

# Introduction to the Koha installation process

This is the Koha installation manual.

The Koha installation process uses 2 tools:

- Web installer
- Onboarding tool

This documentation will outline both of these tools.

## What is the Koha web installer?

The web installer sets up the database tables that store all the data you work with in Koha, for example the library branches, patrons and items.

The web installer starts with a login screen for you to enter the database administrator account credentials.

The installer will then create the tables and fill the tables with data. The next step in the process is to set up a few mandatory first use settings, via the onboarding tool.

## What is the Koha onboarding tool?

The onboarding tool makes sure you have at least one library, patron category, patron, item type and circulation rule before you start using Koha.

If you installed sample data for library, patron category, and/or item type then the screens to create these will be skipped.

You will, however, always have to create a patron (to log into the staff interface at the end of the onboarding tool) and a circulation rule.

## Web installer

### Web installer login

#### Web installer login

This login screen is the first screen that appears when installing Koha.

## Welcome to the Koha 16.12 web installer

1

Before we begin, please verify you have the correct credentials to continue. Please log in with the username and password given to you by your systems administrator and located in your `koha-conf.xml` configuration file.

Please enter your username and password

Username:

2

Password:

3

Log in

4

Web installer login

1. **Koha version name:** This will display whatever Koha version number you are installing.
2. **Username:** This is database administrator username which is *koha\_kohadev* by default.
3. **Password:** This is the database administrator password which is *password* by default.
4. **Log in:** Select this button to login

## Language picker

### Installer start screen

This is the first screen of the web installer.

## Web installer › Choose your language

You are about to install Koha.

Please pick your language from the following list. If your language is not listed, please inform your system administrator.

Select a language:

1

Continue to the next step

2

Web installer start screen

1. **Language picker** dropdown box: This is specifying the language you want Koha to be in.

### Note

Installing other languages that have translations for the installer (DE or FR, for example) will allow those languages to be used for the web installer.

2. Click the *Continue to the next step* button to load the next stage of the web installer.

## Installer perl modules installed

This screen tells you that the installer has all the dependencies it needs, to create the database in the next screen.

### Web installer › Check Perl dependencies

All required Perl modules appear to be installed.

All dependencies installed.

Continue to the next step



Perl modules installed

Click on the *Continue to the next step* button to load the next stage of the web installer.

## Database settings

This screen informs you of the database settings and asks you to confirm them by clicking the *Continue to the next step* button.

### Note

For the majority of users these settings should be correct, if not then you should contact your support provider.

### Web installer › Database settings

#### Database settings:

- Database type : `mysql`
- Database name : `koha_kohadev`
- Database host : `localhost`
- Database port : `3306` (probably okay if blank)
- Database user : `koha_kohadev`

1

Continue to the next step

2

Database settings

1. **Database settings:** Check these database settings are correct.
2. Click the *Continue to the next step* button to confirm the database settings

---

## Connection established

After you click the *Next* button the database connection is confirmed:

## Web installer › Database settings

### Database settings:

- Database type : `mysql`
- Database name : `koha_kohadev`
- Database host : `localhost`
- Database port : `3306` (probably okay if blank)
- Database user : `koha_kohadev`

Connection established.

1

- Database `koha_kohadev` exists.
- User `koha_kohadev` has all required privileges on database `koha_kohadev`.

Continue to the next step

2

Database connection established

1. **Connection established message:** This informs you that the database has been successfully created.
2. Click the *Continue to the next step* button to load the next stage

### Note

If you have database connection difficulties here, the installer will not proceed. Double check the connection information in your `koha-conf.xml` file, and verify that the permissions and credentials on the database itself are correct.

## Ready to fill tables with data

This screen is informing you everything is set up for you to create the database tables in the next screen.

### Web installer › Set up database

Now we're ready to create the database tables and fill them with some default data.

Continue to the next step



Database ready for data

Click the *Continue to the next step* button to load the next stage

### Note

This step can take some time. Please be patient.

## Database tables created

## Web installer › Success

Database tables created

Continue to the next step



Database tables created

Click the *Continue to the next step* button

## Ready for basic configurations

This screen leads onto installing basic configurations necessary to use Koha.

### Web installer › Install basic configuration settings

We are ready to do some basic configuration.

Continue to the next step



Ready for basic configurations

Click the *Continue to the next step* button

## Select MARC flavour

You must choose your MARC flavour (format you want the bibliographic (catalog) records to be stored in the database) on this screen:

### Select your MARC flavor

MARC stands for Machine Readable Cataloging. A MARC record contains bibliographic information about an item. MARC21 is used globally, whereas UNIMARC tends to be used in Europe.

☐ Unimarc

1

☒ Marc21

2

Continue to the next step

3

Select MARC flavour

1. **Unimarc:** This is frequently used in European countries (except for the UK) such as Italy.
2. **MARC21:** Selected by default, as it is more commonly used globally than UNIMARC.
3. Click the *Continue to the next step* button to confirm your choices

## MARC21 and UNIMARC setup

### Note

In the previous screen you either choose MARC21 or UNIMARC as your MARC flavour. This page outlines both.

