
Next Search Catalog 19.05 training Documentation

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KOHA UPGRADE TRAINING OVERVIEW

Next Search Catalog will upgrade to Koha 19.05 on the evening of Saturday, January 4, 2020.

The upgrade will start sometime after all libraries have closed for the day and be finished before any of the libraries reopen on Sunday morning. In the past this process has started around 9:30 p.m. and has finished before midnight.

NEKLS staff will run tests on Sunday morning and phone each open library on Sunday January 5 to make sure there are no unexpected problems.

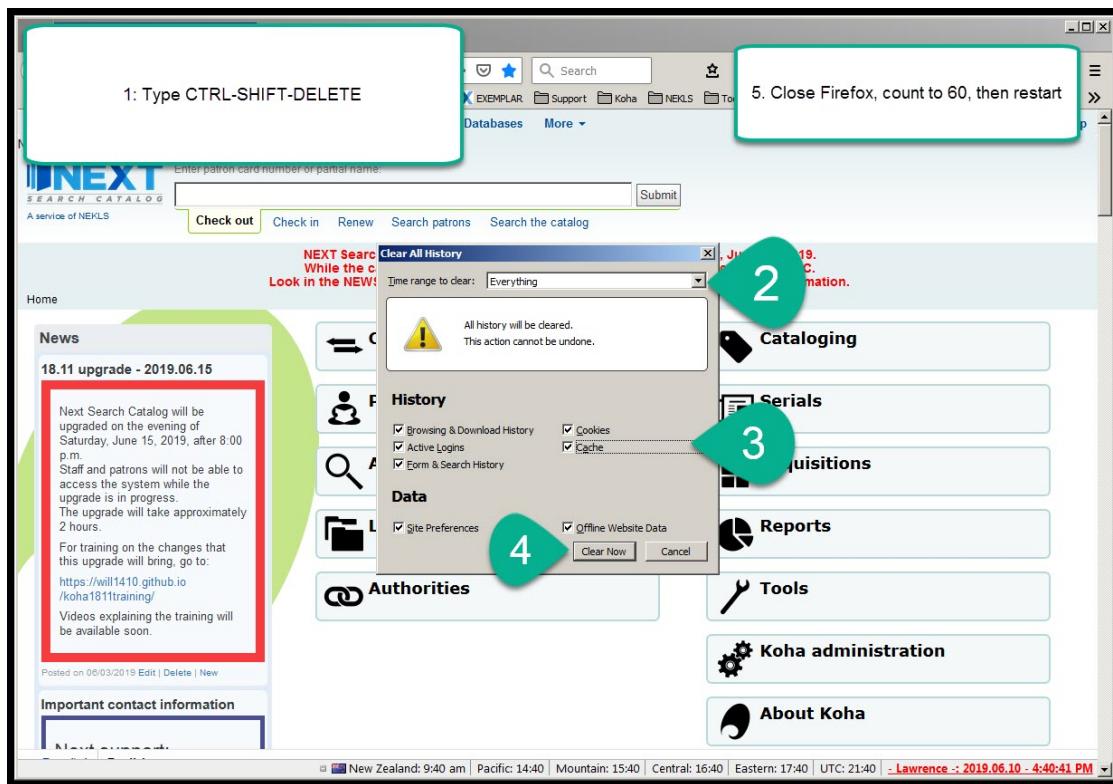
The rest of this website will cover most of the changes that will be added by this upgrade.

1.1 Clearing the cache on your browser

1.1.1 Firefox - Method #1

To clear the cache in Firefox:

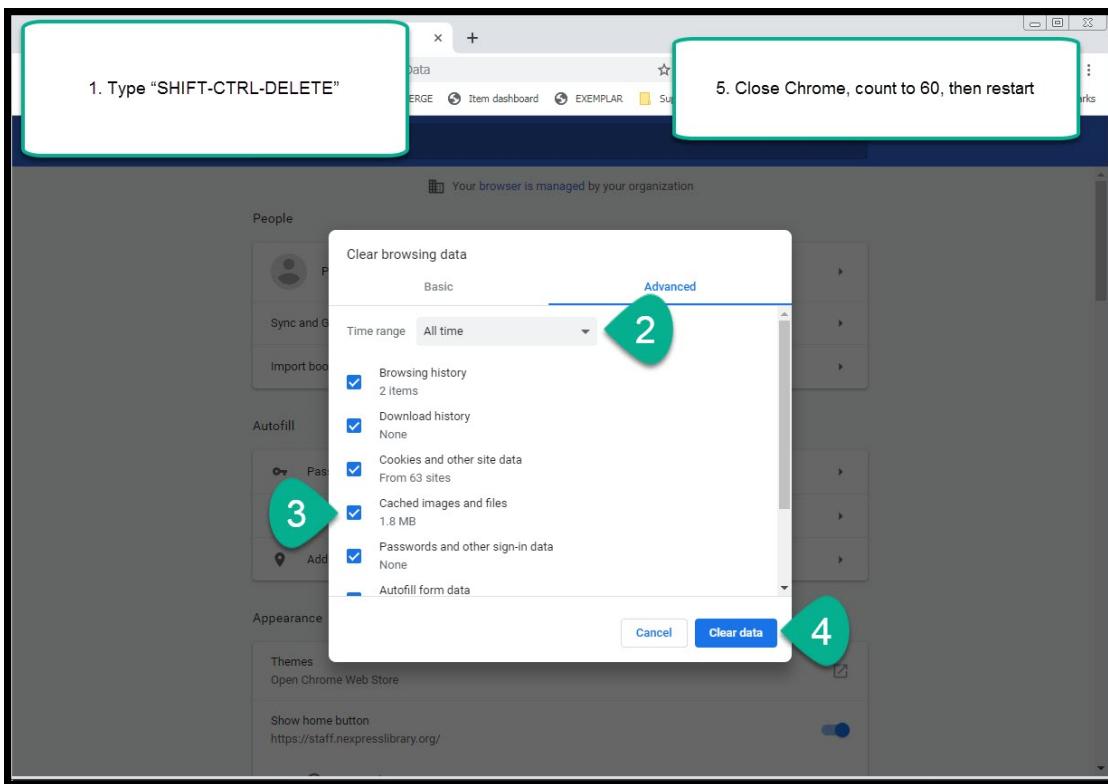
1. Start Firefox and type “SHIFT-CTRL-DELETE” to bring up the “Clear All History” window
2. Make sure the “Time range to clear” drop down says “Everything”
3. Make sure the “Cache” checkbox is checked
4. Click on the “Clear now” button
5. Click on the X to close Firefox
6. Wait 60 seconds then re-start Firefox



1.1.2 Chrome - Method #1

To clear the cache in Chrome:

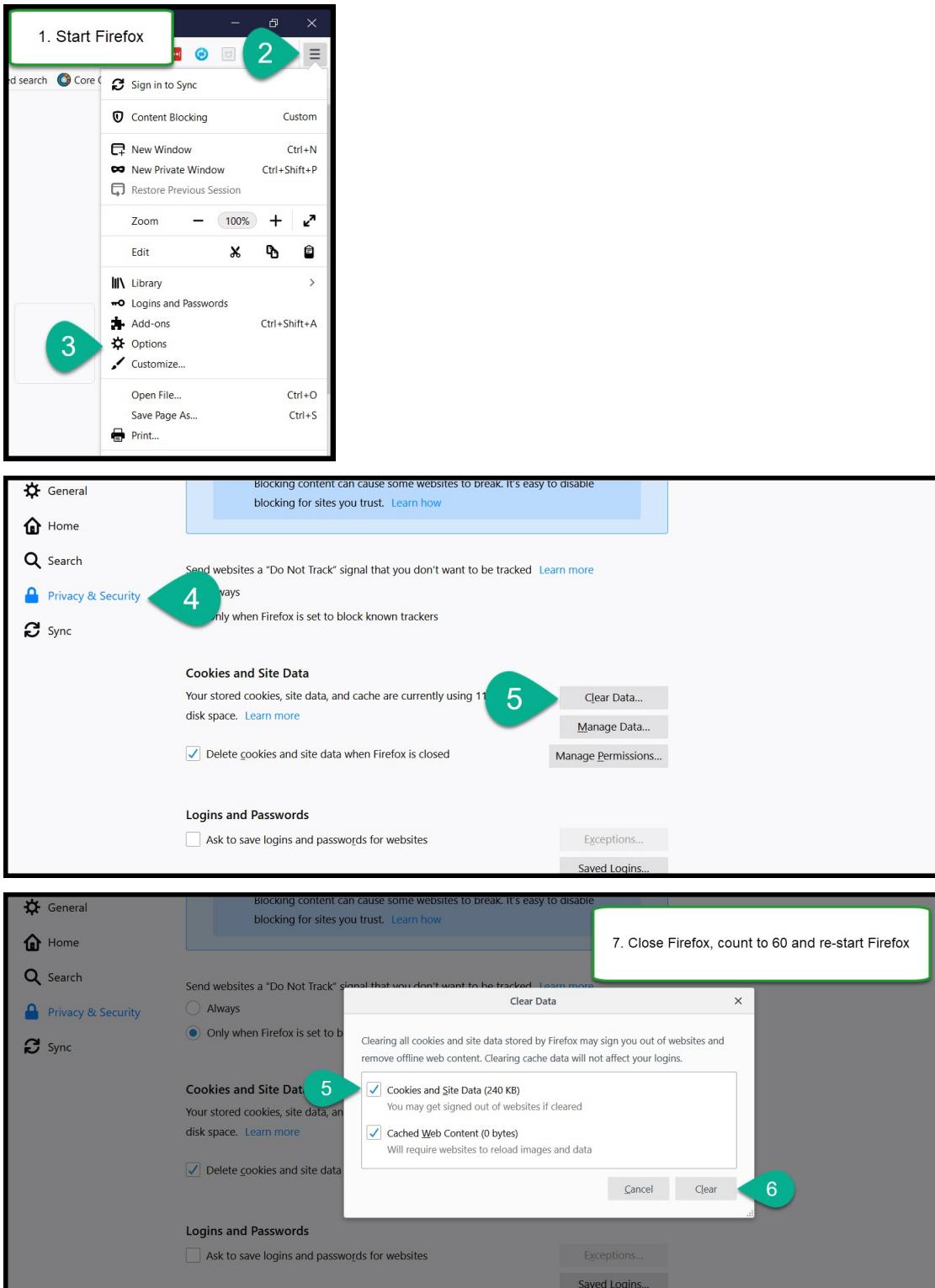
1. Start Chrome and type “SHIFT-CTRL-DELETE” to bring up the “Clear browsing data” window
2. Make sure the “Time range” drop down says “all time”
3. Make sure the “Cached images and files” checkbox is checked
4. Click on the “Clear data” button
5. Click on the X to close Chrome
6. Wait 60 seconds then re-start Chrome



1.1.3 Firefox - Method #2

An alternative way of clearing the cache in Firefox:

1. Start Firefox
2. Click on the options menu icon on the upper right hand side of the browser
3. Click on “Options”
4. Click on “Privacy & Security” on the left hand side of the screen
5. Scroll down to “Cookies and Site Data”
6. Click on “Clear data” and make sure “Cached Web Content” is checked
7. Click on “Clear”
8. Click on the X to close Firefox
9. Wait 60 seconds then re-start Firefox

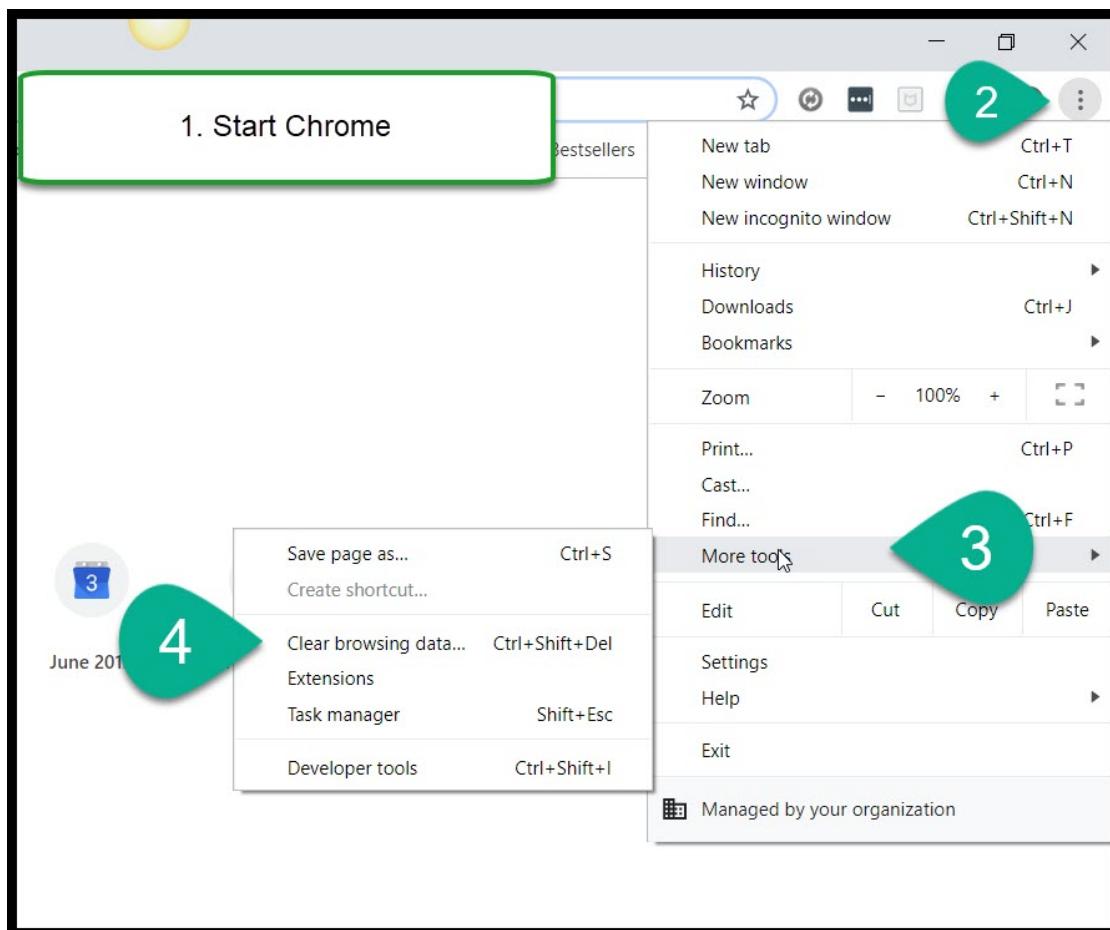


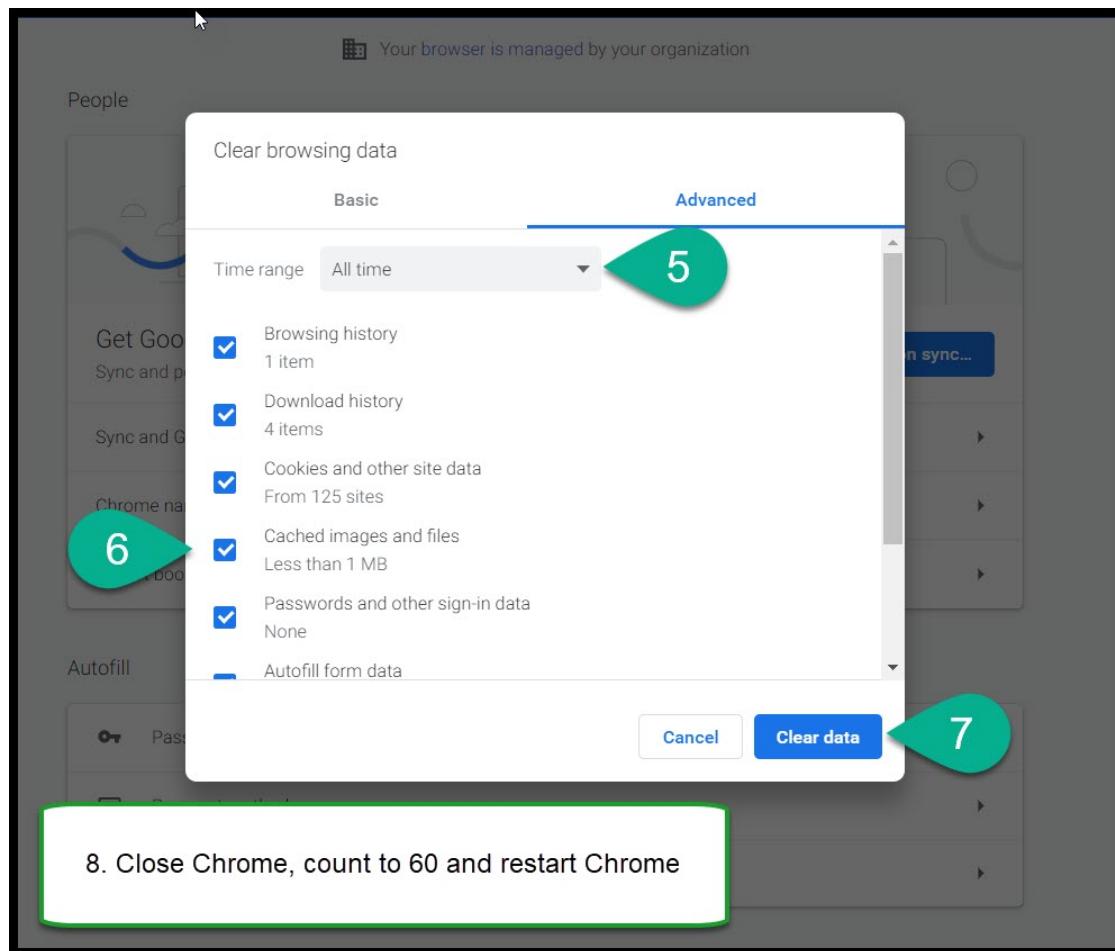
1.1.4 Chrome - Method #2

An alternative way of clearing the cache in Chrome:

