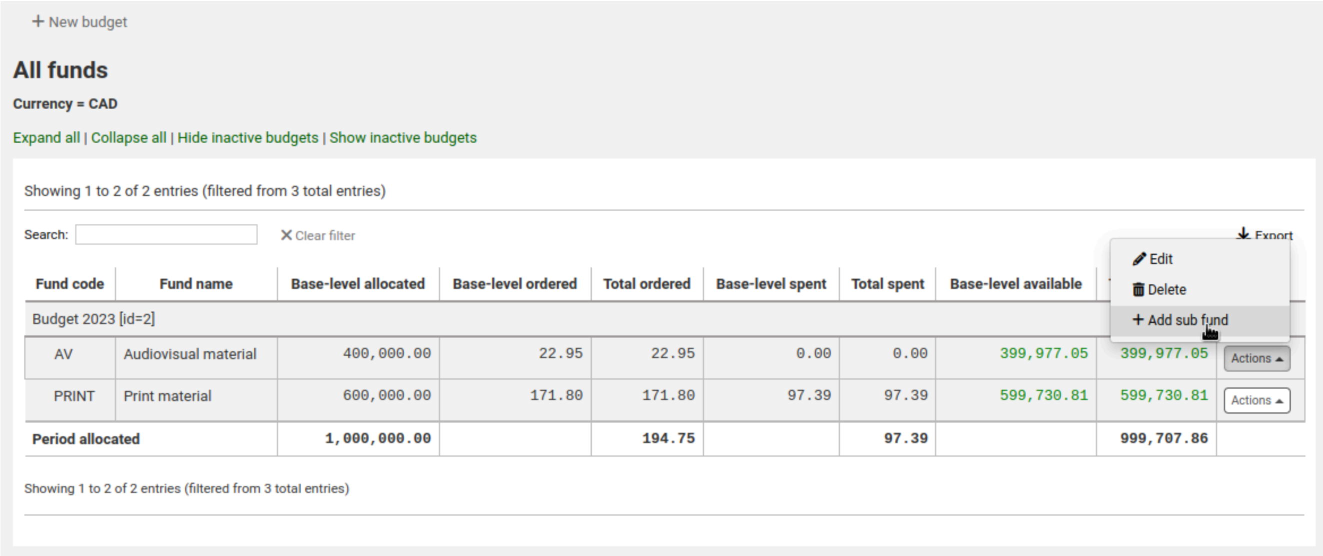
If a budget is locked, it will not be possible to add sub funds.

To add a sub fund to a fund,

- From the list of all funds, or from the list of funds of a specific budget, click the 'Actions' button on the right.



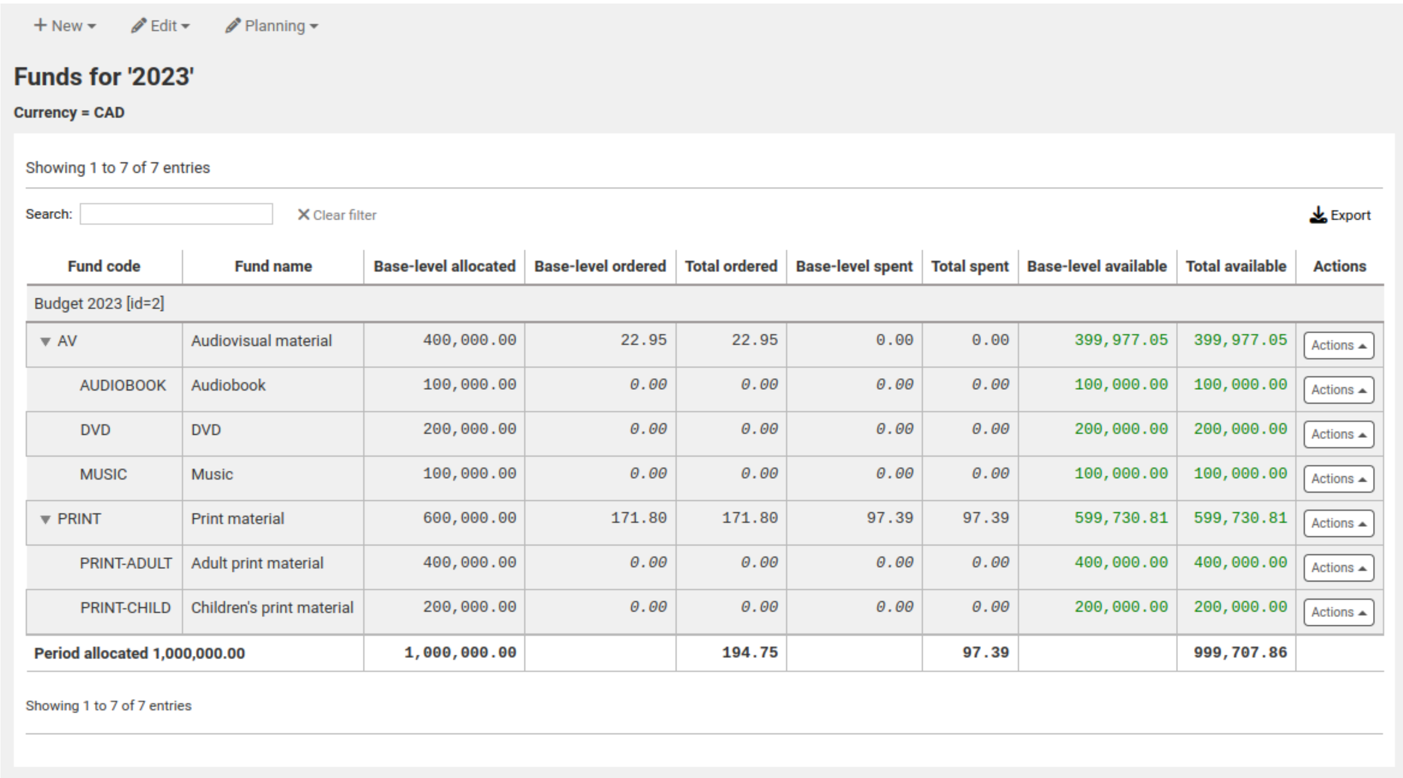
- Choose 'Add sub fund'.



- Fill out the new sub fund form. Fields are the same as for [adding a new fund](). The only difference is that the form will state the 'parent' fund.

- Click 'Submit'.

Funds with sub funds will show with a small arrow to the left. Clicking that will show you the sub funds.



Deleting funds

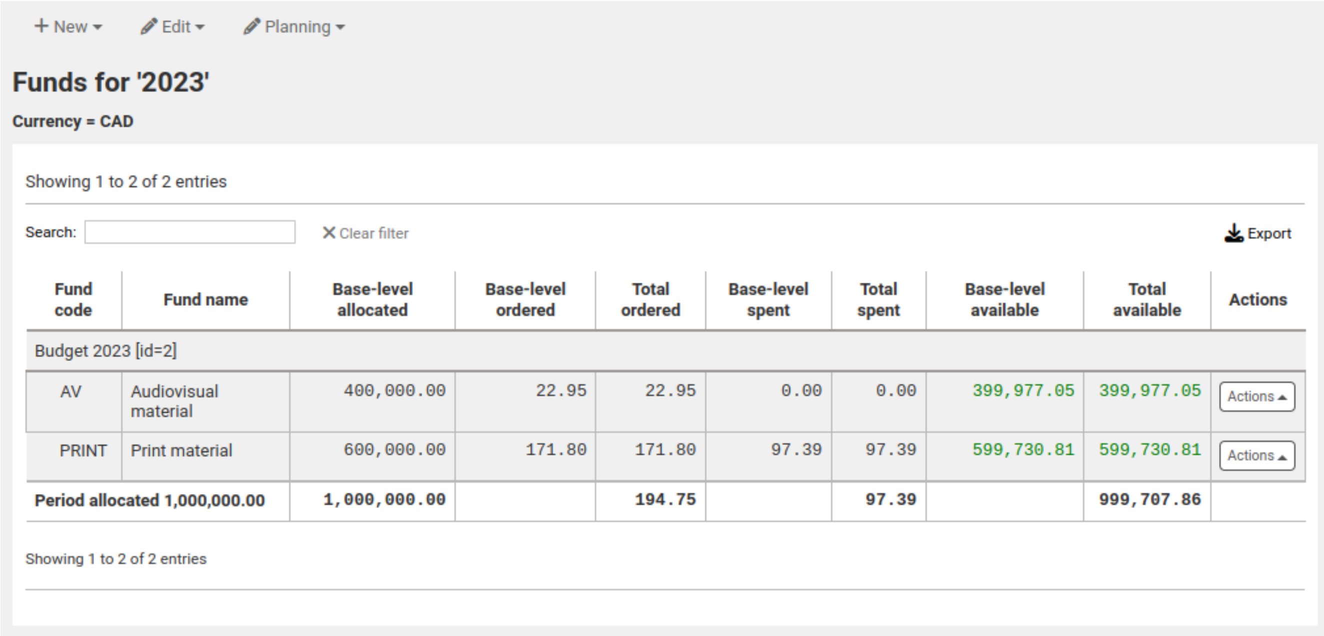
It is possible to delete funds, if necessary.

Warning

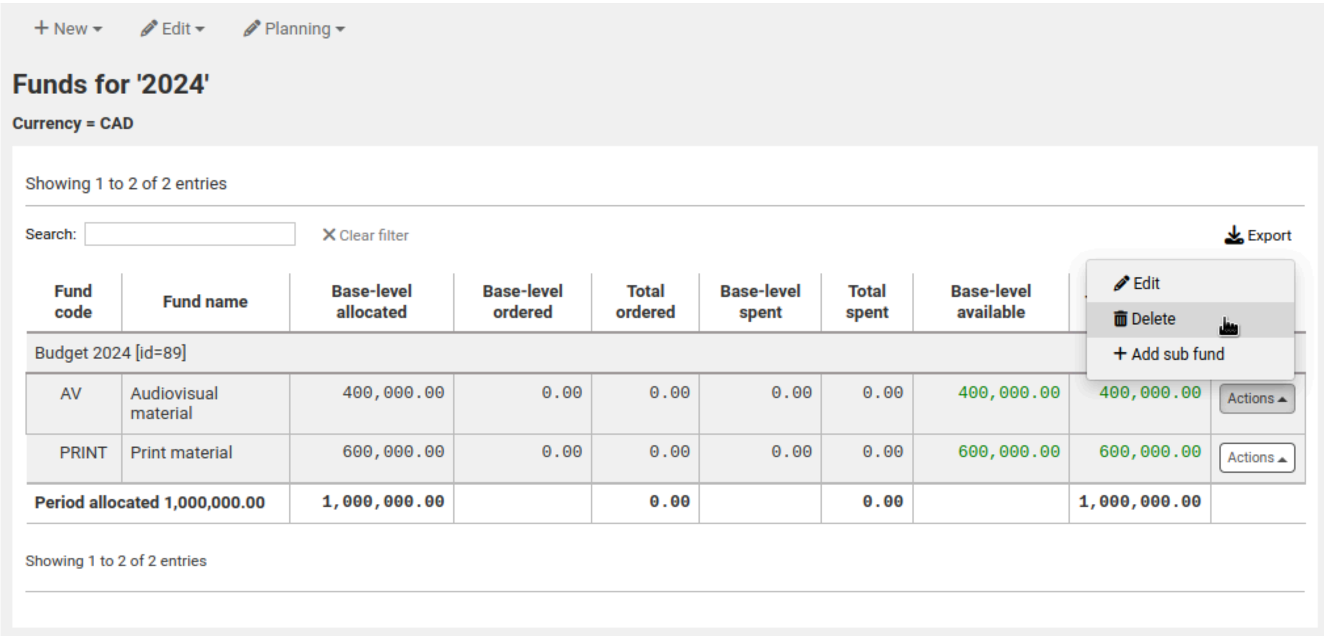
Deleting a fund in which there are orders will delete those orders. Only delete funds if you are certain it needs to be deleted. **It is not possible to undo this.**

To delete a fund,

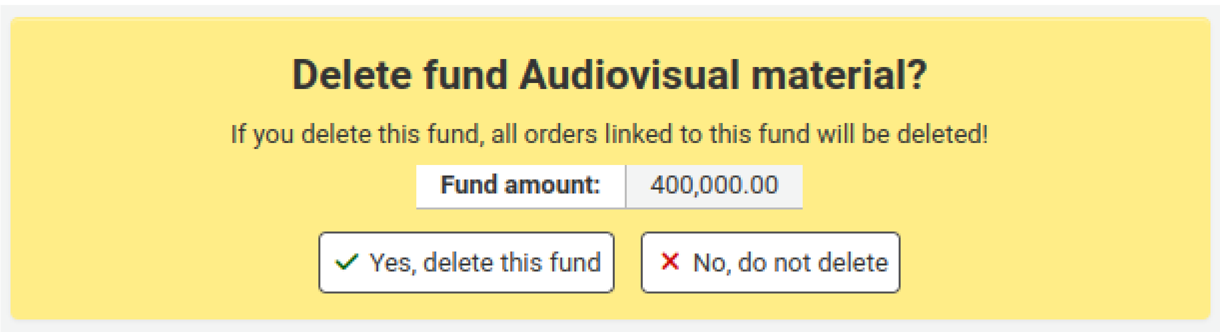
- From the list of all funds, or from the list of funds of a specific budget, click the ‘Actions’ button on the right.



- Choose ‘Delete’.



- Click ‘Yes, delete this fund’ in the warning message.

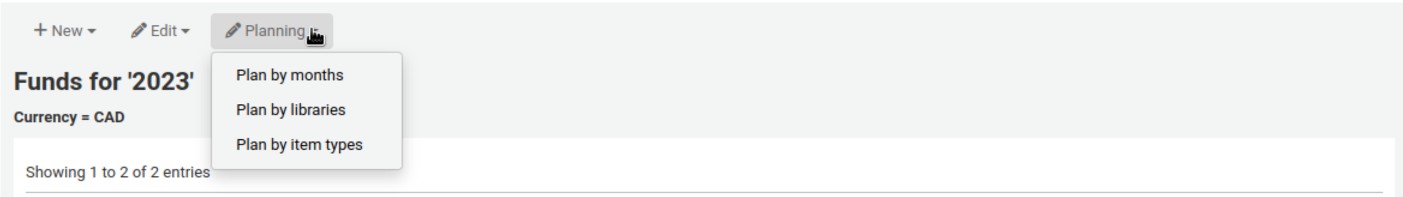


Budget planning

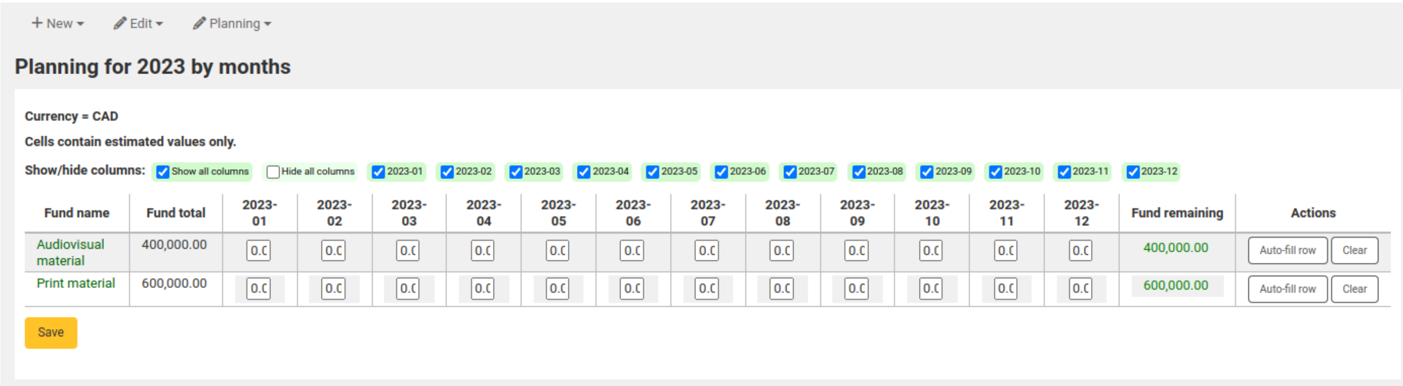
Note

Staff members must have the planning_manage permission, the budget_manage permission, and the period_manage permission (or the superlibrarian permission) in order to access budget planning.