**MARC21 setup**

## Web installer › Selecting default settings

### MARC frameworks: MARC21

#### Mandatory

[Select none](#)

☒ Default MARC21 Standard Authority types:

1

Personal Name  
Corporate Name  
Meeting Name  
Uniform Title  
Chronological Term  
Topical Term  
Geographic Name  
Genre/Form Term

(*authorities\_normal\_marc21*)

☒ Default MARC 21 bibliographic framework.

(*marc21\_framework\_DEFAULT*)

2

#### Optional

[Select all](#)

☐ Selected matching rules for MARC 21 bibliographic records, including:

3

ISBN  
ISSN  
(*marc21\_default\_matching\_rules*)

☐ 'FA', a 'Fast Add' minimal MARC21 framework suitable for ILL or on-the-fly cataloguing.

(*marc21\_sample\_fastadd\_framework*)

4

☐ Simple MARC 21 bibliographic frameworks for some common types of bibliographic material. Frameworks are used to define the structure of your MARC records and the behavior of the integrated MARC editor. You can change these at any time after installation. The frameworks in this optional default setting include:

5

BKS Books, Booklets, Workbooks  
CF CD-ROMs, DVD-ROMs, General Online Resources  
SR Audio Cassettes, CDs  
VR DVDs, VHS  
AR Models  
KT Kits  
IR Binders  
SER Serials  
(*marc21\_simple\_bib\_frameworks*)

### Other data

#### Mandatory

[Select none](#)

☒ Default Koha system authorised values

(*auth\_values*)

6

☒ Default classification sources and filing rules

(*class\_sources*)

7

☒ Defines default message transports for email and sms.

8

(*message\_transport\_types*)

(*message\_transport\_types*)

- ☒ *(patron\_attributes)* **9**
- ☒ Sample frequencies for subscriptions **10**  
*(sample\_frequencies)*
- ☒ Sample notices **11**  
*(sample\_notices)*
- ☒ Defines default messages for the enhanced messaging configuration. **12**  
*(sample\_notices\_message\_attributes)*
- ☒ Defines default message transports for sending item due messages and advance notice messages through email and SMS. **13**  
*(sample\_notices\_message\_transports)*
- ☒ Sample numbering patterns for subscriptions **14**  
*(sample\_numberpatterns)*

## Optional

Select all

- ☐ Some basic default authorised values for library locations, item lost status, etc. You can change these at any time after installation. **15**  
*(auth\_val)*
- ☐ CSV profiles **16**  
Default CSV export profiles; including one for exporting serial claims.  
*(csv\_profiles)*
- ☐ Coded values conforming to the Z39.71-2006 holdings statements for bibliographic items. **17**  
Refer to <http://www.niso.org/standards/index.html> for details.  
*(marc21\_holdings\_coded\_values)*
- ☐ MARC code list for relators, as of <http://www.loc.gov/marc/relators/relaterm.html> **18**  
*(marc21\_relatorterms)*
- ☐ Some basic currencies with USA dollar as default for ACQ module **19**  
*(parameters)*
- ☐ Useful patron attribute types: **20**  
\* SHOW\_BCODE - Show barcode on the patron summary screen items listings  
*(patron\_attributes)*
- ☐ Sample patron types and categories. Types are currently hardcoded but you can manage categories after installation from the administration module. **21**  
  
Adult patron - default patron type  
PT - Patron  
ST - Student  
BH - Homebound  
  
Child - patron with a guarantor  
K - Kid  
J - Juvenile  
YA - Young Adult  
  
Organization - patron is an institution, not a person  
ILL - Inter-library Loan  
SC - School  
L - Library  
  
Professional - a member of an organization (organization is guarantor)  
T - Teacher  
S - Staff  
B - Board  
*(patron\_categories)*
- ☐ Sample label and patron card data **22**  
*(sample\_creator\_data)*
- ☐ Sample holidays: Sunday, Christmas, New Year's **23**  
*(sample\_holidays)*
- ☐ A set of default item types



☐ **Set of default item types** (sample\_itemtypes) **24**

☐ **Sample libraries.** (sample\_libraries) **25**

☐ **Sample news items** (sample\_news) **26**

☐ **Sample patrons** (sample\_patrons) **27**

☐ **Sample quotes** (sample\_quotes) **28**

☐ **Allow access to the following servers to search and download record information:** **29**

LIBRARY OF CONGRESS

LIBRARY OF CONGRESS NAMES (authority records)

LIBRARY OF CONGRESS SUBJECTS (authority records)

COLUMBIA UNIVERSITY

(sample\_z3950\_servers)

When you've made your selections, please click 'Import' below to begin the process. It may take a while to complete. Please be patient.

