Circulation

Circulation functions can be accessed in several different ways. On the main page of the staff client there are some quick links in the center of the page to check items out, in or transfer them. For a complete listing of Circulation functions you can visit the Circulation page which is linked from the top left of every page or from the center of the main page.

Before circulating your collection you will want to set your Global system preferences, Basic parameters and Patrons and circulation rules.

While in Circulation you can jump between the tabs on the quick search box at the top of the screen by using the following hot keys:

- Alt+Q: Search catalog
- Alt+U: Check out
- Alt+R: Check in
- Alt+W: Renew

Note

Staff members must have the circulate permission (or the superlibrarian permission) in order to be able to access circulation functions.
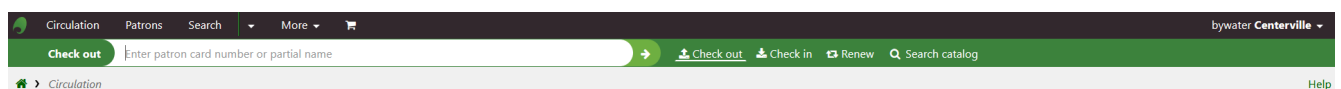
Check out (issuing)

To begin the checkout process you must enter the patron barcode or part of their name. The checkout option appears in three main places:
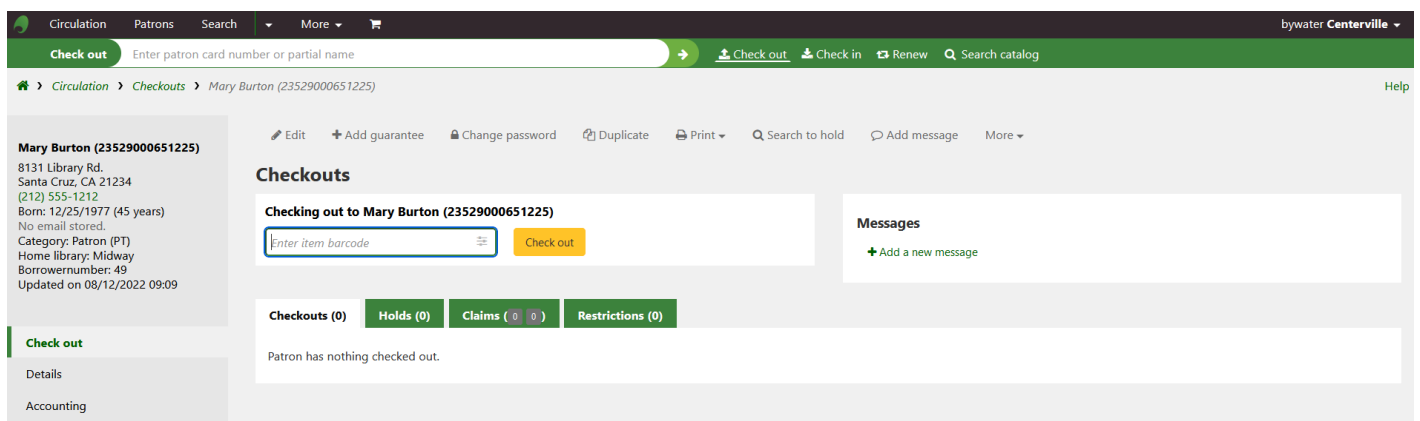
- Check out option in the search bar at the top of the staff interface's main page
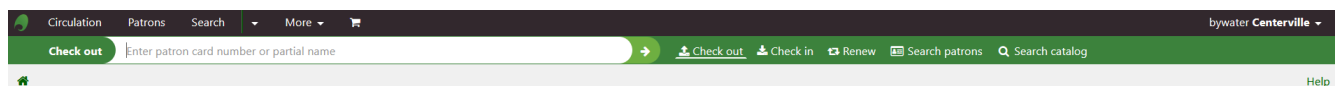
- Check out option in the search bar at the top of the main circulation page

Those two options are essentially a patron search. If you only have one result, Koha will automatically go to the patron's file, in the 'Check out' tab.

If your search gives you more than one result, it will ask you to choose which patron to check out to.

Note

You can customize the columns of this table in the 'Table settings' section of the Administration module, under the patrons tab (table id: memberresultst).

Clicking on a patron search result will bring you to the patron's file, on the 'Details' tab. Click the 'Check out' tab to access the check out screen.

If you have enabled batch checkouts, click the batch check out tab on the patron record

Checking items out

To check an item out to a patron, first search for that patron using one of the many options listed above. You will then be presented with the checkout screen.

If 'Always show checkouts automatically' is checked, you will see the list of current checkouts below the check out box.

Note

The previousIssuesDefaultSortOrder system preference controls in which order these previous checkouts appear (earliest to latest, or latest to earliest).

Note

You can customize the columns of this table in the 'Table settings' section of the Administration module, under the circulation tab (table id: issues-table).

Note

To prevent too many service queries when checking out a number of items in a row, you can use the LoadCheckoutsTableDelay system preference to delay the loading of the table and lighten the load on

resources.
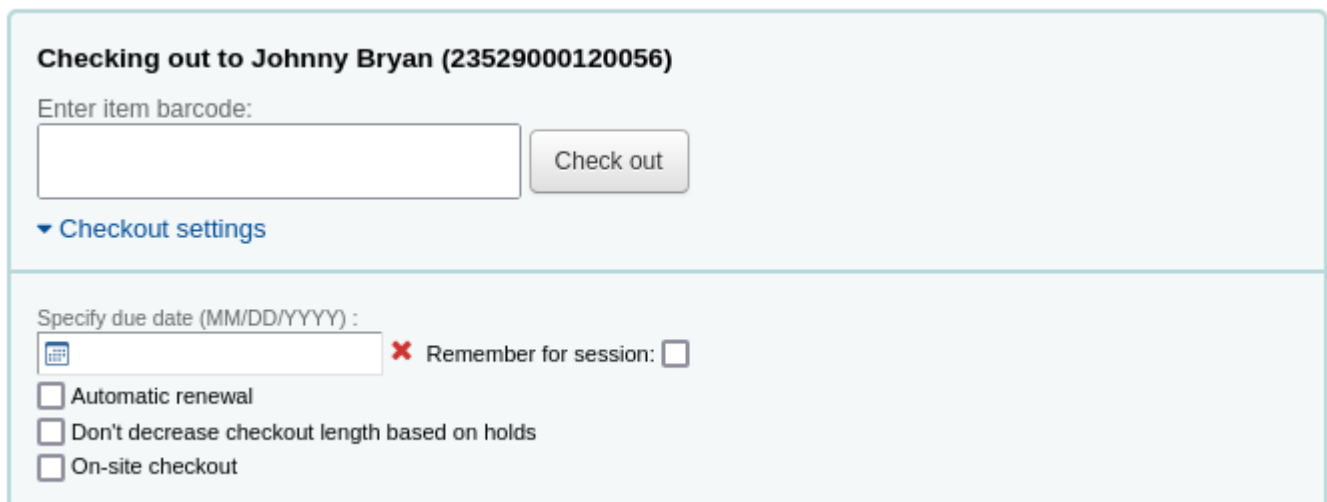
At the top of the check out screen is a field to type or scan the item's barcode into.

Note

Many modern barcode scanners will send a 'return' to the browser, making it so that the 'Check out' button is automatically clicked.

- If the barcode is not found you will be prompted to use fast cataloging to add the item. Learn more about fast cataloging later in this manual.
- If the itemBarcodeFallbackSearch system preference is set to 'Enable', you can enter a keyword search in this box instead of just a barcode (this will make it possible to check out using title and/or call number).
- If the AutoSwitchPatron system preference is set to 'Enable', scanning a patron barcode here will take you to that patron's file.

To see more checkout options click the 'Checkout settings' link to expand the checkout area.

Checking out to Johnny Bryan (23529000120056)

Enter item barcode:

[   ] [Check out]

▾ Checkout settings

Specify due date (MM/DD/YYYY) :

[📅   ]   ✖ Remember for session: ☐

☐ Automatic renewal
☐ Don't decrease checkout length based on holds
☐ On-site checkout

- Specify due date: this option can be used to override the default due date for the item, as defined in the circulation and fines rules.

  Note

  This option will only appear if the SpecifyDueDate system preference is set to allow staff to override the due date.

  - The red 'X' is used to clear the date. If the 'specify due date' field is empty, the default due date, as defined in the circulation and fines rules is used.
  - Remember for this session: check this box to use the same date for all checkouts. This will not only keep the specified due date for this patron but for all patrons, until you log out of the staff interface.

- Automatic renewal: this option will allow this item to automatically be renewed

  - To use automatic renewals,
    - the automatic_renewals cron job must be running
    - the circulation and fines rules regarding automatic renewals must be defined

- - Just like regular renewals, the checkouts will not be automatically renewed if there is a hold on the item.

- Don't decrease checkout length based on holds: this option overrides the decreaseLoanHighHolds system preference.

  Note

  This option will only appear if the decreaseLoanHighHolds system preference is enabled.

- On-site checkout: this option indicates that this checkout is an on-site checkout.

  Note

  This option will only appear if the checkout of items on site to patrons is allowed. These are usually items that are not for loan that you would like to check out for in-library use.

At the bottom of the page there is a summary of the patron's current checked out items along with the due date (and time if the item is an hourly loan). Items checked out today will appear at the top, previously checked out items will be underneath.

Note

The todaysIssuesDefaultSortOrder system preference controls in which order these new checkouts appear (earliest to latest, or latest to earliest).

Note

Items that are hourly loan items will include the time with the due date.

If an item is checked out for on-site use, that information will be highlighted in red in the checkout summary.

Today's checkouts														
07/30/2022	**A Florentine Tragedy; La Sainte Courtisane** by Wilde, Oscar, 000305 (On-site checkout)	Ebook	Ebook			Centerville	07/28/2022 12:35	Midway			0.00	0.00	0.00	☐

If there are notes on the patron record these will appear to the right of the checkout box

Edit	+ Add guarantee	Change password	Duplicate	Print ▾	Search to hold	Add message	More ▾

Checkouts

Checking out to Johnny Bryan (23529000120056)

Enter item barcode:

[   ] [Check out]

› Checkout settings

Attention
› **Overdues:** Patron has ITEMS OVERDUE See highlighted items below
› **Charges:** Patron has outstanding charges of 2.75. [Make payment] [Pay all charges]

Holds waiting here (1)
› 'Twixt Land and Sea : (Ebook), by Conrad, Joseph, Hold placed on 07/04/2022.
  Waiting here until 08/04/2022

Messages
› 07/28/2022 Midway (Caroline Cyr La Rose) *"Confirm email address"* 🗑 Delete

➕ Add a new message

If the patron has a hold waiting at the library, that too will appear to the right of the check out box making it easy for the circulation staff to see that there is another item to give to the patron.

If you would like a more assertive hold warning, you can enable the [WaitingNotifyAtCheckout](#) system preference, which will generate a pop-up after each checkout to the patron who has waiting holds.

The details of the checkouts will appear on the record detail page in the staff interface as well.

Printing receipts

Once you have checked out all of the items for the patron you can print them a receipt by choosing one of two methods.

If you have the [CircAutoPrintQuickSlip](#) preference set to 'open a print quick slip window' you can simply hit enter on your keyboard or scan a blank piece of paper with your barcode scanner. The idea being that you're "checking out" a blank barcode which triggers Koha to print the 'Quick slip.'

If you have the [DisplayClearScreenButton](#) system preference set to 'Show print quick slip and clear buttons' or 'Show print slip and clear buttons', there will be a small printer button in the top right of the checkout box, which can be used to print the slip or quick slip.

You can also click the Print button at the top of the screen and choose 'Print slip' or 'Print quick slip'.

If you choose 'Print slip' it will print all of the items the patron has checked out, including those they checked out at an earlier date.

Note

The slip uses the ISSUESLIP notice. You can customize the notice in the [Notices and slips tool](#).

Choosing 'Print quick slip' will print only the items that were checked out today.

Note

The quick slip uses the ISSUEQSLIP notice. You can customize the notice in the [Notices and slips tool](#).

'Print summary' will generate a full page summary for the patron's circulation information.

Note

The summary cannot be customized.

However, the tables for the checkouts, holds, and charges are customizable in the ['Table settings'](#) section of the Administration module (table id: print-summary-checkouts, print-summary-holds, and print-summary-fines).

'Print account balance' will generate a summary of outstanding charges and unused credits in the patron's account.