1. Start Chrome

2. Click on the “Customize and control Google Chrome” icon
3. Hover on “More tools”
4. Click on “Clear browsing data”
5. Make sure the “Time range” drop down says “All time”
6. Make sure the “Cached images and files” checkbox is checked
7. Click on the “Clear browsing data”
8. Click on the X to close Chrome
9. Wait 60 seconds then re-start Chrome

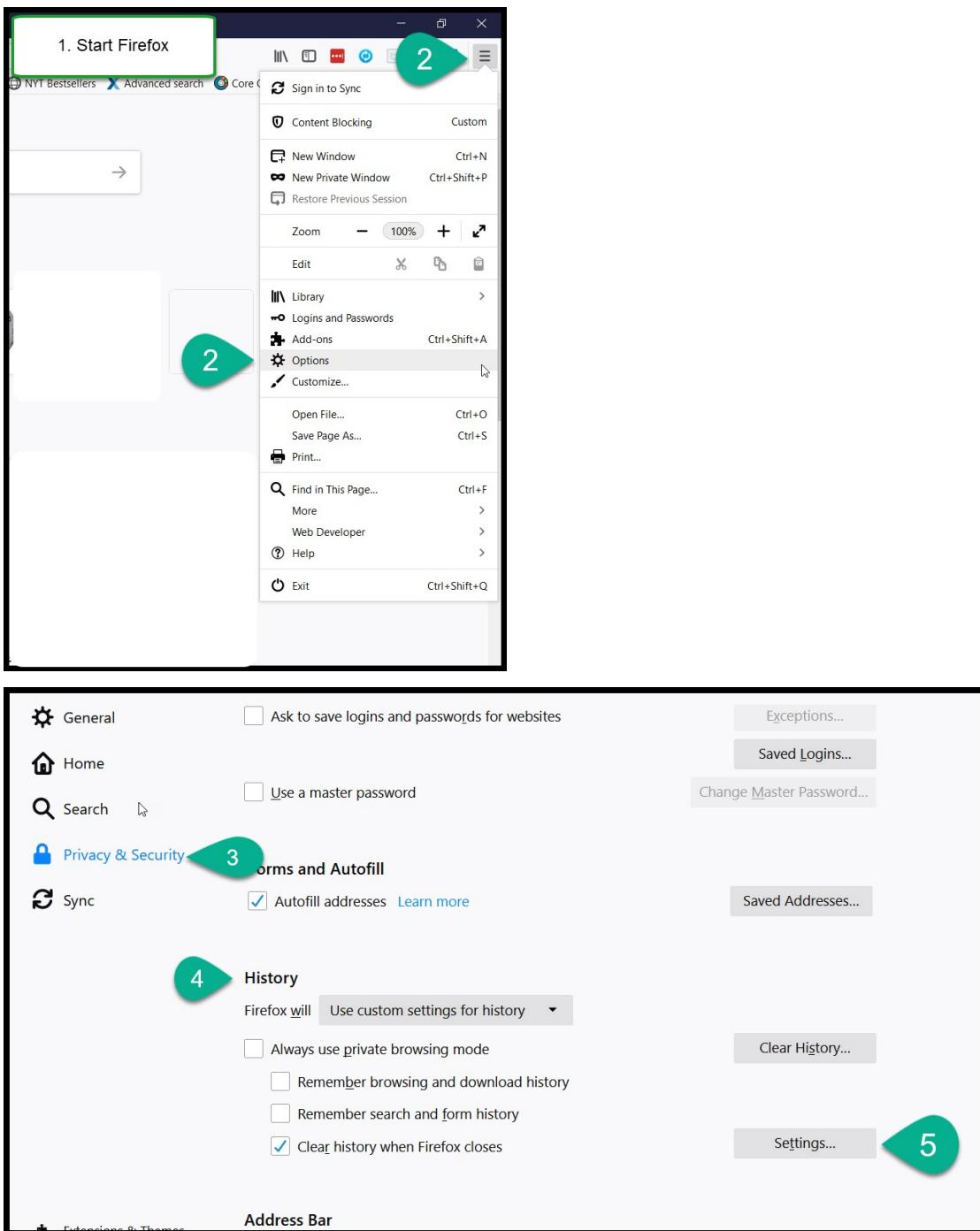


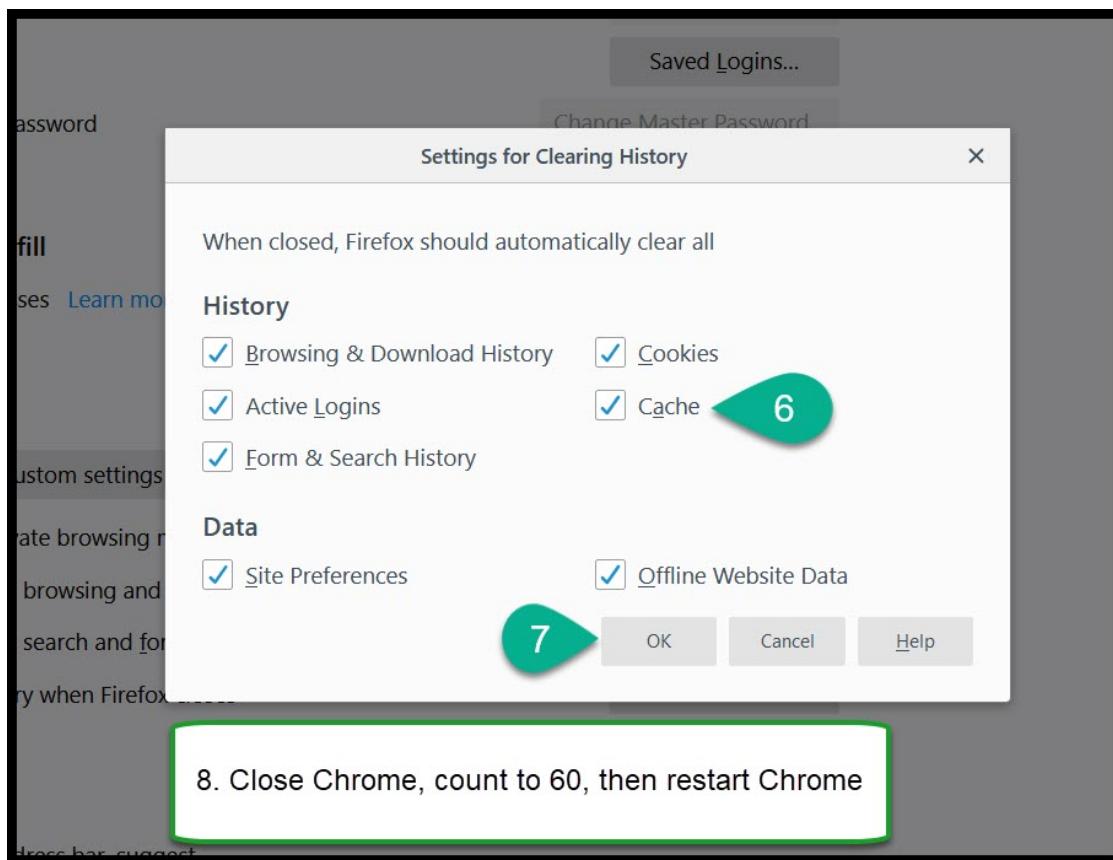


1.1.5 Firefox - Method #3

If you follow this method, you should never need to clear your Firefox cache again

1. Start Firefox
2. Click on the options menu icon on the upper right hand side of the browser #. Click on “Options”
3. Click on “Privacy & Security” on the left hand side of the screen
4. Scroll down to “History”
5. Click on “Settings”
6. In the section marked “History” make sure “Cache” is checked
7. Click “OK”
8. Click on the X to close Firefox
9. Wait 60 seconds then re-start Firefox





This method tells Firefox to clear its own cache every time you close Firefox. As far as overall privacy and confidentiality goes, checking all of the boxes under “Settings for Clearing History” is the best practice. It prevents anyone from accessing any data your web browser stores. For most users, however, the convenience of having Firefox store your passwords and browsing preferences outweighs most user’s privacy concerns.

1.1.6 Chrome - Method #3

The built-in method for Chrome to automatically clear cached data is not effective. However, there is a Chrome extension called “Click and Clean” that will allow you to tell Chrome to delete the cache (as well as other sensitive data) every time you close Chrome.

Click and Clean can be downloaded at <https://chrome.google.com/webstore/detail/clickclean/ghgabhipcejjmhchfonmamedcbeod>. Once it's installed find the “Options” button Then click the checkbox next to “Delete private data when Chrome closes”

1.1.7 What is the browser cache

Your browser’s cache is a temporary storage space on your local computer where data from websites is stored. The stored data can include:

- images
- web pages and HTML
- CSS
- JavaScript
- other data associated with web pages you’ve visited

Your browser's cache speeds up browsing the internet by storing files on your local computer so that your computer doesn't have to download the same files again and again and again when surfing the web. By storing data that doesn't change often on your local computer, when you load pages from the same site that have the same pictures, color schemes, and overall structure, your computer only has to download new content and it can recycle the content that remains static from the cache on your local computer.

1.1.8 So why is this a problem

The problem arises because Koha relies heavily on HTML, CSS, JavaScript, and jQuery that can change drastically during an upgrade. When we move from 1 version of Koha to another during an upgrade, if any of the old version's HTML, CSS, JavaScript, or jQuery remains cached on your local computer, it can cause problems when your computer tries to load pages from the new version of Koha. If the JavaScript has changed, and your web browser tries to execute a cached function that no longer works, Koha won't work correctly.

This is why you need to clear your browser's cache after every Koha upgrade.

1.2 Koha Upgrade - Self check changes

There are some changes to the built-in self-check system.

1.2.1 Self check Changes

There are several changes to the self-check system.

Currently, when someone logs into the self-check system, this is what it looks like:

A screenshot of the Koha Self Checkout System interface. The page title is "Next: search Self checkout system". A red button labeled "Before" is overlaid on the top right. The interface includes a message bar stating "You are logged in as Maria Frosty", a "Messages for you" section with "OPAC note", and a search bar with "Scan a new item or enter its barcode" and "Submit" buttons. Below these, there are sections for "Check out or renew an item:" and "Checkout for Maria Frosty (2 total)". The checkout table has columns for Title, Call no., Due, and Renew. Two items are listed: "Test record Author, Test. (DAMAGED012)" and "Test record Author, Test. (DAMAGED011)". Both items have "TRAINING - TEST" as the call number, "12/23/2019" as the due date, and "Renew item" as the renewal option. There is also a "Finish" link at the bottom left of the table.

Title	Call no.	Due	Renew
Test record Author, Test. (DAMAGED012)	TRAINING - TEST	12/23/2019	Renew item
Test record Author, Test. (DAMAGED011)	TRAINING - TEST	12/23/2019	Renew item

After the upgrade, when a patron checks out items, new items will be marked with a “New” label.

After

Checkouts

New checkouts are marked with a "New" label between the title and the author

Holds (1)

Title	Call no.	Due	Renew
Test record NEW Author, Test. (DAMAGED019)	TRAINING - TEST	12/23/2019	Renew item
Test record Author, Test. (DAMAGED013)	TRAINING - TEST	12/23/2019	Renew item
Test record Author, Test. (DAMAGED012)	TRAINING - TEST	12/23/2019	Renew item

After the upgrade, if the patron has any requests on the hold shelf waiting to be picked up, those request will appear on a new “Holds” tab.

After

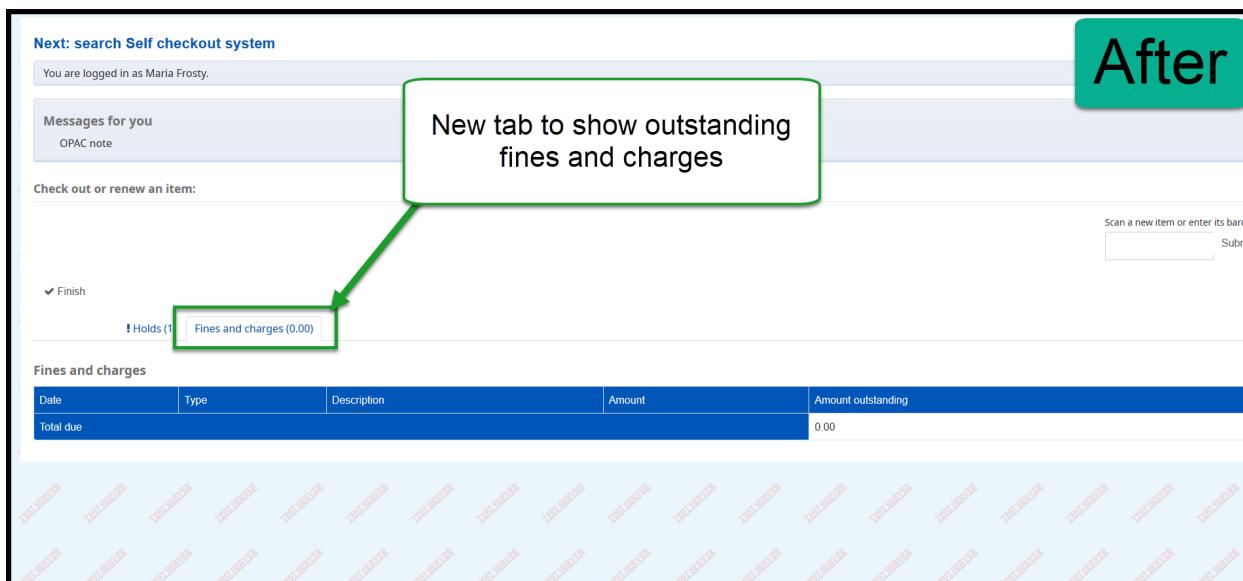
Holds (1 total)

New tab for available holds

Holds (1)

Title	Placed on	Expires on	Pick up location	Status
Test record Author, Test.	Hold date: 12/02/2019	-	Pick up location: Northeast Kansas Library System	Status: Item waiting at Northeast Kansas Library System since 12/02/2019 until 12/09/2019

After the upgrade, patrons will be able to see any outstanding fees and their fee history on a new “Fees and charges” tab.



Frequently asked questions

- Q: **Koha has a built in self check-out system?**
- A: Yes, Koha has a built in self check-out system. It also has a self check-in system. We have several libraries using the built in self-checkout system.
- Q: **How do I use the built in self check-out sytem?**
- A: Contact us at nexthelp@nekls.org for more information.

1.3 Koha Upgrade - OPAC

There are only a few minor changes to the Online Patron Access Catalog (OPAC) in this upgrade.

1.3.1 Password change text

There are some minor changes in the text related to password changes in the OPAC have changed.