**30**

## MARC21 setup

- 1. Default MARC21 standard authority types:** An authority type is a template of an authority record (stores the search fields used to search an institutions catalog for an item). This option will install sample authority types.
- 2. Default MARC21 bibliographic framework:** Following on from the MARC21 selection in the previous screen selecting this checkbox (and the *Import* button) will actually setup the MARC21 bibliographic framework as the desired MARC flavour.
- 3. Selected matching rules for MARC21 bibliographic records:** The MARC21 matching rules are used to find all the information about specific bibliographic records using the authority type search values.
- 4. 'FA', a 'fast add' minimal MARC21 framework suitable for ILL, or on the fly cataloging:** The FA MARC framework displays fewer fields, and allows for faster cataloguing on the fly. Select this checkbox to install this minimal framework.
- 5. Sample MARC21 bibliographic frameworks for some common types of bibliographic material:** This installs the template you will use to create items.
- 6. Default Koha system authorized values:** This installs mandatory authorized values that every Koha installation needs.
- 7. Default classification sources and filling rules:** This will insert several common library classification sources such as Dewey decimal.
- 8. Defines default message transports for email and SMS:** This provides the option to the user of being able to change how the library contacts them. They can choose from the following: email address, printed message, SMS, or phone call. Notices will not work without these.
- 9. Patron attributes:** This does not install any data, and it needs to be removed.
- 10. Sample frequencies for subscriptions:** For items that arrive on a regular and predictable basis (e.g. monthly magazines), installing sample frequencies is useful because you can simply select a pre-installed sample frequency when you create the item.
- 11. Sample notices:** This inserts sample notices into the database, meaning all you have to do is customize these sample notices before you use them. Creating these by hand can be very time consuming and error prone.
- 12. Defines default messages for the enhanced messaging configuration:** The enhanced messaging configuration lets the user choose what messages they receive from the institution. Selecting this will insert sample message types for the due, pre due, and advance notice message types.
- 13. Defines default message transports for sending item due messages and advance notice messages through email and SMS:** This inserts the SMS and email transport types. Mandatory if you want to send notices by email or SMS.

14. **Sample numbering patterns for subscriptions:** This option will install sample numbering patterns, saving you having to manually insert them for magazines and other periodicals.
15. **Some basic default authorized values for library locations, item lost status, etc. You can change these at any time after installation:** This installs authorized values, which filter user inputs, to make sure they match specified criteria before the library or other object is created.
16. **CSV profiles:** Using Koha you can export items. The CSV profile defines how you want to export the item(s). CSV/tab exports will not work without these.
17. **Coded values conforming to the Z39.71-2006 holdings statements for bibliographic items:** Not required to use Koha. A holding statement tells the user if the library has a specific item and where it is located. Selecting will install sample code values for items in the holding statements.
18. **MARC code list for relators:** Not required to use Koha. A relator is a person who was involved in the development of the item (e.g. author). Selecting this will insert sample relator records into the database.
19. **Some basic currencies with USA dollar as default for ACQ module:** Install US dollar, Great British Pound, Canadian Dollar and Euro currencies. Set the US dollar as the default acquisition currency. Not installing these will mean that a currency will need to be defined before acquisitions can be used.
20. **Useful patron attribute types:** Not required to use Koha. Patrons have a barcode which identifies them. By clicking this checkbox you are making sure that this patron barcode is displayed on the patron summary screen.
21. **Sample patron types and categories:** Not required to use Koha. Selecting this will install sample patron categories into the database. This will mean the create patron category step in the onboarding tool is skipped.
22. **Sample label and patron card data:** Not required to use Koha, but recommended for most new installs. Selecting this will install sample data for labels and patron cards and will make it easier to create a labels and patron cards in the future.
23. **Sample holidays: Sunday, Christmas, New Year's** Not required to use Koha. Selecting this will insert sample repeatable public holidays (e.g. Christmas) into the database.
24. **A set of default item types:** Not required for Koha. Selecting this will insert sample item type data into the database, meaning the create item type step in the onboarding tool will be skipped.
25. **Sample libraries:** Not required for Koha. Selecting this will insert sample libraries into the database. Developers will often want this for demo or development purposes. Selecting this means the create library step in the onboarding tool will be skipped.
26. **Sample news items:** Not required for Koha. Selecting this will insert sample news items that are displayed on the OPAC (Online Public Access Catalog) and staff client into the database.
27. **Sample patrons:** Not required for Koha. Patrons are the people who use the Koha Library Management System, for example: library users and staff. Selecting this will insert a number of sample patrons into the database. Developers will often want this for demo or development purposes.
28. **Sample quotes:** Not required for Koha. Quotes of the day can be displayed to library users on the OPAC (Online Public Access Catalog) interface. Selecting this will install a few library related sample quotes.
29. **Allow access to the following servers to search and download record information:** Not required to use Koha, but recommended for most new installs. Selecting this configures Koha to allow access to a selection of Z39.50 targets, which allow searching the target servers for MARC21 records to import them into your Koha instance. This can avoid the need to manually input all record information manually, or greatly speed up the process.
30. Click the *Import* button to install the default and selected data values.

## UNIMARC setup

There are only two data values in the UNIMARC advanced setup which are unique:

- Authority structure for UNIMARC in English
- Default UNIMARC bibliographic framework in English

### Note

Optional values are the same for both UNIMARC and MARC21, therefore their definition will not be repeated.