Note

The quick slip uses the ACCOUNTS_SUMMARY notice. You can customize the notice in the [Notices and slips tool](#).

Note

This option will only appear if the patron has charges in their [Accounting tab](#).

'Print overdues' will print out a slip that lists all items that are overdue.

Note

The overdue slip uses the OVERDUE_SLIP notice. You can customize the notice in the [Notices and slips tool](#).

'Print checkin slip' will print out a slip that lists items that were checked in today.

Note

The checkin slip uses the CHECKINSLIP notice. You can customize the notice in the [Notices and slips tool](#).

Tip

You can add custom slips in this menu by [adding a new notice](#) in the notices and slips tool in the 'Patrons (custom slip)' module.

For example, to have a slip with all the patron's current holds,

- Go to [Tools > Notices and slips](#)

- Click '[New notice](#)', and choose 'Patrons (custom slip)'

- Fill out the code and name for the slip. The name will be what appears in the 'Print' menu.

- In the 'Print' template section, paste the code:

```
Patron has [% borrower.holds.count %] holds

List of holds:
[% FOREACH hold IN borrower.holds %]
===============================
Reserve id: [% hold.reserve_id %]
Title [% hold.biblio.title %]
[% END %]
```
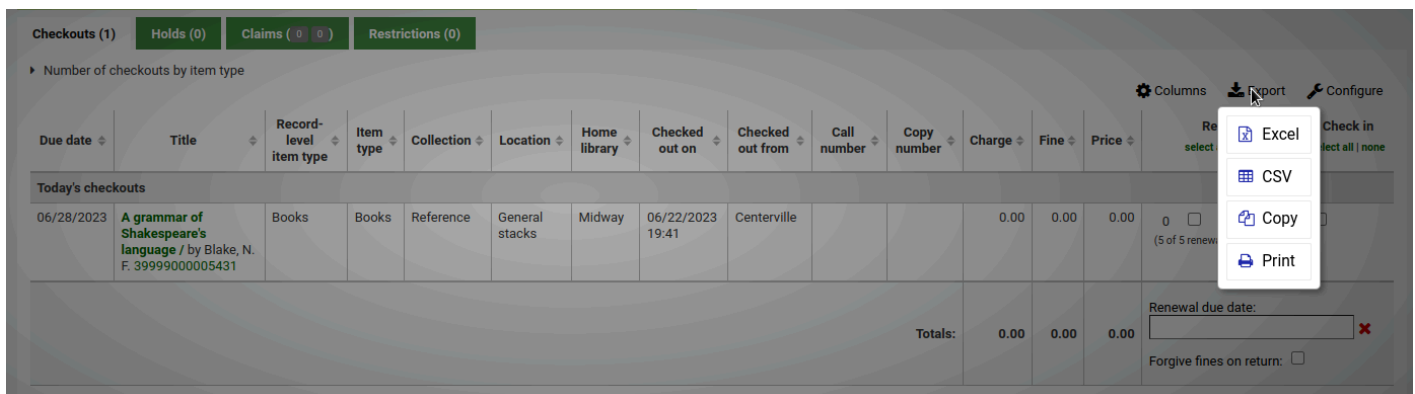
- Click 'Save'

Now, in a patron account, when you click on 'Print' the new custom slip should be available.

Exporting checkouts

Other than [printing a receipt](#), there are several ways to export a patron's checkouts.

The 'Export' button at the top of the table allows you to export the patron's current checkouts in either Microsoft Excel or CSV format, or even copy or print their checkouts.

The CSV file exported this way will contain the columns of the table that are visible. You can click on the 'Columns' button and remove some columns first, if needed.

If the [ExportCircHistory](#) system preference is enabled, there will be an 'Export' column in the checkouts table. This is used to export the patron's current checkouts in either MARC or CSV format.

To export checkouts this way,

- Select the checkouts to be exported using the checkboxes in the 'Export' column.

- At the bottom of the table, choose the options for the export

  - Export checkouts using format

    - MARC with items: this will export the MARC records of the checked out titles, including the item information.
    - MARC without items: this will export the MARC records of the checked out titles.
    - CSV: this will export a CSV file of checked out titles. When this option is selected, a new dropdown menu will appear to choose a CSV profile.

  - Export bundle contents: if the patron checked out a bundle, this option will export the parent record as well as all the child records.

  - Don't export fields: optionally, you can enter MARC fields that are not to be exported.

    Note

    The default values in the "Don't export field" field are set in the ExportRemoveFields system preference.

Clear patron information

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

If you have the CircAutoPrintQuickSlip preference set to 'clear the screen' then you simply need to hit enter or scan a blank barcode and the screen will be cleared of the current patron.

Batch checkouts

If you would like to perform a batch check out you can do so by turning on the BatchCheckouts system preference and assigning the proper patron categories via the BatchCheckoutsValidCategories system preference. This will allow you to use an RFID pad that reads multiple barcodes or perform a batch check out for training internal use.

From this screen you can scan several barcodes or load a file of barcodes.

If you have the SpecifyDueDate system preference enabled you will have the option to set a due date for the checkouts.

If the items cannot be checked out, a warning will be provided on the following screen, with the option to uncheck the items that are not to be checked out.

If you are using a statistical patron type then you'll see that local use was recorded for each item you scanned.

Batch check out

| Edit | 🔒 Change password | 🗐 Duplicate | 🖨 Print ▾ | 🔍 Search to hold | 💬 Add message | More ▾ |

Batch checkout information for in house use (777) |1|

Barcode ⇕	Title ⇕	Information ⇕
000520	**As You Like It [electronic resource] /** , by Shakespeare, William, 000520	❗ Local use recorded.
000041	**Shakespeare's Sonnets [electronic resource] /** , by Shakespeare, William, 000041	❗ Local use recorded.
000427	**Beautiful Stories from Shakespeare [electronic resource] /** , by Nesbit, E. 000427	❗ Local use recorded.
000283	**Tales from Shakespeare [electronic resource] /** , by Lamb, Charles, 000283	❗ Local use recorded.

Check out messages

If you check out an item that has multiple pieces and you have cataloged that information in subfield 3 of the item record (in MARC21) a message will pop up when you check out that item telling you how many pieces should be there.

Note about the accompanying materials: + 1 folded map

There are times when Koha will prevent the librarian from being able to check out items to a patron. When this happens a warning will appear notifying the librarian of why the patron cannot check items out.

- Patron owes too much in fines

Checking out to Beau ENGARD (23529001223644)

Cannot check out!

› **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items below

› **Fines:** Patron has Outstanding fines of 22.50. Checkouts are **BLOCKED** because fine balance is **OVER THE LIMIT**. Make Payment

Messages:

Add a new message

| **1 Checkout(s)** | **1 Hold(s)** |

Due date	Title	Item Type	Checked out on	Call no	Charge	Price	Renew select all | none	Check in select all | none
			Previous checkouts					
01/01/2011	**Blue book, dolls & values.**, by - in repair 10101000000409	Continuing Resources	12/18/2010	688.722B	0.00	25.00	0 On Hold	☐
				Totals:	22.50	25.00	Renewal due date: [ ] 📅 Forgive fines on return: ☐	

Override Renewal Limit: ☐ [Renew or Return checked items] [Renew all]

- You can set the amount at which patron checkouts are blocked with the noissuescharge system preference

- Patron has a restriction on their account

Cannot check out!

› **Restricted:** Patron's account is restricted until 12/31/2013 with the explanation:
Barred for a month

⊘ View restrictions

- This can be set by the librarian editing a patron record and adding a [restriction](#) or by the [Overdue/Notice Status Triggers](#)

- Staff with the [force_checkout permission](#) (or [superlibrarian](#)) will be able to temporarily override a restriction in order to check out anyway.

Cannot check out!

Attention

› **Restricted since 18/05/2023:** Patron's account is restricted until 31/05/2023 with the explanation:
Vandalism in study room 3

⊘ View restrictions | Override restriction temporarily

Messages

✛ Add a new message
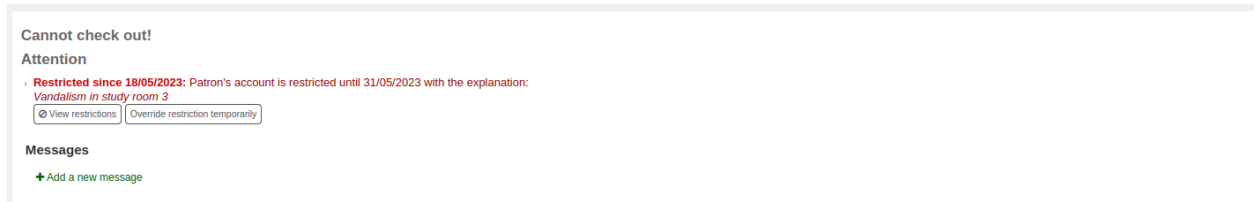
- Patron needs to confirm their address

Cannot check out!

Attention

› **Address:** Patron's address flagged as in doubt

Messages

✛ Add a new message
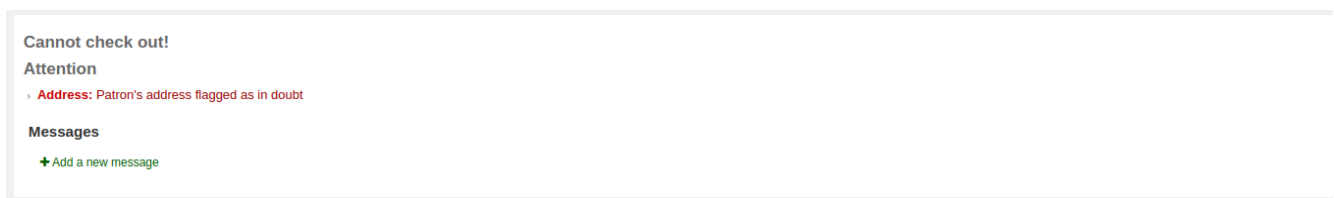
- This can be set by the staff editing a patron record and [adding a flag](#).

- Patrons has lost their library card

Cannot check out!

Attention

Lost: Patron's card is flagged as lost

Messages

✛ Add a new message
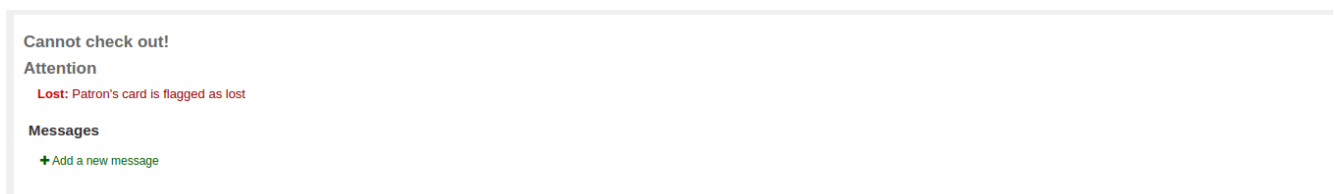
- This can be set by the staff editing a patron record and [adding a flag](#).

Check out warnings

Sometimes checkouts will trigger warning messages that will appear in a yellow box above the check out field. These warnings need to be acknowledged before you will be able to continue checking items out.

- Patron has outstanding fines

Please Confirm Checkout
- The patron has a debt of 1.00

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)
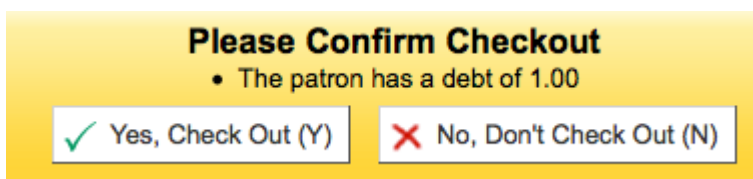
- Item on hold for someone else

Please Confirm Checkout
- Item *Young people* (34000000039637) has been on hold for Chloe Leonard (100545) at Athens since 05/12/2010

☐ Cancel hold

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Item should be on the hold shelf waiting for someone else

Please confirm checkout
- The patron has a debt of 159.00
- Item *PDR for nonprescription drugs, dietary supplements, and herbs, 29th edition, 2008.* (50000162) has been waiting for training training (training) at Henderson since

Cancel hold ○
Revert waiting status ⊙

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Item already checked out to this patron

Please Confirm Checkout
- The patron has a debt of 10.00
- Item *Harry Potter and the sorcerer's stone* (100020) is currently checked out to this patron. Renew?