The text of the “Submit changes” button becomes “Change password” and the text of the “Return to your record” link becomes “Return to my account.”

BEFORE:

Before

Your Summary
Your Fines
Your Personal Details
Your Tags
Change Your Password
Your Reading History
Your Privacy
Your Purchase Suggestions
Your Messaging
Your Lists

Change your password

Your password must be at least 4 characters long.

Current password:

New password:

Re-type new password:

Submit changes Cancel

Looking For Something?
Helpful Links

AFTER:

After

Your Summary
Your Fines
Your Personal Details
Your Tags
Change Your Password
Your Reading History
Your Privacy
Your Purchase Suggestions
Your Messaging
Your Lists

Change your password

Your password must be at least 4 characters long.

Current password:

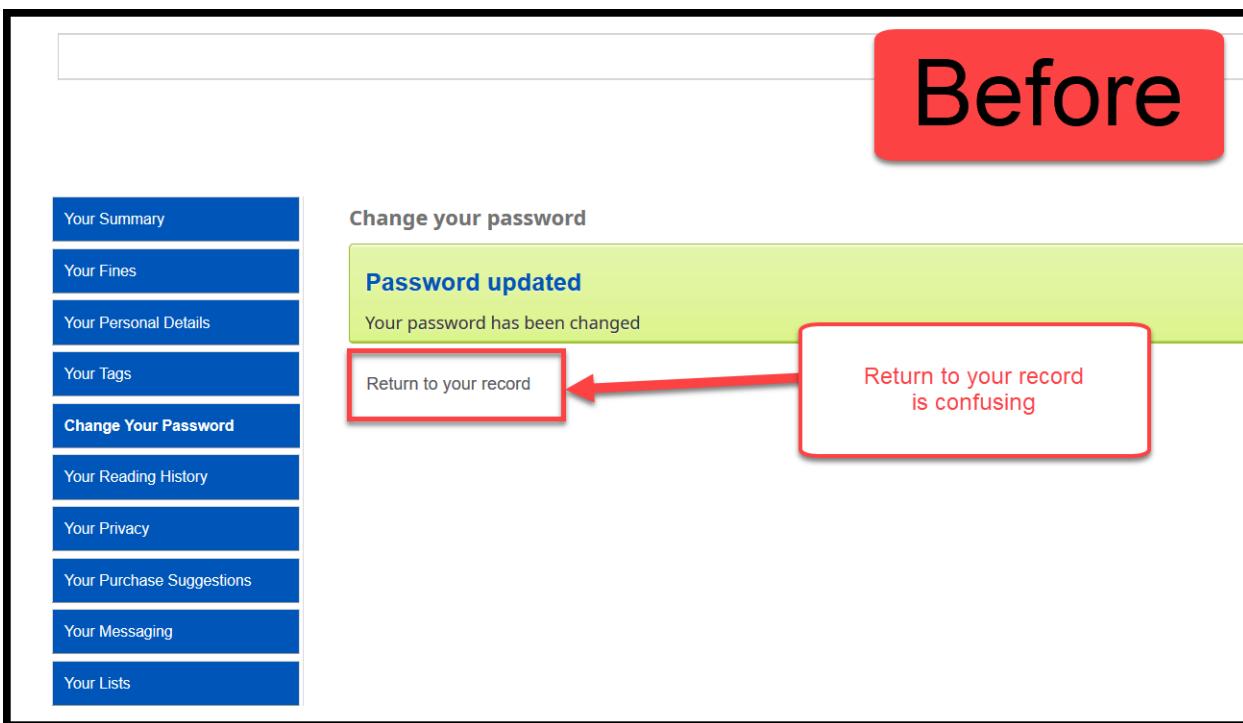
New password:

Re-type new password:

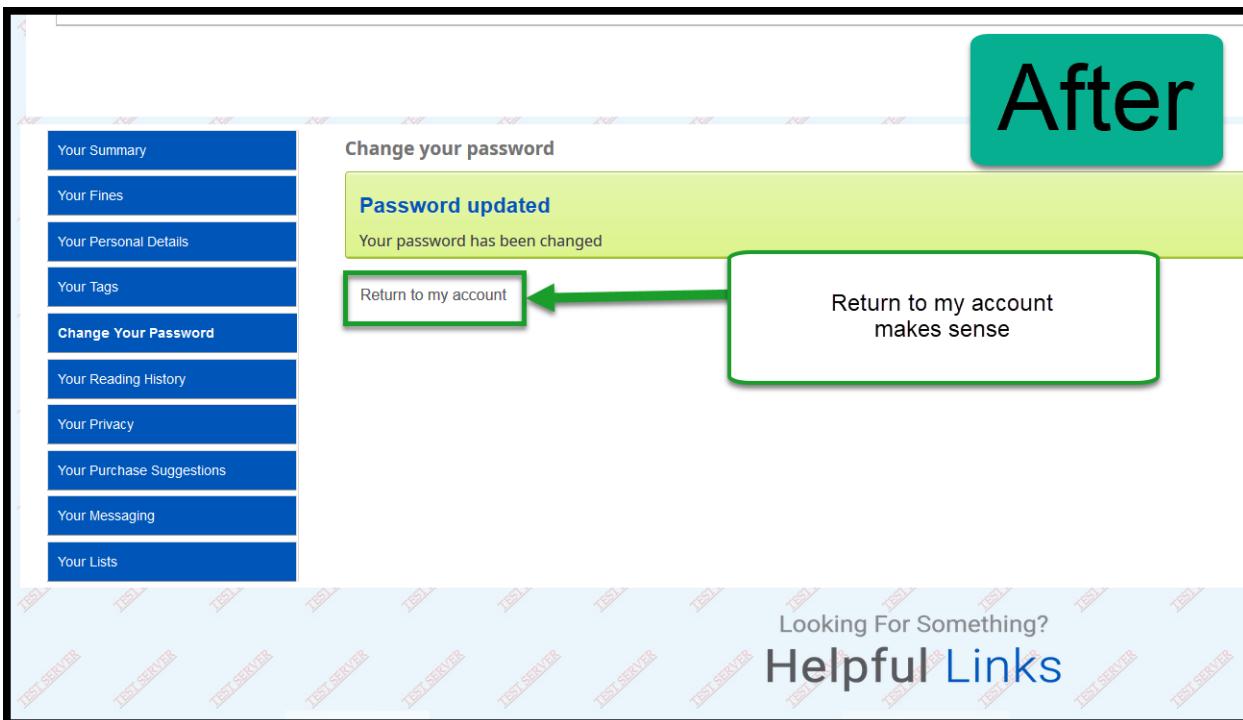
Change password Cancel

Looking For Something?

BEFORE:



AFTER:



1.3.2 Default sort order of fines

Currently when a patron clicks on the “Your fines” tab, the information is displayed in a random order. In Koha 19.05, the information will be sorted by date - with the newest items at the top of the page.

BEFORE:

Before

Welcome, Robert Frosty
Log out



All libraries


[Advanced Search](#)

Your Summary				
Your Fines	Date	Description	Fine amount	Amount outstanding
	06/19/2019	Writeoff , Writeoff	-50.00	0.00
	06/19/2019	Lost item , Another test fine	50.00	0.00
	06/19/2019	Writeoff , Writeoff	-35.00	0.00
	06/19/2019	Writeoff , Writeoff	-18.00	0.00
	06/19/2019	Writeoff , Writeoff	-4.50	0.00
	06/19/2019	Writeoff , Writeoff	-2.50	0.00
	06/19/2019	Writeoff , Writeoff	-10.01	0.00
	06/19/2019	Lost item	35.00	0.00
	06/19/2019	VOID, Item Returned 0003008200513	0.00	0.00
	06/19/2019	Lost item fee refund , Lost Item Responsible responsive design / 0003008200513	18.00	0.00
	05/14/2019	VOID	0.00	0.00
	05/12/2019	Fine , F	4.50	0.00
	05/12/2019	Fine , F	2.50	0.00
	05/12/2019	VOID	0.00	0.00
	05/12/2019	VOID	0.00	0.00
	05/12/2019	VOID	0.00	0.00
	05/12/2019	Fine , F	10.01	0.00
<input type="checkbox"/>	09/27/2019	Lost item , Lost Item Test record DAMAGED014	25.00	25.00
<input type="checkbox"/>	09/26/2019	Lost item , Lost Item Test record DAMAGED013	25.00	25.00
<input type="checkbox"/>	09/26/2019	Lost item , Lost Item Test record DAMAGED015	25.00	25.00
				Total due 75.00

[Pay selected fines and charges](#)

Document location

Clicking on a column header sorts each column
but the default order is random
and can change each time the page is loaded.



Digital Media



Resources & Reference



Help

1.3. Koha Upgrade - OPAC

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AFTER:

The screenshot shows the 'Fines and charges' section of the catalog interface. A green box highlights the table, and a green callout bubble points to it with the text: 'After the upgrade, the columns will sort with the newest dates at the top of the table.' The table has columns for Date, Type, Description, Amount, and Amount outstanding. The total due is 50.00.

Date	Type	Description	Amount	Amount outstanding
12/02/2019	Credit	Item Returned DAMAGED013	25.00	0.00
09/27/2019	Lost item	Test record DAMAGED014 (Test record)	25.00	25.00
09/26/2019	Lost item	Test record DAMAGED015 (Test record)	25.00	25.00
09/26/2019	Lost item fee refund	Test record DAMAGED013 (Test record)	25.00	0.00
06/19/2019	Lost item fee refund	Responsible responsive design / 0003008200513	18.00	0.00
06/19/2019	Payment (Voided) (Voided)	Item Returned 0003008200513	0.00	0.00
06/19/2019	Lost item		35.00	0.00
06/19/2019	Writeoff	Writeoff	10.01	0.00
06/19/2019	Writeoff	Writeoff (Ready Player One)	2.50	0.00
06/19/2019	Writeoff	Writeoff (Red sparrow)	4.50	0.00
06/19/2019	Writeoff	Writeoff	18.00	0.00
06/19/2019	Writeoff	Writeoff	35.00	0.00
06/19/2019	Lost item	Another test fine	50.00	0.00
06/19/2019	Writeoff	Writeoff	50.00	0.00
05/14/2019	Payment (Voided) (Voided)		0.00	0.00
05/12/2019	Fine (Returned) (Returned)	F	10.01	0.00
05/12/2019	Credit (Voided) (Voided)		0.00	0.00
05/12/2019	Payment (Voided) (Voided)		0.00	0.00
05/12/2019	Payment (Voided) (Voided)		0.00	0.00
05/12/2019	Payment (Voided) (Voided)		0.00	0.00
05/12/2019	Fine (Returned) (Returned)	F (Ready Player One)	2.50	0.00
05/12/2019	Fine (Returned) (Returned)	F (Red sparrow)	4.50	0.00
				Total due 50.00

POWERED BY NEKLS

1.4 Koha Upgrade - 1/2 OPAC - 1/2 staff

These changes affect the way that the OPAC and the staff client interact

1.4.1 E-mail purchase suggestions to the library

Currently, when a patron fills out the suggestion form in the OPAC, the only notification the library receives is an increase in the “Suggestions pending approval:” number on the home page in the staff client.

See:

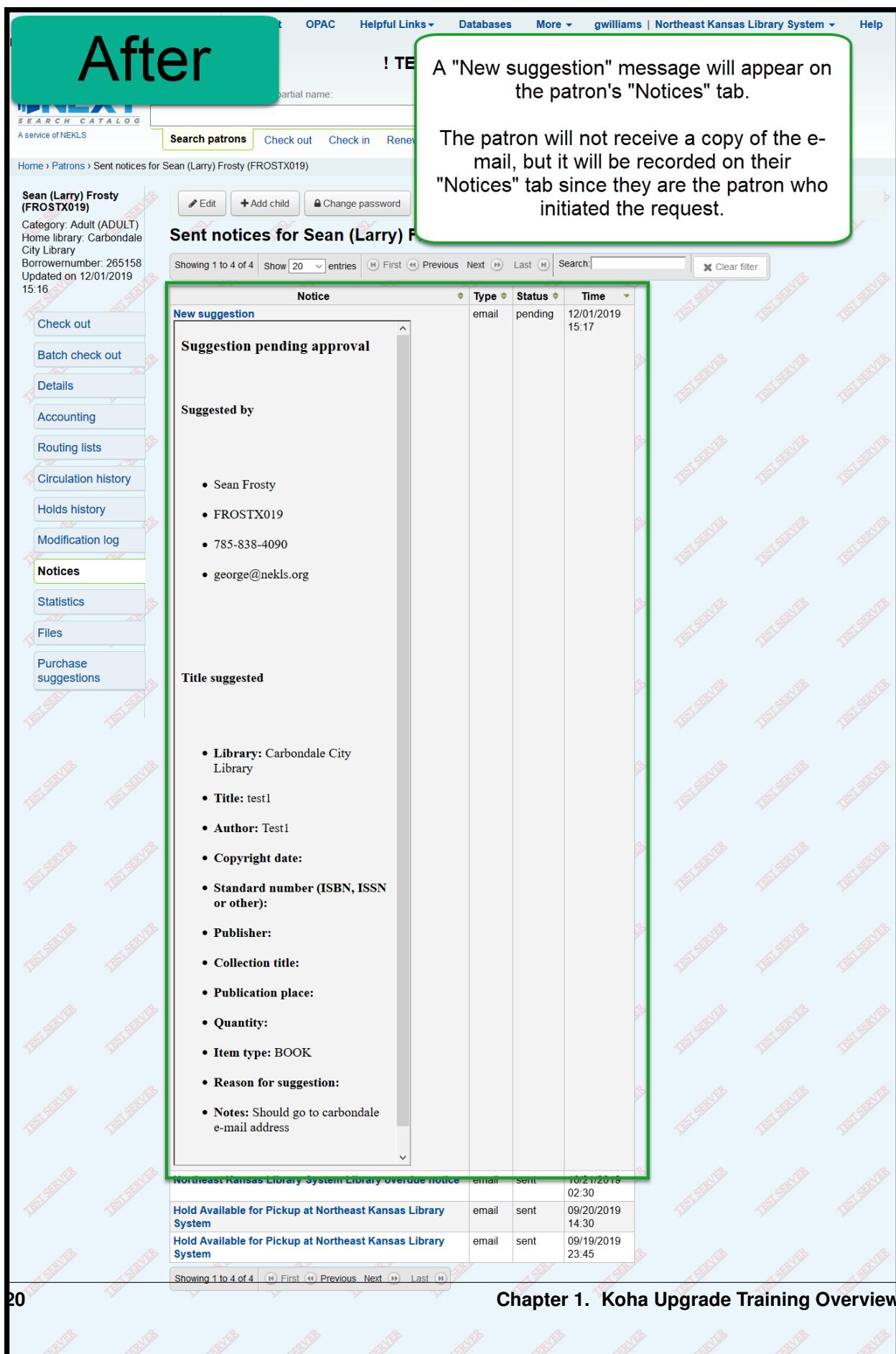
The screenshot illustrates the transition from the Old OPAC to the New Staff Client after a Koha upgrade.

OPAC (Left): A red box labeled "Before" highlights the "News" section, which contains a message about the Koha upgrade coming on Jan 05. This message is enclosed in a red box. Below it, a green arrow points to the "Important contact information" section, which includes support email (nexthelp@nekls.org), phone numbers (785-838-4090), and mailing lists (next@lists.nekls.org).

Staff Client (Right): A red box labeled "Suggestions pending approval count" covers the top navigation bar and the main menu. A red arrow points from the "News" section of the OPAC to the "Suggestions pending approval" count on the Staff Client. Another red box labeled "Next: staff client" covers the bottom section of the Staff Client, which displays the count "Suggestions pending approval: 272" and "Comments pending approval: 1".

After the upgrade, in addition to an increase in the “Suggestions pending approval:,” the system will automatically send an e-mail to the library’s main e-mail address.

Here is a copy of one of the new notices in a patron’s messaging history on the test server:



A "New suggestion" message will appear on the patron's "Notices" tab.

The patron will not receive a copy of the e-mail, but it will be recorded on their "Notices" tab since they are the patron who initiated the request.

After

A "New suggestion" message will appear on the patron's "Notices" tab.

The patron will not receive a copy of the e-mail, but it will be recorded on their "Notices" tab since they are the patron who initiated the request.