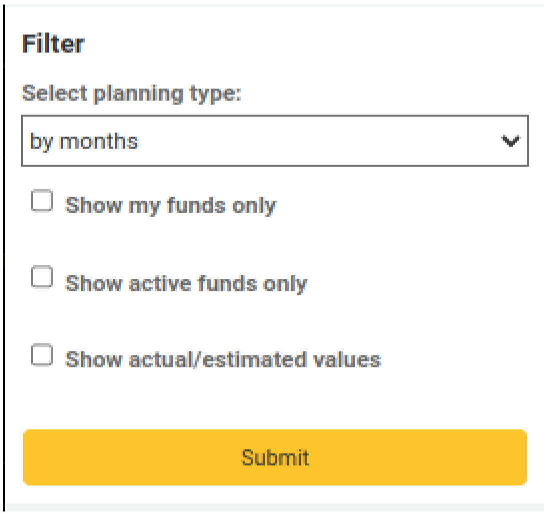
When viewing the list of funds click the 'Planning' button and choose how you would like to plan to spend your budget.



If you choose 'Plan by months' you will see the budgeted amount broken down by months.



On the left are filters that can be used to limit what is shown in the table.



- Select planning type: choose to plan by months, libraries, itemtypes, or any authorized value category used as statistic 1 or 2 in the funds.
- Show my funds only: this will filter out funds of which you are not the owner.
- Show active funds only: this will filter out funds that have not been used (no ordered amount).
- Show actual/estimated values: this will alter the table to show the ordered amounts as well.

To hide some of the columns, uncheck the boxes at the top of the table.

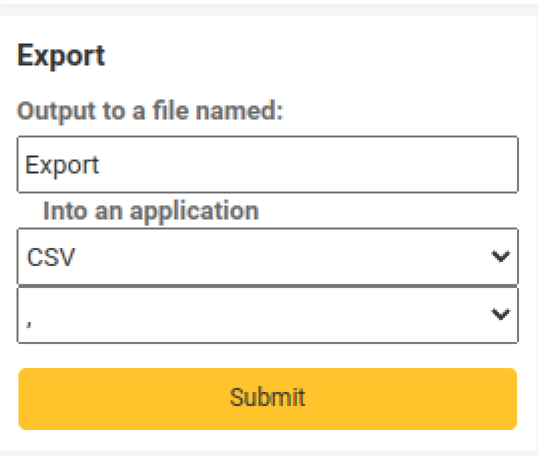
From here, you can plan your budget spending by manually entering values or by clicking the 'Auto-fill row' button. If you choose to auto-fill the form the system will try to divide the amount accordingly, you may have to make some edits to split things more accurately.

Once your changes are made, click the ‘Save’ button.

Note

If a budget is locked, it will not be possible to edit the values.

To export your data as a CSV file, enter a file name in the ‘Output to a file named’ field, in the ‘Export’ section on the left, and click the ‘Submit’ button.



EDI accounts

From here you can set up the information needed to connect to your acquisitions vendors.

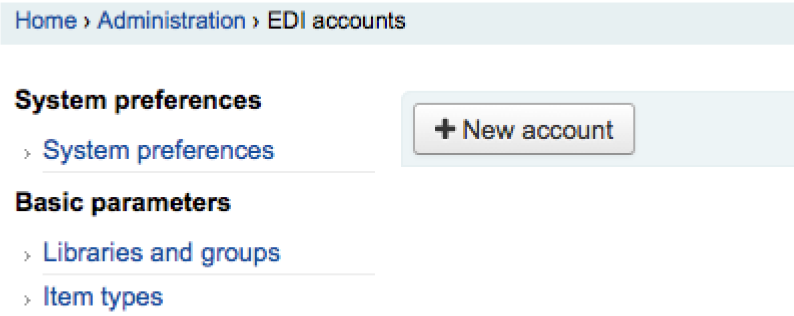
Note

Only staff with the edi_manage permission (or the superlibrarian permission) will have access to this section.

Note

Before you begin you will need at least one vendor set up in acquisitions.

To add account information click the ‘New account’ button.



In the form that appears you will want to enter your vendor information.

See the EDI questions for vendors section of the acquisitions module chapter for a description of each field.

Each vendor will have one account.

Library EANs

A library EAN is the identifier the vendor gives the library to send back to them so they know which account to use when billing. One EDI account can have multiple EANs.

Note

Only staff with the edi_manage permission (or the superlibrarian permission) will have access to this section.

To add an EAN click the 'New EAN' button.

In the form that appears enter the information provided by your vendor.

See the EDI questions for vendors section of the acquisitions module chapter for a description of each field.

Additional parameters

- *Get there:* More > Administration > Additional parameters

Identity providers

This section is used to define and manage external identity providers for Koha users. This is used when your users come from an external source, such as student management system, active directory, or other similar databases.

- *Get there:* More > Administration > Additional parameters > Identity providers

Note

Only staff with the manage_identity_providers permission (or the superlibrarian permission) will have access to this section.

Adding an identity provider

To add an identity provider, click the 'New identity provider' button.

- Basic configuration
  - Code: enter a code for this provider.

    Note

    The code for the identity provider is limited to 20 characters and can only be composed of letters, numbers, and underscore (_).

  - Description: enter a name for this provider. This is what you will see in the interface.
  - Protocol: choose which protocol this identity provider uses.

- OAuth
- OIDC

- Advanced configuration
  - Configuration: Use this field to enter the configuration specific to the protocol chosen above.

    You can click on the ‘Add default OAuth configuration’ button or the ‘Add default OIDC configuration’ button to prefill the field with some default values, which you can change for your own values.

    The default OAuth configuration is:

```
{
 "key": "<enter client id>",
 "secret": "<enter client secret>",
 "authorize_url": "<enter authorization endpoint>",
 "token_url": "<enter token endpoint>",
 "userinfo_url": "<enter user info endpoint (optional)>",
 "scope": "email"
}
```

    The default OIDC configuration is:

```
{
 "key": "<enter client id>",
 "secret": "<enter client secret>",
 "well_known_url": "<enter openid configuration endpoint>",
 "scope": "openid email"
}
```

  - Mapping: Use this field to define the field mappings from the external database to the Koha borrower fields.

    The key is the Koha field from the borrowers table, and the value is the external field.

    Note

    You can find all fields of the borrowers table in the database schema [https://schema.koha-community.org/].

    You can click on the ‘Add default OAuth mapping’ button or the ‘Add default OIDC mapping’ button to prefill the field with some default values, which you can change for your own values.

    Both the default OAuth mapping and default OIDC mapping are:

```
{
 "email": "email",
 "firstname": "given_name",
 "surname": "family_name"
}
```

    If the external fields are nested, you can use periods to separate the levels.

    For example, if the firstname is nested like so:

```
<user>
   <given_name>First name</given_name>
   <family_name>Family name</family_name>
```

```
    <email>Email address</email>
</user>
```

Use:

```
"firstname": "user.0.given_name"
```

This will fetch the "given_name" field in the first "user" field (0 = first).

Important

If you plan on using the auto register function (see below), make sure either "userid" or "cardnumber" are present in the mappings.

Important

Make sure the field for the matchpoint (see below) is included in the mappings.

  - Matchpoint: choose which field is used to match incoming users to existing users.

    Note

    The field chosen here must be included in the mappings (see above).

  - Icon URL: if you want an icon to show on the login screen for this provider, enter the URL to the image file here.

- Domain configuration

  Note

  Enter at least one domain for this provider. Once it is saved, you will be able to add more domains to this provider.

  - Domain: enter the email domain for incoming users.

    Note

    Enter an asterisk (*) to include all domains.

  - Default library: if auto register is enabled, choose at which library new users will be registered.
  - Default category: if auto register is enabled, choose which patron category will be assigned to new users.
  - Allow OPAC: choose if patrons of this domain can log into the OPAC with their credentials from this identity provider.
  - Allow staff: chose if staff members of this domain can log into the staff interface with their credentials from this identity provider.

- Auto register: choose whether or not a new patron account is created in Koha when a user from this domain logs in for the first time with their credentials from this identity provider.

  Note

  If auto register is enabled, make sure the "userid" or "cardnumber" fields are included in the mappings (see above).

  Also make sure the default library and default category are set correctly for new patrons. These will be assigned to the new patrons.

- Update on login: choose whether or not the patron account in Koha is updated with the external information when a user from this domain logs in with their credentials from this identity provider.

  Warning

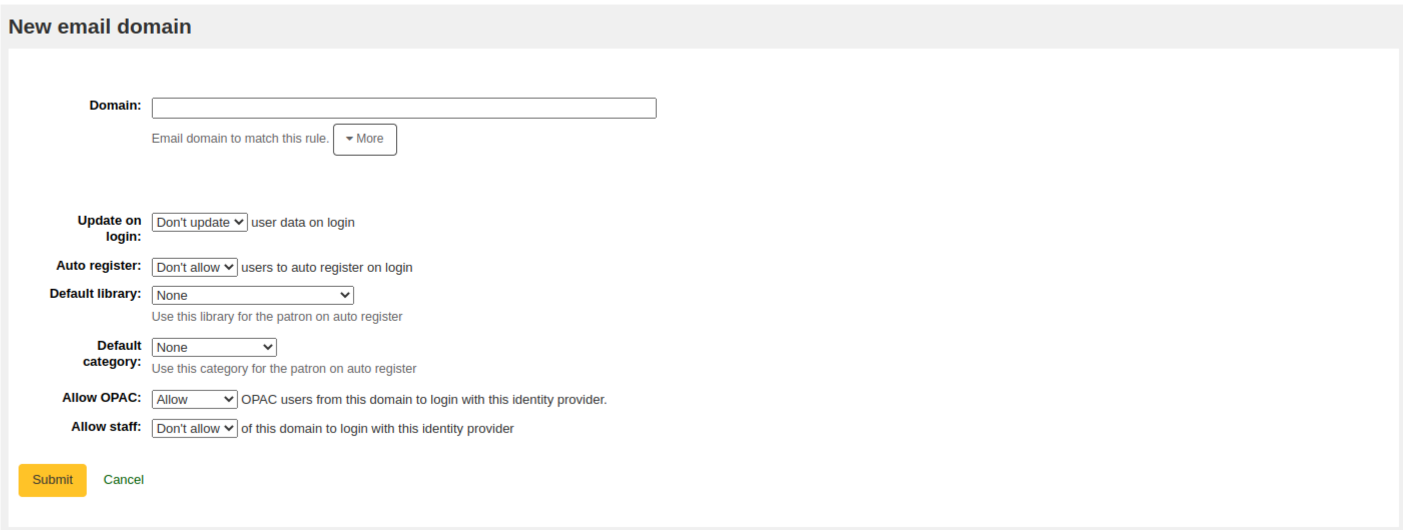
  Information may be lost if you change it directly in Koha.

Once the form is completed, click 'Submit' to save the new identity provider.

You will need to restart Koha once the identity provider is added.

Adding an email domain to an existing identity provider

You will need to add at least one email domain when creating a new identity provider. You can add more by clicking the 'Manage domains' button to the right of the identity provider from the main identity providers page, and clicking 'New email domain'.



- Domain: enter the email domain for incoming users.

  Note

  Enter an asterisk (*) to include all domains.

- Update on login: choose whether or not the patron account in Koha is updated with the external information when a user from this domain logs in with their credentials from this identity provider.

Warning

Information may be lost if you change it directly in Koha.

- Auto register: choose whether or not a new patron account is created in Koha when a user from this domain logs in for the first time with their credentials from this identity provider.

Note

If auto register is enabled, make sure the "userid" or "cardnumber" fields are included in the mappings of the identity provider.

Also make sure the default library and default category are set correctly for new patrons. These will be assigned to the new patrons.

- Default library: if auto register is enabled, choose at which library new users will be registered.
- Default category: if auto register is enabled, choose which patron category will be assigned to new users.
- Allow OPAC: choose if patrons of this domain can log into the OPAC with their credentials from this identity provider.
- Allow staff: chose if staff members of this domain can log into the staff interface with their credentials from this identity provider.

Once the form is completed, click 'Submit' to save the new email domain.

Z39.50/SRU servers

Z39.50 is a client/server protocol for searching and retrieving information from remote computer databases. In short, it's a tool used for copy cataloging.

SRU (Search/Retrieve via URL) is a standard XML-based protocol for search queries, utilizing CQL (Contextual Query Language), a standard syntax for representing queries.

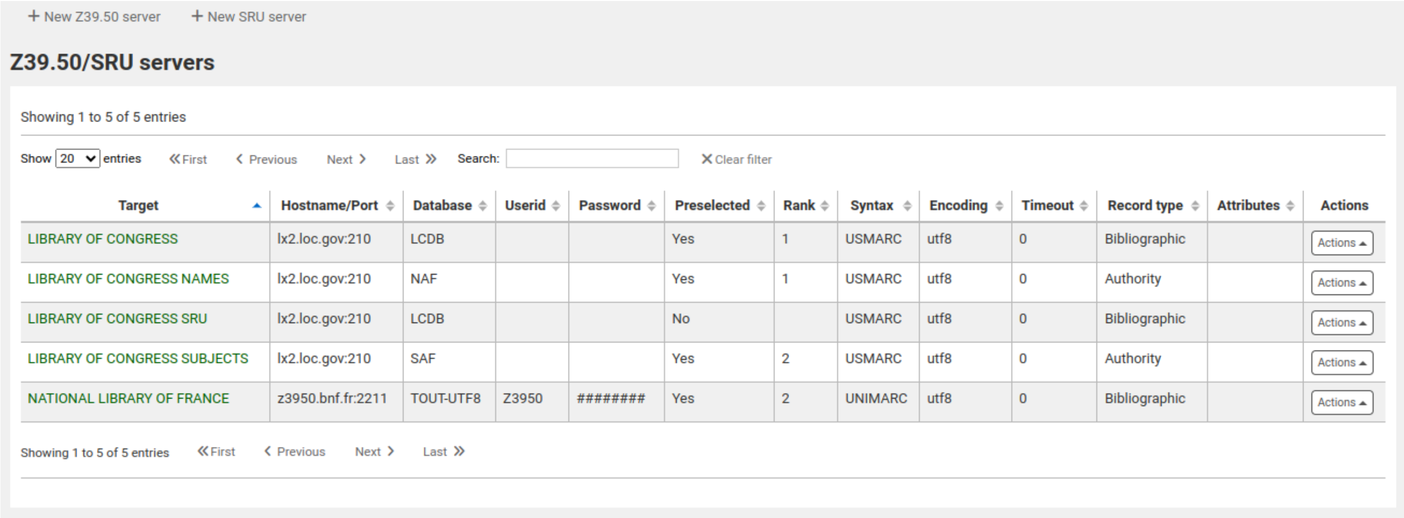
Using Koha you can connect to any Z39.50 or SRU target that is publicly available or that you have the log in information to and copy bibliographic or authority records from that source.

- *Get there:* More > Administration > Additional parameters > Z39.50/SRU servers

Note

Only staff with the manage_search_targets permission (or the superlibrarian permission) will have access to this section.

Koha comes with a default list of Z39.50/SRU targets set up that you can add to, edit or delete.