✓ Yes, Renew (Y)   ✗ No, Don't Renew (N)

- Item checked out to another patron

Please confirm checkout
- The patron has a debt of 5.00.
- Item *Ya-Yas in bloom :* (0060195347) is checked out to Nicole Engard (12345674223). Check in and check out?

✓ Yes, check out (Y)   ✗ No, don't check out (N)

Click here to place a hold for Coda Engard (23529001223637)

  ○ This warning will allow you to place a hold on the item for the patron you're trying to check it out to.

- Item not for loan

Please Confirm Checkout
- Item is normally not for loan. Check out anyway?

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Patron has too many things checked out and AllowTooManyOverride is set to 'Allow'

Please Confirm Checkout
- Too many checked out. 5 checked out, only 5 are allowed.

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Patron has too many things checked out and AllowTooManyOverride is set to "Don't allow"

- Too many checked out. 20 checked out, only 20 are allowed.

- Item cannot be renewed

- No more renewals possible

  - This can be overridden with the AllowRenewalLimitOverride system preference

- Barcode not found

- The barcode was not found 23456778765343234
  Fast cataloging

  - Learn more about fast cataloging later in this manual.

- Item being checked out is marked as 'lost'

  - Depending on the value in your IssueLostItem preference, you may just see a warning

This item has been lost with a status of "Lost".

or a confirmation box

Please confirm checkout
- This item has been lost with a status of "Lost". Check out anyway?

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Item being checked out is not recommended for a patron of this age

Please confirm checkout
- Age restriction PG 13. Check out anyway?
  - The patron has a debt of 32.45

✓ Yes, Check Out (Y)   ✗ No, Don't Check Out (N)

- Item being checked out meets the decreaseLoanHighHolds system preference criteria

- Item has accompanying material (field 952$3, 'Materials specified', is filled)

Note about the accompanying materials: 2 DVD

  - If CircConfirmItemParts is set to 'Require', the staff member will have to confirm the checkout

Please confirm checkout
- Please confirm that the accompanying materials are present: 2 DVD

Yes, check out (Y)   No, don't check out (N)

- If the CheckPrevCheckout system preference says to check the patron's circulation history, a warning will show to indicate that the patron has already checked out the item

Please confirm checkout
- Patron has previously checked out this title: **As You Like It by Shakespeare, William,** . Check out anyway?

Yes, check out (Y)   No, don't check out (N)

Checkout notes

Checkout notes are notes that patrons can add from the OPAC about a particular item they have checked out (for example: missing first page, or DVD is scratched, etc.).

To enable checkout notes, set the AllowCheckoutNotes system preference to 'Allow'.

Once the system preference is activated, a new column titled 'Report a problem' will appear in the list of checkouts in the patron's summary in the OPAC.

Your summary

Hello, Mary Burton

Click here if you're not Mary Burton

| Checked out (3) | Relatives' checkouts | Overdue (2) | Charges (5.00) | Relatives' charges | Clubs (0/1) | Holds (3) | Article requests (1) |

Search   ✖ Clear filter   🗐 Copy   🖨 Print   ⊞ CSV   📅 iCal   ✔ Renew selected   ✔✔ Renew all

3 Item(s) checked out

Title	Author	Due	Barcode	Call number	Renew	Fines	Report a problem
A Drama on the Seashore ★★★★★ Average rating: 0.0 (0 votes) *This item has been recalled. Please return by the new due date.*	Balzac, Honoré de,	2022-07-11	000424	BAL		Yes (Item overdue or lost)	Add note
A Florentine Tragedy; La Sainte Courtisane ★★★★★ Average rating: 0.0 (0 votes)	Wilde, Oscar,	2022-08-25	001183		☐ Renew (9 of 10 renewals remaining)	Yes (Item overdue or lost)	Add note
The Tempest ★★★★★ Average rating: 0.0 (0 votes)	Shakespeare, William,	2023-03-15	000132	822.33 SHA	☐ Renew (10 of 10 renewals remaining)	No	Add note

Renew selected   Renew all

When the patron clicks on 'Add note', they will be able to write a note about this checkout.

Report a problem   ✕

The Tempest

Your note will be shown to the librarian when the item is checked in.

Submit note   Cancel

Staff will be alerted of new checkout notes in the section at the bottom of the staff interface's home page, with other pending requests.

Article requests: **2**
Suggestions pending approval: **Centerville: 3 / All libraries: 5**
Patrons requesting modifications: **1**
Discharge requests pending: **1**
Catalog concerns pending: **5**
Checkout notes pending: **1**
OPAC problem reports pending: **2**

Note

Only staff with the manage_checkout_notes permission (or the superlibrarian permission) will see the new checkout notes and have access to the checkout notes management page.

An email will also be sent to the email address in KohaAdminEmailAddress to alert the system administrator that a checkout note was added.

Note

You can customize this message in the Notices and slips tool. The letter code is CHECKOUT_NOTE.

Checkout notes can be managed from the circulation module home page, under Circulation > Checkout notes, or by clicking on the message in the pending requests section of the staff interface home page.

From this page, staff can mark notes as seen, either individually by clicking the 'Mark seen' button on the right, or in a batch by selecting the notes and clicking 'Mark seen' at the top of the page. Marking the notes as seen will remove them from the pending requests section of the staff interface homepage.

Seen notes can be filtered out with the 'Hide seen' link at the top of the table.

Checkout notes will also appear upon checkin.

Once the item is checked in, the note will be removed permanently from this page.

Renewing checkouts

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

If you allow it, patrons can renew their own items via the OPAC, but sometimes you'll need to help them by renewing their items via the staff interface.

To renew items checked out to a patron, you can do one of three things: renew from the patron's checkout summary, renew from the search bar at the top of the page, or renew from the 'Renew' section of the circulation module.

Renewing from the patron's checkout summary

The first way to renew checkouts is to visit the patron's details page or checkout page and view their checkout summary at the bottom.

In the 'Renew' column, you will see how many times each item has been renewed and a checkbox to renew the item for the patron. Check the box of the items you would like to renew and click the 'Renew selected items' button. Alternatively, click the 'Renew all' button to renew all items checked out to the patron.

Attention

Prior to Koha version 23.11, the button was called 'Renew or check in selected items' and served both for renewing and for checking in depending on which box was checked.

Sometimes renewals will be blocked based on your circulation rules. To override this block, the AllowRenewalLimitOverride system preference must be set to 'Allow'. If you allow renewal limit overrides, you will see a checkbox at the bottom left of the circulation summary. Checking that box will add checkboxes in the renew column above where before the item was not renewable.

Check that box, choose the items you would like to renew, and then click 'Renew selected items'.

You can also mark a renewal as 'unseen', to differentiate between renewals where staff has actually seen the item, versus renewals where they didn't see it (over the phone, for example). To do this, you must first enable the UnseenRenewals system preference. Once enabled, a checkbox will appear at the bottom left of the circulation summary. Check that box to mark the renewals as 'unseen'. Then click either 'Renew selected items' or 'Renew all'.

If you need to renew the checkout for a period different than the standard renewal period, you can pick a due date in the 'Renewal due date' box at the bottom of the 'Renewal' column. Make sure to enter the date **before** clicking the 'Renew selected items' button or the 'Renew all button'.

Renewing from the search bar

If you have the items in hand, you can select the 'Renew' option in the search bar at the top of the page (or press Alt + w, or Option + w on Mac computers), and scan the barcode in the search field.
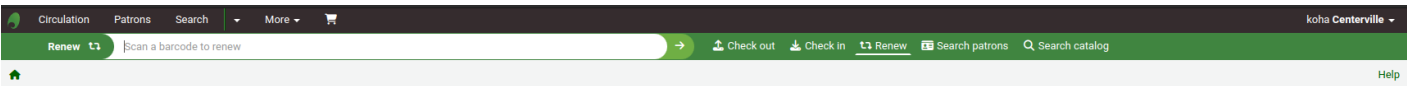
If renewing is permitted, the checkout will be renewed for the period specified in the circulation rules.

Note

There is no way to specify a different renewal period or to override renewal limits from here. You need to use one of the other methods.

Renewing from the 'Renew' page

- *Get there:* Circulation > Renew

The last option to renew checkouts is to visit the 'Renew' page found under the Circulation menu.

Circulation

Circulation

- ⬆ **Check out**
- ⬇ **Check in**
- ↻ **Renew**
- 🏠 **Set library and desk**
- ➕ **Fast cataloging**
- 📑 **Checkout notes**
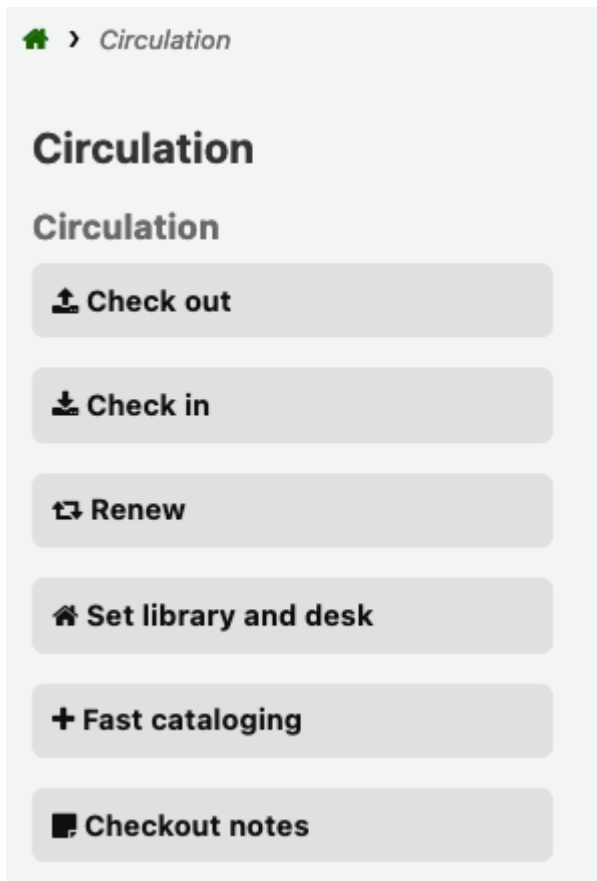
Scan the barcodes of the items you would like to renew.

Renew

[Enter item barcode] [Submit]

📅 Renewal due date (MM/DD/Y) ✕

If you need to renew the checkout for a period different than the standard renewal period, you can pick a due date in the 'Renewal due date' box under the barcode field. Make sure to enter the date **before** scanning the barcode.

If the item is renewed, you will receive a confirmation message.

Item renewed:

Robert Burns : (39999000000771) renewed for Jordan Alford (23529000050113) now due on 01/27/2024
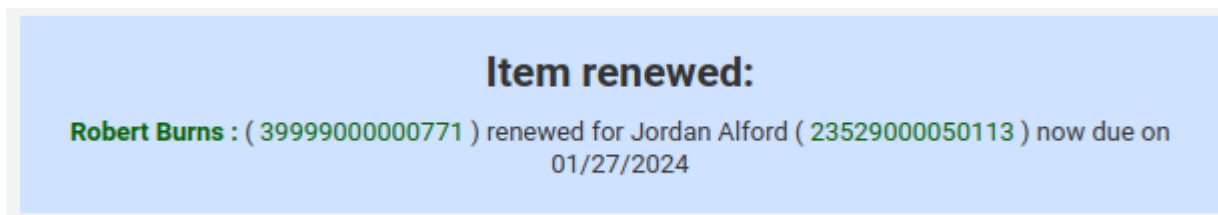
If the barcode is not found, you will be presented with an error.

Cannot renew:

No item matches this barcode

✕ Continue without renewing
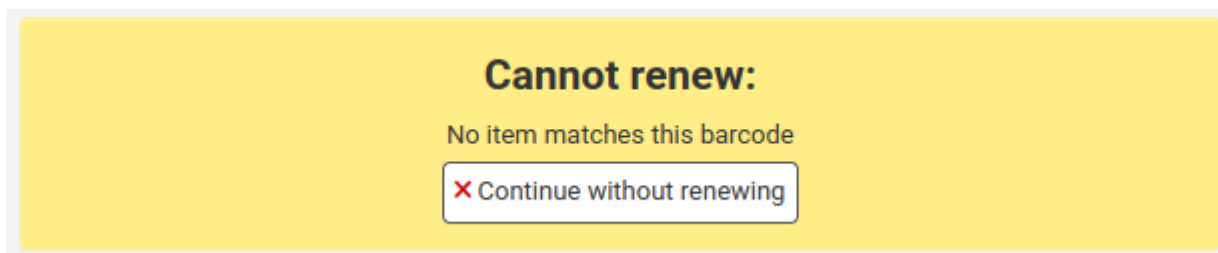
If the item is not actually checked out, you will also receive an error.