Notice	Type	Status	Time
New suggestion	email	pending	12/01/2019 15:17
<p>Suggestion pending approval</p> <p>Suggested by</p> <ul style="list-style-type: none"> • Sean Frosty • FROSTX019 • 785-838-4090 • george@nekls.org <p>Title suggested</p> <ul style="list-style-type: none"> • Library: Carbondale City Library • Title: test1 • Author: Test1 • Copyright date: • Standard number (ISBN, ISSN or other): • Publisher: • Collection title: • Publication place: • Quantity: • Item type: BOOK • Reason for suggestion: • Notes: Should go to carbondale e-mail address 			
Northeast Kansas Library System Library overdue notice	email	sent	10/21/2019 02:30
Hold Available for Pickup at Northeast Kansas Library System	email	sent	09/20/2019 14:30
Hold Available for Pickup at Northeast Kansas Library System	email	sent	09/19/2019 23:45

The box below contains the template for the e-mail message that the system will be sending to your library's e-mail address when a patron submits a suggestion form:

```
<h3>Suggestion pending approval</h3>
<p><h4>Suggested by</h4>
<ul>
  <li><<borrowers.firstname>> <<borrowers.surname>></li>
  <li><<borrowers.cardnumber>></li>
  <li><<borrowers.phone>></li>
  <li><<borrowers.email>></li>
</ul>
</p>
<p><h4>Title suggested</h4>
<ul>
  <li><b>Library:</b> <<branches.branchname>></li>
  <li><b>Title:</b> <<suggestions.title>></li>
  <li><b>Author:</b> <<suggestions.author>></li>
  <li><b>Copyright date:</b> <<suggestions.copyrightdate>></li>
  <li><b>Standard number (ISBN, ISSN or other):</b> <<suggestions.isbn>></li>
  <li><b>Publisher:</b> <<suggestions.publishercode>></li>
  <li><b>Collection title:</b> <<suggestions.collectiontitle>></li>
  <li><b>Publication place:</b> <<suggestions.place>></li>
  <li><b>Quantity:</b> <<suggestions.quantity>></li>
  <li><b>Item type:</b> <<suggestions.itemtype>></li>
  <li><b>Reason for suggestion:</b> <<suggestions.patronreason>></li>
  <li><b>Notes:</b> <<suggestions.note>></li>
</ul>
</p>
```

Any text in <single angle brackets> is an HTML tag and should only be changed if you know HTML

Any text in [square brackets] is a template toolkit tag and should only be changed if you understand template toolkit

Any text in <<double angle brackets>> is a Koha database field and should only be changed if you know the Koha database schema

Frequently asked questions

- Q: **What e-mail address do suggestions go to?**
 - A: It goes to the e-mail address that is set up in Koha as the master e-mail address for your library. If you're not sure which e-mail address this is, look at the library directory table on the Circulaton page in the staff client in the column labeled "Contact information."
- Q: **Can adult suggestions go to one e-mail address and youth suggestions go to another?**
 - A: No. All of the e-mails created when a patron fills out a suggestion form go to the same e-mail address and there is no way to change that.
- Q: **Can you change this message for my library?**
 - A: This message can be configured on a library-by-library basis. If you'd like it changed, please ask for changes at nexthelp@nekls.org

1.4.2 Patron contact updates

A bug was introduced in the last upgrade that has been fixed in the new version that made it necessary to turn off patron's ability to submit changes to their contact information through the OPAC. This is a quick review of how to handle patron suggested contact information updates.

- Once a week or so, check the link on the staff client home page that says "Patrons requesting modifications"

The screenshot shows the staff client home page with various links and sections. A green arrow points from the 'Important contact information' box to the 'Suggestions pending approval' and 'Patrons requesting modifications' links. A green callout box highlights these links with the text 'Check "Patrons requesting notifications" regularly'.

Important contact information:

- Next support: nexthelp@nekls.org
- NEKLS: 785-838-4090 (toll free: 888-296-6963)
- After hours: 785-813-1356
- Next mailing list: next@lists.nekls.org
- All NEKLS staff: nekls.staff@nekls.org
- Technology support: tech@nekls.org
- List of Next libraries (with e-mail addresses): [Click here](#)

Suggestions pending approval: 245
Patrons requesting modifications: 1

Check "Patrons requesting notifications" regularly

Next: staff client

High demand requests at your library

Request information for your library

This table indicates titles that have multiple requests for pickup at your library where one of the following situations is also true:

- Your library owns 0 copies of the title
- There are more than 3 requests per copy system-wide for pickup at your library

- Review any changes you see to make sure the changes are acceptable.

! TEST SERVER !

NEXT SEARCH CATALOG
A service of NEKLS

Enter patron card number or partial name: [+]

Search

Search patrons Check out Check in Renew Search the catalog

Home > Patrons > Update patron records

Show all pending updates

Update patron records

Frosty, Robert - Adult (Northeast Kansas Library System) (FROSTX011) - Requested on 12/04/2019 22:47

Approve Deny Ignore | Patron details

Field	Old value	New value
Other names	Jimbo	Bob

Submit

Verify that the changes are appropriate

3. If the changes are acceptable, click on the radio button that says “Approve” and then click on the “Submit” button at the bottom of the page. This will update the patron’s account.

! TEST SERVER !

NEXT SEARCH CATALOG
A service of NEKLS

Enter patron card number or partial name: [+]

Search

Search patrons Check out Check in Renew Search the catalog

Home > Patrons > Update patron records

Show all pending updates

Update patron records

Frosty, Robert - Adult (Northeast Kansas Library System) (FROSTX011) - Requested on 12/04/2019 22:47

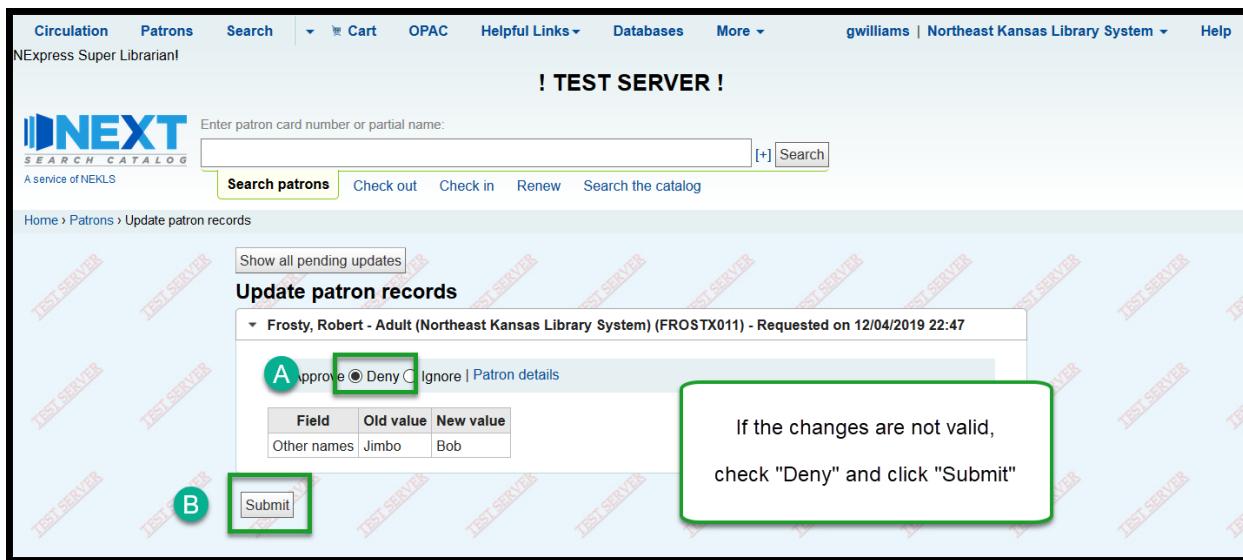
A Approve Deny Ignore | Patron details

Field	Old value	New value
Other names	Jimbo	Bob

B Submit

If the changes are valid,
check "Approve" then click "Submit"

4. If the changes are not acceptable, click on the radio button that says “Deny” and then click on the “Submit” button at the bottom of the page. The patron’s account will not be updated.



Frequently asked questions

- Q: **What was the bug that was introduced?**
A: When a patron suggested a change to their contact information, if the library approved the change, their birthdate was deleted.
- Q: **How often should I check for patron contact updates?**
A: We recommend checking once a week.
- Q: **What happens if I don't check?**
A: If a suggested update goes unanswered for more than 6 weeks, the changes will be marked as "denied."
- Q: **The "Patrons requesting modifications: X" link says there are pending modifications but when I click on the link, I don't see any?**
A: The number after the text "Patrons requesting modifications" gives a count of requests system-wide but, when you click on the link, you will only see changes suggested for your library.

1.4.3 “Movie” item types become “Video” item types

After the upgrade the following item type descriptions will change:

MOVIE becomes **VIDEO**

LOCAL HOLD MOVIE becomes **VIDEO (Local requests only)**

NEW MOVIE becomes **VIDEO (New)**

WALKIN MOVIE becomes **VIDEO (No requests allowed)**

Staff client - before:

Before

Limit to any of the following:				
<input type="checkbox"/> (UNCLASSIFIED)	<input type="checkbox"/> AUDIOBOOK	<input type="checkbox"/> BOOK	<input type="checkbox"/> BORROWED FROM ANOTHER LIBRARY	<input type="checkbox"/> DIGITAL CONTENT
<input type="checkbox"/> Die cut equipment	<input type="checkbox"/> EQUIPMENT	<input type="checkbox"/> FLOATING PLAYAWAY (SLK)	<input type="checkbox"/> Highland CC Reserves	<input type="checkbox"/> KEY
<input type="checkbox"/> KIT OR MULTI-PART SET	<input type="checkbox"/> LAUNCHPAD TABLET	<input type="checkbox"/> LOCAL HOLD BOOK	<input type="checkbox"/> LOCAL HOLD MOVIE	<input type="checkbox"/> LOCAL HOLD ONLY
<input type="checkbox"/> Lynda.com Course	<input type="checkbox"/> MAGAZINE	<input type="checkbox"/> MIFI DEVICE	<input type="checkbox"/> MOVIES	<input type="checkbox"/> MUSIC CD
<input type="checkbox"/> NEW AUDIOBOOK	<input type="checkbox"/> NEW BOOK	<input type="checkbox"/> NEW MAGAZINE	<input type="checkbox"/> NEW MOVIE	<input type="checkbox"/> PASS
<input type="checkbox"/> PUBLIC USE COMPUTER	<input type="checkbox"/> REFERENCE MATERIAL	<input type="checkbox"/> VIDEOGAME	<input type="checkbox"/> WALKIN BOOK	<input type="checkbox"/> WALKIN MOVIE
<input type="checkbox"/> WALKIN ONLY				

Staff client - after:

After

Limit to any of the following:				
<input type="checkbox"/> (UNCLASSIFIED)	<input type="checkbox"/> AUDIOBOOK	<input type="checkbox"/> BOOK	<input type="checkbox"/> BORROWED FROM ANOTHER LIBRARY	<input type="checkbox"/> DIGITAL CONTENT
<input type="checkbox"/> Die cut equipment	<input type="checkbox"/> EQUIPMENT	<input type="checkbox"/> FLOATING PLAYAWAY (SLK)	<input type="checkbox"/> Highland CC Reserves	<input type="checkbox"/> KEY
<input type="checkbox"/> KIT OR MULTI-PART SET	<input type="checkbox"/> LAUNCHPAD TABLET	<input type="checkbox"/> LOCAL HOLD BOOK	<input type="checkbox"/> LOCAL HOLD ONLY	<input type="checkbox"/> MAGAZINE
<input type="checkbox"/> MIFI DEVICE	<input type="checkbox"/> MUSIC CD	<input type="checkbox"/> NEW AUDIOBOOK	<input type="checkbox"/> NEW BOOK	<input type="checkbox"/> NEW MAGAZINE
<input type="checkbox"/> PASS	<input type="checkbox"/> PUBLIC USE COMPUTER	<input type="checkbox"/> REFERENCE MATERIAL	<input type="checkbox"/> VIDEO	<input type="checkbox"/> VIDEO (Local requests only)
<input type="checkbox"/> VIDEO (New)	<input type="checkbox"/> VIDEO (No holds allowed)	<input type="checkbox"/> VIDEOGAME	<input type="checkbox"/> WALKIN BOOK	<input type="checkbox"/> WALKIN ONLY

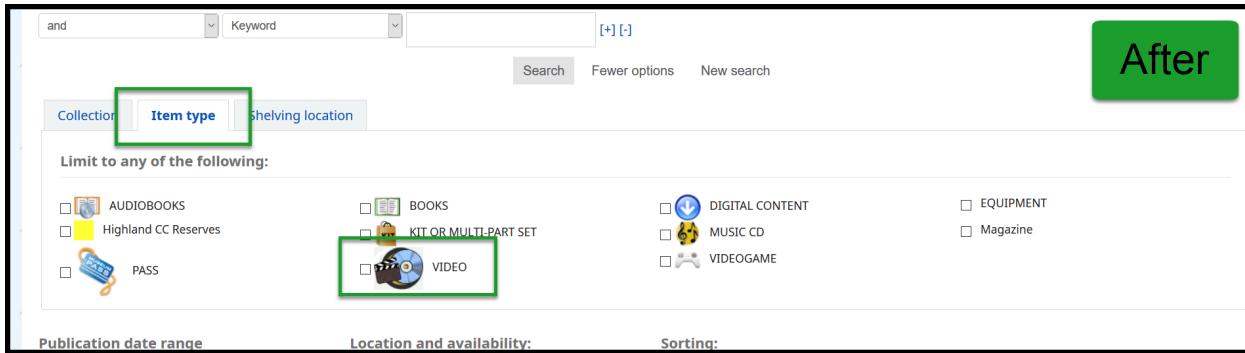
All of these item types will appear in the OPAC as “VIDEO”

OPAC - before:

Before

Limit to any of the following:				
<input type="checkbox"/> AUDIOBOOKS	<input type="checkbox"/> BOOKS	<input type="checkbox"/> DIGITAL CONTENT	<input type="checkbox"/> EQUIPMENT	
<input type="checkbox"/> Highland CC Reserves	<input type="checkbox"/> KIT OR MULTI-PART SET	<input type="checkbox"/> MOVIES	<input type="checkbox"/> MUSIC CD	
<input type="checkbox"/> Magazine	<input type="checkbox"/> PASS	<input type="checkbox"/> VIDEOGAME		
Publication date range		Location and availability:		Sorting:

OPAC - after:



After

This will also affect the search facets.

Before:

Refine your search

Availability

Limit to currently available items.

Authors

Before

[Show more](#)

Collections

Blu-Ray
Blu/Ray - DVD Combo Pack
DVD
Non-Fiction
TV Series
[Show more](#)

Home libraries

Atchison Public Library
Basehor Community Library
Leavenworth Public Library
Linwood Community Library
Wellsville City Library
[Show more](#)

Item types

LOCAL HOLD MOVIE
MOVIES
NEW MOVIE
WALKIN MOVIE
[Show more](#)

.4. Koha Upgrade - 1/2 OPAC - 1/2 staff

Locations

Adult

After:

Refine your search

Availability

Limit to currently available items.

Authors

After

[Show more](#)

Collections

[Blu-Ray](#)
[DVD](#)
[TV Series](#)

Home libraries

[Basehor Community Library](#)
[Lansing Community Library](#)
[Leavenworth Public Library](#)
[Linwood Community Library](#)
[Nortonville Public Library](#)

[Show more](#)

Item types

[BOOK](#)
[VIDEO](#)
[VIDEO \(Local requests only\)](#)
[VIDEO \(New\)](#)
[VIDEO \(No holds allowed\)](#)

Locations

[Adult](#)
[Childrens](#)

.4. Koha Upgrade - 1/2 OPAC - 1/2 staff Series

[Franchise collection](#)

Frequently asked questions

- Q: Why are “MOVIE”’s becoming “VIDEO?”
 - A1: The 4 “Movie” item types cover items that are Blu-ray, DVD, VHS, feature length motion pictures, television shows, short films, and other types of videorecordings. Having an item type called “Movie” may make patrons think that the item type will limit them to feature length motion pictures. Changing the item type from “MOVIE” to “VIDEO” more accurately reflects the items included in this item type.
 - A2: Currently in an alphanumeric list of item types, “Local hold movie,” “Movie,” “New movie,” and “Walkin movie” are separated by other item types. It’s confusing to staff and patrons to see all of these item type descriptions in a drop-down list because all of the “Movie” item types are spread throughout the list.
 - A3: The names of the “WALKIN MOVIE” item type and the “LOCAL HOLD MOVIE” item types contain library staff jargon. It will be much easier for patrons to understand “VIDEO (No holds allowed)” and “VIDEO (Local requests only).”
- Q: What are the benefits for staff
 - A: After the upgrade, reports (such as report 2731) can be rewritten so that staff will be able to run a report for *all* video item types at once instead of having to run those reports one at a time.