### MARC frameworks: UNIMARC

Mandatory

[Select none](#)

- ☒ Authority structure for UNIMARC in English.  
(*authorities\_normal\_unimarc*) **1**
- ☒ Default UNIMARC bibliographic framework in English.  
(*unimarc\_framework\_DEFAULT*) **2**

### Other data

Mandatory

[Select none](#)

- ☒ Default Koha system authorised values  
(*auth\_values*)
- ☒ Default classification sources and filing rules  
(*class\_sources*)
- ☒ Defines default message transports for email and sms.  
(*message\_transport\_types*)
- ☒ (*patron\_attributes*)
- ☒ Sample frequencies for subscriptions  
(*sample\_frequencies*)
- ☒ Sample notices  
(*sample\_notices*)
- ☒ Defines default messages for the enhanced messaging configuration.  
(*sample\_notices\_message\_attributes*)
- ☒ Defines default message transports for sending item due messages and advance notice messages through email and SMS.  
(*sample\_notices\_message\_transports*)
- ☒ Sample numbering patterns for subscriptions  
(*sample\_numberpatterns*)

### Optional

[Select all](#)

- ☐ Some basic default authorised values for library locations, item lost status, etc. You can change these at any time after installation.  
(*auth\_val*)
- ☐ CSV profiles  
  
Default CSV export profiles; including one for exporting serial claims.  
(*csv\_profiles*)
- ☐ Coded values conforming to the Z39.71-2006 holdings statements for bibliographic items.  
Refer to <http://www.niso.org/standards/index.html> for details.  
(*marc21\_holdings\_coded\_values*)
- ☐ MARC code list for relators, as of <http://www.loc.gov/marc/relators/relaterm.html>  
(*marc21\_relatorterms*)
- ☐ Some basic currencies with USA dollar as default for ACQ module  
(*parameters*)
- ☐ Useful patron attribute types:  
\* SHOW\_BCODE - Show barcode on the patron summary screen items listings  
(*patron\_attributes*)

- ☐ Sample patron types and categories. Types are currently hardcoded but you can manage categories after installation from the administration module.

Adult patron - default patron type

PT - Patron

ST - Student

BH - Homebound

Child - patron with a guarantor

K - Kid

J - Juvenile

YA - Young Adult

Organization - patron is an institution, not a person

ILL - Inter-library Loan

SC - School

L - Library

Professional - a member of an organization (organization is guarantor)

T - Teacher

S - Staff

B - Board

(patron\_categories)

- ☐ Sample label and patron card data  
(sample\_creator\_data)

- ☐ Sample holidays: Sunday, Christmas, New Year's  
(sample\_holidays)

- ☐ A set of default item types.  
(sample\_itemtypes)

- ☐ Sample libraries.  
(sample\_libraries)

- ☐ Sample news items  
(sample\_news)

- ☐ Sample patrons  
(sample\_patrons)

- ☐ Sample quotes  
(sample\_quotes)

- ☐ Allow access to the following servers to search and download record information:  
LIBRARY OF CONGRESS  
LIBRARY OF CONGRESS NAMES (authority records)  
LIBRARY OF CONGRESS SUBJECTS (authority records)  
COLUMBIA UNIVERSITY  
(sample\_z3950\_servers)

When you've made your selections, please click 'Import' below to begin the process. It may take a while to complete. Please be patient.

Import

3

## UNIMARC setup

1. *Authority structure for UNIMARC in English:* Authority records store the search terms used to find items in the database. Unlike MARC21, when using UNIMARC the authority structure needs to be compatible with UNIMARC. Selecting this option makes it compatible.
2. *Default UNIMARC bibliographic framework in English:* In the previous screen you clicked to use the UNIMARC flavour, now by selecting this option you are confirming you want to use that framework.
3. Click the *Import* button to install the sample data

## Selected data added

After you have clicked the *Import* button in either the MARC21 or UNIMARC setup screen this screen will appear. It shows you if the selected/default data values were successfully inserted into the database.

## Web installer › Default data loaded

### Optional data added

- auth\_val.sql
- csv\_profiles.sql
- marc21\_default\_matching\_rules.sql
- marc21\_holdings\_coded\_values.sql
- marc21\_relatorterms.sql
- marc21\_sample\_fastadd\_framework.sql
- marc21\_simple\_bib\_frameworks.sql
- parameters.sql
- patron\_attributes.sql
- patron\_categories.sql
- sample\_creator\_data.sql
- sample\_holidays.sql
- sample\_itemtypes.sql
- sample\_libraries.sql
- sample\_news.sql
- sample\_patrons.sql
- sample\_quotes.sql
- sample\_z3950\_servers.sql

1

### Mysql data added

- sysprefs.sql
- userflags.sql
- userpermissions.sql
- audio\_alerts.sql

2

### Mandatory data added

- auth\_val\_cat.sql
- subtag\_registry.sql
- auth\_values.sql
- authorities\_normal\_marc21.sql
- class\_sources.sql
- marc21\_framework\_DEFAULT.sql
- message\_transport\_types.sql
- patron\_attributes.sql
- sample\_frequencies.sql
- sample\_notices.sql
- sample\_notices\_message\_attributes.sql
- sample\_notices\_message\_transports.sql
- sample\_numberpatterns.sql
- refund\_lost\_item\_fee\_rules.sql

3

### Basic installation complete.

4

In the next steps you will be guided through some basic requirements like defining Koha user with all administrative privileges (superlibrarian).