Checking items in (returning)

Checking items in can be performed from various locations: the search bar at the top of the staff interface, the 'Check in' column in the patron's checkout summary, or the dedicated 'Check in' page of the Circulation module.

Koha also offers an automatic check-in feature, which can be set in item types and requires the automatic_checkin.pl cron job.

Checking in from the search bar

To quickly check in an item, you can select the 'Check in' option in the search bar at the top of the page (or press Alt + r, or Option + r on Mac computers), and scan the barcode in the search field.
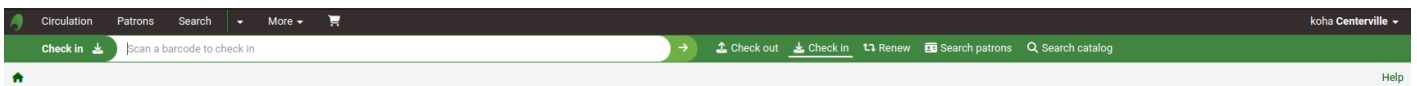
This will check in the item and bring you to the 'Check in' section of the Circulation module to check in more items.

> **Note**
>
> There is no way to specify a return date, use the book drop mode, or forgive fines from the search bar. You need to go to Circulation > Check in to have access to those options.

Checking in from the patron's checkout summary

Another way to check in items is to visit the patron's details page or checkout page and view their checkout summary at the bottom.

Check the box in the 'Check in' column of the items you would like to check in and click the 'Check in selected items' button.

Attention

Prior to Koha version 23.11, the button was called 'Renew or check in selected items' and served both for renewing and for checking in depending on which box was checked.

Warning

This method doesn't require staff to scan the barcode, which can lead to errors when selecting the items to check in. Be careful when using this method.

Checking in from the 'Check in' page

- *Get there:* Circulation > Check in

You can also check items in from the 'Check in' section in the Circulation module.

Circulation

Circulation

⤒ **Check out**

⤓ **Check in**

↻ **Renew**

🏠 **Set library and desk**

➕ **Fast cataloging**

📝 **Checkout notes**
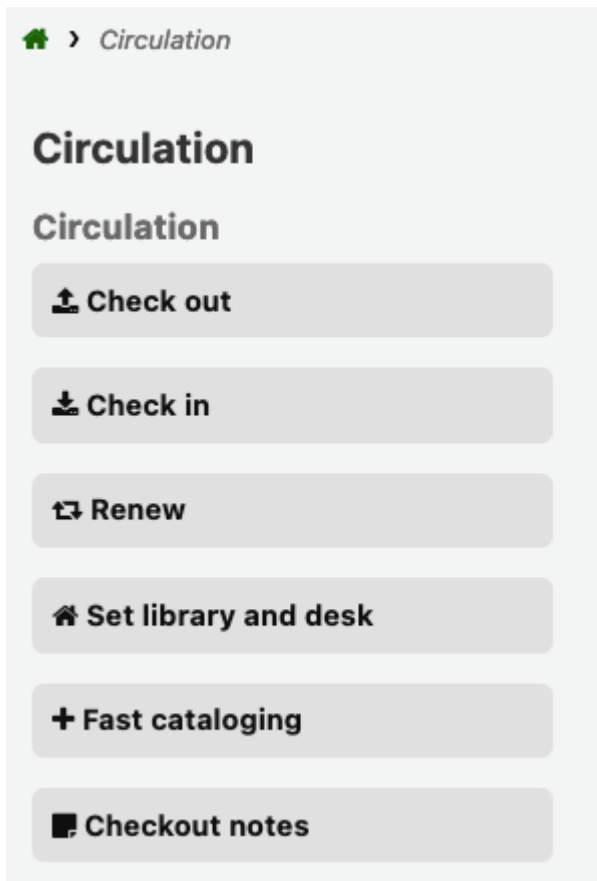
To check an item in, scan the barcode of the item into the box provided.

A summary of all items checked in will appear below the check-in box.

Check in

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

Check-in settings are available by clicking on the settings icon in the barcode field. These are used for non-standard check-ins, for example, if you need to specify a different return date, or if you need to forgive all fines.

If the [SpecifyReturnDate](#) system preference is set to 'Allow' you will be able to arbitrarily set the return date from below the check in box.

If you are checking items in that were put in the book drop while the library was closed, you can check the 'Book drop mode' box before scanning items. This will effectively roll back the return date to the last date the library was open.

Note

This requires that the closed days are added to the calendar tool.

You can also choose to forgive all overdue charges for items you are checking in by checking the 'Forgive overdue charges' box before scanning items.

Note

This checkbox will only appear if you charge overdue fines, i.e., if the finesMode system preference is set to 'Calculate and charge'.

Check in messages

There are several messages that can appear when checking items in:

- If the return policy dictates items need to be returned back to their home or holding library, a message will appear asking staff to transfer the item.

    Note

    When set to 'Block', the TransfersBlockCirc system preference will block all actions until the pop-up is confirmed.

    When set to "Don't block", the AutomaticConfirmTransfer system preference determines what happens if the pop-up is dismissed without confirming the transfer.

    - After this item is checked in and the transfer is confirmed, the status of the item will be changed in the catalog to 'in transit'.

    - To mark an item as back at the home or holding library, check the item in at that library.

        - A message will appear to tell you that the item is not checked out, but the status will now say available in the catalog. This step is necessary to mark items as received by the library.

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

    Note about the accompanying materials: 2 DVD

    - If CircConfirmItemParts is set to 'Require', the staff member will have to confirm the checkin

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

  - Clicking the Confirm hold button will mark the item as waiting for pickup from the library

  - Clicking the 'Print slip and confirm' button will mark the item as waiting for pickup at the library and present the library with a receipt to print and place on the book with the patron's information

  - Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

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

  - Clicking the 'Confirm hold and transfer' button will mark the item as in transit to the library where the hold was placed

  - Clicking the 'Print slip, transfer and confirm' button will mark the item as in transit to the library where the hold was placed and present the library with a receipt to print and place on the book with the patron's information

  - Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

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

Claiming an item as returned

If the patron claims they returned something, you can mark that item as 'Claimed returned' and track those claims.

In order to use this feature,

- [Add a new authorized value](#) to the LOST category to represent items claimed as returned.
- Enter the authorized value in the [ClaimReturnedLostValue](#) system preference (this enables the return claims feature).
- Choose if a lost fee should be charged to the patron who claims an item as returned. Set a value in the [ClaimReturnedChargeFee](#) system preference (the default is to ask if a lost fee should be charged).
- Optionally set a number of return claims a patron can make before a warning appears in their record in the [ClaimReturnedWarningThreshold](#) system preference.

Once the feature is enabled, a button to 'Claim returned' will appear in the patron's checkouts tab.

To claim an item as returned,

- Click the 'Claim returned' button next to the checkout.

- In the pop-up, enter any notes about this claim.

- If the ClaimReturnedChargeFee system preference is set to ask whether or not the lost fee should be charged to the patron, there will be a checkbox to charge the fee.

- Click 'Make claim'.

The claimed returned item will stay in the patron's checkouts, and its lost status will be updated. The claim will also appear in the 'Claims' tab.

Resolving a return claim

To resolve a claim,

- Go to the patron's record in the 'Claims' tab.

- Click 'Actions' next to the item and choose 'Resolve'.

- In the pop-up, choose a resolution and new lost status.

  - Resolution: the resolution is the reason this claim is being closed.

    Note

    The values are managed in the RETURN_CLAIM_RESOLUTION authorized value category.

  - New item lost value: this is the new lost status for this item.

    Note

    The values are managed in the LOST authorized value category.

- Click 'Resolve claim'.

The resolved claim will stay in the patron's record, unless they are purged by the cleanup_database.pl cron job after the number of days specified in the CleanUpDatabaseReturnClaims system preference.

Circulating bundles

This feature adds the ability to create bundles of items that can be checked out as a single entity. A bundle could for example be a box of related items from your library or a collection of musical scores which need to be circulated together.

You create a collection level bibliographic record and add items to it in the usual way. Those items can then be converted to a bundle by adding existing item records to them using their barcodes. The items will remain attached to their original records and be marked as 'not for loan'.

Configuration

First you need to make some configuration choices.

Item types - you may want to [create a separate item type](#) to identify your bundles.

Circulation rules - you can optionally [create circulation rules](#) for your bundle item type.

There are two system preferences which control the status values used with bundles:

- [BundleNotLoanValue](#).
- [BundleLostValue](#).

Creating bundles

The bundle functionality will only be displayed if you create a catalogue record with the Leader, (000 MARC tag) position 7 set to 'c' for Collection.

Note

It might be useful to have a separate MARC bibliographic framework for bundles with the 'c' set as a default value if you will use bundles regularly. You can also add any custom fields to the template that might be unique to bundles such as size or weight.

Your catalogue record will contain information to identify the content of the bundle.

For example, if the bundle is a box of resources for school children on the topic of oceans, the catalogue record might look something like the one shown below.

Add an item record for each physical bundle. It is likely that you will want a specific item type for bundles so that you can identify them easily and create circulation rules for them. In this case the bundle has the item type COLLECTION.

An item record attached to this type of catalogue record can be converted into a bundle via the Manage bundle button on the far right-hand side of the holdings table for each item as shown below.

Adding items to bundles

Click on Manage bundle and then the Add to bundle button to add items to the bundle using the barcode of the item.

You will see a message telling you that the item has been added successfully.

When you have finished scanning in items you can click on Close and view the bundle contents. The bundle contents list can be exported or printed if required.

Warning

Items added to bundles are still attached to their permanent catalogue record, however, they cannot be checked out individually. When added to a bundle an item's Not for Loan status is updated and can be viewed in the holdings table of the permanent record along with a link to the bundle. The Not for Loan status can be defined in the BundleNotLoanValue system preference.

If an item is already found to be attached to the bundle, a warning message will be displayed.

If an item has an item-level hold, a warning message will be displayed. To add the item to the bundle anyway, click 'Ignore holds and add to bundle'. To cancel, click 'Close'.

If an item cannot be added to the bundle for any other reason a failure message will display.

Removing items from bundles

To remove an individual item from a bundle you can click on the Remove button from the Actions column of the bundle contents list.

To remove multiple items from the bundle you have two options:

Use the 'Remove from bundle' button from within the Manage bundle display

Scan in barcodes in the same way as you add items to bundles. You will see a confirmation dialogue to let you know the item has been removed.

If the item couldn't be removed you will see a Failure message.

The second way to remove multiple items is to scan the barcode of the item into the checkin box and you will be given the option to remove the item from its bundle.

When you have finished working with a bundle you can close the contents list by clicking on the Manage bundle button again.

Circulating bundles

Checkout

You can checkout a bundle in the usual way from Circulation using the barcode of the bundle. If required you can create specific circulation rules for bundles based on their item type.

Remember, once an item is within a bundle it cannot be checked out individually. If you try to do this the following alert will be displayed.

You can see the checkout from the patron's list of checkouts.

You can also see that the bundle is checked out from the status column of the Holdings table of the catalogue record.from the catalogue record display.

Checkin

Check in bundles in the usual way from Circulation. You will then be prompted to verify the presence of each item that belongs in the bundle.

If you need to skip the verification process, click the 'Confirm checkin without verifying bundle contents' button. You will be able to verify the contents later.

A list of the items currently attached to the bundle, and expected to be returned, will display at the top of the dialogue. Beneath the list will be a 'Barcodes' box where you are expected to scan the barcodes of the returned items one by one.

As you scan items, the matching row in the list will be highlighted to give some visual feedback. You also see a running total of items that have been checked in on the right hand side.

When you have finished scanning the returned items you can click on 'Confirm checkin and mark missing items as lost' or you can cancel the checkin.

If all the bundle items were marked as found you will be presented with a message to say the checkin is complete.

You can view and print a contents list.

Missing items

If some items were found to be missing during the verification stage the check in will proceed but you will be alerted to the fact that the bundle content has changed and you will be given the option to view and print an updated contents list.

You can also view a list of the missing items.

Any items that were missing during the verification stage will automatically be marked with an appropriate Lost status and a return claim added to track which checkout lost the contained item. You can add your own Lost statuses as authorized values and can control which lost status is used via the BundleLostValue system preference. For example a 'Missing from bundle' status as shown below.