1.5 Koha Upgrade - Cataloging

1.5.1 Cataloging changes

Changes in the edit bibliographic record interface

When entering a new bibliographic record, the look and layout of the 000, 100, 200, etc. tabs have changed.

Currently we see:

Circulation Patrons Search ▾ Cart OPAC Helpful Links Databases More ▾

Home > Cataloging > Editing Fear and loathing in Las Vegas and other American stories / Hunter S. Thompson ; illustrated by Ralph Steadman. (Record number 304501)

Editing Fear and loathing in Las Vegas and other American stories / Hunter S. Thompson ; illustrated by Ralph Steadman. (Record number 304501)

Save Q Z39.50/GRU search Settings Cancel

0 1 2 3 4 5 6 7 8 9

000 ?_LEADER

- 00 fixed length control field 02251cam a2200325 a 4500
- 001 ? - CONTROL NUMBER ⓘ* 001 control field ocm38432032
- 008 ? - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION ⓘ* 008 fixed-length control field 98020619961972nyu 000 0aeng
- 010 ?_□ - LIBRARY OF CONGRESS CONTROL NUMBER ⓘ* 010 LC control number 98012001
- 020 ?_□ - INTERNATIONAL STANDARD BOOK NUMBER ⓘ* 020 International Standard Book Number 067902984
- 020 ?_□ - INTERNATIONAL STANDARD BOOK NUMBER ⓘ* 020 International Standard Book Number 9780679602599
- 022 ?_□ - INTERNATIONAL STANDARD SERIAL NUMBER ⓘ* 022 International Standard Serial Number
- 024 ?_□ - OTHER STANDARD IDENTIFIER ⓘ* 024 Source of number or code
- 024 ?_□ - OTHER STANDARD IDENTIFIER ⓘ* 024 Standard number or code
- 024 ?_□ - OTHER STANDARD IDENTIFIER ⓘ* 024 Terms of availability
- 024 ?_□ - OTHER STANDARD IDENTIFIER ⓘ* 024 Additional codes following the standard number or code
- 024 ?_□ - OTHER STANDARD IDENTIFIER ⓘ* 024 Qualifying information
- 027 ?_□ - STANDARD TECHNICAL REPORT NUMBER ⓘ* 027
- 028 ?_□ - PUBLISHER NUMBER ⓘ* 028 Publisher number
- 028 ?_□ - PUBLISHER NUMBER ⓘ* 028 Source
- 035 ?_□ - SYSTEM CONTROL NUMBER ⓘ* 035 System control number (OCoLC)38432032
- 037 ?_□ - SOURCE OF ACQUISITION ⓘ* 037
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Original cataloging agency DLC
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Transcribing agency DLC
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency IAK
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency BAKER
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency XY4
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency BTCTA
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency YDIXCP
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency NIALS
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Modifying agency LQS
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Language of cataloging
- 040 ?_□ - CATALOGING SOURCE ⓘ* 040 Description conventions
- 041 ?_□ - LANGUAGE CODE ⓘ* 041
- 043 ?_□ - GEOGRAPHIC AREA CODE ⓘ* 043 Geographic area code n-us--
- 045 ?_□ - TIME PERIOD OF CONTENT ⓘ* 045
- 047 ?_□ - FORM OF MUSICAL COMPOSITION CODE ⓘ* 047
- 048 ?_□ - NUMBER OF MUSICAL INSTRUMENTS OR VOICES CODE ⓘ* 048
- 050 ?_1 0 - LIBRARY OF CONGRESS CALL NUMBER ⓘ* 050 Classification number PN4874.T444
- 050 ?_1 0 - LIBRARY OF CONGRESS CALL NUMBER ⓘ* 050 Item number A3 1996
- 074 ?_□ - GPO ITEM NUMBER ⓘ* 074
- 082 ?_0 0 - DEWEY DECIMAL CLASSIFICATION NUMBER ⓘ* 082 Classification number 070/.32
- 082 ?_0 0 - DEWEY DECIMAL CLASSIFICATION NUMBER ⓘ* 082 Edition number 21
- 082 ?_0 0 - DEWEY DECIMAL CLASSIFICATION NUMBER ⓘ* 082 Item number
- 082 ?_1 4 - DEWEY DECIMAL CLASSIFICATION NUMBER ⓘ* 082 Classification number 8
- 082 ?_1 4 - DEWEY DECIMAL CLASSIFICATION NUMBER ⓘ* 082 Edition number 21
- 082 ?_1 4 - DEWEY DECIMAL CLASSIFICATION NUMBER ⓘ* 082 Item number
- 086 ?_□ - GOVERNMENT DOCUMENT CLASSIFICATION NUMBER ⓘ* 086

No descriptions
You must scroll to a subfield
You must scroll to the top of the page to move to a different tab

BEFORE

After the upgrade we will see:

Next Search Catalog 19.05 training Documentation

Skip to main content | Skip to search | Accessibility Statement | Help

Home Cataloging : Editing Fear and loathing in Las Vegas and other American stories / Hunter S. Thompson ; illustrated by Ralph Steadman. (Record number 304501)

Editing Fear and loathing in Las Vegas and other American stories / Hunter S. Thompson ; illustrated by Ralph Steadman. (Record number 304501)

Save Q,Z39.50/GRU search Settings Cancel

Control and coded fields	Main entry	Title and edition	Physical description	Series	Notes	Subject access	Added and linking entry	Series added entry and electronic access	Koha related
000 001 008 010 020 022 024 027 028 035 037 040 041 043 045 047 048 050 074 082 082 086									
Section 0 - Control and coded fields									
000 <input type="checkbox"/> -LEADER <input type="checkbox"/>	fixed length control field	02251cam a220325 a 4500							
001 <input type="checkbox"/> - CONTROL NUMBER <input type="checkbox"/>	control field	ocm38412032							
008 <input type="checkbox"/> - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION <input type="checkbox"/>	fixed length control field	988020619961972nyu	000 Oaeng						
010 <input type="checkbox"/> - LIBRARY OF CONGRESS CONTROL NUMBER <input type="checkbox"/>	LC control number	98012001							
020 <input type="checkbox"/> - INTERNATIONAL STANDARD BOOK NUMBER <input type="checkbox"/>	International Standard Book Number	0679602984							
020 <input type="checkbox"/> - INTERNATIONAL STANDARD BOOK NUMBER <input type="checkbox"/>	International Standard Book Number	9780679602989							
022 <input type="checkbox"/> - INTERNATIONAL STANDARD SERIAL NUMBER <input type="checkbox"/>	International Standard Serial Number								
024 <input type="checkbox"/> - OTHER STANDARD IDENTIFIER <input type="checkbox"/>	Source of number or code								
a	Standard number or code								
c	Terms of availability								
d	Additional codes following the standard number or code								
q	Qualifying information								
027 <input type="checkbox"/> - STANDARD TECHNICAL REPORT NUMBER <input type="checkbox"/>									
028 <input type="checkbox"/> - PUBLISHER NUMBER <input type="checkbox"/>	Publisher number								
a	Source								
b									
035 <input type="checkbox"/> - SYSTEM CONTROL NUMBER <input type="checkbox"/>	System control number	OCULC38432032							
037 <input type="checkbox"/> - SOURCE OF ACQUISITION <input type="checkbox"/>									
040 <input type="checkbox"/> - CATALOGING SOURCE <input type="checkbox"/>	Original cataloging agency	DLC							
a	Transcribing agency	DLC							
c	Modifying agency	VAK							
d	Modifying agency	BAKER							
d	Modifying agency	XY4							
d	Modifying agency	BTCIA							
d	Modifying agency	YDIXCP							
d	Modifying agency	NIALS							
d	Modifying agency	LQS							
b	Language of cataloging								
e	Description conventions								
041 <input type="checkbox"/> - LANGUAGE CODE <input type="checkbox"/>									
043 <input type="checkbox"/> - GEOGRAPHIC AREA CODE <input type="checkbox"/>	Geographic area code	P-US---							
a									
045 <input type="checkbox"/> - TIME PERIOD OF CONTENT <input type="checkbox"/>									
047 <input type="checkbox"/> - FORM OF MUSICAL COMPOSITION CODE <input type="checkbox"/>									
048 <input type="checkbox"/> - NUMBER OF MUSICAL INSTRUMENTS OR VOICES CODE <input type="checkbox"/>									
050 <input type="checkbox"/> - LIBRARY OF CONGRESS CALL NUMBER <input type="checkbox"/>	Classification number	PN4874.T44							
a	Item number	A3 1996							
074 <input type="checkbox"/> - GPO ITEM NUMBER <input type="checkbox"/>									
082 <input type="checkbox"/> - DEWEY DECIMAL CLASSIFICATION NUMBER <input type="checkbox"/>	Classification number	070/.92							
a	Edition number	21							
b	Item number								
082 <input type="checkbox"/> - DEWEY DECIMAL CLASSIFICATION NUMBER <input type="checkbox"/>	Classification number	B							
a	Edition number	21							
b	Item number								
086 <input type="checkbox"/> - GOVERNMENT DOCUMENT CLASSIFICATION NUMBER <input type="checkbox"/>									

AFTER

Removal of outdated message on Fast add framework

In October we modified the Fast add framework so that the 000 and 008 fields were no longer required on Fast add records (ILL records).

After the upgrade the “It is no longer necessary …” message on the “Fast add” framework will be removed.

Currently we see:

BEFORE

This message is going away.

After the upgrade we will see:

AFTER

Add/edit item interface

The fields in the add/edit item editor are the subfields from the 952 field in the Marc record. They are currently arranged in alphanumeric order by subfield code. After the upgrade they'll be grouped by their function.

Currently we see:

Edit Item #1834751 / Barcode 0003012072153

Before

0 - Withdrawn status	<input type="text"/>
1 - Lost status	<input type="text"/>
3 - Materials specified (bound volume or other part)	<input type="text"/>
4 - Damaged status	<input type="text"/>
7 - Not for loan	<input type="text"/>
8 - Collection code	Non-Fiction <input type="text"/>
a - Home Library	Basehor Community Library <input type="text"/>
b - Current location	Basehor Community Library <input type="text"/>
c - Shelving location	Adult <input type="text"/>
d - Date acquired	2017-08-02 <input type="text"/>
e - Source of acquisition	<input type="text"/>
g - Cost, normal purchase price	<input type="text"/>
o - Full call number	591.509 Flores <input type="text"/>
p - Barcode	0003012072153 <input type="text"/>
t - Copy number	<input type="text"/>
v - Cost, replacement price	19.95 <input type="text"/>
x - Non-public note	<input type="text"/>
y - Koha item type	BOOK <input type="text"/> Required
z - Public note	<input type="text"/>

After the upgrade we will see:

The screenshot shows the 'Edit Item #1834751 / Barcode 0003012072153' screen. The interface is organized into several sections:

- Library, classification, and barcode (-)**: Contains fields for:
 - a - Home library: Basehor Community Library
 - b - Current location: Basehor Community Library
 - c - Shelving location: Adult (Required)
 - y - Koha item type: BOOK (Required)
 - 8 - Collection code: Non-Fiction (Required)
 - o - Full call number: 591.509 Flores
 - t - Copy number: (empty)
 - p - Barcode: 0003012072153
- Acquisition data (-)**: Contains fields for:
 - d - Date acquired: 2017-08-02
 - e - Source of acquisition: (empty)
 - g - Cost, normal purchase price: (empty)
 - v - Cost, replacement price: 19.95
- Statuses (-)**: Contains fields for:
 - 0 - Withdrawn status: (empty)
 - 1 - Lost status: (empty)
 - 4 - Damaged status: (empty)
 - 7 - Not for loan: (empty)
- Notes (-)**: Contains fields for:
 - x - Non-public note: (empty)
 - z - Public note: (empty)
 - 3 - Materials specified (bound volume or other part): (empty)

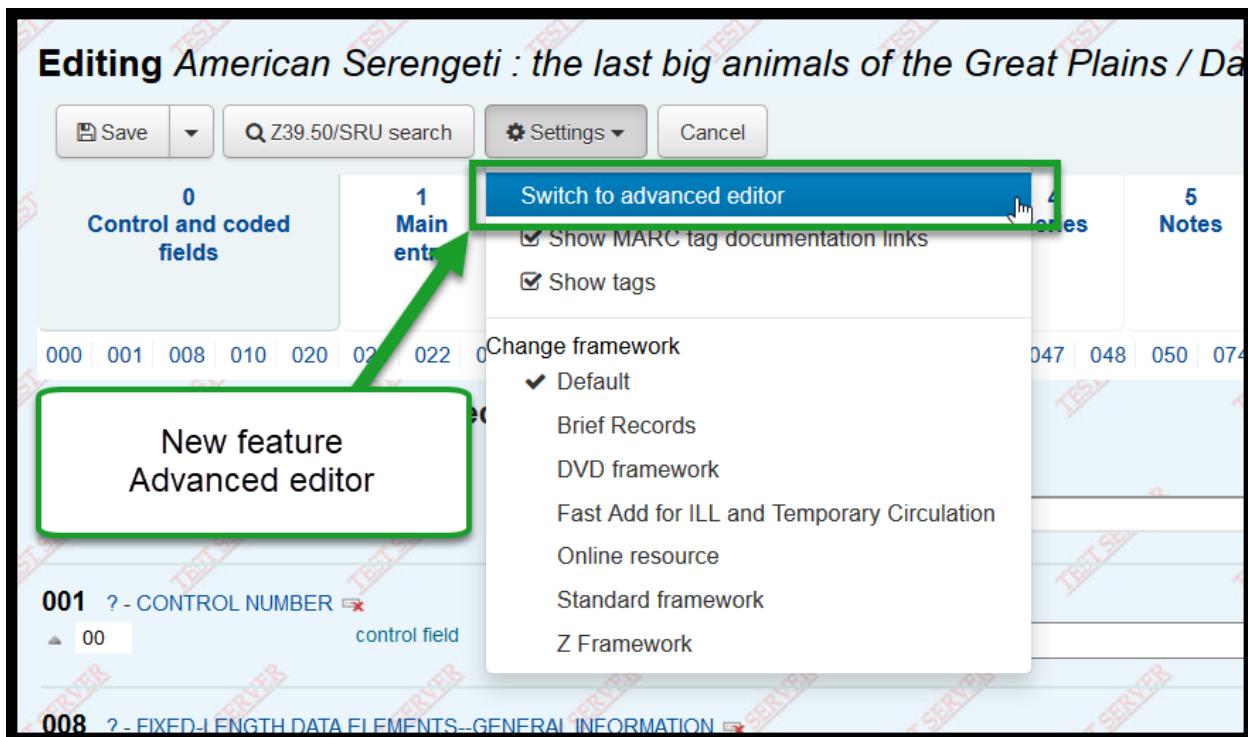
At the bottom are buttons: Save changes, Add a new item, and Cancel.

Advanced cataloging editor

The advanced cataloging editor has been a part of Koha for several years now, but we have not turned it on because there is a potential that an untrained staff member could accidentally damage bibliographic records with this tool.

After the upgrade the advanced cataloging editor has been tied to a security setting so it can be turned on for specific individual staff members that have been trained in how to use it.