You can help the Koha community by sharing your statistics with us.

If you wish to share some of your data, please enable the functionality in the "Share your usage statistics" section of the Administration module.

Set up some of Koha's basic requirements

5

### Selected data added

1. **Optional data added:** If you selected an optional data value then it will be displayed here. If you did not choose any optional data value then the **optional data added** title will not be displayed.
2. **MySQL data added:** These data values will always be installed and consequently displayed on this screen.
3. **Mandatory data added:** Same as above.

4. **Installation message:** Tells you if the Koha database was successfully created ready for you to use the onboarding tool.
5. Click the *Set up some of Koha's basic requirements* button to go to a redirection screen, which in turn will take you to the onboarding tool.

## Redirect to onboarding tool

If you wait for around 10 seconds this screen should redirect you to the onboarding tool start screen.

Web installer › Installation complete

Congratulations, installation complete

If this page does not redirect in 10 seconds, [start onboarding process.](#)



Redirect to onboarding tool

### Note

If after waiting you are not redirected select the link pointed out by the arrow in the above screenshot.

## Onboarding tool

### Create a library

The installer will prompt to create the first library or branch if the sample libraries were not installed.

A library in Koha is the digital representation of a “physical” place. More libraries can be added later by going to Administration -> Libraries and groups.

Web installer › Create a library

Library code:  Required

1

Name:  Required

2

To add another library and for more settings, go to:

Administration › Libraries and groups

3

Submit


4

Create library

1. **Library code:** code consisting of up to 10 letters.
2. **Name:** Official name of the library, as it is commonly known.
3. **Create more libraries:** If more libraries are required, or changes need to be made to this freshly created library, go to Administration -> Libraries and groups
4. Click the *Submit* button to create a library.

For example:

## Web installer › Create a library

**Library code:**  *Required* 

**Name:**  *Required*

To add another library and for more settings, go to:

Administration › Libraries and groups

Submit

### Create library example

**Library code:** The regular expression that filters the acceptable inputs for library code only accepts up to 10 letters.

## Create a patron category

All patrons in Koha must have a patron category. The patron category is like a jelly mold; multiple individual patron accounts can share common characteristics, such as circulation rules, notice frequency, holds allowed, and much more. Koha requires at least one patron category in order to add patrons.

A patron category requires:

- Category code
- Description
- Overdue notice required
- Category type
- Default privacy
- Enrolment period: In months OR Until date



## Web installer > Create a patron category

Library created!

1

The patron category you create will be used by the [administrator account](#).

Category code:

Required

2

Description:

Required

3

Overdue notice  
required:

4

Category type:

Staff

5

Default privacy:

6

Controls how long a patrons checkout history is kept for new patrons of this category. "Never" anonymizes checkouts on return, and "Forever" keeps a patron's checkout history indefinitely. When set to "Default", the amount of history kept is controlled by the cronjob `batch_anonymise.pl` which should be set up by your system administrator.

Enrolment  
period:

Choose one

In months:

7

Until date:

8

(MM/DD/YYYY)

To add another patron category and for more settings go to:

Administration > Patron categories

9

Submit

10

### Create a patron category

1. **Library creation message:** Indicates whether the library was created successfully.
2. **Category code:** Code consisting of up to 10 letters.
3. **Description:** Sentence describing what the patron category is.
4. **Overdue notice required** dropdown button: Set by default to 'no'. This specifies if you want the patron category to receive overdue notices.
5. **Category type:** This makes the category created a staff member.
6. **Default privacy:** Set by default to 'default'. The Default privacy controls the amount of time that the reading history of the patron is stored for.
7. **Enrolment period - in months:** This is the number of months that the patrons created from this patron category are enrolled for.
8. **Enrolment period - until date:** Select a date from the interactive datepicker calendar icon which appears when you click on this input box. The date you choose will be the enrolment end date for patrons created from this patron category.
9. **Path to create patron category:** More patron categories can be created or altered by going to Administration -> Patron categories.
10. Click the *Submit* button to create the patron category.

For example:

## Web installer › Create a patron category

Library created!

The patron category you create will be used by the [administrator account](#).

Category code:  *Required*

Description:  *Required*

Overdue notice  
required:

Category type: Staff

Default privacy:

Controls how long a patrons checkout history is kept for new patrons of this category. "Never" anonymizes checkouts on return, and "Forever" keeps a patron's checkout history indefinitely. When set to "Default", the amount of history kept is controlled by the cronjob [batch\\_anonymise.pl](#) which should be set up by your system administrator.