In the Manage bundle contents view, the missing item displays with the date last seen.

Claims returned process

Within the patron record the missing items are listed as claims returned and can be viewed from the Claim(s) tab in the Checkouts table.

Click on the numbered square to view the missing items for the patron.

If an item is found it should be checked in. The checkin dialogue box will include a button to 'Resolve' the claim.

You are required to add a resolution reason and can optionally change the lost value of the item.

Inventory (checking bundle contents at any time)

A verification can be triggered at any time by checking the bundle in. If the system detects that the bundle was not checked out at this point, a modified confirmation dialogue is displayed which will include all items expected to be present in the bundle, even those currently marked as lost.

This allows for a quick view of what should be in the bundle and what's currently marked as missing. You can optionally cancel the checkin or choose to rescan the items to perform the verification, marking items as found or subsequently missing. As this is a checkin that is not associated with a checkout, if new items are found to be missing, we will mark them as lost but cannot associate them with a checkout and returns claim.

Holds

Koha allows patrons to put things on hold. A 'Hold' is a way to reserve an item. Depending on your circulation and fines rules and hold system preference settings, patrons will be able to place items on hold for pickup at the library at a later date and time.

Placing holds in the staff interface

Note

Staff members must have the place_holds permission (or the superlibrarian permission) in order to be able to place holds.

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

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

To place holds on multiple titles at the same time, check the boxes next to the titles in the search results, and click the 'Place hold' button at the top of the search results.

You will be asked to search for a patron by barcode or any part of their name to start the hold process.

If you'd like to search for the patron first and then the bibliographic record for the hold, you can open the patron record and click on the 'Search to Hold' button at the top of the patron record.

After clicking the button you will be brought to the catalog search page where you can find the title or titles you need to place a hold on. Under each title on the results you'll see an option to 'Place hold for (patron name).'

If you want to place a hold on multiple titles for this patron, check the boxes to the left of the titles, click the arrow to the right of the 'Place Hold' button and choose 'Place hold for (patron name)'.

Note

Once the holds are placed, you can choose to have Koha 'forget' the patron's name by clicking the arrow to the right of the 'Place hold' button on the search results and choosing the 'Forget (patron name)' option.

Depending on how many items you choose to place a hold on at once you will see a different place hold form. If you are placing a hold on one bibliographic record you will see a list of all of the items you can place a hold on.

- Patron: the patron's name for whom this hold is

- Estimated priority: this takes into account holds that are already placed on this title

- Note: enter any notes that might apply to this hold

- Pickup at: choose the library where the patron will pick up the item

- Request specific item type: if the AllowHoldItemTypeSelection system preference is set to 'Allow' there will be an option to choose to limit the hold to a specific item type

- Hold starts on date: if the AllowHoldDateInFuture system preference is set to 'Allow', and the patron wants the hold to start on a date other than today, enter the date here

- Hold expires on: if the patron has specified that they don't want the item after a certain date, or if you have limits on hold lengths, you can enter an expiration date for the hold in the 'Hold expires on date'

  Note

  To cancel expired holds automatically you need to have the expired holds cron job set to run on a regular basis.

- Hold next available item: check if the hold should be on the next available item, if not, choose an item group in the 'Hold next available item from an item group' section or a specific item in the 'Place hold on a specific item' section below

- Holds to place (count): If 'Hold next available item' is checked and multiple holds per record are allowed, you can enter a number in the 'Holds to place (count)' text box to place that number of holds for the selected patron.

    Note

    The 'Holds to place (count)' text box will only appear if the Circulation and Fines rules are set to allow a 'Holds per record' limit that is greater than 1, but not Unlimited, for this combination of item type and patron category.

- Non-priority hold: if you are placing a hold for internal purposes, such as checking for missing pages or needing to add a label, check the 'Non-priority hold' box. This type of hold will not prevent the patron who currently has the item to renew their checkout.

- Hold next available item from an item group: if the EnableItemGroupHolds system preference is set to 'Enable' and the record has item groups, you can choose to place a hold on the next available item of a group, rather than the next available item on the whole record or a specific item.

- Place hold on a specific item: if the hold should be on a specific item rather than the next available item of the record or the group, select the item that should be placed on hold

    Note

    The default pickup library for item-level holds is determined by the DefaultHoldPickupLocation system preference.

If you're placing holds on multiple records you will be presented with the next available option for all titles. If no items are available for hold it will say so on the confirmation screen.

If your library uses the patron clubs feature, use the clubs tab to place a hold for a club.

To place a hold for a club, click the clubs tab, search for and select the club name, and click the 'Place hold' button.

Managing holds

Holds can be altered and cancelled from the holds tab found on the left of the bibliographic record.

From the list of holds you can change the order of the holds, the pickup location, whether the hold is on a specific item or for the next available item, suspend, or cancel the hold.

Note

If the HoldsSplitQueue system preference is set, you will see the holds list split across different tables by either pickup library, item type or both.

Note

If the AllowHoldDateInFuture system preference is set to "Don't allow", you will not have the option to edit the date the hold was placed (the column labelled Date).

Note

Depending on how the HidePatronName system preference is set, the list may show card numbers instead of names in the patron column like in the image above.

Changing the order of the holds

Note

Staff members must have the modify_holds_priority permission (or the superlibrarian permission) in order to be able to change holds' priorities.

To rearrange holds, make a selection from the 'Priority' drop-down or click the arrows to the right of the priority pull down.

Warning

Clicking the double down arrow to the right of the hold will stick the hold at the bottom of the list even if more requests are made.

For example, if your library has home-bound patrons that are allowed to keep items out for months at a time, it would not be fair to other patrons if a home-bound patron were able to check out a brand new book and keep it for months. For this reason, the home-bound patron's hold request would stay at the bottom of the queue until everyone else who wanted to read that book has already done so.

In the list of existing holds, lowest priority holds are indicated by the double down arrow with a line underneath.

Clicking the double arrow again will put the hold back in regular priority, in last place.

Changing the level of a hold

Version

This feature was added in version 23.11 of Koha.

Sometimes it can be necessary to change a hold that has been made on a specific item (known as an item level hold) to a hold that is not specific to an item and will be filled as soon as the next item is returned (often

referred to as a record level hold). To change the level of a hold, make a selection from the 'Details' dropdown and confirm the change by clicking the 'Update hold(s)' button above.

Suspending holds

If a patron asks to have their hold suspended and the SuspendHoldsIntranet system preference is set to 'Allow', you can do so by clicking the 'Suspend' button at the far right.

If the patron gives you a date for the holds to resume, you can enter that in the date box and click the 'Update hold(s)' button to save your changes.

Note

If the AutoResumeSuspendedHolds system preference is set to "Don't allow" there will not be the option to put an end date on the hold suspension.

Note

The auto_unsuspend_holds.pl cron job is required to automatically resume suspended holds.

You can also unsuspend holds manually by clicking the 'Unsuspend' button.

If the SuspendHoldsOpac system preference is set to 'Allow', patrons will be able to suspend and unsuspend their own holds from their online account.

Deleting holds

To delete or cancel a hold, click the red trash can to the right of the hold line.

To delete/cancel a bunch of holds you can choose 'del' from the drop-down menu on the left of each line and then click 'Update hold(s)' at the bottom of the list.

Alternatively, you can select the holds to be cancelled and click the 'Cancel selected' button.

Receiving holds

When items that are on hold are checked in or out the system will remind the circulation staff that the item is on hold and offer them options for managing the hold.

When you check in an item that has a hold on it the system will ask you to either confirm and transfer the item

or just confirm the hold

If the item needs to be transferred, clicking 'Confirm and transfer' or 'Print slip, transfer, and confirm' will mark the item as in transit to the proper library.

If the item is already at the pickup library, clicking the 'Confirm' or the 'Print slip and confirm' button will mark the item as ready for pickup by the patron.

Clicking 'Ignore' will retain the hold, but allow the item to be checked out to another patron or change the status of the item (if it was returned damaged, for example).

The 'Print slip and confirm' or 'Print slip, transfer, and confirm' options will open a printable page that you can attach to the item with the necessary hold or transfer information.

Note

The slip that is printed is the HOLD_SLIP notice. It can be modified with the Notices and slips tool.

When the hold is confirmed, if the patron is notified, the 'hold filled' notice will be sent to them.

Note

The notice that is sent is the HOLD notice. It can be modified with the Notices and slips tool.

Note

If the HoldsAutoFill system preference is enabled, the circulation staff will not have to confirm the hold, but they will have the option to print the hold or transfer slip.

If the HoldsAutoFillPrintSlip system preference is enabled, the print window to print the hold or transfer slip will open automatically.

Once confirmed, the hold will show as 'waiting' on the patron record and on the checkout screen under the 'Holds' tab.

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

In some cases, a patron may come in to pick up a hold on behalf of someone else. In this case, make sure that the hold is cancelled when you check the item out to someone else. Alternatively, a check out might be attempted in error for an item that is already waiting for someone else. In this case you will be presented with a warning message.

- Cancel hold: in combination with 'Yes, check out', this option will cancel the current hold and check the item out to the new patron.
- Revert waiting status: in combination with 'Yes, check out', this option will revert the waiting status of the hold (the patron who placed the hold will be back in first position in the queue) and check the item out to the new patron.
- Yes, check out: this option will check the item out to the current patron.
- Don't check out and print slip: this option will open the print window to print the hold slip, the check out will be cancelled and the hold will remain.
- No, don't check out: this option will cancel the check out, the hold will remain.

If you check in an item that is already waiting to be picked up, a pop up indicating that a hold was found and the item is already waiting will appear. In addition to this, there is an option to allow staff to cancel the hold and choose a hold cancellation reason.

Note

Hold cancellation reasons are connected to the authorized values.

- Confirm hold: this option will keep the existing hold.
- Print slip and confirm: this option will open the print window to print the hold slip and keep the existing hold.
- Cancel hold: this option will remove the hold.
    - If you cancel the hold and further holds exist for the item you will be presented with a new option to confirm the hold for the next patron.
    - A reason can be allocated to the cancellation of the hold. A notice can be sent to the patron explaining why this hold was cancelled.

Warning

If you want to send a notice with the cancellation reason, you will need to add a new notice with code "HOLD_CANCELLATION" if you do not have one already.

Curbside pickups

Koha has an integrated curbside pickup module that can be used to schedule hold pickups by patrons.

- *Get there*: Circulation > Curbside pickups

See the curbside pickup configuration section to learn how to set up curbside pickup.

Note

Staff members must have the manage_curbside_pickups permission (or the superlibrarian permission) in order to schedule and manage pickups.

Scheduling a pickup

- *Get there*: Circulation > Curbside pickups > Schedule pickup

To schedule a pickup,

- Click the 'Schedule pickup' tab

- Search for the patron for whom to schedule a pickup, with either their name or their card number

    Warning

    If 'Enable for waiting holds only' is set in the curbside pickup configuration for your library, and the patron has no waiting holds, there will be an error message.

- Enter a date for the pickup

   Note

   Only dates with available time slots will be displayed.

- The possible pickup times will be displayed, depending on the day of the week

   Note

   The number in parentheses under each time slot is the number of patrons who are currently scheduled for a pickup at that time. If the maximum number of appointments has been reached, based on the 'Maximum patrons per interval' setting in the curbside pickup configuration, the time slot will be displayed in red and you will not be able to select it.

- If needed, you can add a note concerning this pickup
- Click 'Submit'

Alternatively, you can schedule a pickup from the patron's account.

- Click 'Schedule pickup' at the top of the patron's detail page

Note

If the patron has chosen to receive the 'Hold filled' notice by email, they will also get a notification when a curbside pickup is scheduled.

You can customize the notice by editing the NEW_CURBSIDE_PICKUP template in the Notices and slips tool.

Preparing for curbside pickups

- *Get there*: Circulation > Curbside pickups > To be staged

The 'To be staged' tab contains all the curbside pickups still waiting to be prepared.

Note

If the patron has overdues or restrictions, it will be shown here, under their name.

Once the items are prepared and ready to be picked up, click 'Mark as staged & ready'. This will transfer the scheduled pickup appointment in the 'Staged & ready' tab.

Note

There is no need to checkout the item or items to the patron at this point. When [delivering curbside pickups](#), the module will automatically check the items out.

You have the option to refresh the list manually by clicking the 'Refresh' button. You can also set up your session to refresh every X seconds. Check the box next to 'Refresh automatically every X seconds' and enter the number of seconds.