To access the editor, look under the “Settings” button:



Once the editor is open, you should see this interface:

Editing catalog record #838257 (view) (edit items)

000 Leader: #####c a m _a22####_i 4500

001 ocn966395514

008 Fixed data: BKS -v 161216t 2017 2016 ksu a b ____b ____0 0 1 0 eng d

020 - _ta 070062466X
020 - _ta 9780700624669
035 - _ta (OCoLC) 966395514
040 - _ta YDX#eng#rda#IDX#duOK
043 - _ta np-----
082 0 4 _ta 591.50978 #223
100 1 _ta Flores, Dan L. **tg**(Dan Louie), **td**1948- **te**author. **tg**125452
245 1 0 _ta American Serengeti : **tb**the last big animals of the Great Plains / **tc**Dan Flores.
264 - 1 _ta Lawrence, Kansas : **tb**University Press of Kansas, **tc**2016.
300 - _ta 213 pages : **tb**illustrations, maps ; **tc**23 cm
504 - _ta Includes bibliographical references (pages [185]-196) and index.
505 0 - _ta Introduction: American Serengeti -- 1. Empires of the Sun : Big History and the Great Plains -- 2. Pronghorns : Survivors from a Lost World -- 3. Coyote : The American Jackal -- 4. Bringing Home All the Pretty Horses : The Horse Trade and the American Great Plains -- 5. The Most Dangerous Beast : The Grizzly, the Great Plains, the West -- 6. A Dream of Bison -- 7. Wolfson Redux -- 8. Loving the Plains, Hating the Plains, Re-Wilding the Plains.
520 - _ta "America's Great Plains once possessed one of the grandest wildlife spectacles of the world, equaled only by such places as the Serengeti, the Masai Mara, or the veld of South Africa. Pronghorn antelope, gray wolves, bison, coyotes, wild horses, and grizzly bears: less than two hundred years ago these creatures existed in such abundance that John James Audubon was moved to write, "it is impossible to describe or even conceive the vast multitudes of these animals." In a work that is at once a lyrical evocation of that lost splendor and a detailed natural history of these charismatic species of the historic Great Plains, veteran naturalist and outdoorsman Dan Flores draws a vivid portrait of each of these animals in their glory--and tells the harrowing story of what happened to them at the hands of market hunters and ranchers and ultimately a federal killing program in the nineteenth and twentieth centuries. The Great Plains with its wildlife intact dazzled Americans and Europeans alike, prompting numerous literary tributes. American Serengeti takes its place alongside these celebratory works, showing us the grazers and predators of the plains against the vast opalescent distances, the blue mountains shimmering on the horizon, the great rippling tracts of yellowed grasslands. Far from the empty "flyover country" of recent times, this landscape is alive with a complex ecology at least 20,000 years old--a continental patrimony whose wonders may not be entirely lost, as recent efforts hold out hope of partial restoration of these historic species."--Amazon.com.
650 - 0 _ta Animals #zGreat Plains #xHistory.
650 - 0 _ta Herbivores #zGreat Plains #xHistory.
650 - 0 _ta Predatory animals #zGreat Plains #xHistory.
650 - 0 _ta Natural history #zGreat Plains.
650 - 0 _ta Human-animal relationships #zGreat Plains #xHistory.

035: [?] SYSTEM CONTROL NUMBER **ta:** System control number

1.6 Koha Upgrade - Searching

1.6.1 Searching - availability display

In the search results page, Koha used to describe items as:

Available

On loan

Items that were in transit from one library to another or that were on the hold shelf waiting to be picked up were listed as “Available.”

Items are now described as:

Available

On loan

Unavailable

Any items that are waiting on the hold shelf to be picked up or are in transit from one library to another or are lost or missing will be described as “Unavailable.”

Unfortunately we cannot display a “Before” and “After” picture of this change because the change has already been back-ported to our production system.

The screenshot shows a search results page with the following details:

- Refine your search:**
 - Availability:** Limit to currently available items
 - Authors:** Beck, Michael; Grisham, John
 - Collections:** Book on CD, Book on Digital (Playaways), Fiction, Large Print, Mystery
 - Home libraries:** Atchison Public Library, Bonner Springs City Library, Eudora Public Library, Ottawa Library, Seneca Free Library
 - Show more:** Item types (AUDIOBOOK, BOOK, NEW AUDIOBOOK, NEW BOOK), Locations (Adult, Places (Florida)), Topics (African Americans, False imprisonment, Justice, Murder, Priests)
- Search Query:** 5 result(s) found for "kw,wrld: John grisham guardians" in Next: search Catalog.
- Results Table:**

	Results	Location
<input type="checkbox"/>	1. The Guardians [sound recording (CD)] by Grisham, John. Edition: Abridged. Publisher: Random House Audio, [2019] Length: audio discs : 4 3/4 in. Holds (2) Add to cart Edit record Edit items OPAC view	1 item , None available (+) 1 unavailable: Click + OR title for full availability No local copies
<input type="checkbox"/>	2. The Guardians [text (large print)] by Grisham, John. Publisher: Random House Large Print, 2019 Length: 469 pages (large print) : 24 cm. Holds (20) Add to cart Edit record Edit items OPAC view	13 items , None available (+) 11 on loan: 2 unavailable: Click + OR title for full availability No local copies
<input type="checkbox"/>	3. The guardians [sound recording (media player)] by Grisham, John. Edition: Unabridged. Publisher: Findaway World, LLC, [2019] ©2019 Length: 1 audio media player (12 hours) : 3 3/8 x 2 1/8 in. Holds (0) Add to cart Edit record Edit items OPAC view	1 item , None available (+) 1 on loan: Click + OR title for full availability No local copies
<input type="checkbox"/>	4. The Guardians [sound recording (CD)] by Grisham, John. Edition: Unabridged. Publisher: Random House Audio, [2019] Length: 10 audio discs (12 hours) : 4 3/4 in. Holds (1) Add to cart Edit record Edit items OPAC view	10 items , 4 available: (+) 4 on loan: 2 unavailable: Click + OR title for full availability No local copies
<input type="checkbox"/>	5. The Guardians by Grisham, John. Edition: First edition. Publisher: Doubleday, [2019] Length: 375 pages : 25 cm. Holds (40) Add to cart Edit record Edit items OPAC view	40 items , None available (+) 27 on loan: 13 unavailable: Click + OR title for full availability No local copies
- Annotations:**
 - A callout box points to the first result (CD) with the text: “Koha used to show items as “Available” or “On loan” even if the “Available” item was in transit between two libraries or waiting on the hold shelf to be picked up by a requesting patron.”
 - A callout box points to the last result (book) with the text: “Koha now shows items as “Available,” “On loan,” or “Unavailable.”
 - A callout box points to the bottom right of the results table with the text: “In transit or items on hold awaiting pickup now count as “Unavailable.””

1.7 Koha Upgrade - Report changes

There will be some broken reports.

1.7.1 Broken reports

This is a change that we can't really show you.

There are some back-end changes to the database - particularly in the fines tables - that will break about a dozen of our existing reports. This is not an uncommon thing during an upgrade (we had an upgrade 2.5 years ago that broke hundreds of reports) but the issue with this change is that we cannot fix the reports until after the upgrade is over. If we fixed the reports now, they'd stop working until after the upgrade. If we don't fix them now, they'll break the day after the upgrade.

So, this is really just to inform you that, if, after the upgrade, you try to run a report and that report fails, let us know at nexthelp@nekls.org and we'll try to move the repair of that report to the top of the to-do list.

We will try to start writing replacement reports on the test server as soon as we are done with the trainings, but it is likely that we will not finish writing those reports until after the upgrade.

1.8 Koha Upgrade - Patron changes

1.8.1 Patron messaging preferences defaults

Since time immemorial, Next Search Catalog has had the default settings for a patron's messaging preferences only set to automatically send patrons a notification when requests arrive and are ready to be picked up.

Beginning with the upgrade on January 4, 2020, all new patrons will have their default messaging preferences set to send them the following messages via e-mail:

- Item due: Email digest
- Advanced notice: 3 days, Email digest
- Hold filled: Email
- Email check-out/renewal receipt: Email

Here are some screen shots:

Before

BEFORE

Patron messaging preferences (-)

Hold e-mail only | 5 Day advance e-mail + Item due | 3 Day advance e-mail + Item due | Clear all

Text message provider: Unknown

'Advanced Notices' and 'Item Due' notices (e-mail and text) are sent between 2:00 and 2:30 a.m. Patrons should set their 'Do Not Disturb' settings on their phone appropriately if they do not want their phones to alert them to these notices at that time of day.

Instructions for setting the do-not-disturb feature on most phones can be found at Set do-not-disturb for iPhone | Set do-not-disturb for Android phones

Charges for text messages may be incurred when using this service. Please have the patron check with their mobile service provider if they have questions about fees for text messages.

Free Carrier Lookup - Click here to lookup a mobile phone provider (limited to 30 searches per month)
Carrier Lookup - Click here to lookup a mobile phone provider
Phone Carrier Lookup - Click here to lookup a mobile phone provider
Fone finder - Click here to lookup a mobile phone provider

	Days in advance	Text message	Email	Digests only	Do not notify
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email check-in receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email check-out/renewal receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Currently only "Hold filled" is set by default on most new patron accounts

After:

AFTER

Patron messaging preferences (-)

Hold e-mail only | 5 Day advance e-mail + Item due | 3 Day advance e-mail + Item due | Clear all

Text message provider: Unknown

'Advanced Notices' and 'Item Due' notices (e-mail and text) are sent between 2:00 and 2:30 a.m. Patrons should set their 'Do Not Disturb' settings on their phone appropriately if they do not want their phones to alert them to these notices at that time of day.

Instructions for setting the do-not-disturb feature on most phones can be found at Set do-not-disturb for iPhone | Set do-not-disturb for Android phones

Charges for text messages may be incurred when using this service. Please have the patron check with their mobile service provider if they have questions about fees for text messages.

Free Carrier Lookup - Click here to lookup a mobile phone provider (limited to 30 searches per month)
Carrier Lookup - Click here to lookup a mobile phone provider
Phone Carrier Lookup - Click here to lookup a mobile phone provider
Fone finder - Click here to lookup a mobile phone provider

	Days in advance	Text message	Email	Digests only
Item due	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advance notice	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email check-in receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Email check-out/renewal receipt	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

After the upgrade, everything will be set by default for all new patrons except E-mail check-in receipt

Frequently asked questions

- Q: Will this affect existing patrons?
- A: No. This will only affect patrons created after January 4, 2020.
- Q: What if a patron doesn't have an e-mail address?
- A: If you don't enter an e-mail address for the patron, none of these settings have **any** effect on the patron's account.
- Q: What if a patron has an e-mail address but doesn't want us to send them any e-mail?
- A: If the patron doesn't want us to send *any* e-mail, don't enter their e-mail address.
- Q: What if a patron doesn't want some of these e-mails but not all of these e-mails?
- A: Un-check the boxes next to the messages the patron doesn't want to get.

1.8.2 Email and Digests only

For the “Item due” and “Advanced notice” messaging preferences, if staff check “Email,” “Digests only” will also be checked automatically.

The screenshot shows the 'Patron messaging preferences' window. At the top, there are three buttons: 'Hold e-mail only', '5 Day advance e-mail + item due', and '3 Day advance e-mail + item due'. Below these are dropdown menus for 'Text message provider' (set to 'Unknown') and 'Days in advance' (set to '3'). A note at the top states: "'Advanced Notices' and 'Item Due' notices (e-mail and text) are sent between 2:00 and 2:30 a.m. Patrons should set the 'Do Not Disturb' settings on their phone appropriately if they do not want their phones to alert them at that time of day.' Instructions for setting the do-not-disturb feature on most phones can be found at Set do-not-disturb for iPhone | Set do-not-disturb for Android phones". Another note below says: 'Charges for text messages may be incurred when using this service. Please have the patron check with their mobile service provider if they have questions about fees for text messages.' At the bottom, there is a table with columns for 'Item type', 'Days in advance', 'Text message', 'Email', 'Digests only', and 'Do not notify'. The 'Digests only' column contains checked checkboxes for 'Item due', 'Advance notice', and 'Hold filled', while it is empty for the other rows.

The "Digests only" buttons are disabled.

When you check "Email" the "Digests only" checkbox will be automatically checked.

When you uncheck "Email" the "Digests only" checkbox will be automatically unchecked.

In the past it has been possible to check the “Digests only” checkbox without also checking the “Email” checkbox. When “Digests only” is checked and “Email” is not, the patron will not receive any e-mail for that notice. Because many staff don’t understand this, we added code that automatically checks the “Digests only” checkbox whenever “Email” is checked.

Frequently asked questions

- Q: What does “Digests only” mean?
- A: In the case of the “Item due” and “Advanced notice,” if a patron checks out 25 books, when those items are due, the patron will receive 1 e-mail saying that all 25 of those items are due.
- Q: What if “Digests only” is turned off?
- A: In the case of the “Item due” and “Advanced notice,” if a patron checks out 25 books, and “Digests only” is turned off, the patron will receive 25 separate e-mails saying those items are due - 1 e-mail for each item.
- Q: If I can no longer control the “Digests only” checkboxes, why can I still see the “Digests only” column.
- A: We are working on removing that entire column from the screen.
- Q: Can patrons still modify their own “Digests only” settings.
- A: Yes. And we are working on that too.
- Q: Why aren’t there “Digests only” options for the “Email check-in receipt” and “Email check-out/renewal receipt” notices?
- A: “Email check-in receipt” and “Email check-out/renewal receipt” digest automatically with one caveat - they are sent every 15 minutes at X:00, X:15, X:30, and X:45. So, if a patron is checking out 50 items and you check 45 of those items out at 10:14 a.m. and the last 5 at 10:15 a.m., the patron will receive 1 e-mail with 45 items at 10:15 a.m. and a second e-mail with the additional 5 items at 10:30 a.m.
- Q: Why isn’t there a “Digests only” option for the “Hold filled” message.

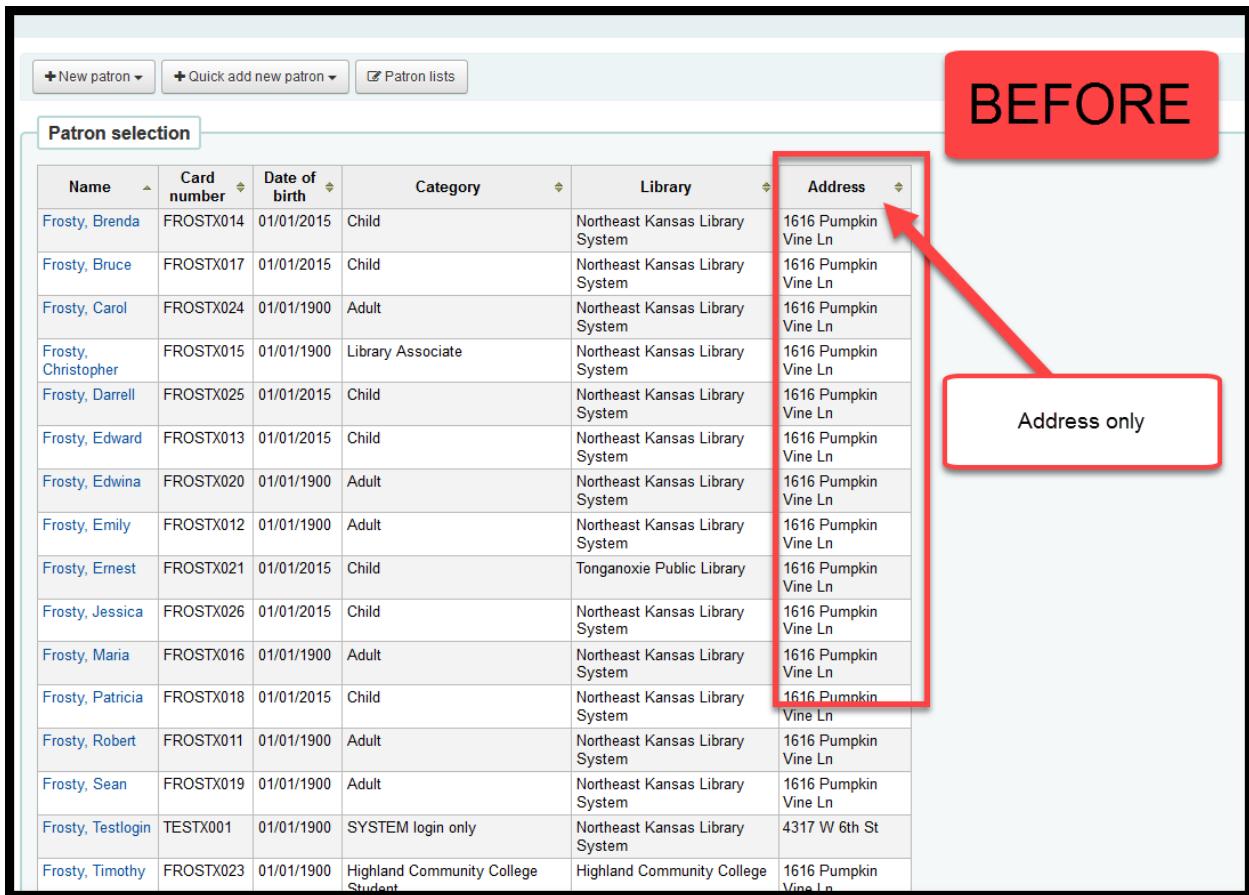
- A: Currently Koha does not have the ability to digest this message. A development is underway that would add that function to the system. When completed, this development would work similarly to the self-digesting “Email check-in receipt” and “Email check-out/renewal receipt” once-every-15-minutes schedule.