+ New Z39.50 server + New SRU server

Z39.50/SRU servers

Showing 1 to 5 of 5 entries

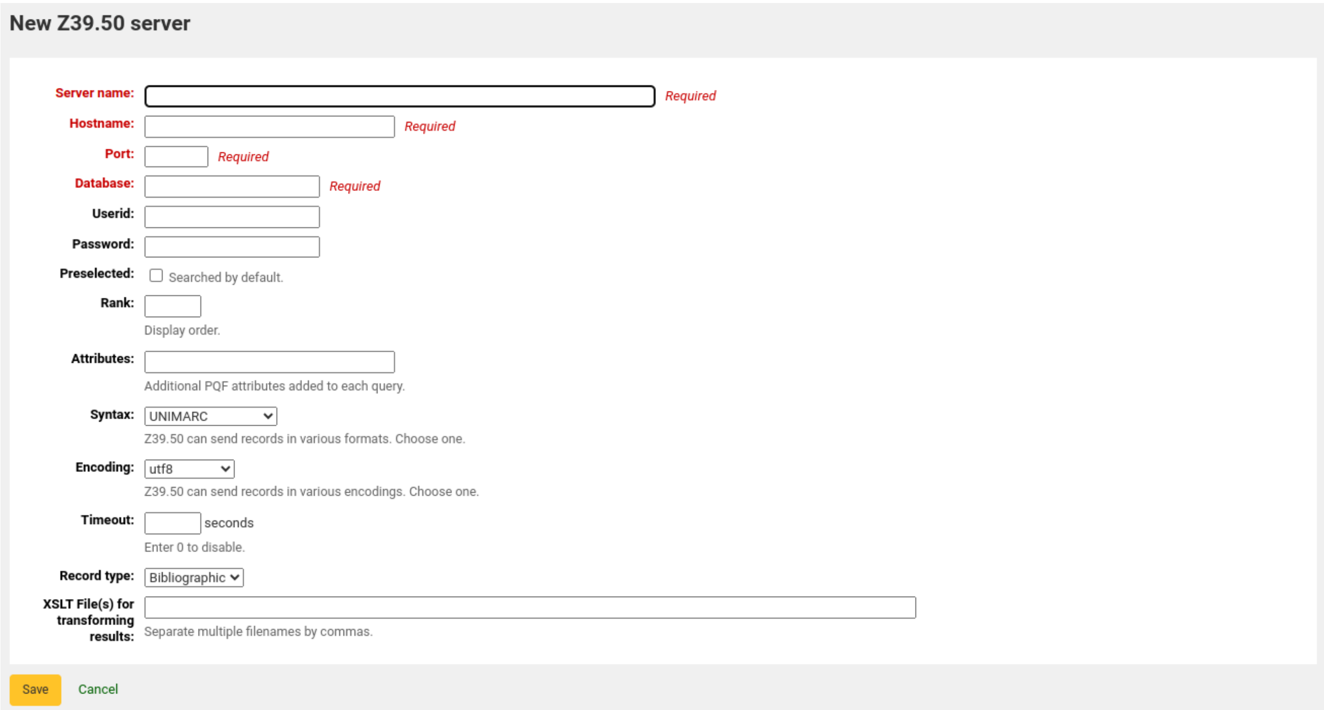
Target	Hostname/Port	Database	Userid	Password	Preselected	Rank	Syntax	Encoding	Timeout	Record type	Attributes	Actions
LIBRARY OF CONGRESS	lx2.loc.gov:210	LCDB			Yes	1	USMARC	utf8	0	Bibliographic		Actions
LIBRARY OF CONGRESS NAMES	lx2.loc.gov:210	NAF			Yes	1	USMARC	utf8	0	Authority		Actions
LIBRARY OF CONGRESS SRU	lx2.loc.gov:210	LCDB			No		USMARC	utf8	0	Bibliographic		Actions
LIBRARY OF CONGRESS SUBJECTS	lx2.loc.gov:210	SAF			Yes	2	USMARC	utf8	0	Authority		Actions
NATIONAL LIBRARY OF FRANCE	z3950.bnf.fr:2211	TOUT-UTF8	Z3950	########	Yes	2	UNIMARC	utf8	0	Bibliographic		Actions

Showing 1 to 5 of 5 entries

Adding a Z39.50 target

To find additional Z39.50 targets, you can use IndexData's IRSpy: http://irspy.indexdata.com [http://irspy.indexdata.com/] or the Library of Congress's list of targets http://www.loc.gov/z3950/. You can also contact individual libraries and ask for their Z39.50 information.

- From the main Z39.50 page, click 'New Z39.50 server'.



  - Server name: enter a name that will help you identify the source (such as the library name). It will be saved in capital letters.
  - Hostname: enter the address to the Z39.50 target.
  - Port: enter the port number to listen on to get results from this target.
  - Database: enter the name of the database.
  - Userid: some servers might be password protected. If that is the case for the server you are trying to add, enter your user ID for that source.
  - Password: if the server is password protected, enter your password for that source.

- Preselected: check this box if you want this target to always be selected by default.
- Rank: enter a number representing where in the list you'd like this target to appear. 0 is the top position, then 1, 2, etc.
  - If this is left blank the targets will be in alphabetical order.
- Attributes: enter PQF attributes to be added to all queries.
- Syntax: choose the MARC flavor used by this target.
- Encoding: choose the character encoding used by this target.

  Note

  If you notice special characters don't appear correctly when you import records through Z39.50, it means the encoding is wrong. Change it to another and try importing again.

- Timeout: enter a number of seconds after which to stop trying to search the target if results aren't found in a reasonable amount of time. It is helpful for targets that take a long while.
- Record type: choose if this is a bibliographic or an authority target.
- XSLT file(s) for transforming results: enter one or more (comma-separated) XSLT file names that you want to apply on the search results.
  - When retrieving records from external targets you may wish to automate some changes to those records. XSLT's allow you to do this. Koha ships with some sample XSLT files in the /koha-tmpl/intranet-tmpl/prog/en/xslt/ directory ready for use:
    - Del952.xsl: Remove Koha items (field 952) (MARC21)
    - Del995.xsl: Remove Koha items (field 995) (UNIMARC)
    - Del9LinksExcept952.xsl: Remove links to authorities in bibliographic records ($9), except in the case of 952$9 (itemnumber) (MARC21)
    - Del9LinksExcept995.xsl: Remove links to authorities in bibliographic records ($9), except in the case of 995$9 (itemnumber) (UNIMARC)

- Click 'Save'.

Suggested bibliographic Z39.50 targets

Koha libraries with open Z39.50 targets can share and find connection information on the Koha wiki: http://wiki.koha-community.org/wiki/Koha_Open_Z39.50_Sources. You can also find open Z39.50 targets by visiting IRSpy: http://irspy.indexdata.com.

The following targets have been used successfully by other Koha libraries:

- ACCESS PENNSYLVANIA 205.247.101.11:210 INNOPAC
- CUYAHOGA COUNTY PUBLIC webcat.cuyahoga.lib.oh.us:210 INNOPAC
- GREATER SUDBURY PUBLIC 216.223.90.51:210 INNOPAC
- HALIFAX PUBLIC catalog.halifaxpubliclibraries.ca:210 horizon
- HALTON HILLS PUBLIC cat.hhpl.on.ca:210 halton_hills
- LIBRARY OF CONGRESS lx2.loc.gov: 210 LCDB
- LONDON PUBLIC LIBRARY catalog.londonpubliclibrary.ca:210 INNOPAC
- MANITOBA PUBLIC library.gov.mb.ca:210 horizon
- MILTON PL cat.mpl.on.ca:210 horizon
- NATIONAL LIBRARY OF WALES cat.llgc.org.uk:210 default
- NHUPAC 199.192.6.130:211 nh_nhupac

- OCEAN STATE LIBRARIES (RI) catalog.oslri.net:210 INNOPAC
- OHIOLINK olc1.ohiolink.edu:210 INNOPAC
- PUBCAT prod890.dol.state.vt.us:2300 unicorn
- SAN JOAQUIN VALLEY PUBLIC LIBRARY SYSTEM (CA) hip1.sjvls.org:210 ZSERVER
- SEATTLE PUBLIC LIBRARY ZSERVER.SPL.ORG:210 HORIZON
- TORONTO PUBLIC symphony.torontopubliclibrary.ca:2200 unicorn
- TRI-UNI 129.97.129.194:7090 voyager
- VANCOUVER PUBLIC LIBRARY z3950.vpl.ca:210 Horizon

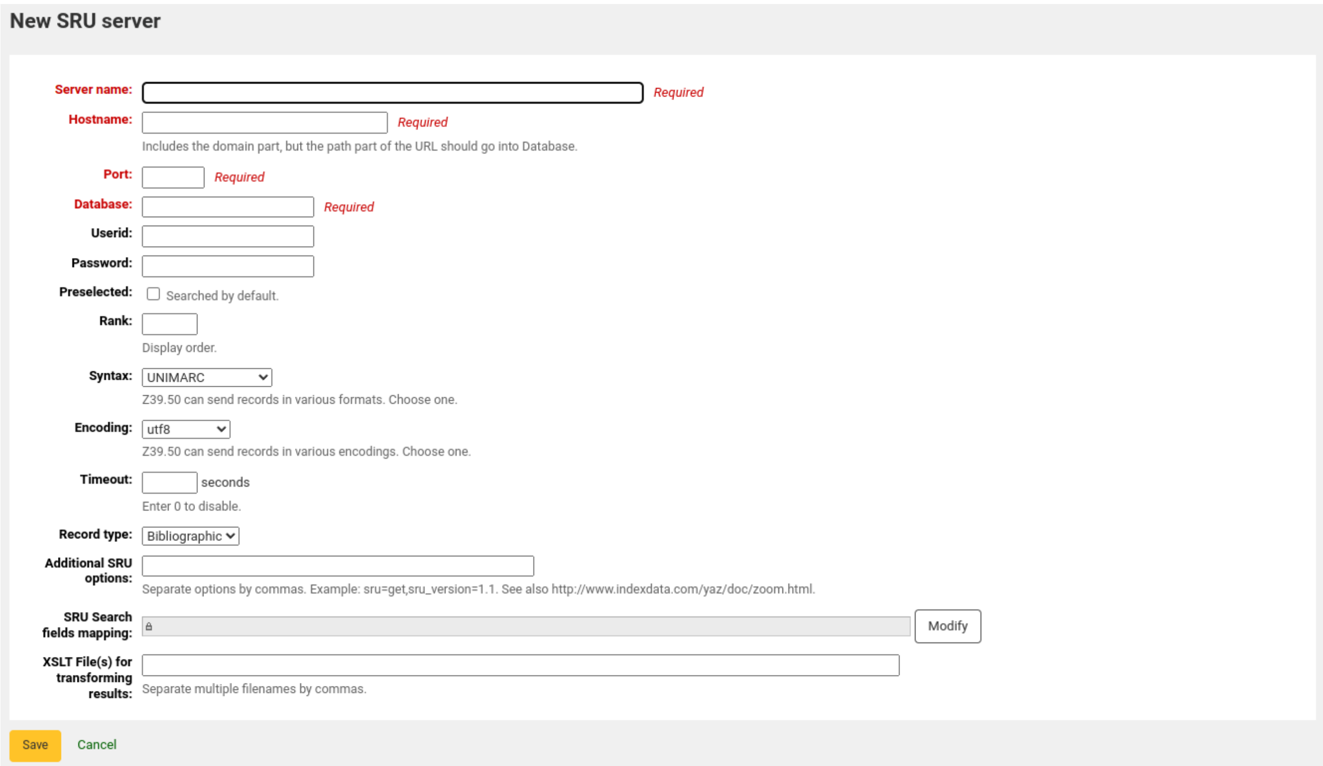
Suggested authority Z39.50 targets

The following targets have been used successfully by other Koha libraries (in the Americas):

- LIBRARIESAUSTRALIA AUTHORITIES z3950-test.librariesaustralia.nla.gov.au:210 AuthTraining Userid: ANLEZ / Password: z39.50
- LIBRARY OF CONGRESS NAME AUTHORITIES lx2.loc.gov:210 NAF
- LIBRARY OF CONGRESS SUBJECT AUTHORITIES lx2.loc.gov:210 SAF

Adding an SRU target

- From the main Z39.50/SRU page, click ‘New SRU server’



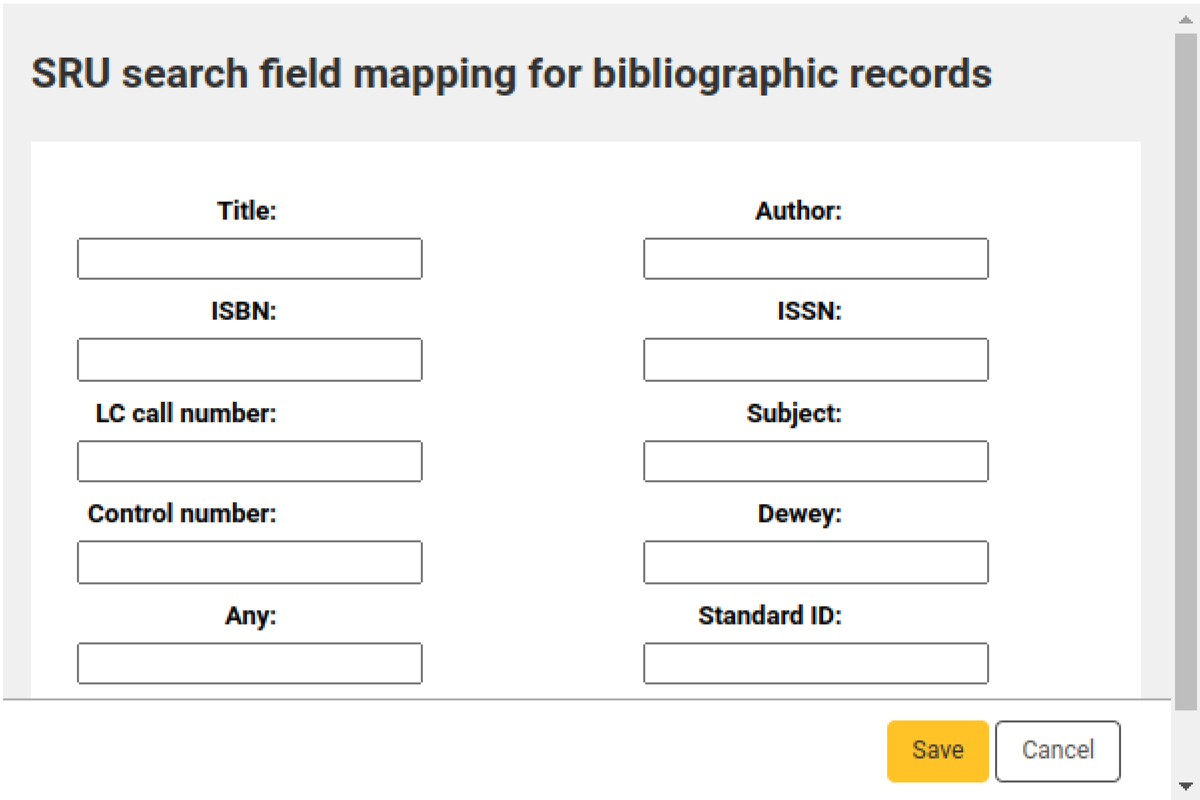
  - Server name: enter a name that will help you identify the source (such as the library name).
  - Hostname: enter the address (URL) to the SRU target.
  - Port: enter which port to listen on to get results from this target.
  - Database: enter the name of the database.
  - Userid: some servers might be password protected. If that is the case for the server you are trying to add, enter your user ID for that source.
  - Password: if the server is password protected, enter your password for that source.
  - Preselected: check this box if you want this target to always be selected by default.

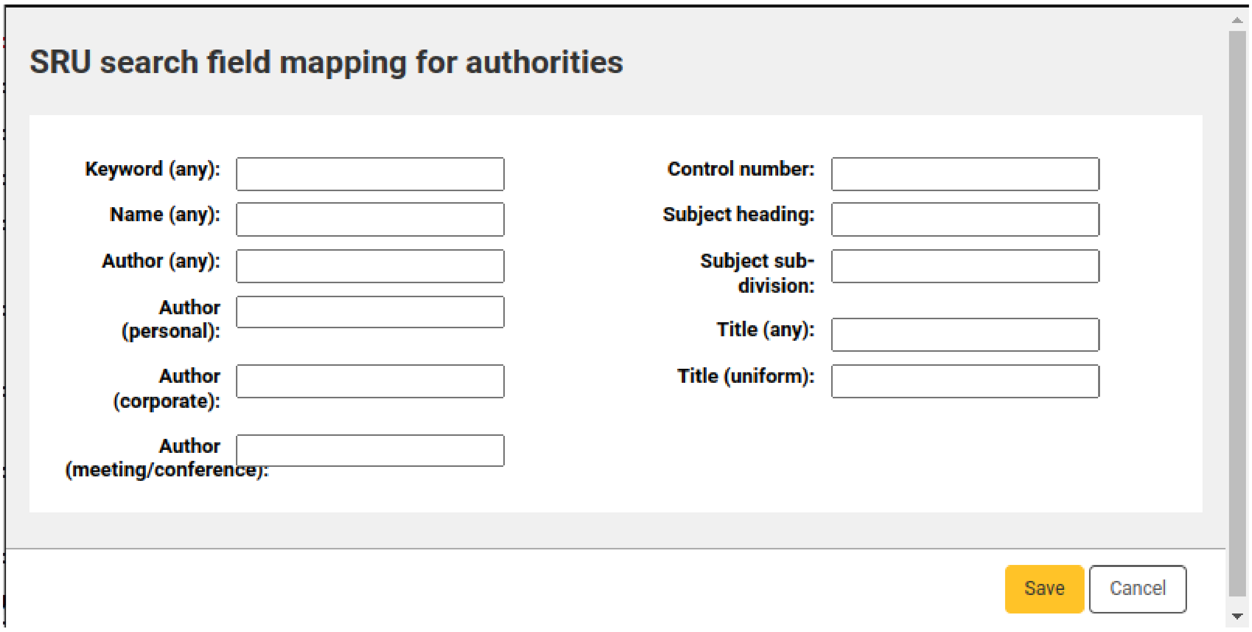
- Rank: enter a number representing where in the list you'd like this target to appear. 0 is the top position, then 1, 2, etc.
    - If this is left blank the targets will be in alphabetical order.
- Syntax: choose the MARC flavor used by this target.
- Encoding: choose the character encoding used by this target.