Delivering curbside pickups

- *Get there*: Circulation > Curbside pickups > Patron is outside

From the OPAC, the patron can alert that they are outside. Staff can also indicate that the patron has arrived by clicking on the 'Patron has arrived' button from the 'Staged & ready' tab.

At the designated time, meet the patron to give them their items. Then, click 'Mark as delivered'. This will check out the item or items to the patron and transfer the curbside pickup appointment to the 'Delivered today' tab.

Cancelling curbside pickups

- *Get there*: Circulation > Curbside pickups > To be staged

If, for any reason, you need to cancel a curbside pickup appointment, click the 'Cancel' button from the 'To be staged' tab.

If the appointment has already progressed beyond the 'To be staged' status, click 'Mark as To be staged' to bring it back there in order to cancel it.

Recalls

The recalls feature allows users to recall items that are currently checked out. Once the recall is confirmed, the borrower who currently has the item checked out will be notified that their due date has been adjusted and they need to return their item. Once recalled items are returned, the recall requester will be notified that their item is awaiting pickup at their specified pickup location.

See the [requesting recalls](#) section to learn how to place a recall in the OPAC.

Setting up recalls in Koha

To use this feature:

- Enable the [UseRecalls](#) system preference
- Set the [RecallsMaxPickUpDelay](#) system preference
- Optionally, enable the [RecallsLog](#) system preference
- Modify the following sections in the relevant [circulation rules](#)
  - Recalls allowed (count)
  - Recalls per record (count)
  - On shelf recalls allowed
  - Recall due date interval (day)
  - Recall overdue fine amount

- Recall pickup period
- Make sure all the staff members who will be managing recalls have the manage_recalls permission (or the superlibrarian permission).
- Schedule the recalls cronjobs
- Review the recalls notices and slips to make sure they have all the information needed

Managing recalls

The recalls feature is relatively automated. Staff do not have a lot of manipulations to do to manage recalls.

> **Note**
>
> Only staff with the manage_recalls permission (or the superlibrarian permission) will be able to access recall management.

Recall statuses

The possible statuses for recalls are the following:

- Requested
  - A new recall request has been made and the item must be returned by the patron who currently has it
  - Requested recalls appear in
    - the recalls queue
    - the recalls to pull list, if an available item can fulfill the recall
    - the 'Recalls' tab of the bibliographic record
    - the 'Recalls' tab of the patron's file (and its equivalent in the OPAC)
    - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)
- Waiting
  - A recalled item is awaiting pickup at the requester's chosen branch
  - Waiting recalls appear in
    - the recalls awaiting pickup list
    - the recalls queue
    - the 'Recalls' tab of the patron's file (and its equivalent in the OPAC)
    - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)
- In transit
  - An item has been assigned to a recall and is in transit to the requester's chosen pickup branch
  - In transit recalls appear in
    - the recalls queue
    - the 'Recalls' tab of the patron's file (and its equivalent in the OPAC)
    - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)
- Overdue
  - A recalled item is overdue to be returned by the patron who currently has it
  - Overdue recalls appear in
    - the overdue recalls list
    - the recalls queue
    - the 'Recalls' tab of the patron's file (and its equivalent in the OPAC)
    - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)
- Fulfilled
  - A recalled item has been checked out to the recall requester, and the recall is complete
  - Fulfilled recalls appear in
    - the old recalls list
    - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)
- Expired
  - The recall was not completed before a defined expiration date or the recall requester failed to pick up their waiting recall within the pickup period defined in RecallsMaxPickUpDelay

- - Expired recalls appear in
      - the old recalls list
      - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)
- Cancelled
    - The recall request was cancelled.
    - Cancelled recalls appear in
      - the old recalls list
      - the 'Recalls history' tab of a patron's file (and its equivalent in the OPAC)

Receiving recalled items

Upon checkin in an item that has been recalled, a pop up will appear asking the staff member to confirm or ignore the recall.

- Confirm recall: this option will put the recall in 'Waiting' status and, if the patron has an email address in their file, will notify them that their recalled item is now ready for pickup.

  Note

  The notice sent is PICKUP_RECALLED_ITEM. You can modify it's content in the notices and slips tool

- Print slip and confirm: this option will print a slip you can attach to the item (similar to a hold slip) in addition to everything the 'confirm recall' does (change the status and send the notice).

  Note

  The slip is RECALL_REQUESTER_DET. You can modify it's content in the notices and slips tool

- Ignore: this option will check in the item, but the recall will not be set as awaiting pickup and the patron will not be notified.

If the patron asked to pick up their recalled item at a different library, a transfer will be triggered.

- Confirm recall and transfer: this option will put the recall 'In transit'.
- Print slip, transfer, and confirm: this option will print a slip you can attach to the item (similar to a hold slip) in addition to setting the recall as 'In transit'.
- Ignore: this option will check in the item, but the recall will not be set as 'In transit'

Note

The patron will not be notified that their recall is ready for them with any of the above options.

Cancelling recalls

Note

Only requested or overdue recalls can be cancelled.

It is not possible to cancel a recall that is currently awaiting pickup

Staff can cancel recalls from various screen in the staff interface.

- Cancel from the [recalls queue](#) either individually by clicking the 'Actions' button and selecting the 'Cancel' option.

  Or by selecting several recalls and clicking the 'Cancel selected recalls' button at the bottom of the screen.

  If the recalled item is currently in transit, the cancel option will also trigger a transfer back to the item's home library.

- Cancel from the [recalls to pull](#) by clicking the 'Cancel recall' button on the right

  If the recalled item is currently in transit, the cancel option will also trigger a transfer back to the item's home library.

- Cancel from the [overdue recalls list](#) either individually by clicking the 'Actions' button and selecting the 'Cancel' option.

  Or by selecting several recalls and clicking the 'Cancel selected recalls' button at the bottom of the screen.

- Cancel from the 'Recalls' tab of a bibliographic record by clicking the 'Actions' button and selecting the 'Cancel' option.

  Or by selecting several recalls and clicking the 'Cancel selected recalls' button at the bottom of the screen.

- Cancel from the 'Recalls' tab of a patron's details page by clicking the 'Actions' button and selecting the 'Cancel' option.

- Cancel from the 'Recalls history' tab of a patron's file by clicking the 'Actions' button and selecting the 'Cancel' option.

Changing waiting recalls' status

If a recall is currently awaiting pickup and for some reason the staff needs to change this status (for example, the requesting patron called and they won't be picking up the recall), it is possible to revert the waiting status.

- Revert the status from the [recalls queue](#) by clicking the 'Actions' button and selecting the 'Revert waiting' option.

- Revert the status from the [Recalls awaiting pickup list](#) by clicking the 'Revert waiting status' button on the right.

Marking recalls as overdue

If a recall is not checked in by the new due date, it should be marked as overdue by the [overdue_recalls cronjob](#). However, it is possible to mark recalls as overdue manually.

From the [recalls queue](#), click the 'Actions' button and selecting the 'Mark as overdue' option.

Overdue recalls appear in the [Overdue recalls list](#).

Expiring recalls

If a recall as been awaiting pickup for longer than the allowed period defined in [RecallsMaxPickUpDelay](#), it should be expired automatically by the [expire_recalls cronjob](#). However, it is possible to expire recalls manually.

From the [recalls awaiting pickup list](#), click the 'Expire recall' button on the right.

Recalls reports

Once [recalls are set up](#), new sections will appear in the circulation module.

- *Get there*: Circulation > Recalls

Recalls queue

The recalls queue shows all the current active recalls with their statuses.

From the recalls queue, staff can cancel active recalls either individually by clicking the 'Actions' button and selecting the 'Cancel' option.

Or by selecting several recalls and clicking the 'Cancel selected recalls' button at the bottom of the screen.

For recalls that are in transit, it is possible to cancel them and this will trigger a transfer back to their home library.

For recalls that are currently awaiting pickup, it is possible to revert the waiting status by clicking the 'Actions' button and selecting the 'Revert waiting' option.

For recalls that are overdue, it is possible to mark them as such from the recalls queue by clicking the 'Actions' button and selecting the 'Mark as overdue' option.

Recalls to pull

The recalls to pull list shows all the records that have been recalled but that have available items that could fulfill the request.

Staff can pick up these items from the shelves and check them in to fulfill the requests.

From the recalls to pull list, staff can cancel recalls if needed, by clicking the 'Cancel recall' button on the right.

If the item is currently in transit, cancelling the recall will also trigger a transfer back the the item's home library.

Overdue recalls

This list shows the items that have been recalled but have not been returned by the new due date.

Recalls can be marked as overdue automatically through the overdue_recalls cronjob or manually.

From this list, staff can cancel active recalls either individually by clicking the 'Actions' button and selecting the 'Cancel' option.

Or by selecting several recalls and clicking the 'Cancel selected recalls' button at the bottom of the screen.

Recalls awaiting pickup

The recalls awaiting pickup list shows all the recalls that are currently waiting for the patron to come and get them.

This list is divided in two tabs:

- Recalls waiting: shows all the recalls currently awaiting pickup.
- Recalls waiting over x days: shows the recalls that have been waiting for more than the number of days specified in the RecallsMaxPickUpDelay system preference.

From this list, staff can revert waiting recalls by clicking on the 'Revert waiting status' button on the right.

Staff can also manually expire recalls by clicking on the 'Expire recall' button on the far right.

Old recalls

The old recalls list shows all the inactive recalls (completed, cancelled and expired).

Transfers

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

- *Get there*: Circulation > Transfer

To transfer an item,

- Click 'Transfer' on the Circulation page.

- Select the library to transfer the item to.

- Scan or type the barcode on the item to transfer.

- Click 'Submit'.

The item will now say that it is in transit in the 'Status' column of the holdings table in the staff interface and in the OPAC.

When the item arrives at the other library, the staff member must check the item in to acknowledge that it has arrived and is no longer in transit.

The item will not be permanently moved to the new library. The item will keep the same 'Home library' and the 'Current location' is updated to note where it resides at this time.

Staff can check the status of items in transit in the Transfers to receive report.

If you are using the stock rotation automation tool, you can check which items from your library are requested by the stock rotation tool for transfer to another library using the Transfers to send report.

Set library

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

This is the library where all circulation transactions will take place. If you are at another library (or on a bookmobile) you will need to set the library before you start circulating items. To do this, click on your username and logged in library at the top right and choose 'Set library' or click 'Set library' on the main circulation page.

Circulation

Circulation	Holds	Patron request
⬆ Check out	☰ Holds queue	🖼 Article requests
⬇ Check in	○ Holds to pull	**Transfers**
⇄ Renew	🗓 Holds awaiting pickup	⇄ Transfer
🏠 Set library	⟳ Curbside pickups	➡ Transfers to send
✚ Fast cataloging	⬈ Hold ratios	↪ Transfers to receive
🖹 Checkout notes	**Recalls**	**Overdues**
📍 Pending on-site checkouts	☰ Recalls queue	⊘ Overdues
	○ Recalls to pull	⊘ Overdues with fines
	⊘ Overdue recalls	
	🗓 Recalls awaiting pickup	
	☰ Old recalls	

Offline circulation

Upload offline circulation file (.koc)   🖥 Get desktop application
Pending offline circulation actions   ⬇ Get Firefox add-on

Note

Only staff with the [loggedinlibrary permission](#) (or the [superlibrarian permission](#)) will be able to change the ibrary they are logged in at.

This will bring you to a page where you can choose at which library you are.

Once you save your changes, your new library will appear in the top right.

Note

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

Staff members who do not have this permission will only be able to log into their home library.

Fast add cataloging

Note

Staff members must have the [fast_cataloging permission](#) (or the [superlibrarian permission](#)) in order to be able to use the fast cataloging option.

Sometimes circulation librarians need to quickly add a record to the system for an item they are about to check out. This is called 'Fast add'.

There are two ways to add titles via fast add. If you know that you're about to check out an item that isn't in you catalog you can go to the Circulation module and click 'Fast cataloging.'

Circulation

Circulation

⬆ Check out

⬇ Check in

🔁 Renew

🏠 Set library

➕ Fast cataloging

📖 Checkout notes

📍 Pending on-site checkouts

Holds

☰ Holds queue

○ Holds to pull

📅 Holds awaiting pickup

🔄 Curbside pickups

📈 Hold ratios

Recalls

☰ Recalls queue

○ Recalls to pull

⊘ Overdue recalls

📅 Recalls awaiting pickup

☰ Old recalls

Patron request

🔲 Article requests

Transfers

⇄ Transfer

↪ Transfers to send

↩ Transfers to receive

Overdues

⊘ Overdues

⊘ Overdues with fines

Offline circulation

Upload offline circulation file (.koc)   🖥 Get desktop application
Pending offline circulation actions   ⬇ Get Firefox add-on

The cataloging interface will open up with the short cataloging record:

After adding your cataloging data you will be asked to enter item data. Enter the items barcode, collection code, etc and save the item before checking it out.