Enrolment  
period:

Choose one

In months:

Until date:   
(MM/DD/YYYY)

To add another patron category and for more settings go to:

[Administration › Patron categories](#)

## Create a patron

A superlibrarian patron user is required to log into the Koha staff interface, once the onboarding process has been completed.

### Note

It is very important to document the username and password created here as they are the account credentials required to login as an administrator (superlibrarian) of Koha.

You will need to input/select:

- Surname
- First name
- Card number
- Library
- Patron category
- Username
- Password

## Web installer › Create Koha administrator patron

Patron category created!

1

Now we will create a patron with superlibrarian permissions. Log in with this to access Koha as a staff member with all permissions.

### Administrator identity

Surname:  Required 2

First name:  Required 3

Card number:  Required 4

Library:  Required 5

Patron category:  Required 6

**Note:** If you installed sample patron categories please select the "Staff" option in the patron categories dropdown box.

### Administrator account permissions

superlibrarian

7

### Administrator login

Username:  Required 8

Password:  Required 9

Confirm password:  Required 10

To create another patron, go to:

Patrons › New patron

11

To give the new patron superlibrarian permissions go to:

More › Set permissions

12

Submit

13

Create a patron

1. **Patron category creation message:** This indicates that if the patron category was created successfully.
2. **Surname:** Surname, or something descriptive
3. **First name:** First name, or something descriptive
4. **Card number:** This number must be unique
5. **Library** dropdown box: If a library has been created using this onboarding tool, it will be the only option. Otherwise select a random library from the sample libraries installed by the web installer.
6. **Patron category** dropdown box: If a patron category was created using this onboarding tool, it will be the only option. Otherwise select the *Staff* patron category.
7. **Superlibrarian permission:** This non-editable setting allows access to all librarian and web based Koha administration tasks in the staff interface. This user is the most powerful user in any Koha, so protect the credentials well.
8. **Username:** The username to log into the staff interface and OPAC (Online Patron Access Catalogue) with.
9. **Password:** A password consisting of letters, numbers, and spaces only which is greater than 8 characters.
10. **Confirm password:** Repeat the above password again
11. Click the *Submit* button to create the patron account
12. **Path to create patron:** Patron's can be created or altered by going to Patrons -> New patron

13. **Assign patron permissions:** After creating a patron go More -> Set permissions to assign permissions.

For example:

**Web installer > Create Koha administrator patron**

Patron category created!

Now we will create a patron with superlibrarian permissions. Log in with this to access Koha as a staff member with all permissions.

### Administrator identity

**Surname:**  *Required*

**First name:**  *Required*

**Card number:**  *Required*

**Library:**  *Required*

**Patron category:**  *Required*

**Note:** If you installed sample patron categories please select the "Staff" option in the patron categories dropdown box.

### Administrator account permissions

### Administrator login

**Username:**  *Required*

**Password:**  **The entered passwords do not match** *Required*

**Confirm password:**  *Required*

To create another patron, go to:

Patrons > New patron

To give the new patron superlibrarian permissions go to:

More > Set permissions

Submit

Create a patron example

## Create an item type

If you did not install sample item types in the web installer then this screen will be displayed.

As with the patron category the item type is basically a template which you use to make multiple items with common characteristics.

You need to input:

- Item type code
- Description

## Web installer › Create a new item type

Administrator account created!

1

Item types are used to group related items. Examples of item types might be books, CDs, or DVDs.

When adding to your institution's catalog you will create an item of a particular item type.

Important!: Item types are what you apply circulation rules to. Circulation rules govern how your institution will lend its items: Checkout length, renewal policy, hold policy, etc. For example a circulation rule applied to the DVD item type may enforce a payment of \$1.00 for checking out any DVD.

Item type code:

Required

2

Description:

Required

3

To create another item type later and for more settings go to:

Administration › Item types

4

Submit

5

### Create item type

1. **Administrator account creation message:** Indicates if the administrator patron was created successfully
2. **Item type code:** Code consisting of up to 10 letters
3. **Description:** Sentence describing what the item type is.
4. **Path to create item type:** Item types can be created or altered by going to Administrator->Item types
5. Click the *Submit* button to create the item type

For example:

## Web installer › Create a new item type

Administrator account created!

Item types are used to group related items. Examples of item types might be books, CDs, or DVDs.

When adding to your institution's catalog you will create an item of a particular item type.

Important!: Item types are what you apply circulation rules to. Circulation rules govern how your institution will lend its items: Checkout length, renewal policy, hold policy, etc. For example a circulation rule applied to the DVD item type may enforce a payment of \$1.00 for checking out any DVD.

Item type code:

Required

Description:

Required

To create another item type later and for more settings go to:

Administration › Item types

Submit

### Create item type example

#### Note

The regular expression filtering item type code input will only accept letters.

# Create a circulation rule

This screen will always be displayed no matter what sample data you installed with the web installer.

Here you are creating a rule which applies the pre-defined organizational decisions of your library as to what restrictions you place on patrons borrowing items.

