
Next Search Catalog 19.05 training Documentation

George Williams

Dec 17, 2019

CONTENTS:

1	Koha Upgrade Training Overview	1
1.1	Clearing the cache on your browser	1
1.2	Koha Upgrade - Self check changes	9
1.3	Koha Upgrade - OPAC	11
1.4	Koha Upgrade - 1/2 OPAC - 1/2 staff	16
1.5	Koha Upgrade - Cataloging	26
1.6	Koha Upgrade - Searching	33
1.7	Koha Upgrade - Report changes	34
1.8	Koha Upgrade - Patron changes	34
1.9	Koha Upgrade - Item statuses	42
1.10	Koha Upgrade - Fees	44
1.11	Koha Upgrade - Receipts	52

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.

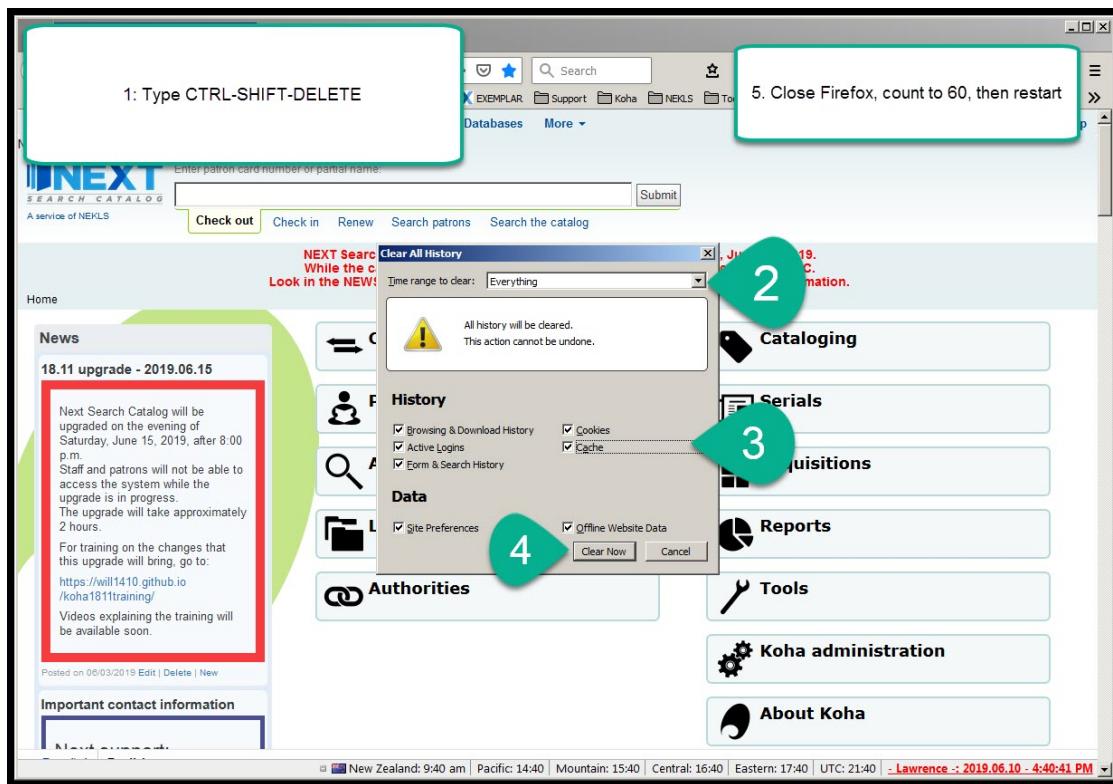
You can also find a set of videos that covers all of the things discussed on this site at [Next search catalog upgrade - 2020-01 all videos](#)

1.1 Clearing the cache on your browser

1.1.1 Firefox - Method #1

To clear the cache in Firefox:

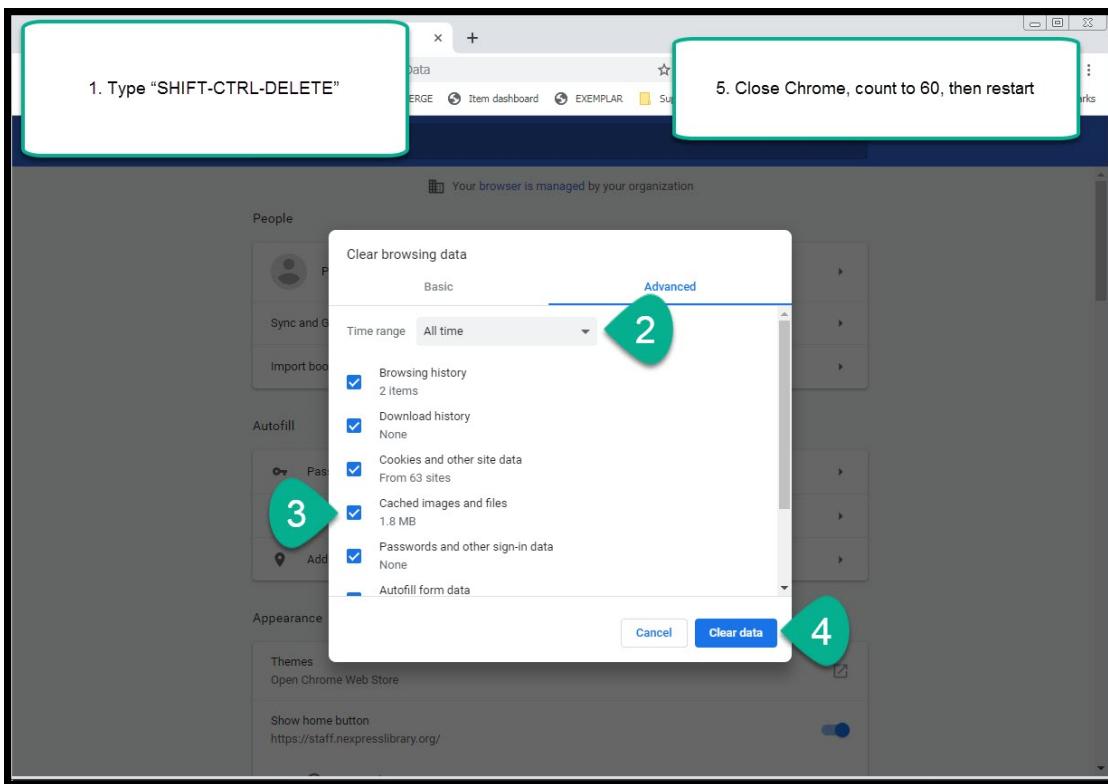
1. Start Firefox and type “SHIFT-CTRL-DELETE” to bring up the “Clear All History” window
2. Make sure the “Time range to clear” drop down says “Everything”
3. Make sure the “Cache” checkbox is checked
4. Click on the “Clear now” button
5. Click on the X to close Firefox
6. Wait 60 seconds then re-start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