  Note

  If you notice special characters don't appear correctly when you import records through Z39.50, it means the encoding is wrong. Change it to another and try importing again.

- Timeout: enter a number of seconds after which to stop trying to search the target if results aren't found in a reasonable amount of time. It is helpful for targets that take a long while.
- Record type: choose if this is a bibliographic or an authority target.
- Additional SRU options: enter additional options of the external server here, like `sru_version=1.1` or `schema=marc21`, etc. Note that these options are server dependent.
- SRU Search field mapping: click 'Modify' to add or update the mapping from the available fields on the Koha search form to the specific server dependent index names.





- To further refine your searches, you could add the following index names to the SRU search field mappings. To do this, edit the server and click the Modify button next to this field.

Title	dc.title
ISBN	bath.isbn
Any	cql.anywhere
Author	dc.author
ISSN	bath.issn
Subject	dc.subject
Standard ID	bath.standardIdentifier

Table: SRU mapping

- XSLT file(s) for transforming results: enter one or more (comma-separated) XSLT file names that you want to apply on the search results.
  - When retrieving records from external targets you may wish to automate some changes to those records. XSLT's allow you to do this. Koha ships with some sample XSLT files in the /koha-tmpl/intranet-tmpl/prog/en/xslt/ directory ready for use:
    - Del952.xsl: Remove Koha items (field 952) (MARC21)
    - Del995.xsl: Remove Koha items (field 995) (UNIMARC)
    - Del9LinksExcept952.xsl: Remove links to authorities in bibliographic records ($9), except in the case of 952$9 (itemnumber) (MARC21)
    - Del9LinksExcept995.xsl: Remove links to authorities in bibliographic records ($9), except in the case of 995$9 (itemnumber) (UNIMARC)

- Click ‘Save’.

SMTP servers

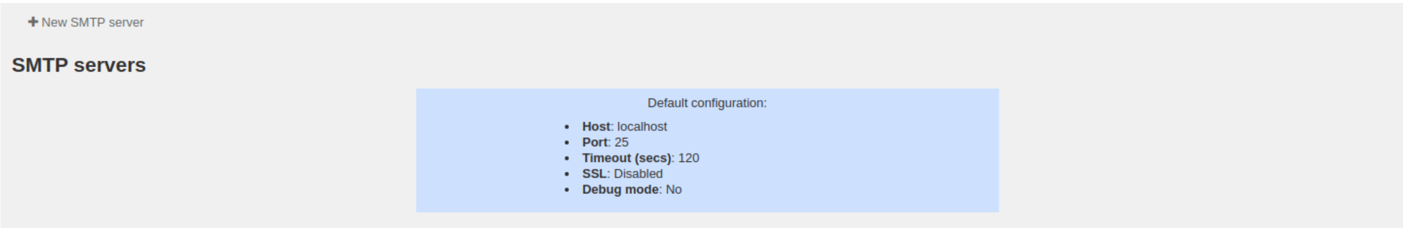
- *Get there:* More > Administration > Additional parameters > SMTP servers

This section is used to configure SMTP servers to send emails through Koha.

Note

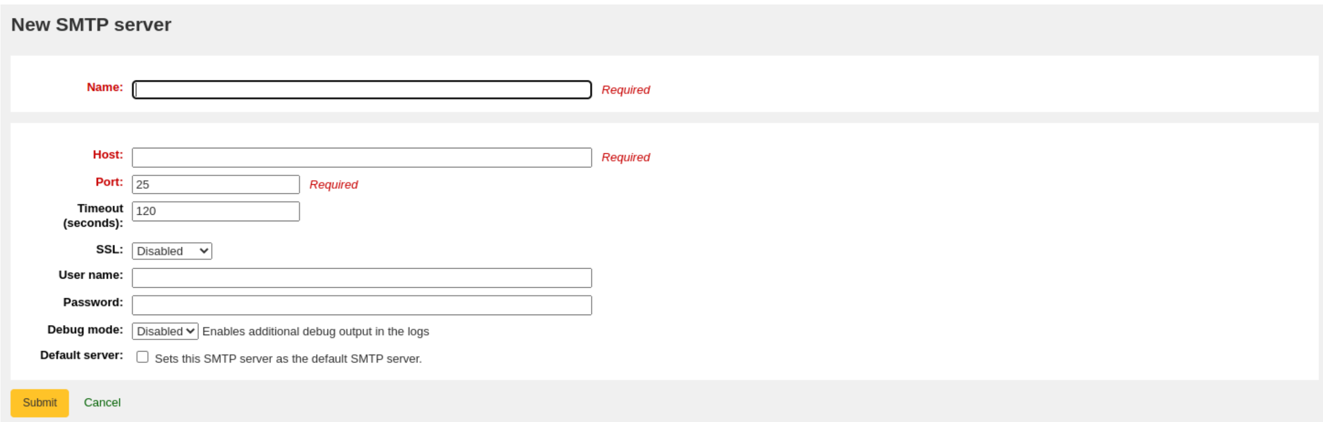
Only staff with the manage_smtp_servers permission (or the superlibrarian permission) will have access to this section.

The default STMP configuration is set in the koha-conf.xml file. But this section allows you to add additional servers.



To add a new server,

- Click ‘New SMTP server’



  - Name (required): give the server a significant name, this is the name that will be displayed in Koha
  - Host (required): enter the host name or IP address of the server
  - Port (required): enter the port number provided by your administrator
  - Timeout (seconds): enter the number of seconds after which an unsent email will result in an error
  - SSL: choose the security protocol provided by your administrator
    - Disabled: no security (not recommended)
    - SSL
    - STARTTLS
  - Username: enter the username provided by your administrator
  - Password: enter the password provided by your administrator
  - Debug mode: choose whether to enable the debug mode to send additional output to the logs
  - Default server: choose whether this server is the default one to be used by all libraries

- Click ‘Submit’

Once the server is added, you can select it in the library's details.

Did you mean?

Get there: More > Administration > Additional parameters > Did you mean?

Note

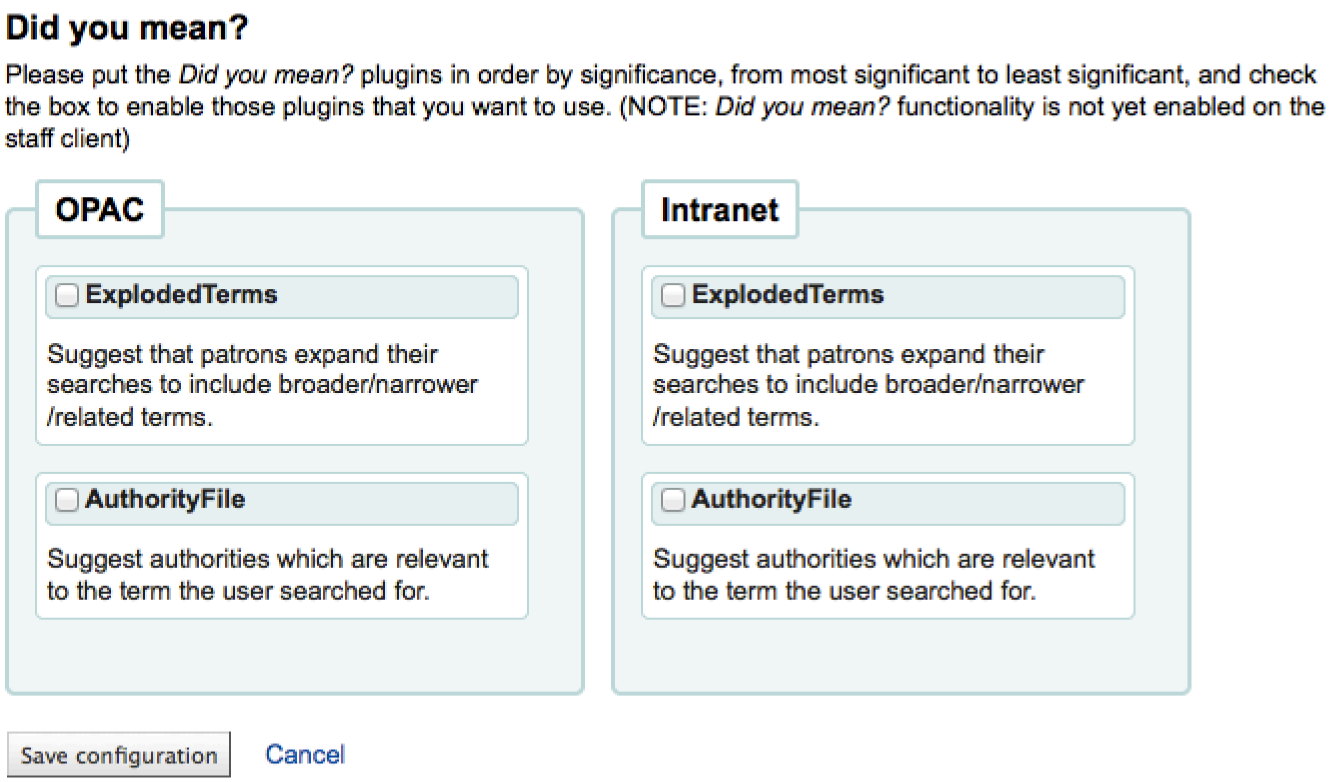
Only staff with the manage_didyoumean permission (or the superlibrarian permission) will have access to this section.

Koha can offer 'Did you mean?' options on searches based on values in your authorities.

Important

Did you mean? only works in the OPAC at this time. The intranet options are here for future development.

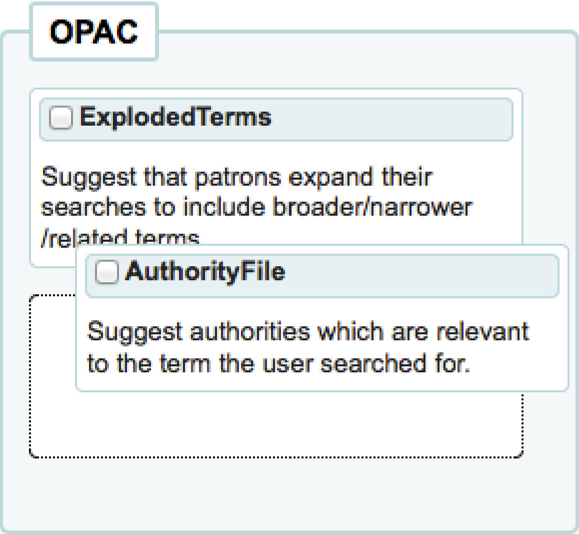
Using this page you can control which options Koha gives patrons on their search results.



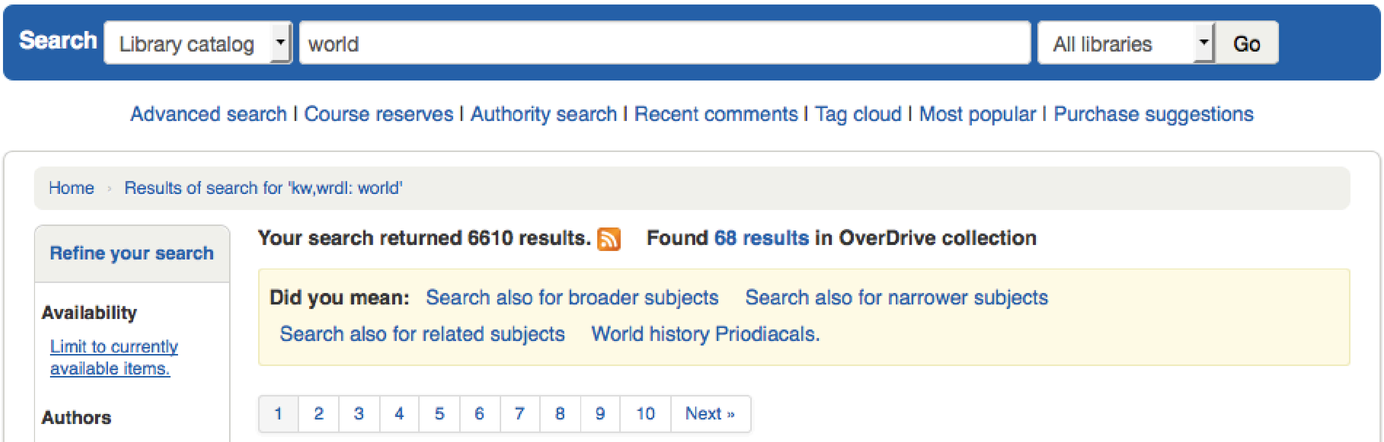
To turn on the 'Did you mean?' bar on your search results you need to check the box next to each plugin you would like to use. The two plugins you have to choose from are:

- The ExplodedTerms plugin suggests that the user try searching for broader/narrower/related terms for a given search (e.g. a user searching for "New York (State)" would click the link for narrower terms if they're also interested in "New York (City)"). This is only relevant for libraries with highly hierarchical authority data.
- The AuthorityFile plugin searches the authority file and suggests the user might be interested in bibs linked to the top 5 authorities

If you want one plugin to take priority over another you simply drag it above the other.



If you choose both plugins you will see several options at the top of your search results



If you choose just the AuthorityFile you'll see just authorities.

Table settings

This administration area will help you hide or display columns on fixed tables throughout the staff interface and OPAC.

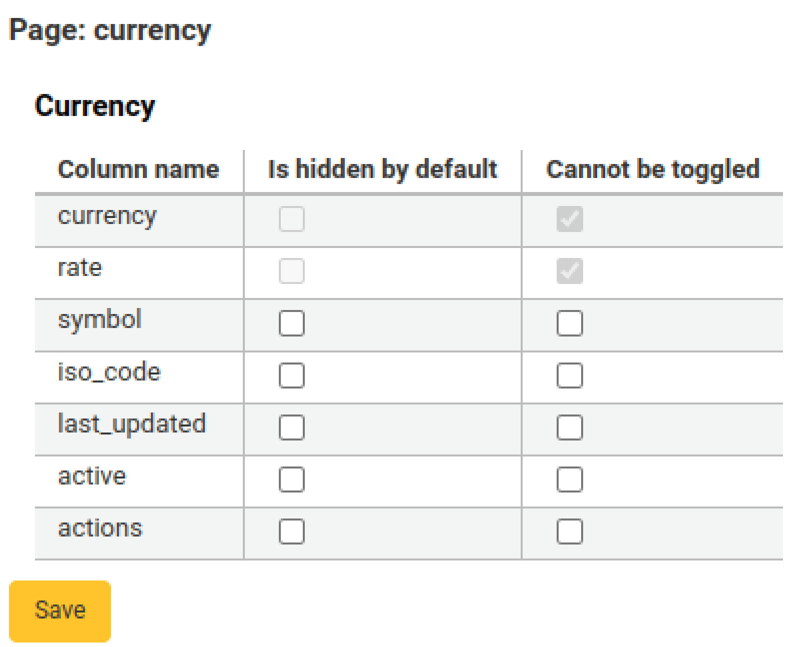
- *Get there:* Administration > Additional parameters > Table settings

Note

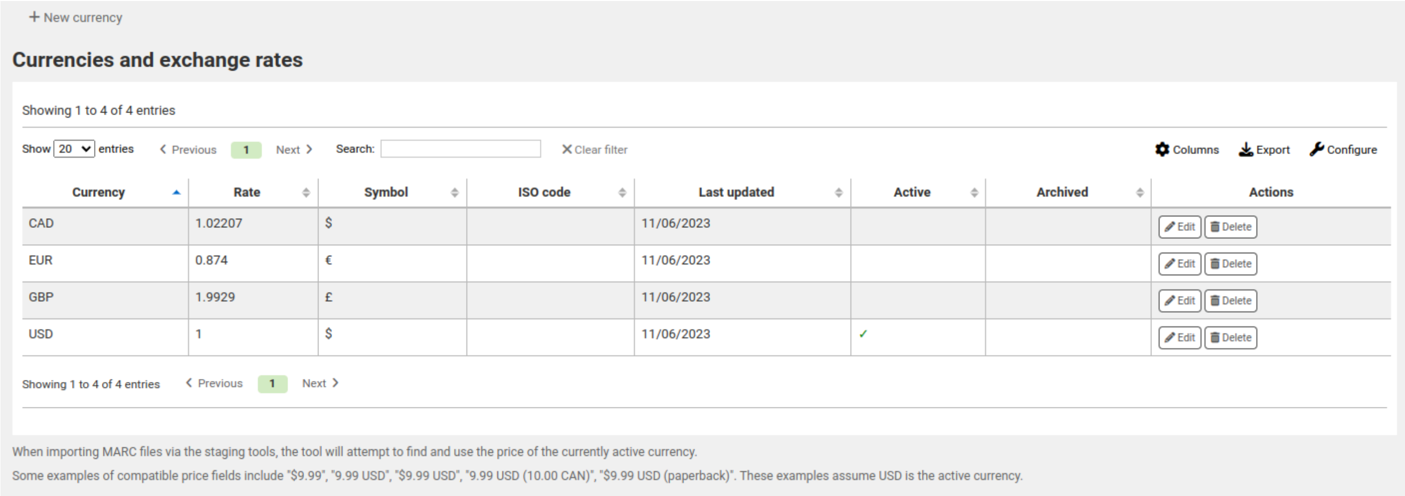
Only staff with the manage_column_config permission (or the superlibrarian permission) will have access to this section.