Web installer > Create a new circulation rule

New item type created! 1

Library branch: All Required 2

Patron category: All Required 3

Item type: All Required 4

Current checkouts allowed: 50 Required 5

Loan period: 14 Required 6

Units: Days 7

Renewals allowed: 10 Required 8

Renewals period: 14 Required 9

On shelf holds allowed: Yes 10

To create circulation rule, go to:

Administration > Circulation and fine rules 11

Submit 12

Create circulation rule

## Note

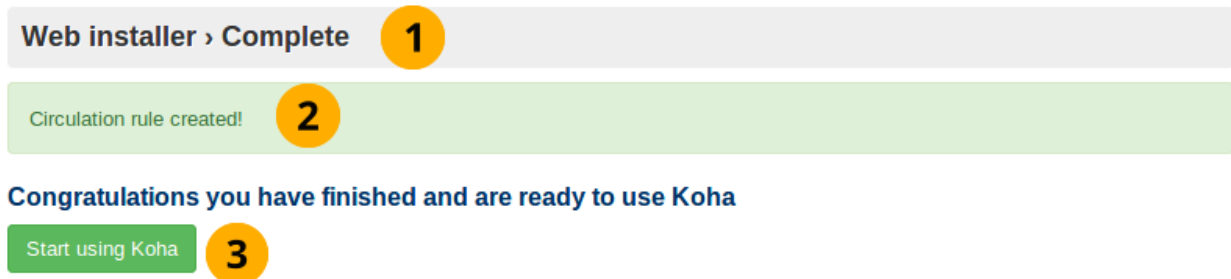
Numbers are the only valid input for all input fields in this form.

1. **Item type creation message:** Indicates if the item type was created successfully
2. **Library branch** dropdown box: This is the library (or libraries) you want to apply the circulation rule to. By default it is set to *all*, however you can select a singular library to apply the rule to from the dropdown box.
3. **Patron categories** dropdown box: This is the patron categories you want to apply the circulation rule to. As with *library branch* it is set to *all* by default but more options are available.
4. **Item type** dropdown box: This is the item types that you want the circulation rule to apply to. Again more options are available than the default selected *all* option.
5. **Current checkouts allowed:** This is the number of items allowed from the selected library, for selected patron categories and of the selected item type. Set to 50 by default.
6. **Loan period:** Number of days or hours that an item is allowed out for. Set to 14 by default.
7. **Units** dropdown box: Set by default to *days*, the unit selecting in this field is applied to the numerical values written into **loan period** and **renewals period**
8. **Renewals allowed:** Number of times a item can be renewed. Set to 10 by default.
9. **Renewals period:** Number of days or hours that a renewal lasts for. Set to 14 by default.
10. **On shelf holds allowed** dropdown box: If items can be held whilst they are on the shelf.

11. **Path to create circulation rule:** Circulation rules can be created or altered by going to Administration  
-> Circulation and fines rules
12. Click the *submit* button to create the circulation rule.

## Onboarding tool complete

This page tells you if the circulation rule was created successfully, and that the Koha installation is complete



1. **Web installer message:** Indicates if the web installation is complete
2. **Circulation rule creation message:** Indicates if the circulation rule was created successfully.
3. **Start using Koha:** Click to login to Koha using the Koha administrator account you created using the onboarding tool.

## Login to access staff interface

You have now finished using the onboarding tool and can log into the staff interface using the patron account credentials you created in the onboarding tool

The image shows the Koha login screen. At the top is the Koha logo and the text 'OPEN-SOURCE INTEGRATED LIBRARY SYSTEM'. Below this is a red error message box that says 'Error: Session timed out. Please log in again'. Underneath the error message are three input fields: 'Username:', 'Password:', and 'Library:'. The 'Library:' field is a dropdown menu with 'My library' selected. To the right of each input field is a yellow circle with a number (1, 2, and 3 respectively). At the bottom right is a 'Login' button, with a yellow circle containing the number 4 next to it.