The other way to fast catalog is from the checkout screen. When you enter a barcode at checkout that Koha can't find, it will prompt you to use fast cataloging to add the item to Koha and check it out.
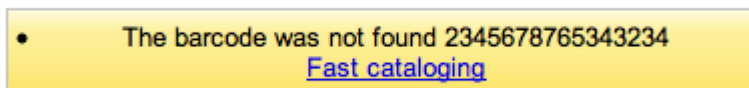
Clicking 'Fast cataloging' will bring you to the fast cataloging form where you can enter the title information

After clicking 'Save' you will be brought to the item record where the barcode will already be filled in with the barcode you're trying to check out.

After clicking the 'Add item' button the item will automatically be checked out the patron you were trying to check the book out to originally.

Circulation reports

Most reports can be found via the Reports module, but some of the more common circulation reports are available right from the Circulation module.

- *Get there*: Circulation > Circulation reports

Holds queue

This report will show you all holds waiting to be pulled off the shelf at your library.

First, choose some filters for the report.

Then, the report will be displayed.

To generate this report, you must either have the [Build holds queue cron job](#) running, or the [RealTimeHoldsQueue](#) system preference must be set to 'Enable'. Either of these will run a script that decides which library should be responsible for fulfilling a given hold request. This should be enabled if your library system allows borrowers to place on-shelf holds.

The holds queue behavior is controlled by the system preferences [StaticHoldsQueueWeight](#), [RandomizeHoldsQueueWeight](#) and [UseTransportCostMatrix](#).

If you do not want all of your libraries to participate in the on-shelf holds fulfillment process, you should list the libraries that *do* participate in the process here by inputting all the participating library's branchcodes, separated by commas (e.g. "MPL,CPL,SPL,BML" etc.).

By default, the holds queue will be generated such that the system will first attempt to hold fulfillment using items already at the pickup library if possible. If there are no items available at the pickup library to fill a hold, the system will then use the list of libraries defined in [StaticHoldsQueueWeight](#). If [RandomizeHoldsQueueWeight](#) is disabled (which it is by default), the script will assign fulfillment requests in the order the libraries are placed in the [StaticHoldsQueueWeight](#) system preference.

For example, if your system has three libraries, of varying sizes (small, medium and large) and you want the burden of holds fulfillment to be on larger libraries before smaller libraries, you would want [StaticHoldsQueueWeight](#) to look something like "LRG,MED,SML".

If you want the burden of holds fulfillment to be spread out equally throughout your library system, simply enable [RandomizeHoldsQueueWeight](#). When this system preference is enabled, the order in which libraries will be requested to fulfill an on-shelf hold will be randomized each time the list is regenerated.

An alternative to static and randomized is using the [Tansport cost matrix](#). It takes precedence in controlling where holds are filled from and allows you to define the 'cost' of transport between any two libraries. To use the Transport cost matrix simply set your [UseTransportCostMatrix](#) preference to 'Use'.

Holds to pull

This report will show you all of the items that have holds on them that are available at the library for pulling. If the items are available at multiple libraries then all libraries with that item available will see the hold to pull until one library [triggers the hold](#).

Note

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

Depending on the value of the [CanMarkHoldsToPullAsLost](#) system preference, clicking the "Mark item as lost" button or "Mark item as lost and notify patron" button will mark item as lost and notify the requesting patron.

You can choose which [LOST value](#) to set the item to with the [UpdateItemWhenLostFromHoldList](#) system preference.

Warning

These buttons will only appear on item-level holds.

Note

The notification sent to the patron will use the CANCEL_HOLD_ON_LOST template. It can be customized in the [Notices and slips tool](#).

You can limit the results you see by using the Refine box on the left side of the page.

Note

The default dates in the filters are determined by the [HoldsToPullStartDate](#) and [ConfirmFutureHolds](#) system preferences.

Holds awaiting pickup

This report will show all of the holds that are waiting for patrons to pick them up.

Note

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

You can cancel individual holds manually by clicking the 'Cancel hold' button to the right of each hold, or you can cancel selected holds using the button at the top of the list.

Items that have been on the hold shelf longer than you normally allow (based on the [ReservesMaxPickUpDelay](#) system preference value or the 'Holds pickup delay' rule in the [circulation and fine rules](#)) will appear on the 'Holds waiting past their expiration date' tab.

Note

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

These holds will not automatically be canceled unless the [ExpireReservesMaxPickUpDelay](#) system preference is set to 'Allow' and the [cancel_expired_holds.pl cron job](#) is scheduled to run regularly.

You can cancel individual holds manually by clicking the 'Cancel hold' button to the right of each hold, or you can cancel selected holds using the button at the top of the list, or even cancel all holds.

The 'Holds with cancellation requests' tab contains waiting holds that have been canceled by patrons through [their account on the OPAC](#), if that is allowed by the [waiting hold cancellation policy](#).

From this tab, staff can cancel the holds, and transfer them back to their home library, if that is the case.

Note

[Checking in the items](#) will also cancel the holds with cancellation requests.

Hold ratios

Hold ratios help with collection development. Using this report you will be able to see how many of your patrons have holds on items and whether you should buy more. By default it will be set to the library needing 3 items per hold that has been placed. The report will tell you how many additional items need to be purchased to meet this quota.

Note

You can change the default ratio with the [HoldRatioDefault](#) system preference.

Note

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

Transfers to receive

This report lists all the items that are in transit to your library.

If your transfers are late in arriving, you will see a message stating how late your items are.

Note

A transfer is considered late based on the number of days entered in the [TransfersMaxDaysWarning](#) system preference.

Transfers to send

This report lists all the items that are requested from your library by the stock rotation tool.

Note

This report will only be shown and filled if you are using the [stock rotation automation tool](#).

Article requests

Article requests are somewhat similar to holds, but are not requests for an item to check out. Instead, article requests are requests for a photocopy of a particular section of a book or an article from a serial issue. This is very common in academic libraries where researchers may request a copy of a single article found in a journal.

Setting up article requests

First, enable your system preference for [ArticleRequests](#).

Set to 'Enable' patrons to place article requests.

Next you will need to decide how your patrons will make requests, either record only, item only, or both record and item level.

You can set 3 different system preferences for mandatory fields to be filled in depending on how your records are requested.

- [ArticleRequestsMandatoryFields](#): make the following fields mandatory for records that are record level or item level requestable
- [ArticleRequestsMandatoryFieldsItemsOnly](#) make the following fields mandatory for records that are only item level requestable
- [ArticleRequestsMandatoryFieldsRecordOnly](#) make the following fields mandatory for records that are only record level requestable

The [ArticleRequestsOpacHostRedirection](#) system preference is used if you create analytical records. If enabled, it will redirect the patron from the child record to the host record in the OPAC.

The [ArticleRequestsSupportedFormats](#) system preference determines the various formats patrons can request their articles in (either photocopy or scan).

Next you will want to go into your [circulation and fines rules matrix](#) and select each rule for which you want to allow requests.

You can allow requests to be made at the record level, item level, yes (which means both) and no (which means no article requests may be placed).

You can also limit the number of open article requests a patron can have at one time by patron category in the [Default open article requests limit](#) section of the circulation rules page.

You can set up a fee for each article request in the [Default article request fees](#) section of the circulation rules page.

Placing article requests

Now you can place requests on both the staff client and OPAC.

In the staff client, on the record details page, you will see a 'Request article' button at the top and an 'Article requests' tab to the left. The two options lead to the same page.

Just like a hold, you will be prompted to enter the patron's card number or name.

If there is a fee, a message will appear to inform the staff member.

Fill in the form.

Note

The mandatory fields are set through the three system preferences ArticleRequestsMandatoryFields, ArticleRequestsMandatoryFieldsItemsOnly, and ArticleRequestsMandatoryFieldsRecordOnly.

- Title: enter the title of the requested article or chapter

- Author: enter the author of the requested article or chapter

- Volume: enter the volume in which this article or chapter is found

- Issue: enter the issue in which this article is found

- Date: enter the date of the issue in which this article is found

- Table of contents: check to indicate the patron wants a copy of the table of contents

- Pages: enter the pages to photocopy or scan

- Chapters: enter the chapters to photocopy or scan

- Patron notes: enter any relevant notes

- Format: choose the format in which the patron wishes to receive this article or chapter

  Note

  The possible formats are defined in the ArticleRequestsSupportedFormats system preference.

- Pickup library: choose the library at which the patron wishes to pick up their photocopy

If allowed, choose the specific item to request.

Then, click on 'Place request'.

From the OPAC, patrons can place requests themselves either from the results list

or by going to the detailed record.

As with a hold, if the patron is not logged in, they will be asked to do so.

The form is the same as the one in the staff interface.

If there is a fee, a message will appear to inform the patron.

If allowed, the patron can choose the specific item to request.

From their account, the patron will be able to follow the progress of their request from 'new'

to 'pending', if necessary,

to 'processing'.

The patron will receive an email notification after placing the request to confirm it as well as when the status of the request changes.

> **Note**
>
> When placing an article request, the patron will receive a notification. The notice sent is based on the AR_REQUESTED template.
>
> Each status is also linked to a notification. See below, under Managing article requests for the letter code for each status.
>
> The content of any notification can be customized in the Notices and slips tool.

Once the request is completed the patron will receive an email notification and the article request will no longer appear in their account.

> **Note**
>
> When staff marks the article request as 'Completed', the patron will receive a notification. The notice sent is based on the AR_COMPLETED template. The content of this notification can be customized in the Notices and slips tool.

Managing article requests

Once the article request has been placed, staff will see new requests at the bottom of the home page on the staff client. (In the same location as tags, comments and modifications).

From there staff will be able to select requests to process.

New requests are in the 'New' tab.

The first step would be for a staff member to process the request, that moves the request to the processing tab and alerts other staff members that the request is in process. In the actions column, click on the dropdown menu and select 'Process request'. This will move the request to the processing tab.

> **Note**
>
> Setting an article request to 'Processing' will send a notification to the patron. The notice sent is based on the AR_PROCESSING template. The content of this notification can be customized in the Notices and slips tool.

If for any reason, a request cannot be processed right away (for example, if the title is currently checked out), the status can be changed to 'Pending'. This will send a notice to the patron indicating the request has been received and seen, but has yet to be processed.

> **Note**
>
> Setting an article request to 'Pending' will send a notification to the patron. The notice sent is based on the AR_PENDING template. The content of this notification can be customized in the Notices and slips tool.

Next staff will go to the shelf and make a copy of the requested article.

Once that is complete, staff can print the article request slip and staple or paper clip it to the article. In the actions column, you can select the dropdown and select print slip.

> **Note**
>
> The slip used is based on the AR_SLIP template. The content of this slip can be customized in the Notices and slips tool.

Finally, staff will select the complete article request from the actions dropdown menu which will send a notice to the patron who made the request letting them know the request is ready for pickup.

This removes the article request from the processing tab.

> **Note**
>
> Completing an article request will send a notification to the patron. The notice sent is based on the AR_COMPLETED template. The content of this notification can be customized in the Notices and slips tool.

If, for any reason, an article request must be cancelled, staff can choose the 'Cancel request' option from the 'Actions' button.

> **Note**

Cancelling an article request will send a notification to the patron. The notice sent is based on the AR_CANCELED template. The content of this notification can be customized in the [Notices and slips tool](#).

Note

Actions can also be made in bulk by checking the boxes next to the requests to process or by clicking 'Select all', and choosing the new status from the actions menu on top of the table.

Overdues

This report will list all items that are overdue at your library.

Note

Only staff with the [overdues_report permission](#) (or the [superlibrarian permission](#)) will be able to run this report.

Warning

For libraries with a large patron base, this report may take a significant amount of time to run.

Large libraries can choose to filter the report before it runs by setting the [FilterBeforeOverdueReport](#) system preference to 'Require'.

Note

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

The report can be filtered using the menu options found on the left of the report.

Note

The 'Show any items currently checked out' checkbox basically switches this from a report of overdues to a report of checkouts. It will show all titles checked out regardless of due date.