Clicking on the module you'd like to edit tables for will show you the options available to you.

This area lets you control the columns that show in the table in question. If nothing is hidden you will see no check marks in the 'is hidden by default' column.



And will see all of the columns when viewing the table on its regular page.


+ New currency

Currencies and exchange rates

Showing 1 to 4 of 4 entries

Show 20 entries ‹ Previous 1 Next › Search: ✕ Clear filter Columns Export Configure

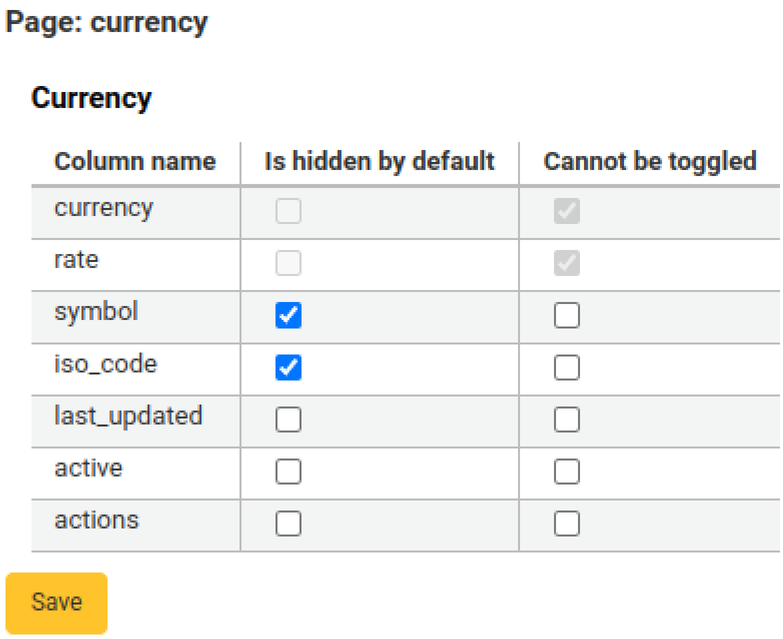
Currency	Rate	Symbol	ISO code	Last updated	Active	Archived	Actions
CAD	1.02207	$		11/06/2023			Edit Delete
EUR	0.874	€		11/06/2023			Edit Delete
GBP	1.9929	£		11/06/2023			Edit Delete
USD	1	$		11/06/2023	✓		Edit Delete

Showing 1 to 4 of 4 entries ‹ Previous 1 Next ›

When importing MARC files via the staging tools, the tool will attempt to find and use the price of the currently active currency.

Some examples of compatible price fields include "$9.99", "9.99 USD", "$9.99 USD", "9.99 USD (10.00 CAN)", "$9.99 USD (paperback)". These examples assume USD is the active currency.

If columns are hidden they will have checks in the 'is hidden by default' column.

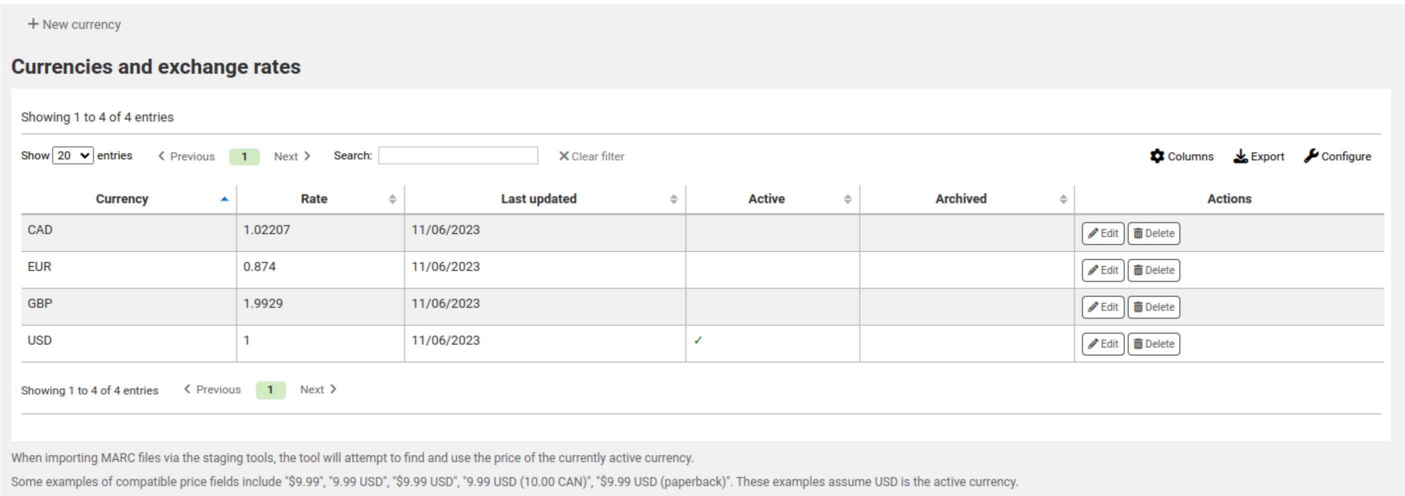

Page: currency

Currency

Column name	Is hidden by default	Cannot be toggled
currency	☐	☑
rate	☐	☑
symbol	☑	☐
iso_code	☑	☐
last_updated	☐	☐
active	☐	☐
actions	☐	☐

Save

And hidden when you view the table.


+ New currency

Currencies and exchange rates

Showing 1 to 4 of 4 entries

Show 20 entries ‹ Previous 1 Next › Search: ✕ Clear filter Columns Export Configure

Currency	Rate	Last updated	Active	Archived	Actions
CAD	1.02207	11/06/2023			Edit Delete
EUR	0.874	11/06/2023			Edit Delete
GBP	1.9929	11/06/2023			Edit Delete
USD	1	11/06/2023	✓		Edit Delete

Showing 1 to 4 of 4 entries ‹ Previous 1 Next ›

When importing MARC files via the staging tools, the tool will attempt to find and use the price of the currently active currency.

Some examples of compatible price fields include "$9.99", "9.99 USD", "$9.99 USD", "9.99 USD (10.00 CAN)", "$9.99 USD (paperback)". These examples assume USD is the active currency.

The 'Cannot be toggled' column is used to prevent individual users from showing or hiding this column when viewing the table.

Individual users can toggle columns using the 'Columns' button at the top of the table.

For example, in the Currencies table, the 'Currency' and 'Rate' columns cannot be toggled. When the user clicks on the 'Columns' button, they are not able to choose whether these two columns are hidden or visible.

Note that using the 'Columns' button show or hide columns will only toggle them for the current user and session. Once the user logs out, the columns will go back to their default settings as set in the table settings administration page. It will not affect any other user.

Module	Tables
Acquisitions	• Funds table on the main acquisition page (accounts) • Basket summary (orders) • Order search results (histsearcht) • Late orders (late_orders) • Suggestions (suggestions)
Administration	• Patron categories (patron_categories) • Cities (table_cities) • Currencies (currency) • Item types (table_item_type) • Libraries (libraries)
Authorities	There aren't any tables that can be configured from the Authorities module.
Catalog	• Acquisition details (acquisitiondetails-table) • Item bundles (bundle_tables) • Checkout history (checkoutshistory-table) • Holdings/items (holdings_table) • Holdings/items from other libraries (otherholdings_table) (when SeparateHoldings is enabled)
Cataloging	• Reservoir results (reservoir-table) • Item table above edit item form (Items Editor) • Catalog concern management (table_concerns) • Z39.50 search results (resultst)

Module	Tables
Circulation	• Holds tab in the patron's checkout page (holds-table) • Checkouts (issues-table) • Relatives' checkouts (relatives-issues-table) • Patron search results (table_borrowers) • List of holds on a bibliographic record (patron_holds_table) **Version** Table settings for the list of holds on a bibliographic record (patron_holds_table) was added in version 23.11 of Koha. • Holds awaiting pickup (holds with cancellation requests) (holdscr) • Holds awaiting pickup (holds waiting over X days) (holdso) • Holds awaiting pickup (holds waiting) (holdst) • Hold ratios (holds-ratios) • Overdues report (circ-overdues) • Checkouts table when printing the summary (print-summary-checkouts) • Charges table when printing the summary (print-summary-fines) • Holds table when printing the summary (print-summary-holds) • Checkins (checkedintable) • Holds queue (holds-table)
Course reserves	• Courses (courses page, course_reserves_table) • Reserves (reserves page, course_reserves_table)
E-resource management	• Agreements (agreements) • E-holdings packages (packages) • E-holdings titles (titles) • Licenses (licenses)
Interlibrary loans	• Requests (ill-requests)
Patrons	• Patron checkout history (checkouthistory-table) • Accounting > Transactions (account-fines) • Holds history (holdshistory-table) • Patron search results (memberresultst) • Details > Holds (holds-table)

Module	Tables
	• Details > Checkouts (issues-table) • Details > Relatives' checkouts (relatives-issues-table) • Patron lists (patron-list-table) • Accounting > Make a payment (pay-fines-table)
Point of sale	• Point of sale (invoices)
Tools	• Batch patron modification tool (borrowerst) • Log viewer (logst) • MARC modification templates templatest • Notices and slips (lettert) • Stock rotation rotas (stock_rotation) • Stock rotation items (stock_rotation_manage_items) • List of files in upload tool (uploadresults)
OPAC	• Course reserves (course-items-table) • Courses (course_reserves_table) • Holdings/Items (holdingst) • Serials issues on subscription tab (subscriptionst)
Reports	• Items lost (lostitems-table) • Orders by fund (funds-table) • Saved SQL reports (table_reports)
Serials	• Acquisition details (orders)

Note

Patrons in the OPAC can't toggle column visibility. For OPAC tables this feature only allows to control the visibility of columns.

Note

Any tables with columns listed here also have the option to export to Excel, export to CSV, copy, or print within the table header.

Audio alerts

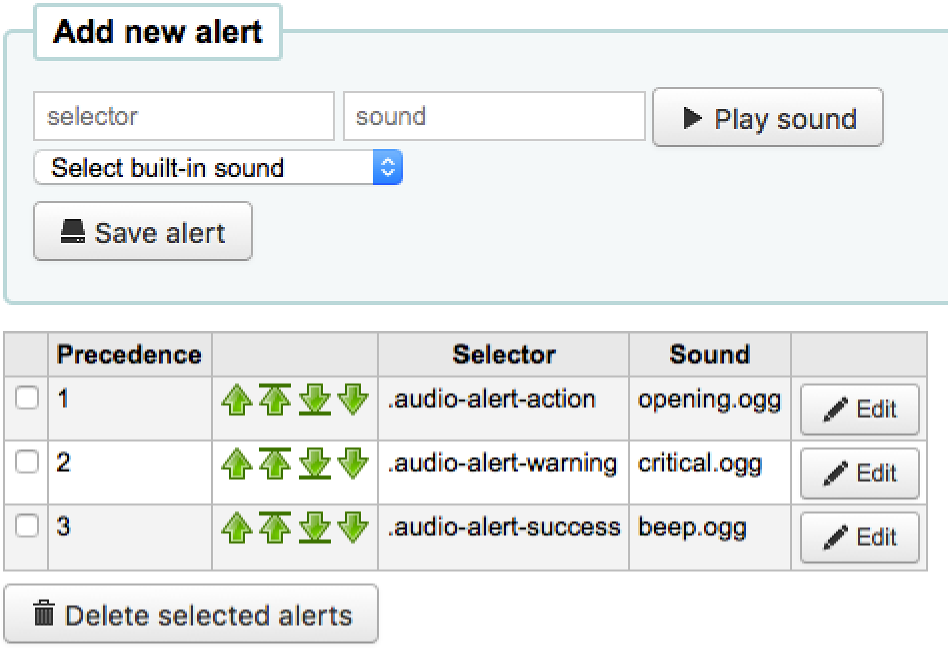
If you have your AudioAlerts preference set to 'Enable' you will be able to control the various alert sounds that Koha uses from this area.

- *Get there:* More > Administration > Additional parameters > Audio alerts

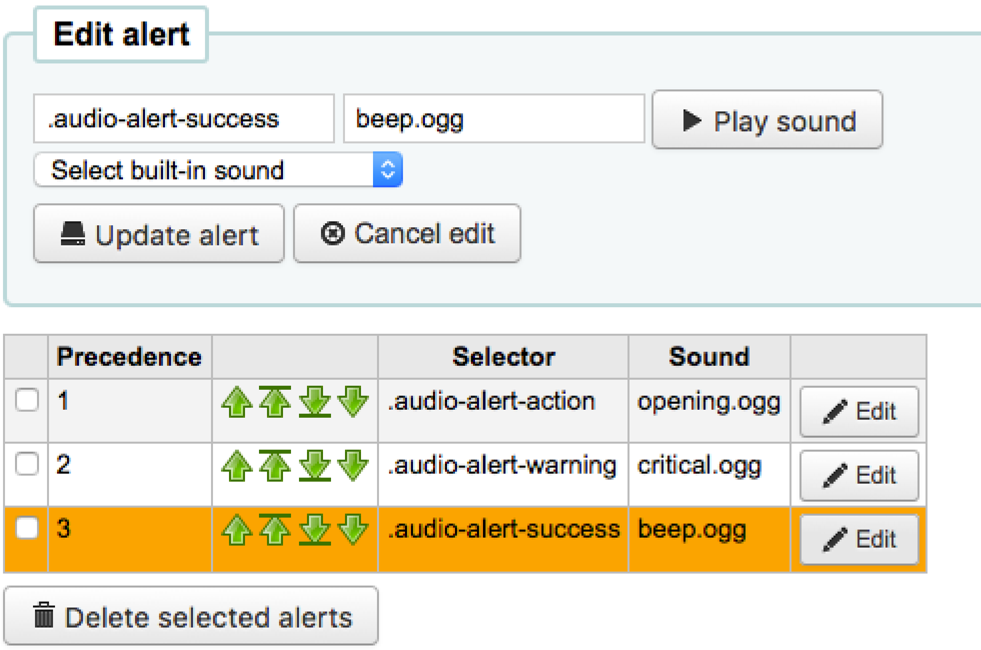
Note

Only staff with the manage_audio_alerts permission (or the superlibrarian permission) will have access to this section.

Each dialog box in Koha has a CSS class assigned to it that can be used as a selector for a sound.



You can edit the defaults by clicking the ‘Edit’ button to the right of each alert.



You can assign alerts to other CSS classes in Koha by entering that information in the selector box. For example if you enter

```
body:contains('Check in message')
```

Then when you visit the check-in page you will hear an alert.

Every page in Koha has a unique ID in the body tag which can be used to limit a sound to a specific page

Any ID selector (where HTML contains id=”name_of_id”) and can also be a trigger as: #name_of_selector

SMS cellular providers

Important

This option will only appear if the [SMSSendDriver] preference is set to 'Email'.

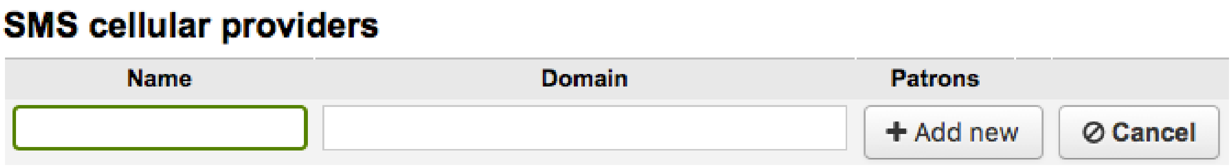
Note

Only staff with the manage_sms_providers permission (or the superlibrarian permission) will have access to this section.

Note

Many mobile providers have deprecated support for the SMS::Send::Email feature. It is not recommended for use unless you have a dedicated SMS to Email gateway.

From here you can enter as many cellular providers as you need to send SMS notices to your patrons using the email protocol.