1.8.3 Patron search results

After the upgrade, the patron's phone number will be included in search results when searching for patrons in check-out.

Here are some screen shots.

BEFORE:

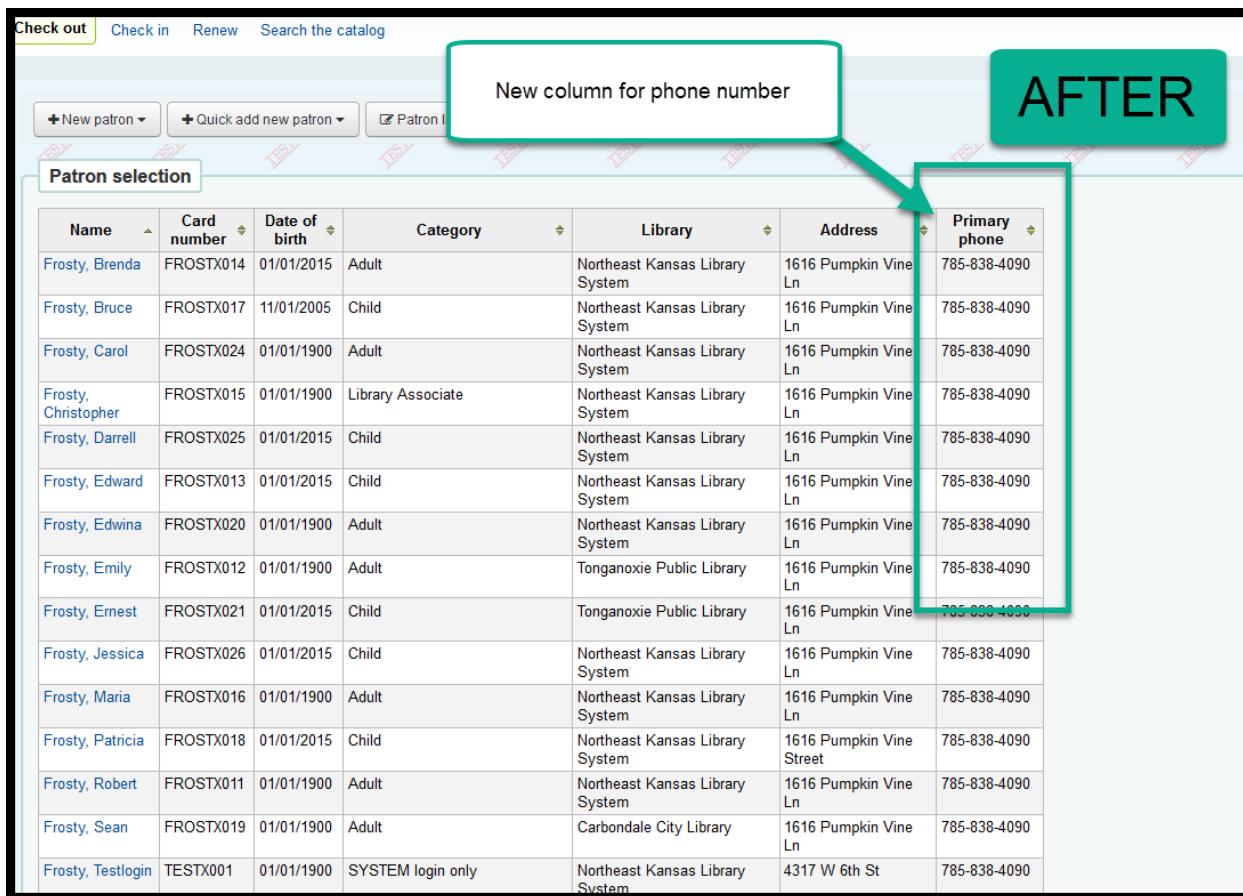


BEFORE

Address only

Name	Card number	Date of birth	Category	Library	Address
Frosty, Brenda	FROSTX014	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Bruce	FROSTX017	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Carol	FROSTX024	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Christopher	FROSTX015	01/01/1900	Library Associate	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Darrell	FROSTX025	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Edward	FROSTX013	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Edwina	FROSTX020	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Emily	FROSTX012	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Ernest	FROSTX021	01/01/2015	Child	Tonganoxie Public Library	1616 Pumpkin Vine Ln
Frosty, Jessica	FROSTX026	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Maria	FROSTX016	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Patricia	FROSTX018	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Robert	FROSTX011	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Sean	FROSTX019	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln
Frosty, Testlogin	TESTX001	01/01/1900	SYSTEM login only	Northeast Kansas Library System	4317 W 6th St
Frosty, Timothy	FROSTX023	01/01/1900	Highland Community College Student	Highland Community College	1616 Pumpkin Vine Ln

AFTER:



The screenshot shows a table of patron records. A green callout box labeled "New column for phone number" points to the "Primary phone" column, which is highlighted with a green border. An arrow from a green box labeled "AFTER" also points to this same column. The table has columns for Name, Card number, Date of birth, Category, Library, Address, and Primary phone.

Name	Card number	Date of birth	Category	Library	Address	Primary phone
Frosty, Brenda	FROSTX014	01/01/2015	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Bruce	FROSTX017	11/01/2005	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Carol	FROSTX024	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Christopher	FROSTX015	01/01/1900	Library Associate	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Darrell	FROSTX025	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Edward	FROSTX013	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Edwina	FROSTX020	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Emily	FROSTX012	01/01/1900	Adult	Tonganoxie Public Library	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Ernest	FROSTX021	01/01/2015	Child	Tonganoxie Public Library	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Jessica	FROSTX026	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Maria	FROSTX016	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Patricia	FROSTX018	01/01/2015	Child	Northeast Kansas Library System	1616 Pumpkin Vine Street	785-838-4090
Frosty, Robert	FROSTX011	01/01/1900	Adult	Northeast Kansas Library System	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Sean	FROSTX019	01/01/1900	Adult	Carbondale City Library	1616 Pumpkin Vine Ln	785-838-4090
Frosty, Testlogin	TESTX001	01/01/1900	SYSTEM login only	Northeast Kansas Library System	4317 W 6th St	785-838-4090

Frequently asked questions

- Q: If some staff members are blocked from seeing patron details, doesn't this allow them to see confidential data they shouldn't be able to see?
 - A: Yes, it does. We're working on correcting that.
-

1.8.4 Cities and towns

Currently Koha allows you to select a city/state/zip code combination from a drop-down list when adding a patron's address. Some libraries use "Alternate address" and "Alternate contact" which both have address fields, but do not have a drop-down for a city/state/zip code combination.

After the upgrade, the drop-down for city/state/zip code combinations will be added to those addresses.

BEFORE:

BEFORE

Main address (-)

School (+)

Address: 1616 Pumpkin Vine Ln

Address 2:

City: Lawrence **or choose**

State: KS

Zip code: 66047

Contact (+)

Alternate address (-)

Address:

Address 2:

City:

State:

Zip code:

Phone:

Email:

Contact note: Staff note

Alternate contact (-)

Surname:

First name:

Address:

Address 2:

City:

State:

Zip code:

Phone:

Library management (-)

Card number: FROSTX025 *Required*

Card number must be between 1 and 32 characters.

Here

But not here

Or here

AFTER:

Main address (-)

School (+)

Address: 1616 Pumpkin Vine Ln

Address 2:

City: Lawrence or choose

State: KS

Zip code: 66047

Contact (+)

Alternate address (-)

Address:

Address 2:

City: or choose

State:

Zip code:

Phone:

Email:

Contact note: Staff note

Alternate contact (-)

Surname:

First name:

Address:

Address 2:

City: or choose

State:

Zip code:

Phone:

Library management (-)

Card number: FROSTX025 *Required*

Card number must be between 1 and 32 characters.

Library: Northeast Kansas Library System *Required*

AFTER

Cities and towns drop-down appears for all 3 types of addresses

1.8.5 Patron logs

There are changes in Koha 19.05 that adds more information to the patron logs.

Currently if you change a patron's name or contact information or anything else on their account, the only thing recorded in the patron logs is a note that the account was updated. After the upgrade, there will be details about what was changed.

The caveat concerning this change is that we can only see changes made within the previous 60 days.

Here are some examples of what this looks like in the log viewer.

BEFORE:

BEFORE

Date	Librarian	Module	Action	Object	Info	Interface
12/03/2019 00:07	George H Williams (224610)	Patrons	Modify	Patricia Frosty (265157)	UPDATE (executed w/ arg: 265157)	intranet
12/03/2019 00:07	George H Williams (224610)	Patrons	Change password	Patricia Frosty (265157)	UPDATE (executed w/ arg: 265157)	intranet
12/03/2019 00:09	George H Williams (224610)	Patrons	Modify	Patricia Frosty (265157)	UPDATE (executed w/ arg: 265157)	intranet
12/03/2019 00:09	George H Williams (224610)	Patrons	Modify	Patricia Frosty (265157)	UPDATE (executed w/ arg: 265157)	intranet
12/03/2019 11:49	George H Williams (224610)	Circulation	Checkout	Patricia Frosty (265157)	Item	intranet
12/03/2019 11:49	George H Williams (224610)	Circulation	Checkout	Patricia Frosty (265157)	Item	intranet
12/03/2019 14:00	George H Williams (224610)	Circulation	Checkout	Patricia Frosty (265157)	Item	intranet
12/03/2019 14:01	George H Williams (224610)	Circulation	Return	Patricia Frosty (265157)	Item	intranet
12/04/2019 15:13	George H Williams (224610)	Circulation	Return	Patricia Frosty (265157)	Item	intranet
12/04/2019 15:14	George H Williams (224610)	Circulation	Return	Patricia Frosty (265157)	Item	intranet
12/04/2019 15:14	George H Williams (224610)	Circulation	Return	Patricia Frosty (265157)	Item	intranet

AFTER:

AFTER

Date	Librarian	Module	Action	Object	Info	Interface
12/03/2019 00:09	George H Williams (224610)	Patrons	Change password	Patricia Frosty (265157)	{"guarantorid": {"after": "", "before": null}, "othernames": {"after": "Lwanda", "before": "Patty"}, "relationship": {"after": "Parent", "before": ""}, "sms_provider_id": {"after": "", "before": null}}	intranet
12/03/2019 00:10	George H Williams (224610)	Patrons	Modify	Patricia Frosty (265157)	{"address": {"after": "1616 Pumpkin Vine Street", "before": "1616 Pumpkin Vine Ln"}, "guarantorid": {"after": "", "before": null}, "sms_provider_id": {"after": "", "before": null}}	intranet
12/03/2019 00:11	George H Williams (224610)	Patrons	Modify	Patricia Frosty (265157)	Item	intranet
12/03/2019 11:51	George H Williams (224610)	Circulation	Checkout	Patricia Frosty (265157)	Item	intranet
12/03/2019 11:51	George H Williams (224610)	Circulation	Checkout	Patricia Frosty (265157)	Item	intranet
12/03/2019 11:51	George H Williams (224610)	Circulation	Checkout	Patricia Frosty (265157)	Item	intranet
12/05/2019 12:05	George H Williams (224610)	Circulation	Return	Patricia Frosty (265157)	Item	intranet
12/05/2019 12:05	George H Williams (224610)	Circulation	Return	Patricia Frosty (265157)	Item	intranet

Frequently asked questions

- Q: Can we see the logs?
- A: Currently, no. Now that there is useful information in the patron logs, though, we will write reports to help you access the logs.

- Q: Why can't the logs show changes more than 60 days old?
- A: A lot of data is logged. Changes to item records, bibliographic records, patron records, and circulation records are all logged. Currently we have a script running every night to delete any lines in the log files more than 60 days old in order to keep the log files from getting so large that they would slow down the entire system.

1.9 Koha Upgrade - Item statuses

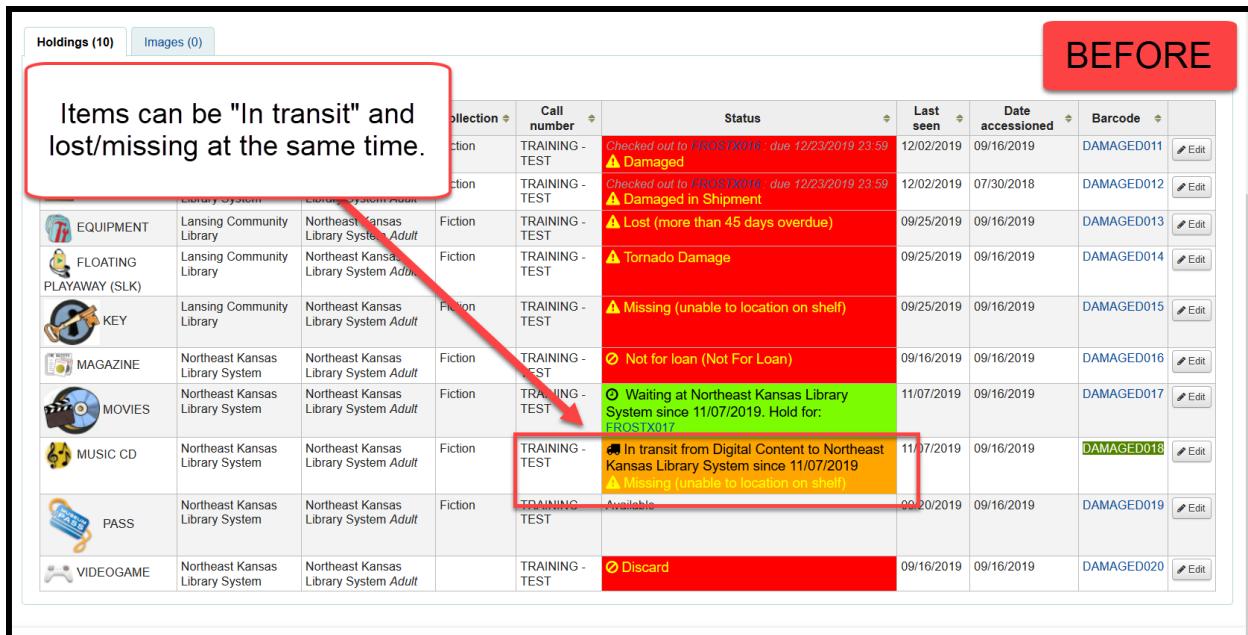
1.9.1 In transit items and lost and missing statuses

When an item that is “In transit” from one library to another is marked as “Missing (unable to location on shelf)” the “In transit” status will now be removed.

The current behavior is that when you change the status of an “In transit” item to “Missing (unable to location on shelf),” the item remains in transit and has the missing status added to the item.

The new behavior prevents an item from being both “Missing” and “In transit” at the same time.

BEFORE:



BEFORE

Holdings (10) Images (0)

Items can be "In transit" and lost/missing at the same time.