The report result can be downloaded via the 'Download file of displayed overdues' link or the 'Export' button at the top of the table.

Overdues with fines

This report will show you any overdues at your library that have accrued fines on them.

Note

Only staff with the overdues_report permission (or the superlibrarian permission) will be able to run this report.

If you would like to limit the report you can use the pull down menu at the top to limit to a specific shelving location at your branch. To see overdues with fines at other branches you will have to change your branch or log in at that branch.

> **Important**
>
> If you do not charge fines and/or don't have the fines cron job running you will see no data on this report.

Pending on-site checkouts

If you are using the on site checkouts functionality (OnSiteCheckouts) then you'll have a report to view all items that are currently checked out on site.

This will list the due date (overdues in red), who has the item, item information and what library the item is at.

Tracking in-house use

Many libraries track the use of items within the library.

> **Note**
>
> This is different from tracking on-site usage. In-house use is the use of items in the library by patrons without them having to check them out. On-site use is the use of items on site that must first be checked out. To learn more about on site usage please review the OnSiteCheckouts preference.

Tracking the use of items in the library without checking them out can be done in Koha one of two ways. The first is to create one or more Statistical Patrons. When collecting items that have been used within the library, you will want to check them out to your statistical patron:

Instead of marking the item as 'checked out' the system will record that the item was used in house:

Repeat these steps for all items that have been used within the library to keep accurate statistics for item use.

The other way to record local use of items is to set your RecordLocalUseOnReturn preference to 'Record.' Then whenever you check an item in that is not checked out and not on hold a local use will be recorded.

> **Note**
>
> If you have RecordLocalUseOnReturn set to 'Record' you can still use your statistical patrons to record local use as well.

Self checkout

Koha comes with a very basic self checkout module. To enable this module you need to set the WebBasedSelfCheck system preference to 'Enable.' To use this module you have to log in as a staff member with the self_checkout_module permission.

> **Note**
>
> Create a staff patron specifically for this action so that you don't leave a real staff client logged into a computer all day

There is no link to the Self checkout module, but a simple addition to the OPACUserJS system preference can add one.

```
$(document).ready(function(){
    $("#login .btn").parent().after("<p><a href=\"http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-ma
});

**Important**

The code above has line breaks added to make it more readable,
please be sure to enter the above as one line in when putting it in
the system preference.
```

The link will then appear at the bottom of the log in page:

You can also access this module by going to: http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl

When on the self checkout page, depending on the value in your SelfCheckoutByLogin system preference you will be asked to enter your cardnumber

or your username and password

Once you're logged in to the self check module you will be asked to scan the items you are checking out

As you scan items they will appear below the barcode box

When you are finished scanning items it is important to click the 'Finish' button. This will prompt you to print a receipt and log you out of the self check module.

When attempting to check items out there are some instances where error messages will appear and the patron will be directed to the librarian. This will happen even if you are allowing overrides on circulation functions. Only a librarian can override a circulation block and so patrons must go to the librarian for help in these situations.

You can add content, like instructions on how to use the self check-out system for example, by using the SCOMainUserBlock display location in the HTML customizations tool.

Self check-in

In order to use the self check-in module, you must first set the SelfCheckInModule system preference to 'Enable'.

Then, you will have to create a patron with the self_checkin_module permission.

> **Note**
>
> Create a staff patron specifically for this action so that you don't leave a real staff client logged into a computer all day. You can give this patron only the aforementioned permission so it cannot be used for anything else.

Once this is done, you can head over to the self check-in page: http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sci/sci-main.pl

Log in with your staff patron with self check-in permissions

Once the computer or kiosk is set and the self check-in user logged in, patrons will be able to check-in their items themselves.

The patron will either scan the item's barcode, if the computer is attached to a barcode scanner, or type in their item's barcode in the box and click 'Add' or press enter.

> **Note**
>
> Most barcode scanners will automatically hit return after scanning.

Once they have scanned or entered all their items' barcodes, they can click on the 'Check-in' button to return all the items at once.

> **Important**
>
> If the patron doesn't click the 'Check-in' button, the items will not be returned and will stay in their account.

> **Important**
>
> The self check-in module will not warn user if the item is late, if they have fines, if the item is on hold for someone else, or if they have messages in their account.

They can then click 'Finish' to return to the main self check-in page.

> **Note**
>
> If the patron doesn't click 'Finish', the screen will refresh after the timeout period specified in the SelfCheckInTimeout system preference.

> **Note**

Even if the patron doesn't click 'Finish' the item will still be checked in from their account.

You can customize the look of your self check-in screens by using the [SelfCheckInUserCSS](#) system preference or the [SelfCheckInUserJS](#) system preference.

You can add content, like instructions on how to use the self check-in system for example, by using the SelfCheckInMainUserBlock display location in the [HTML customizations tool](#).

Statistics about the transactions made through the self check-in module are logged into the action_logs table in the Koha database. You can therefore [build a custom report](#) to get the statistics you need.

Offline circulation utilities

Koha allows for you to continue circulation actions while offline by using any one of three utilities.

Offline circulation in Koha

Attention

The offline circulation module was deprecated in Koha version 23.11. Only the [Firefox plugin](#) and [Windows tool](#) are now supported.

If the [AllowOfflineCirculation](#) preference is set to 'Enable' the library staff can continue to perform circulation actions within Koha when the system is offline. You will want to visit [http://your-koha-staff-client-url/cgi-bin/koha/circ/offline.pl](#) at least once while online and bookmark that page. That is the page you will go to when you are offline.

Important

The offline interface uses HTML LocalStorage, which depending on the browser and user setting, is limited to 2.5MB or 5MB per domain. This means that larger systems will not be able to synchronize their data and are recommended to use either the [Firefox](#) or [Windows](#) application for offline circulation.

Setup

Before the first time the system goes offline go to Circulation and choose 'Built-in offline circulation interface'

And synchronize your data on every circulation computer by clicking the 'Synchronize' link on the right of the screen.

Important

The offline interface uses HTML LocalStorage, which depending on the browser and user setting, is limited to 2.5MB or 5MB per domain. This means that larger systems will not be able to synchronize their data and are recommended to use either the [Firefox](#) or [Windows](#) application for offline circulation.

This will allow you download a local copy of your patrons and circulation data. Click the 'Download records' link at the top of the page to synchronize your data.

Once your data is downloaded you will see the dates your data was last synced to the right of each data set.

This should be done regularly in preparation for any unexpected connection losses.

Circulating

When your system goes offline visit the Offline Circulation page (http://your-koha-staff-client-url/cgi-bin/koha/circ/offline.pl) in Koha and click 'Check out' or 'Check in' to perform offline actions.

Checking out is done by searching for the patron by barcode or name at the top of the 'Check out' screen. After selecting a patron you will be presented with the synced patron info, including fines and check outs.

Scan the barcode of the item you would like to check out and enter a due date. If you don't enter a due date Koha will prompt you for one.

Once the item is checked out it will appear below the patron's info.

Koha offline uploading

Once the system is back online visit the 'Synchronize' page on the Offline circulation module and click 'Upload transactions'

After the files are uploaded you can click 'View pending offline circulation actions' on the right.

After clicking 'View pending offline circulation actions' you will be brought to a summary of all of the actions you loaded in to Koha in your *.koc file.

- Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.
- Click on the 'Process' button and Koha will record every stored transaction one by one. For each transaction, the status will change to:
  - "Success." if the transaction was processed correctly
  - "Borrower not found." if the borrower card number is incorrect
  - "Item not found." if the item barcode is wrong
  - "Item not issued." if you checked in an available item

Once finished you will have a summary of all of your transactions

Firefox plugin

There is an offline circulation tool that you can add to your Firefox browser as an add-on. To do so, just go to https://addons.mozilla.org/en/firefox/addon/koct/ page and click on the "install now" button. You may have to confirm the installation, just click on "install now" and then restart Firefox to complete the installation.

Once you have installed the plugin and restarted Firefox, you will see the Koha logo in the download bar at the bottom right of Firefox.

A click on the logo will open the tool in its own window.

The plugin consists of three sections:

- The 'Check out' section is where you check out items

- The 'Check in' section is where you check in items

- The 'Transactions' section is where you can track the transactions done while in offline mode

  - The transactions will keep information until you empty it.

    If you'd like to clear the transactions, click the 'Clear' box before hitting the 'OK' button.

The first thing you want to do then is to set up the plugin. Proceed to the settings page, linked in the top right of the page or under 'Configuration page' in the Transactions section.

Answer the 5 questions presented:

- Server = the URL of the librarian interface

- Username = your staff account login

- Password = your staff account password

- Branch code = the code for the branch where you are located

- Commit Type = If you select 'Send data to Koha', your account will need to be approved by an administrator. If you select 'Apply directly to Koha', your account will not need to be approved.

    Important

    To save the settings, you will have to close the plugin window and re-open it by clicking again on the Koha logo in the add-on bar.

    Note

    You can create a staff account dedicated to the offline circulation. So that, no matter who is at the circulation desk, they can all use the same login. Along those lines, you can use a group login that you already have in place for circulation as well.

Once you have everything set up you can start checking items in and out.

Checking out:

- Under the 'Checkout' heading
- Scan the patron barcode
- Scan the item barcode
- Click 'Checkout'

Checking in:

- Under the 'Checkin' heading
- Scan the item barcode
- Click 'Checkin'

Each time, you check out or check in an item, a new transaction is recorded in the local plugin database. This is recorded in the Transactions section bellow.

Note

The status will be "Local." as long as you are offline and don't process the transactions into Koha.

When your Internet connection comes back up you will want to get these transactions in to Koha. Before processing these transactions you should be aware of a few issues.

Because you are not connected to your Koha database when using this plugin holds will need additional processing. If an item you check in while offline has a hold, the hold is kept on the item. Since, you can't confirm holds found during the processing of every check in, the holds stay on the item and will need to be managed later. If you only checked in a few items you can just keep a record of them all. If you checked in a lot of items you can use the Holds queue once it rebuilds to see what holds made it to the shelf erroneously.

Similarly, if an patron card was expired, the offline circulation tool won't know about it, so the checkout will be recorded regardless of the patron's account being blocked normally.

You have two options for adding this data to Koha

- Apply to Koha

  - If you checked in/out on more than one computer at the same time, what you want is to process every transaction consistently. Let's say for instance that one patron checked a book out on one computer and then checked the same book in on another computer. To be consistent, you need to record the check out first and then the check in. Not the opposite! To do so, you need to group every transaction in one place, sort them all and then, process everything. So, you need to use the "Apply to Koha" option from every plugin/computer you worked with. This way, the log will go to Koha and be accessible from the Offline Circulation page.

  - *Get there:* Circulation > Pending offline circulation actions

  - Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.

  - Click on the Process button and Koha will record every stored transaction one by one. For each transaction, the status will change to:

- "Success." if the transaction was processed correctly
- "Borrower not found." if the borrower card number is incorrect
- "Item not found." if the item barcode is wrong
- "Item not issued." if you checked in an available item

- Once finished you will have a summary of all of your transactions

- Apply directly

  - If you performed all of the circulation actions on one computer then everything is sorted already so you can choose to "Apply directly"
  - The status column will be updated to let you know if the transactions were applied
    - "Success." if the transaction was processed correctly
    - "Borrower not found." if the borrower card number is incorrect
    - "Item not found." if the item barcode is wrong
    - "Item not issued." if you checked in an available item

Offline circulation tool for Windows

The Offline circulation utility can be downloaded at: https://github.com/bywatersolutions/koha-offline-circulation/releases

To generate a borrowers.db file for loading in to the Windows tool you will need to run the file generator via a cron job.

Upload offline circulation file

The offline circulation tool for Windows will generate a KOC file that you can upload into Koha once your system comes back up.

On the Circulation menu click 'Upload offline circulation file (.koc)'

Browse your computer for the *.koc file

Once the file is uploaded, click the process the file

When this is complete you'll be able to upload another file or tend to pending offline circulation actions.

After clicking 'View pending offline circulation actions' you will be brought to a summary of all of the actions you loaded in to Koha in your *.koc file.

- Once all of the logs from all of the circulation computers are loaded you will be able to check them all or select just those you want to process into Koha.
- Click on the Process button and Koha will record every stored transaction one by one. For each transaction, the status will change to:
  - "Success." if the transaction was processed correctly
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Once finished you will have a summary of all of your transactions

- "Item not found." if the item barcode is wrong
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Once finished you will have a summary of all of your transactions