Login screen

1. **Username:** Enter the username you created for the patron

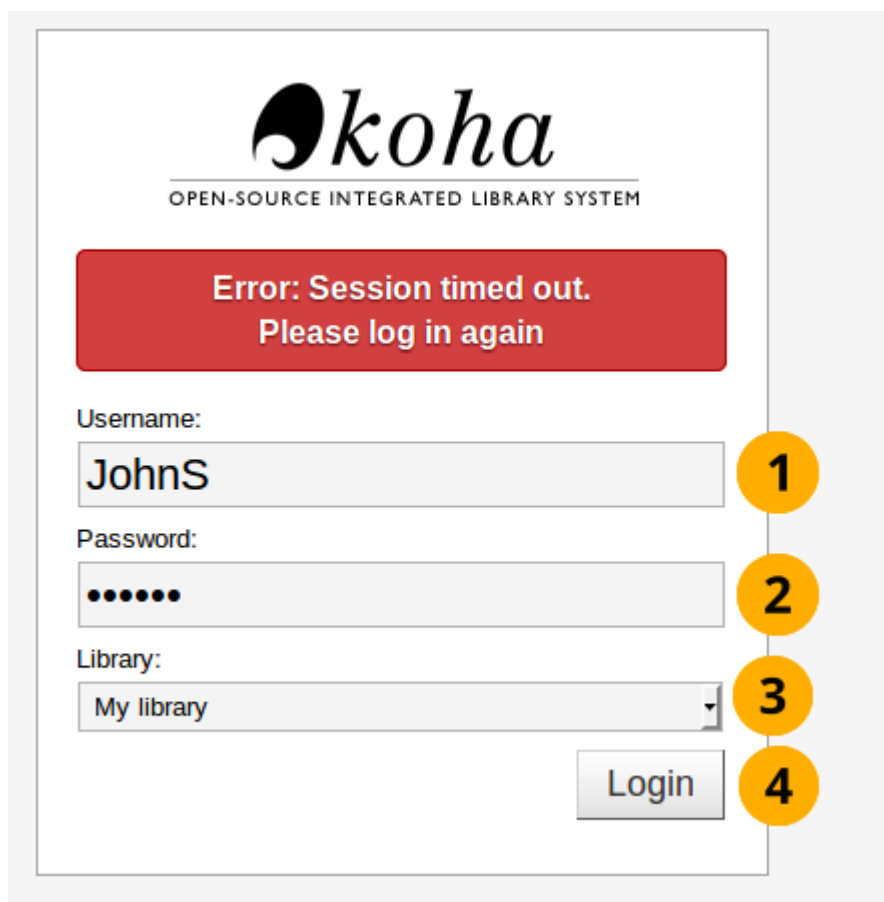
2. **Password:** Enter the password you created
3. **Library:** This is the library staff interface you want to log into. The options are either: *my library* or the library you installed/created. Leaving the default selected option of *my library* is fine to log in with first time.

#### Note

Only staff with the [loggedinlibrary\\_permission](#) (or the [superlibrarian\\_permission](#)) will be able to log into a library different from their home library.

4. Click the *login* button to access the staff interface

For example:



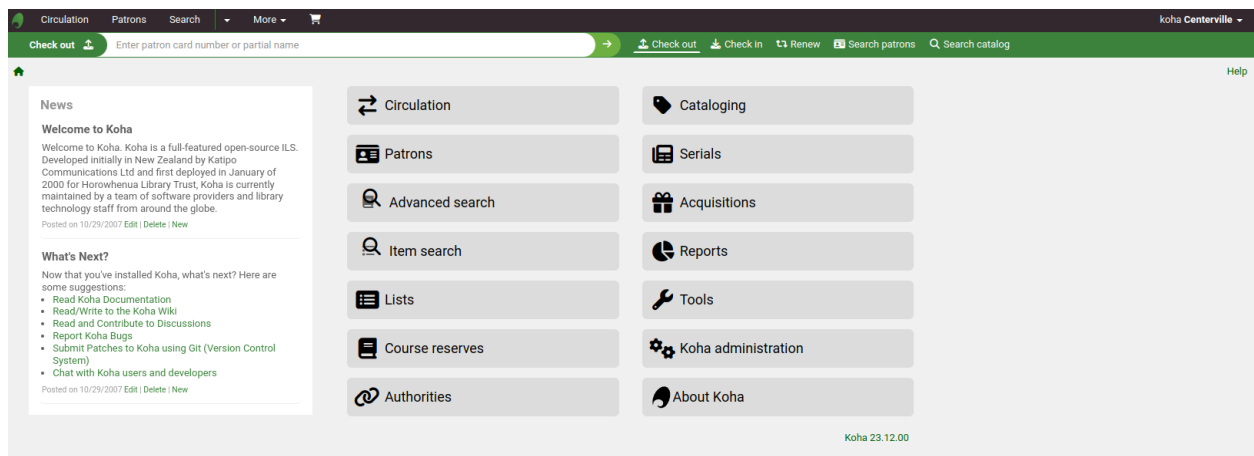
The image shows the Koha login interface. At the top is the Koha logo with the text "OPEN-SOURCE INTEGRATED LIBRARY SYSTEM". Below this is a red error message box that says "Error: Session timed out. Please log in again". The login form consists of four fields: "Username:" with the value "JohnS", "Password:" with masked characters, "Library:" with a dropdown menu showing "My library", and a "Login" button. To the right of each field is a yellow circle with a number: 1 for Username, 2 for Password, 3 for Library, and 4 for the Login button.

Login example

## Staff interface

The staff interface should now appear





## Advanced configurations

### VirtualHost overrides

Koha allows for the override of some system settings at a VirtualHost level.

#### OPAC\_BRANCH\_DEFAULT

The *OPAC\_BRANCH\_DEFAULT* directive can be used to specify the default branch for anonymous users of the OPAC.

```
SetEnv OPAC_BRANCH_DEFAULT "CPL"  
RequestHeader add X-Koha-SetEnv "OPAC_BRANCH_DEFAULT CPL"
```

Note: This override affects which *News* and *HTML Customisation* blocks a user will see prior to logging in to the OPAC.