Some examples in the US are:

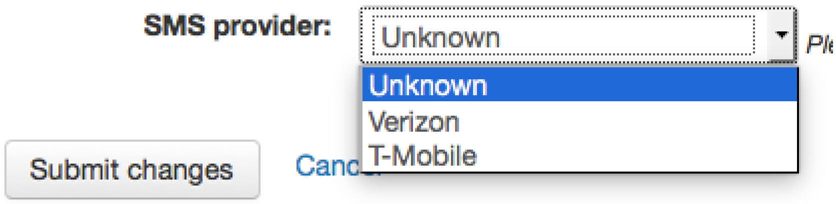
Mobile carrier	SMS gateway domain
Alltel	sms.alltelwireless.com
AT&T	txt.att.net
Boost Mobile	sms.myboostmobile.com
Project Fi	msg.fi.google.com
Republic Wireless	text.republicwireless.com
Sprint	messaging.sprintpcs.com
T-Mobile	tmomail.net

Mobile carrier	SMS gateway domain
U.S. Cellular	email.uscc.net
Verizon Wireless	vtext.com
Virgin Mobile	vmobl.com

Table: SMS provider examples

To add new providers enter the details in the form and click ‘Add new’ to save.

These options will appear in the OPAC for patrons to choose from on the messaging tab if you have EnhancedMessagingPreferences enabled.



Share your usage statistics

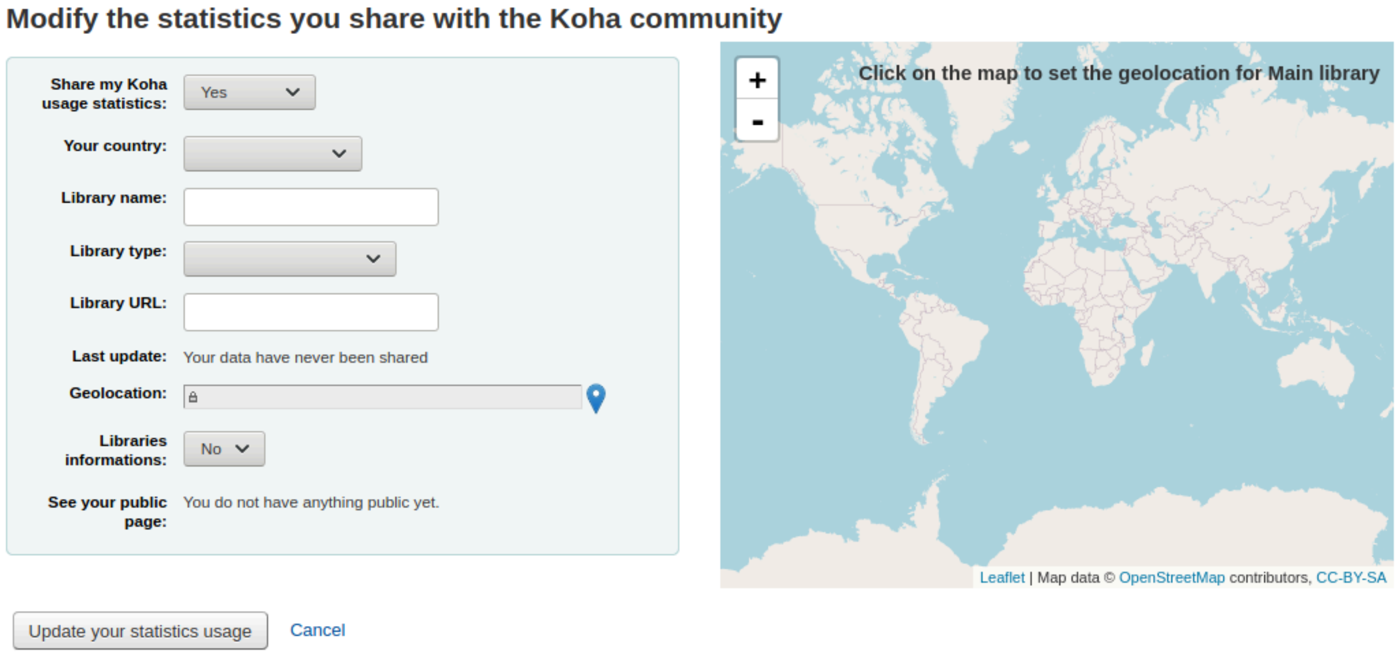
You can share your Koha usage statistics with the Hea community. Sharing your usage statistics helps with the development of Koha as the community regularly checks these statistics to make decisions.

Note

Only staff with the manage_usage_stats permission (or the superlibrarian permission) will have access to this section.

Note that statistics are anonymized and no patron information is shared.

Worldwide statistics can be viewed at https://hea.koha-community.org/



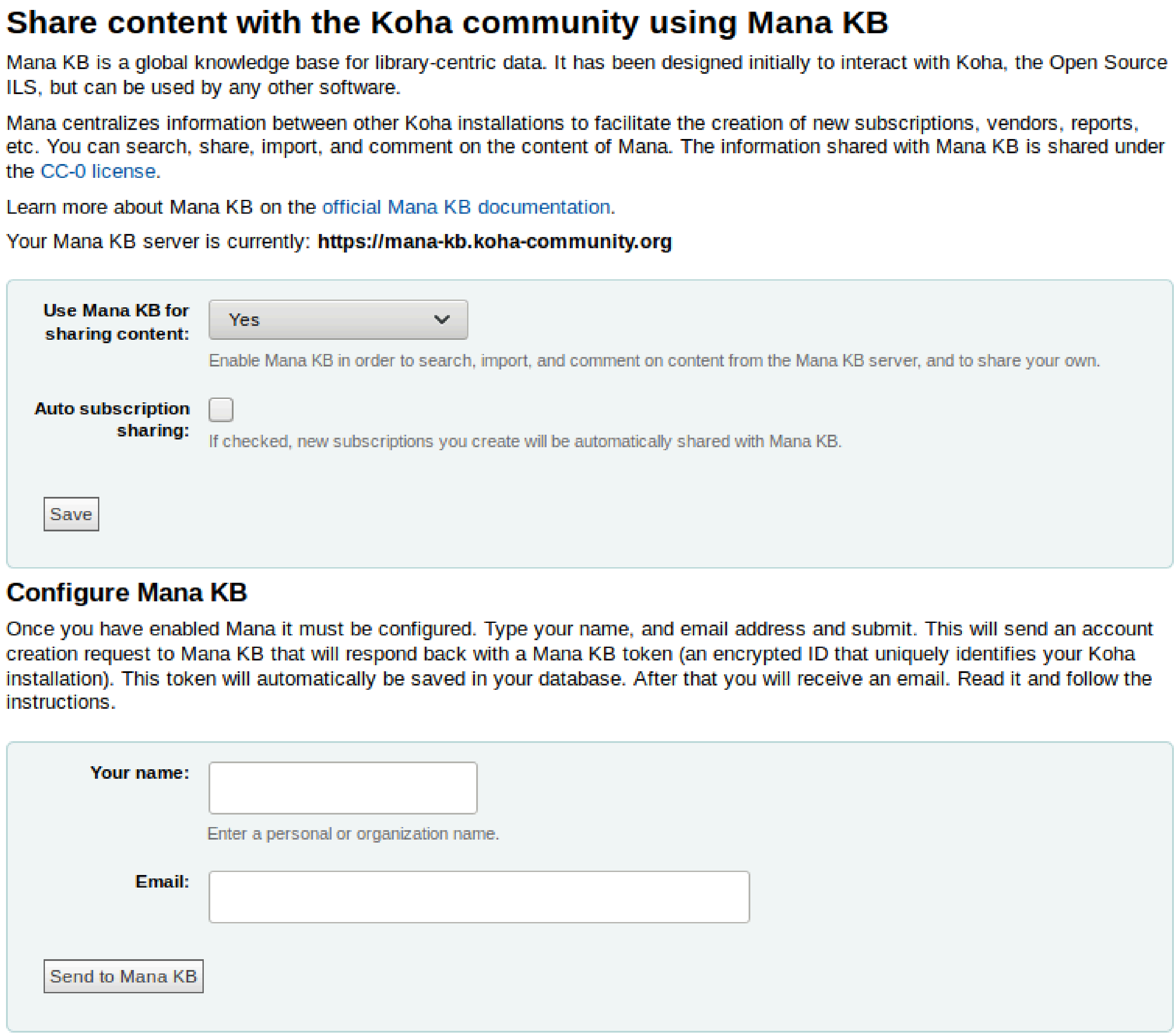
- Share my Koha usage statistics:
  - The default choice is ‘Undecided’, this make the message appear on the administration main page.
  - Choose ‘yes’ if you want to share your usage statistics
  - Choose ‘no’ if you don’t want to share your statistics and you don’t want to see the message on the administration page
- Your country: choose the country where your library is located
- Library name: enter your library’s name
- Library type: choose your library’s type
- Library URL: enter your library’s Web site URL
- Last update: here your will see the last date when your data was uploaded to the Hea website
- Geolocation: use the map on the right to put the marker where your main library is situated. The coordinates will appear in the Geolocation field.
- Libraries information: if you have more than one branch, you can choose ‘yes’ here to put all your branches on the map
- See your public page: this is the URL to your information on the Hea website.

Click ‘Update your statistics usage’ to save the information.

Share content with Mana KB

Mana KB is a worldwide knowledge base used to share content specific to libraries. Koha is currently connected to Mana Kb in order to share serial subscription models and reports. This section is used to configure your connexion with Mana KB.

Get there: More > Administration > Additional parameters > Share content with Mana KB



Note

Only staff with the manage_mana permission (or the superlibrarian permission) will have access to this section.

In the form, choose whether you want to use Mana KB to share content or not. The default is “No, let me think about it”. If you do want to use Mana KB, change the option to “Yes”. If you do not want to share with Mana KB, choose “No”, this will remove the blue rectangle from the Administration home page.

The rest of this section assumes you chose “Yes”.

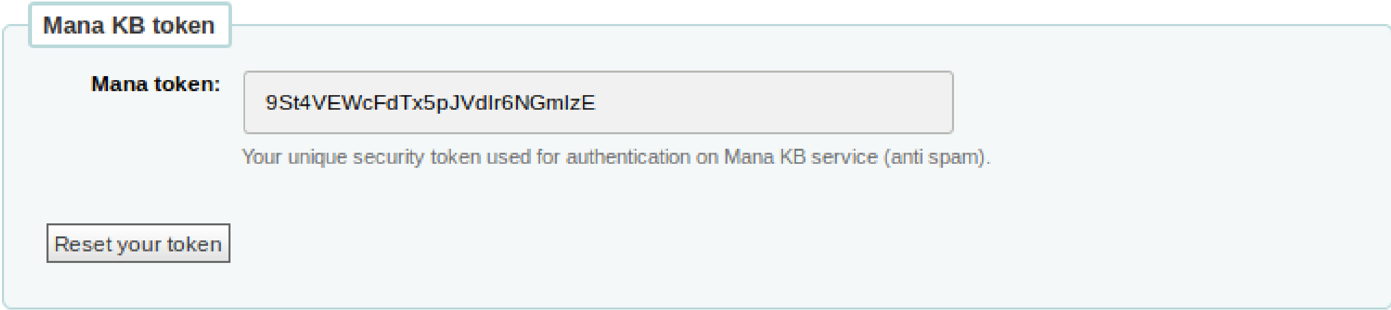
Choose whether you want to share your subscription models automatically. This means that every time you create a subscription in the serials module, it will be automatically shared with Mana KB and other libraries will be able to copy it.

In order to configure Mana KB, you must get a Mana KB token to authenticate your Koha installation on the Mana KB server.

Enter your name or your organization’s name in the “Your name” field.

Enter your email in the “Email” field. Make sure you have access to this email inbox since you will receive further information by email.

Once you send your information to Mana KB, you will get a Mana KB token.



In the email your receive, click on the confirmation link and confirm you are not a robot to finish the Mana KB setup.

Additional fields

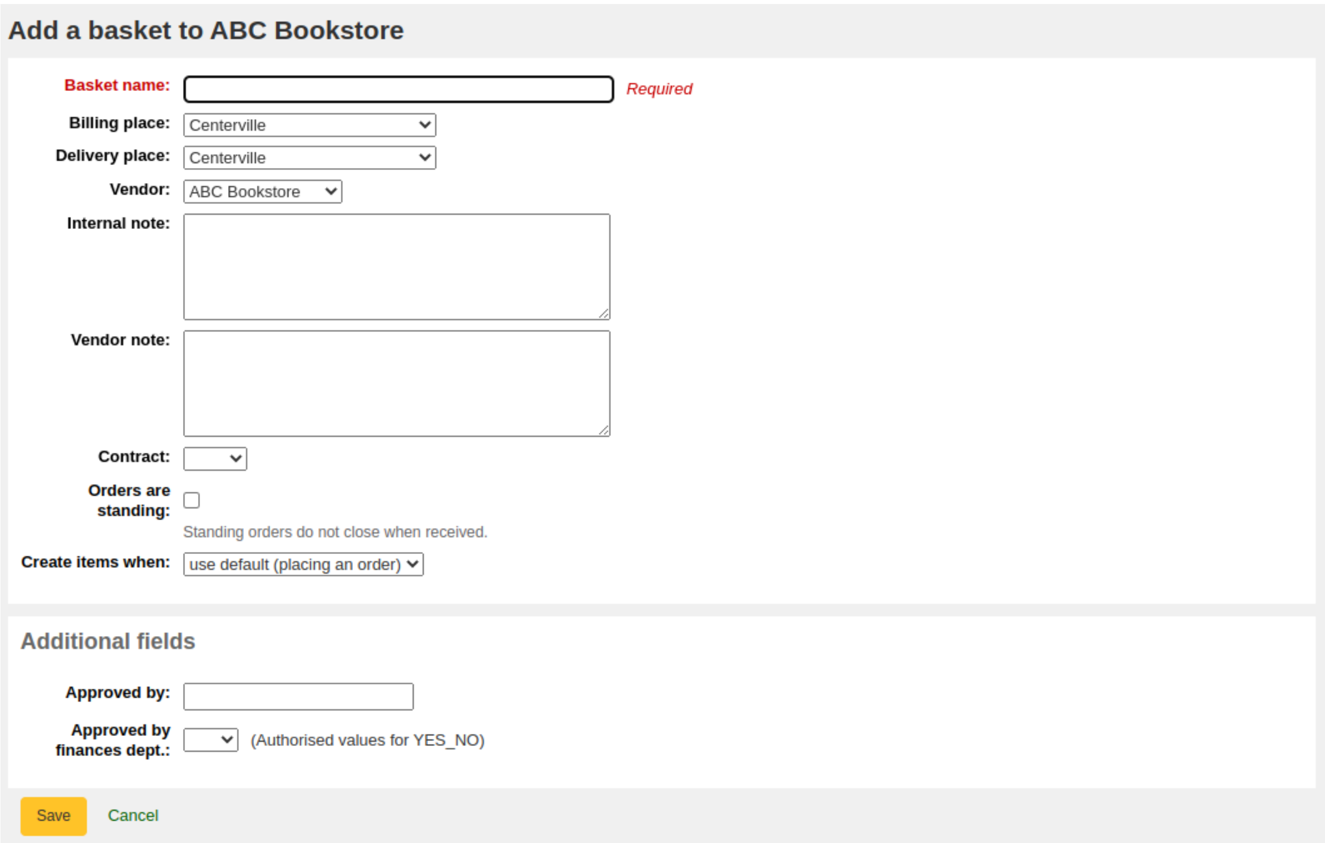
This section is used to add custom fields to order baskets, invoice, serial subscriptions, and accountlines.

Note

Only staff with the manage_additional_fields permission (or the superlibrarian permission) will have access to this section.