Collection	Call number	Status	Last seen	Date accessioned	Barcode	
TEST	TRAINING - TEST	Checked out to FROSTX016 due 12/23/2019 23:59 ⚠ Damaged	12/02/2019	09/16/2019	DAMAGED011	
TEST	TRAINING - TEST	Checked out to FROSTX016 due 12/23/2019 23:59 ⚠ Damaged in Shipment	12/02/2019	07/30/2018	DAMAGED012	
TEST	TRAINING - TEST	⚠ Lost (more than 45 days overdue)	09/25/2019	09/16/2019	DAMAGED013	
TEST	TRAINING - TEST	⚠ Tornado Damage	09/25/2019	09/16/2019	DAMAGED014	
TEST	TRAINING - TEST	⚠ Missing (unable to location on shelf)	09/25/2019	09/16/2019	DAMAGED015	
TEST	TRAINING - TEST	∅ Not for loan (Not For Loan)	09/16/2019	09/16/2019	DAMAGED016	
TEST	TRAINING - TEST	∅ Waiting at Northeast Kansas Library System since 11/07/2019. Hold for: FROSTX017	11/07/2019	09/16/2019	DAMAGED017	
TEST	TRAINING - TEST	■ In transit from Digital Content to Northeast Kansas Library System since 11/07/2019 ⚠ Missing (unable to location on shelf)	11/07/2019	09/16/2019	DAMAGED018	
TEST	TRAINING - TEST	Available	09/20/2019	09/16/2019	DAMAGED019	
TEST	TRAINING - TEST	∅ Discard	09/16/2019	09/16/2019	DAMAGED020	

AFTER:

The screenshot shows a table of item statuses. A green box highlights the header 'Item is in transit'. A large green arrow points from this box down to a specific row for a 'MUSIC CD' item. This row has a yellow background and contains the note: 'In transit from Digital Content to Northeast Kansas Library System since 12/09/2019'. The word 'AFTER' is in the top right corner.

	Collection	Call number	Status	Last seen	Date accessioned	
Fiction	TRAINING - TEST	Checked out to PROSTX016 due 12/26/2019 23:59	Damaged	12/02/2019	09/16/2019	
Fiction	TRAINING - TEST	Checked out to PROSTX016 due 12/23/2019 23:59	Damaged in Shipment	12/02/2019	07/30/2018	DAMAGED012
			Missing (unable to location on shelf)	12/03/2019	09/16/2019	DAMAGED013
EQUIPMENT	Everest Barnes Reading Room	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Waiting at Northeast Kansas Library System since 12/02/2019. Hold for: FROSTX016	DAMAGED014
FLOATING PLAYAWAY (SLK)	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST		
KEY	Lansing Community Library	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Lost (more than 45 days overdue)	DAMAGED015
MAGAZINE	Everest Barnes Reading Room	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST		DAMAGED016
MUSIC CD	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	In transit from Digital Content to Northeast Kansas Library System since 12/09/2019	DAMAGED018
PASS	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Checked out to PROSTX016 due 12/26/2019 23:59	DAMAGED019
VIDEO	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Available	DAMAGED017
VIDEOGAME	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Available	DAMAGED020

The screenshot shows the 'Edit' screen for item statuses. A green box highlights the note field with the placeholder 'Change status to any lost or missing status'. A large green arrow points from this box down to the 'Notes (-)' section. A green box highlights the 'Non-public note' section, which contains the note: 'Missing (unable to location on shelf)'. The word 'AFTER' is in the top right corner.

e - Source of acquisition
g - Cost, normal purchase price 25.00
v - Cost, replacement price 25.00

statuses (-)

0 - Withdrawn status

1 - Lost status

4 - Damaged status

7 - Not for loan

x - Non-public note

z - Public note

(Lost)
Lost (Damaged/Replace)
Lost (more than 45 days overdue)
Lost (Patron Claims Returned)

Save changes Add a new item Cancel

AFTER

Item type	Current location	Home library	Collection	Call number	Status	Last seen	Date accessioned	Barcode	Actions
AUDIOBOOK	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Checked out to FROSTX016 due 12/26/2019 23:59 ▲ Damaged	12/02/2019	09/16/2019	DAMAGED011	
					Checked out to FROSTX016 due 12/23/2019 23:59 ▲ Damaged in Shipment	12/02/2019	07/30/2018	DAMAGED012	
					▲ Missing (unable to location on shelf)	12/03/2019	09/16/2019	DAMAGED013	
					● Waiting at Northeast Kansas Library System since 12/02/2019. Hold for: FROSTX016	12/02/2019	09/16/2019	DAMAGED014	
					▲ Lost (more than 45 days overdue)	09/25/2019	09/16/2019	DAMAGED015	
KEY	Evergreen Community Library	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST		12/03/2019	09/16/2019	DAMAGED016	
MAGAZINE	Everest Barnes Reading Room	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST		12/09/2019	09/16/2019	DAMAGED018	
MUSIC CD	Digital Content	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	▲ Missing (unable to location on shelf)	12/02/2019	09/16/2019	DAMAGED019	
PASS	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Checked out to FROSTX016 due 12/26/2019 23:59	09/16/2019	09/16/2019	DAMAGED017	
VIDEO	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Available	09/16/2019	09/16/2019	DAMAGED020	
VIDEOGAME	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Available	09/16/2019	09/16/2019	DAMAGED020	

1.10 Koha Upgrade - Fees

There will be quite a few changes to fees.

1.10.1 Labeling changes for fines/fees/accounting

The label on the “Fines and fees” tab has changed as well as some of the other tabs in the fines interface.

“Fines and fees” becomes “Accounting”

“Account” becomes “Transactions”

“Pay fines” becomes “Make a payment”

Before:

Before

As a service of NEKLS

Search patrons | Check out | Check in | Renew | Search the catalog

Home > Patrons > Account for Edward (Eddie) Frosty (FROSTX013)

Edward (Eddie) Frosty (FROSTX013)
Category: Child (CHILD)
Home library: Northeast Kansas Library System
Borrower number: 265152
Updated on 09/06/2019 10:16

Check out
Batch check out
Details
Fines and fees
Routing lists
Circulation history
Holds history
Modification log
Notices

Account Pay fines Create manual invoice Create manual credit

Showing 1 to 3 of 3 Show 20 entries First Previous Next Last Search: Column visibility Excel CSV Copy Print

Filter paid transactions

Date	Description of charges	Home library	Note	Amount	Outstanding	Actions
12/01/2019	Account management fee, Account management fee test		Test 3 - invoice created by gwiliams at NEKLS	10.00	10.00	Print Details
12/01/2019	Fine, Fine test		Test 2 - invoice created by gwiliams at NEKLS	10.00	10.00	Print Details
12/01/2019	Lost item, Lost item test		Test 1 - invoice created by gwiliams at NEKLS	10.00	10.00	Print Details
					30.00	

Next Last

After:

After

OPAC Helpful Links Databases More gwiliams | Northeast Kansas Library System Help

As a service of NEKLS

Search patrons | Check out | Check in | Renew | Search the catalog

Home > Patrons > Account for Edward (Eddie) Frosty (FROSTX013)

Edward (Eddie) Frosty (FROSTX013)
Category: Child (CHILD)
Home library: Northeast Kansas Library System
Borrower number: 265152
Updated on 09/06/2019 10:16

Check out
Batch check out
Details
Accounting
Routing lists
Circulation history
Holds history
Modification log

Transactions Make a payment Create manual invoice Create manual credit

Showing 1 to 3 of 3 Show 20 entries First Previous Next Last Search: Clear filter Columns Export

Filter paid transactions

Date	Account type	Description of charges	Barcode	Due date	Return date	Home library	Note	Amount	Outstanding	Actions
12/01/2019	Account management fee	Account management fee test					Test 3 - invoice created by gwiliams at NEKLS	10.00	10.00	Print Details
12/01/2019	F	Fine test					Test 2 - invoice created by gwiliams at NEKLS	10.00	10.00	Print Details
							Test 1 - invoice created by gwiliams at NEKLS	10.00	10.00	Print Details
		Total due							30.00	

1.10.2 New columns and layout of accounting information

Columns on boraccount.pl (including item home library) - add a before/after picture

New +- sign for notes

1.10.3 Ability to calculate how much change to give a patron

This is an optional thing that needs a before/after picture.

Change calculation on fee payment

1.10.4 Fine invoices and payment receipts now customizable

Need a before/after receipt example.

Need a before/after invoice example.

Account payment receipt template:

```
<table>
  [% IF ( LibraryName ) %]
    <tr>
      <th colspan="4" class="centerednames">
        <h3>[% LibraryName | html %]</h3>
      </th>
    </tr>
  [% END %]
  <tr>
    <th colspan="4" class="centerednames">
      <h2><u>Fee receipt</u></h2>
    </th>
  </tr>
  <tr>
    <th colspan="4" class="centerednames">
      <h2>[% Branches.GetName( patron.branchcode ) | html %]</h2>
    </th>
  </tr>
  <tr>
    <th colspan="4">
      Received with thanks from [% patron.firstname | html %] [% patron.surname | html %] <br />
      Card number: [% patron.cardnumber | html %]<br />
    </th>
  </tr>
  <tr>
    <th>Date</th>
    <th>Description of charges</th>
    <th>Note</th>
    <th>Amount</th>
  </tr>

  [% FOREACH account IN accounts %]
    <tr class="highlight">
      <td>% account.date | $KohaDates %</td>
      <td>
        [% PROCESS account_type_description account=account %]
        [%- IF account.description %], [% account.description | html %][% END %]
      </td>
      <td>% account.note | html %</td>
      [% IF ( account.amountcredit ) %]<td class="credit">[% ELSE %]<td class="debit">
        [% END %] [% account.amount | $Price %]</td>
    </tr>
  
```

(continues on next page)

(continued from previous page)

```
[% END %]
<tfoot>
  <tr>
    <td colspan="3">Total outstanding dues as on date: </td>
    [% IF ( totalcredit ) %]<td class="credit">[% ELSE %]<td class="debit">[% END
  ↵%] [% total | $Price %]</td>
  </tr>
</tfoot>
</table>
```

Any text in <single angle brackets> is an HTML tag and should only be changed if you know HTML

Any text in [square brackets] is a template toolkit tag and should only be changed if you understand template toolkit

Any text in <><>double angle brackets>> is a Koha database field and should only be changed if you know the Koha database schema

Account invoice receipt template:

```
<table>
  [% IF ( LibraryName ) %]
    <tr>
      <th colspan="5" class="centerednames">
        <h3>[% LibraryName | html %]</h3>
      </th>
    </tr>
  [% END %]

  <tr>
    <th colspan="5" class="centerednames">
      <h2><u>INVOICE</u></h2>
    </th>
  </tr>
  <tr>
    <th colspan="5" class="centerednames">
      <h2>[% Branches.GetName( patron.branchcode ) | html %]</h2>
    </th>
  </tr>
  <tr>
    <th colspan="5" >
      Bill to: [% patron.firstname | html %] [% patron.surname | html %] <br />
      Card number: [% patron.cardnumber | html %]<br />
    </th>
  </tr>
  <tr>
    <th>Date</th>
    <th>Description of charges</th>
    <th>Note</th>
    <th style="text-align:right;">Amount</th>
    <th style="text-align:right;">Amount outstanding</th>
  </tr>

  [% FOREACH account IN accounts %]
    <tr class="highlight">
```

(continues on next page)

(continued from previous page)

```
<td>[% account.date | $KohaDates%]</td>
<td>
    [% PROCESS account_type_description account=account %]
    [%- IF account.description %], [% account.description | html %][% END %]
</td>
<td>% account.note | html %</td>
[% IF ( account.amountcredit ) %]<td class="credit">[% ELSE %]<td class="debit">
[% END %][% account.amount | $Price %]</td>
[% IF ( account.amountoutstandingcredit ) %]<td class="credit">[% ELSE %]<td class="debit">
[% END %][% account.amountoutstanding | $Price %]</td>
</tr>
[% END %]

<tfoot>
<tr>
    <td colspan="4">Total outstanding dues as on date: </td>
    [% IF ( totalcredit ) %]<td class="credit">[% ELSE %]<td class="debit">[% END %
    [% total | $Price %]</td>
</tr>
</tfoot>
</table>
```

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1.11 Koha Upgrade - Receipts

There are a couple of changes to printing receipts for patrons.

1.11.1 Print drop-down changes

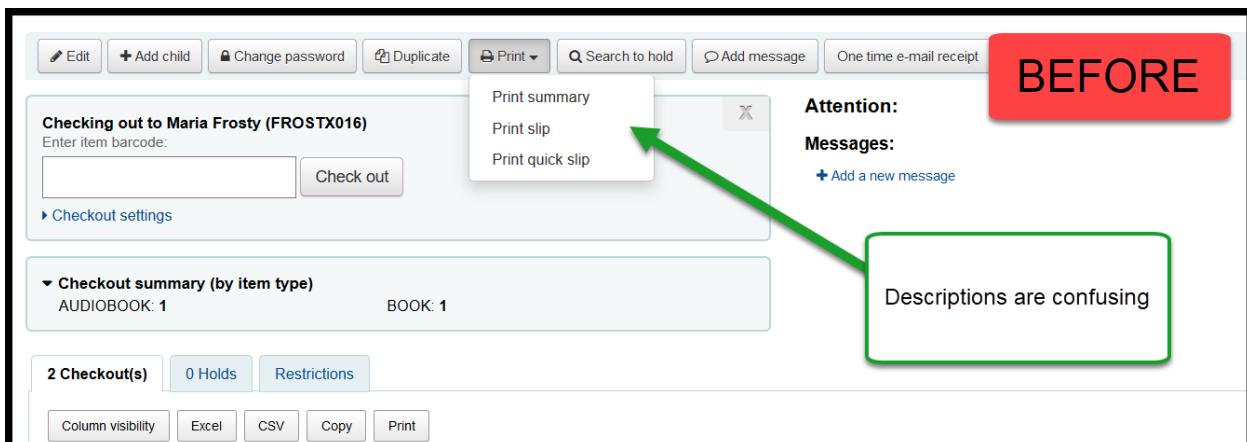
The text under the “Print” button doesn’t clearly describe what the options do. The text will be updated during the upgrade.

Print summary becomes **Full page-summary**

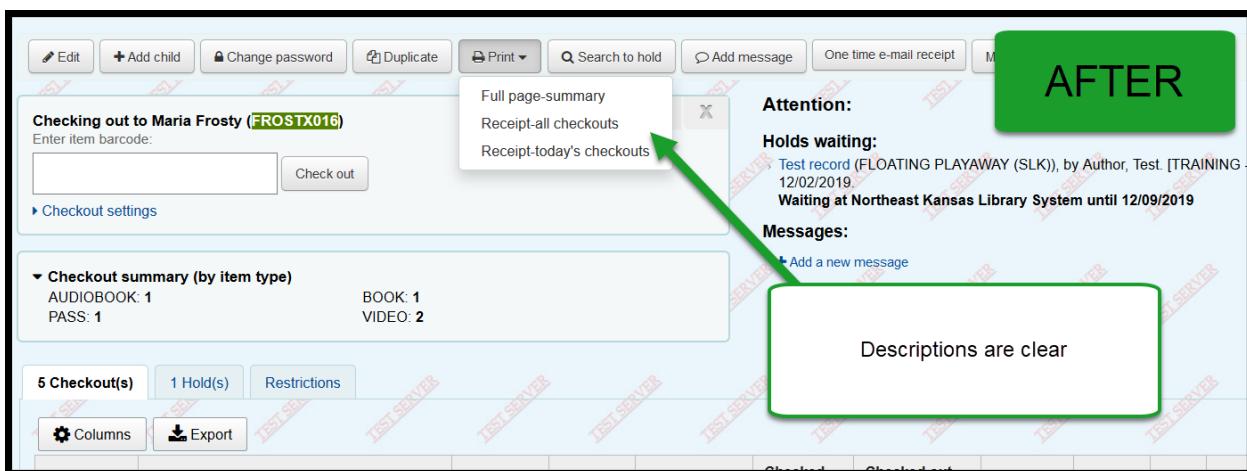
Print slip becomes **Receipt-all checkouts**

Print quick slip becomes **Receipt-today’s checkouts**

BEFORE:



AFTER:



Frequently asked questions

- Q: What is the “Print summary” / “Full page-summary?”
A: This option prints the full details of the patron’s account - contact information, items checked out, overdues, current fees, etc. The template for this prints on a full 8 1/2 x 11 inch sheet of paper and the template for this page cannot be modified at the present.
- Q: What is the “Print slip” / “Receipt-all checkouts?”
A: This option prints a list of all items checked out to the patron on a receipt sized sheet of paper. This receipt can be customized on a library-by-library basis.
- Q: What is the “Print quick slip” / “Receipt-today’s checkouts?”
A: This option prints only a list of the items checked out today on a receipt sized sheet of paper. This receipt can be customized on a library-by-library basis.

1.11.2 Print receipt and close

There is a new icon that will both print a quick slip and close the check-out screen.