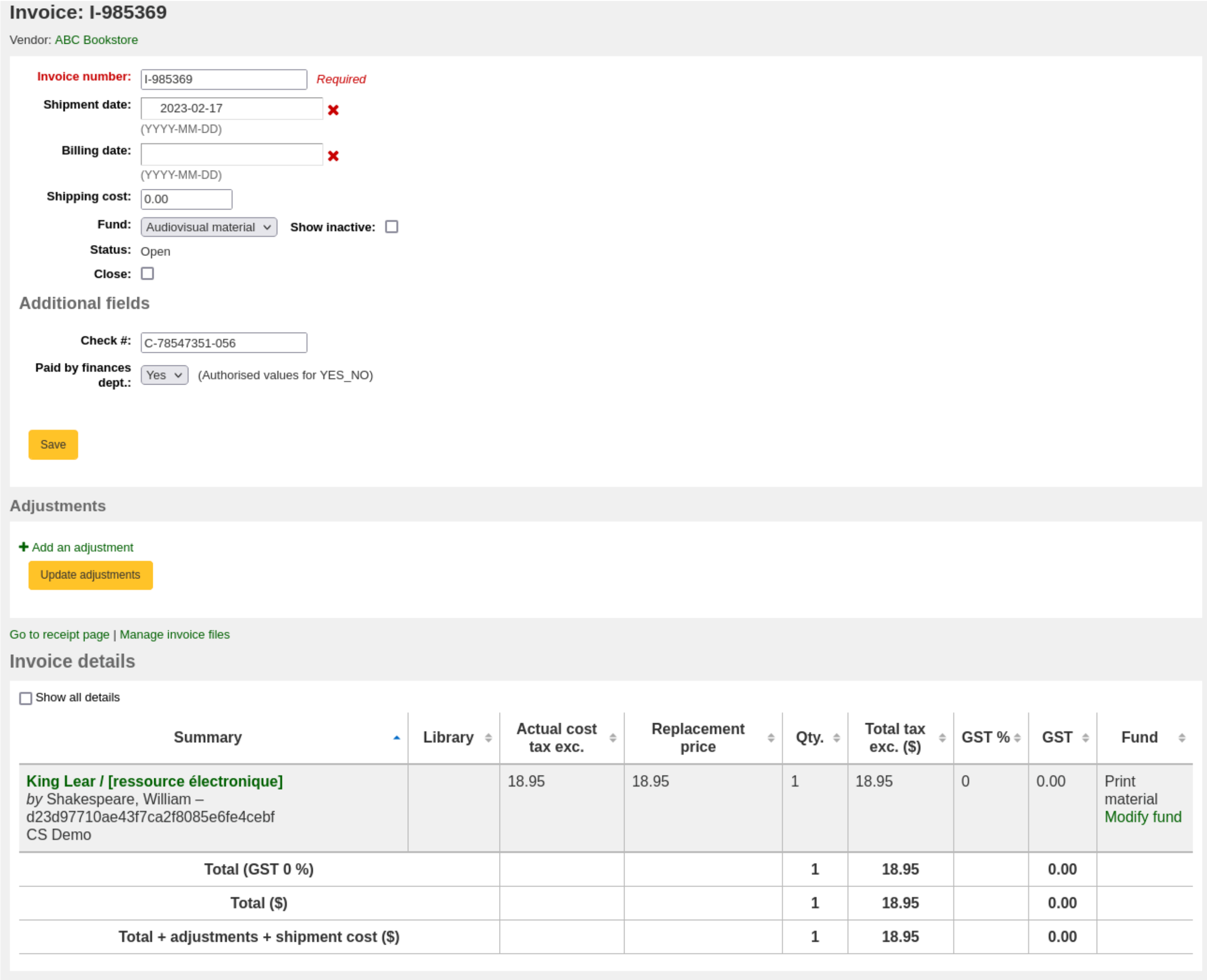
To add a new field, first choose which table you want to add it to.

- Order baskets (aqbasket): a field added to aqbasket will appear upon the creation of a new order basket or the modification of an existing order basket in the acquisitions module.

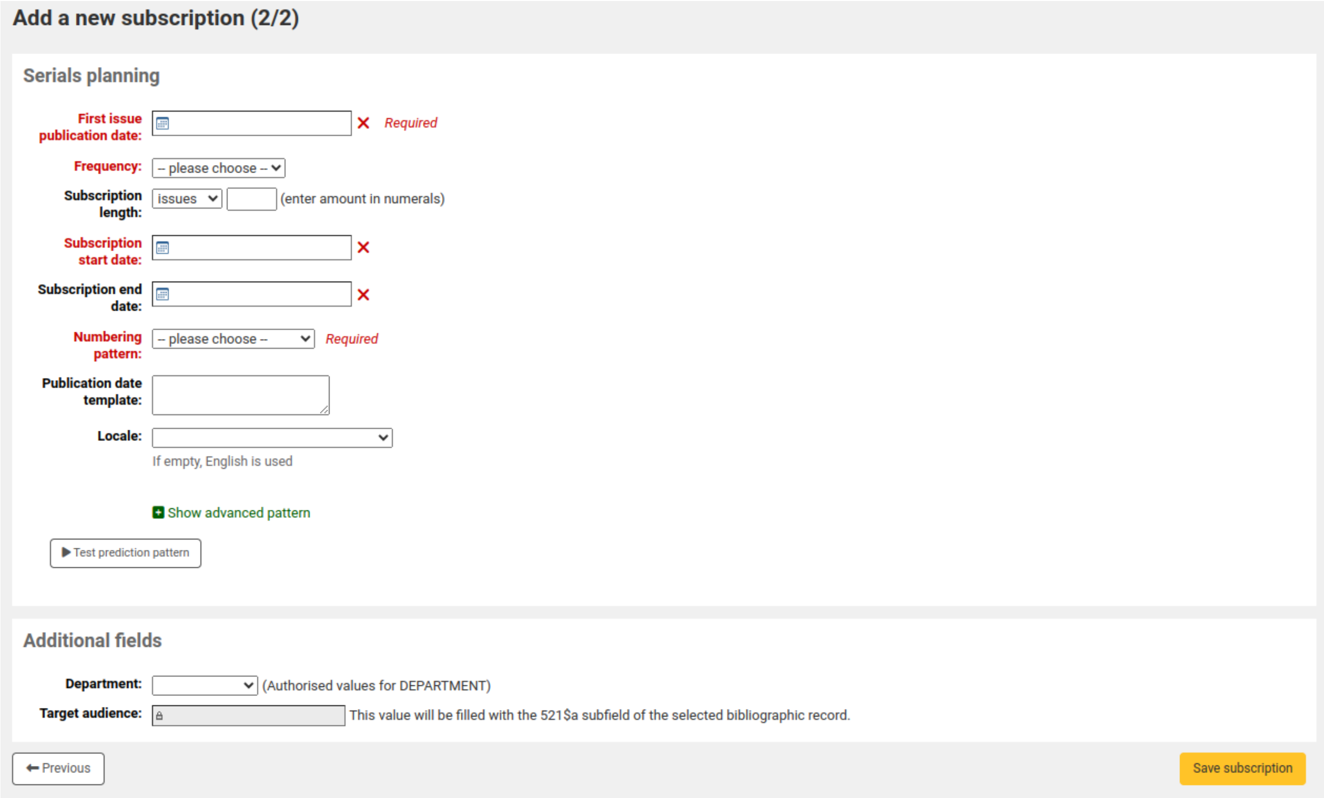


- Order lines (aqorders): a field added to aqorders will appear when adding orders to a basket or editing orders in open baskets.

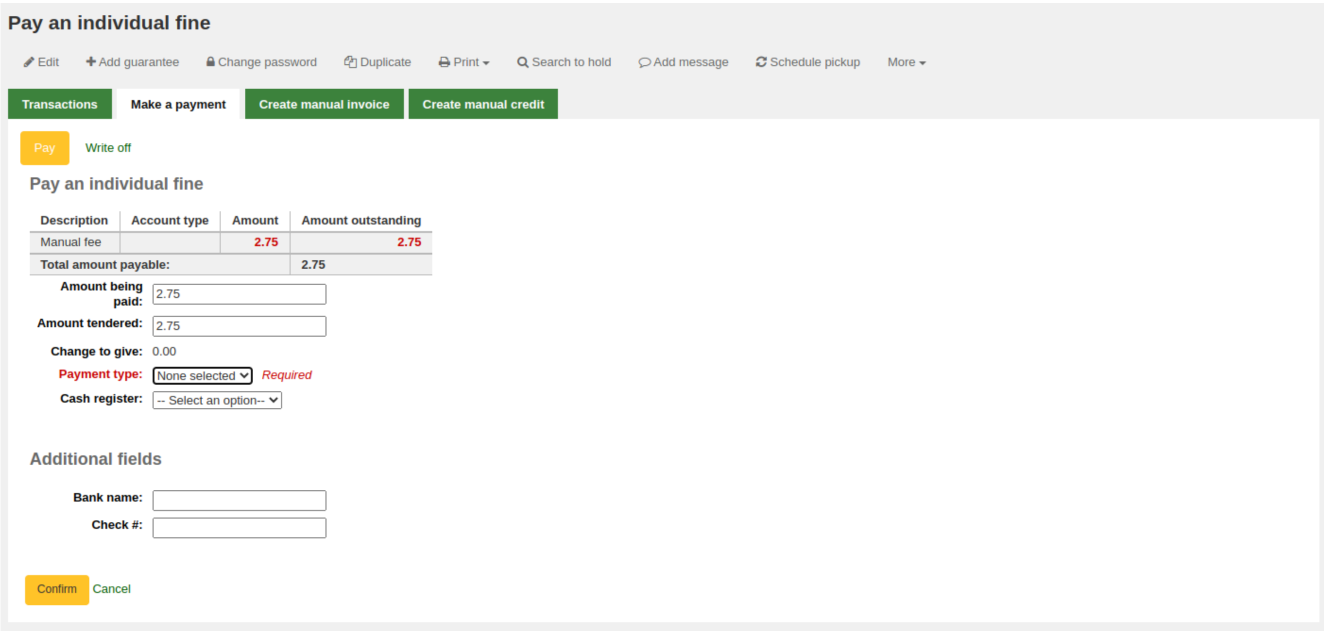
- Invoices (aqinvoices): a field added to aqinvoices will appear when viewing an [invoice in the acquisitions module](#).



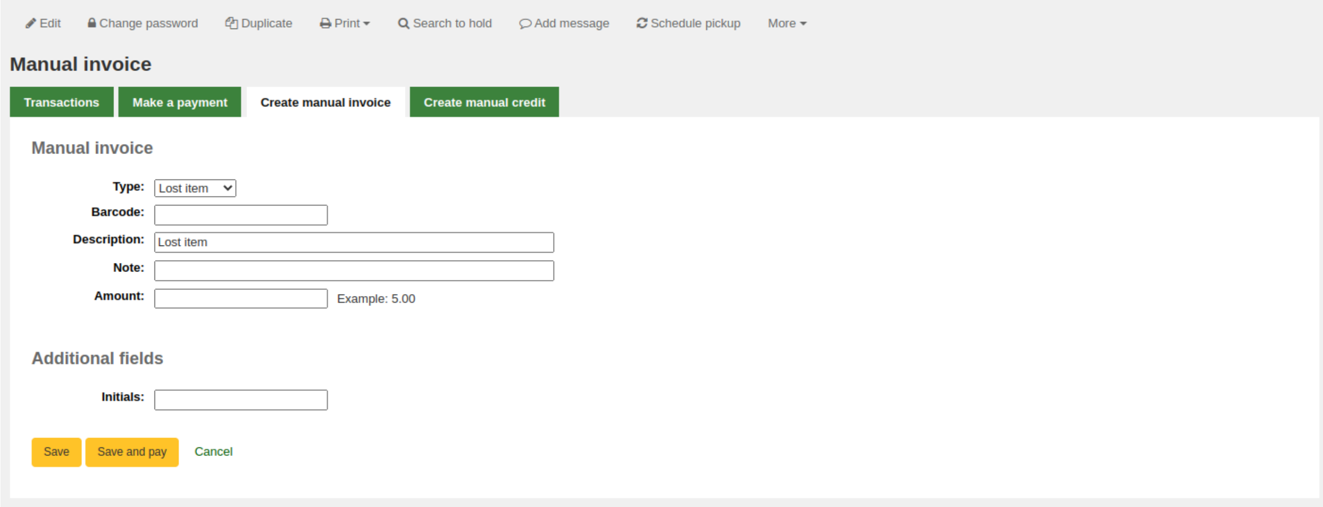
- Subscriptions (subscription): a field added to subscription will appear when [creating a new subscription](#) or when [editing an existing subscription](#) in the serials module.



- Account lines (credit) (accountlines:credit): a field added to account line credits will appear when [paying or writing off charges in a patron's account] or when [creating manual credits].

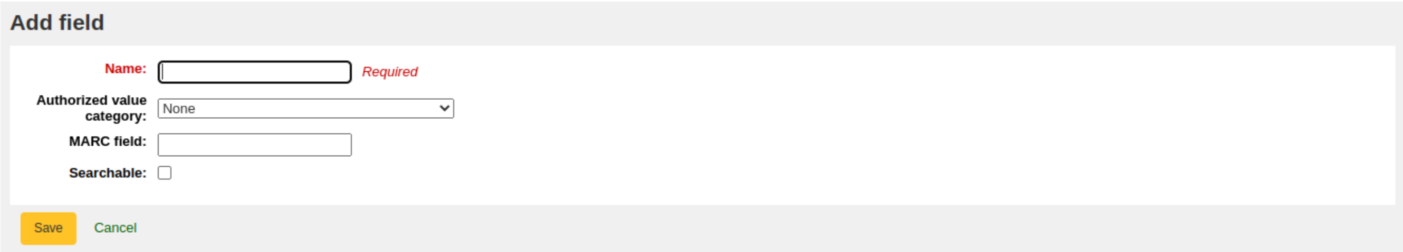


- Account lines (debit) (accountlines:debit): a field added to account line debit will appear when [creating a manual invoice]



Click on “Create field”

Fill out the form



- Name: this is the name of the field as you want it to appear.
- Authorized value category: if you want to add a drop-down menu to the field choose an authorized value category here (you can also create a new authorized value category if you need to).
- MARC field: for additional subscription fields, it is possible to link the field to a MARC field. The additional field will be automatically populated with the corresponding record’s value for this MARC field.

Note

You can only choose one of the two options (authorized value OR MARC field)

Warning

If you choose the MARC field, make sure you enter it in this format: field$subfield

For example: 590$a

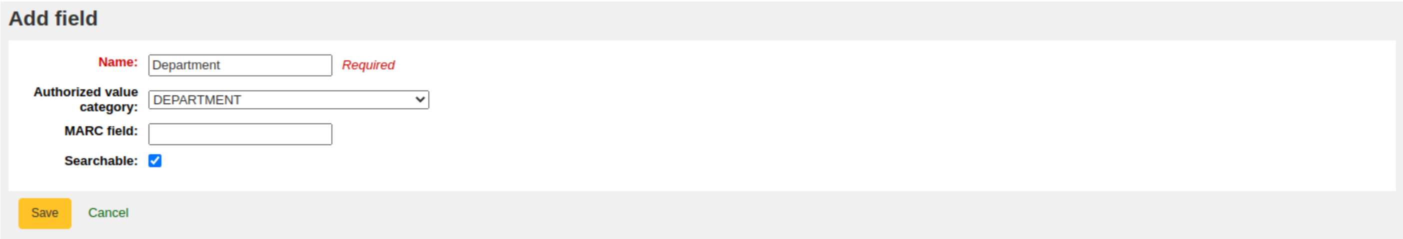
- Searchable: check this box if you want to be able to search baskets or subscriptions based on this field
  - Order basket searchable additional fields will be available in the orders advanced search form
  - Invoice searchable additional fields will be available in the invoice search form
  - Subscription searchable additional fields will be available in the subscription advanced search form

Examples of additional fields

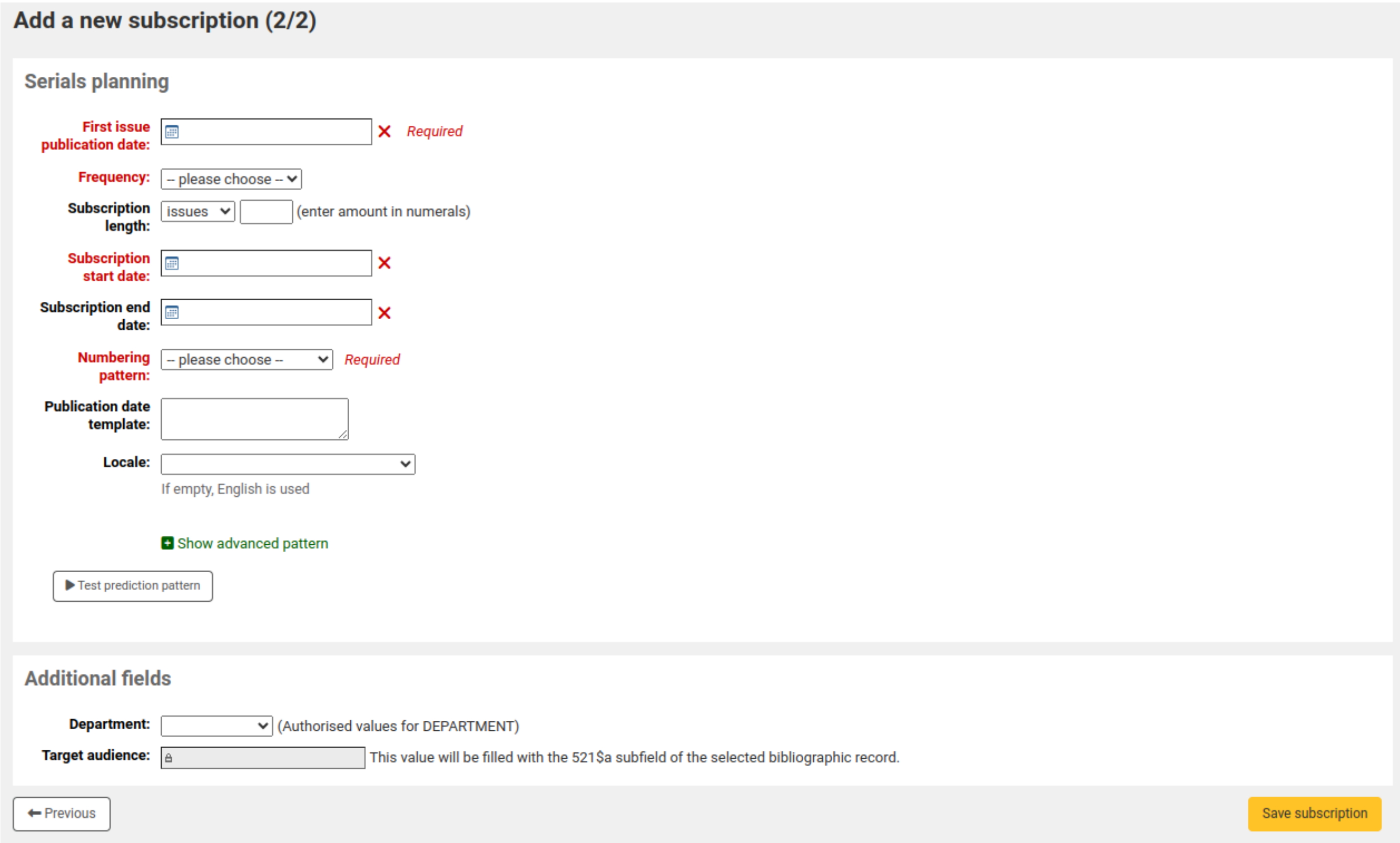
Example 1: Additional subscription field using authorized values

You might want to track which department you're ordering this serial for

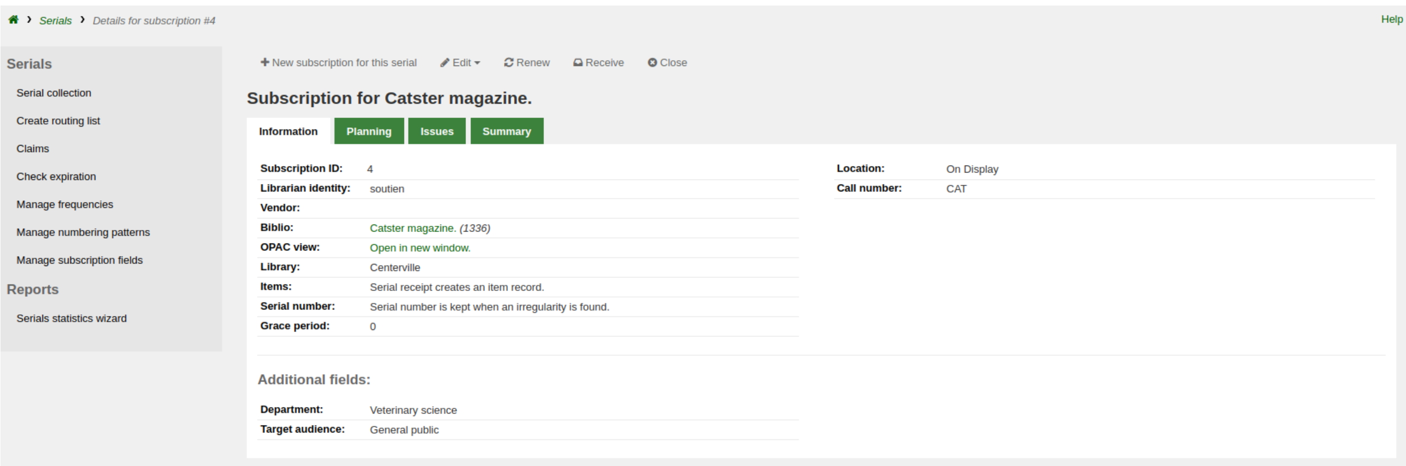
- In the 'Name' field, enter 'Department'
- In the 'Authorized value category' field, choose DEPARTMENT
- Check the 'Searchable' box



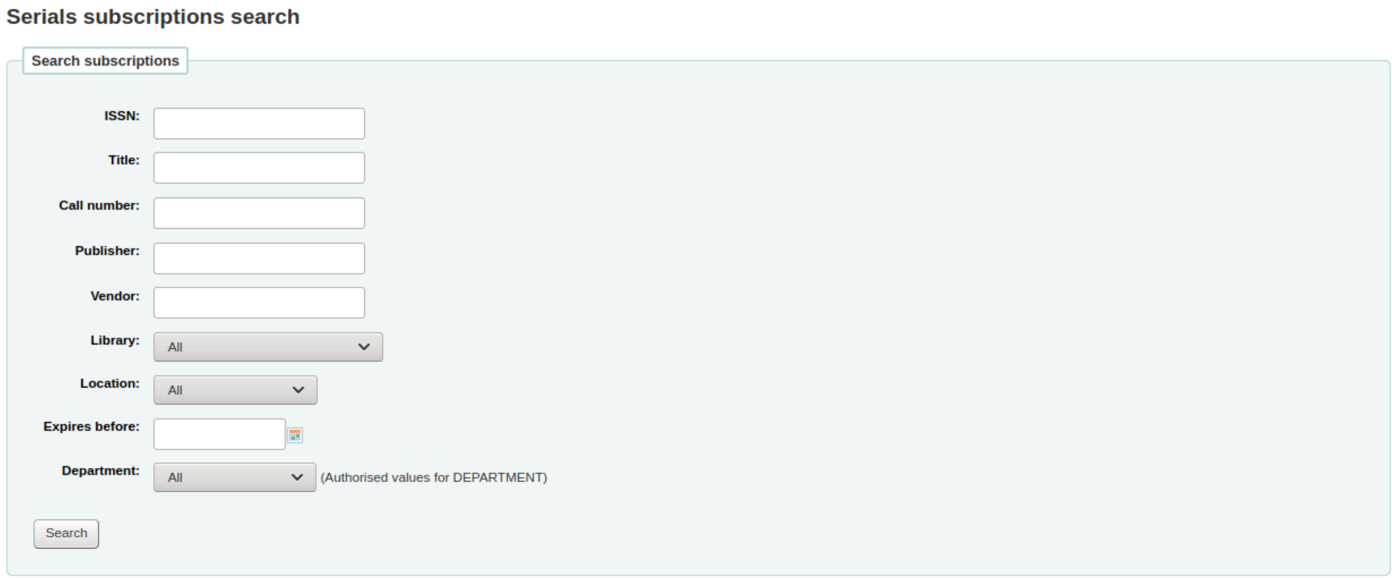
When you are [adding a subscription](), the field will be in the 'Additional fields' section with its authorized values drop-down menu.



When you view the subscription, the field will appear under 'Additional fields'.



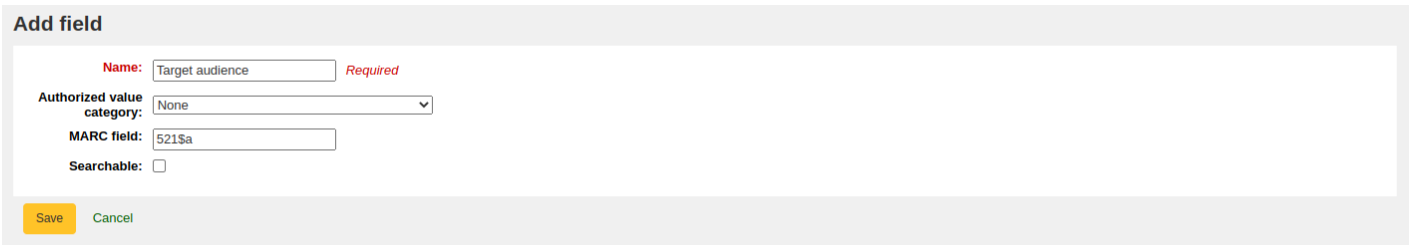
Because we made the field searchable, it will also be in the serials subscription search.



Example 2: Additional subscription field using MARC field

This is particularly useful if you want to view bibliographic information in the subscription detail page. In this example, we will add the 521$a field, which is, in MARC21, the target audience note.

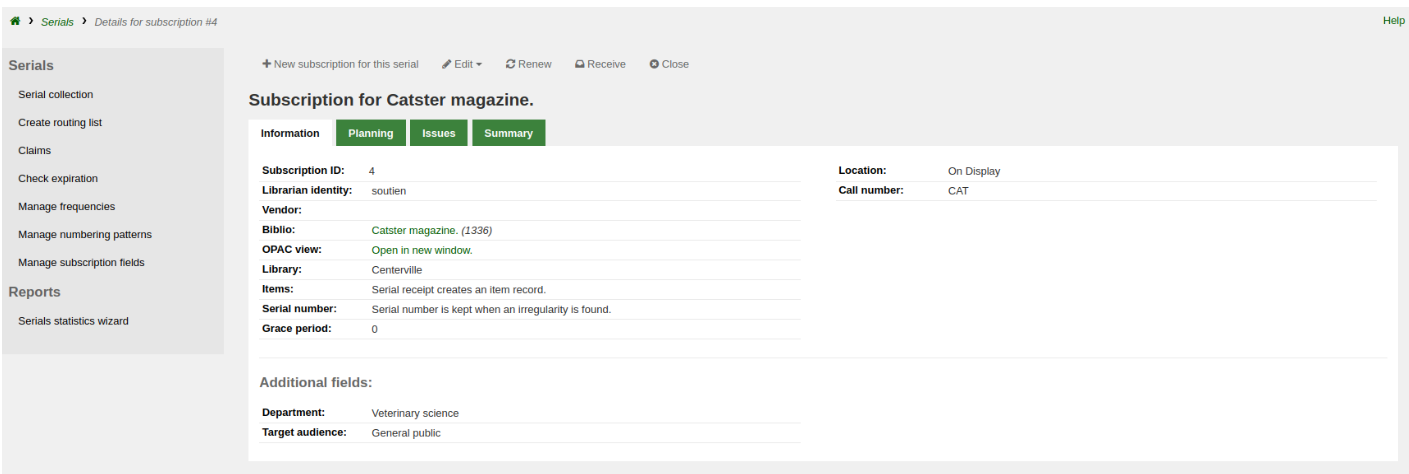
- In the 'Name' field, enter 'Target audience'
- In the 'MARC field' field, enter '521$a'



Note

You will not be able to edit this field from the subscription form. If you need to add or change the value in this field, you must go through the [cataloging module](#).

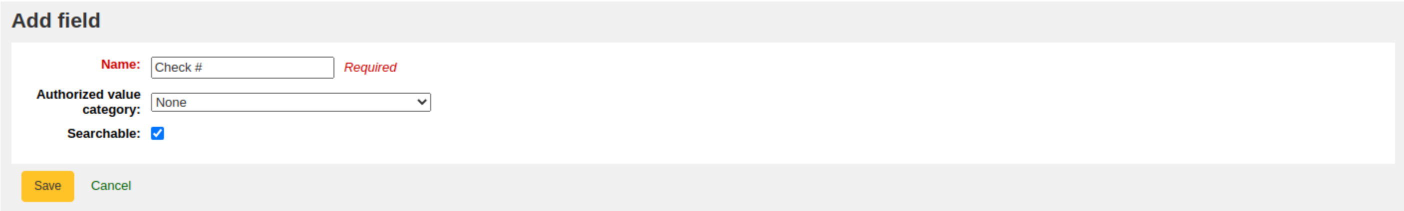
When you view the subscription, the field and the information from the bibliographic record will appear under 'Additional fields'.



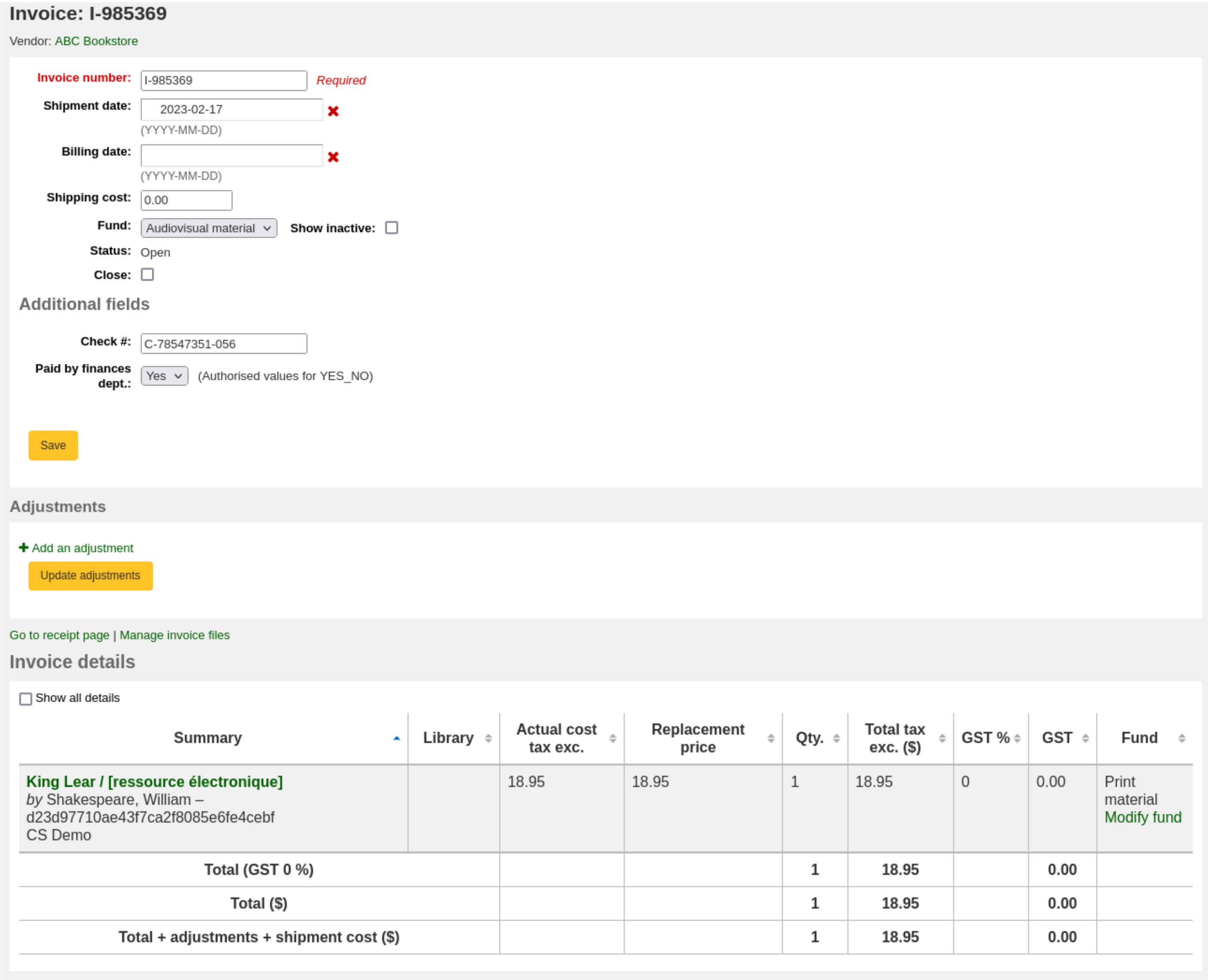
Example 3: Free text invoice additional field

If you need to enter additional information in invoices, such as the number of the check used to pay for the invoice, you can choose not to use an authorized value at all.

- In the ‘Name’ field, enter ‘Check #’
- Check the ‘Searchable’ box



The new fields will be displayed when [viewing the invoice] in the [acquisitions module].



Because we made the field searchable, it will also be in the invoice search.

Search filters

Invoice number

Vendor:

All

Shipment date

From:

(YYYY-MM-DD)

To:

(YYYY-MM-DD)

Billing date

From:

(YYYY-MM-DD)

To:

(YYYY-MM-DD)

ISBN / EAN / ISSN:

Title:

Author:

Publisher:

Publication year:

Library:

All

Check #:

Paid by finances dept.:

All

Search

Invoices

Use the search form on the left to find invoices.