1.1.2 Chrome - Method #1

To clear the cache in Chrome:

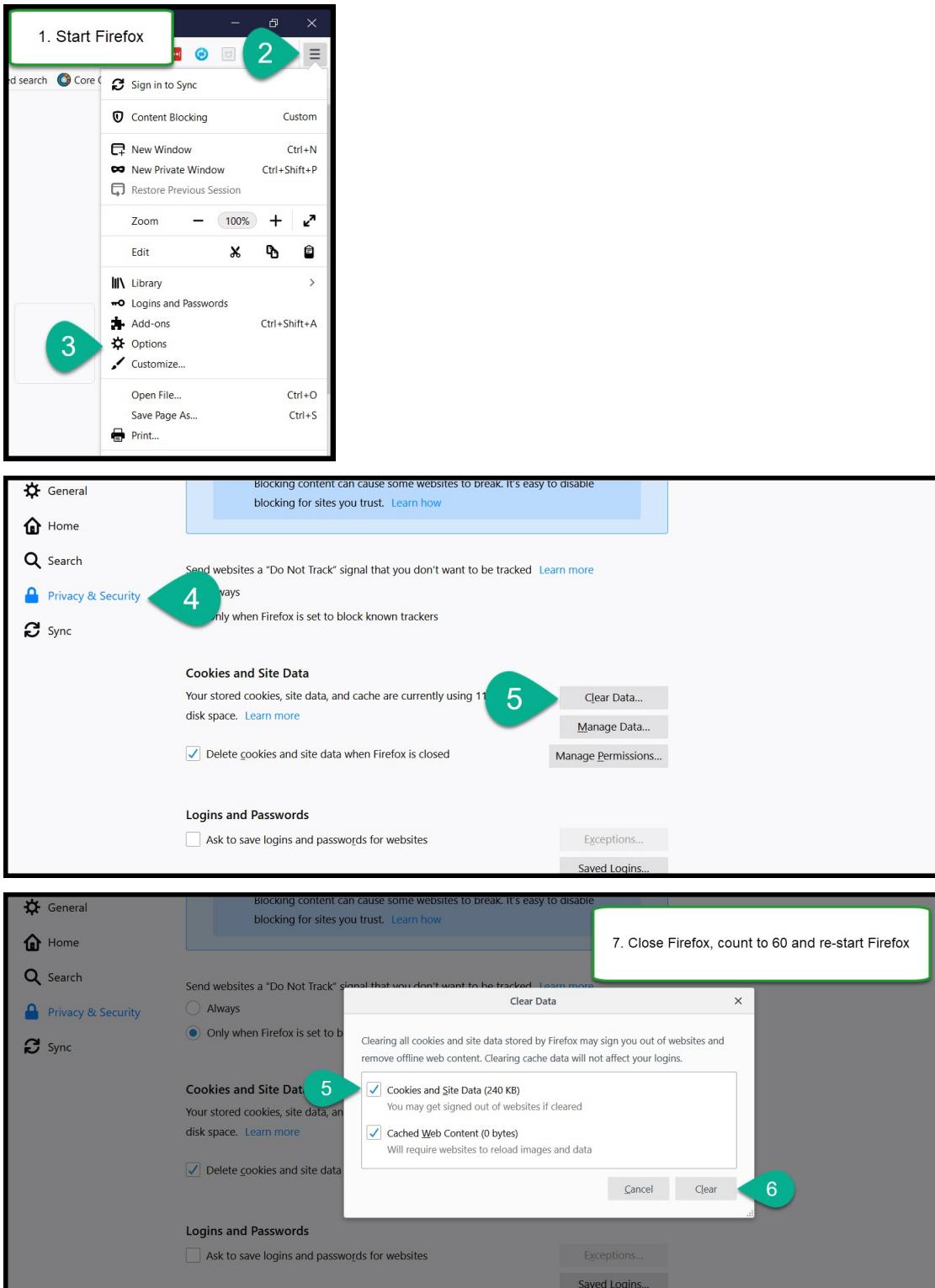
1. Start Chrome and type “SHIFT-CTRL-DELETE” to bring up the “Clear browsing data” window
2. Make sure the “Time range” drop down says “all time”
3. Make sure the “Cached images and files” checkbox is checked
4. Click on the “Clear data” button
5. Click on the X to close Chrome
6. Wait 60 seconds then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

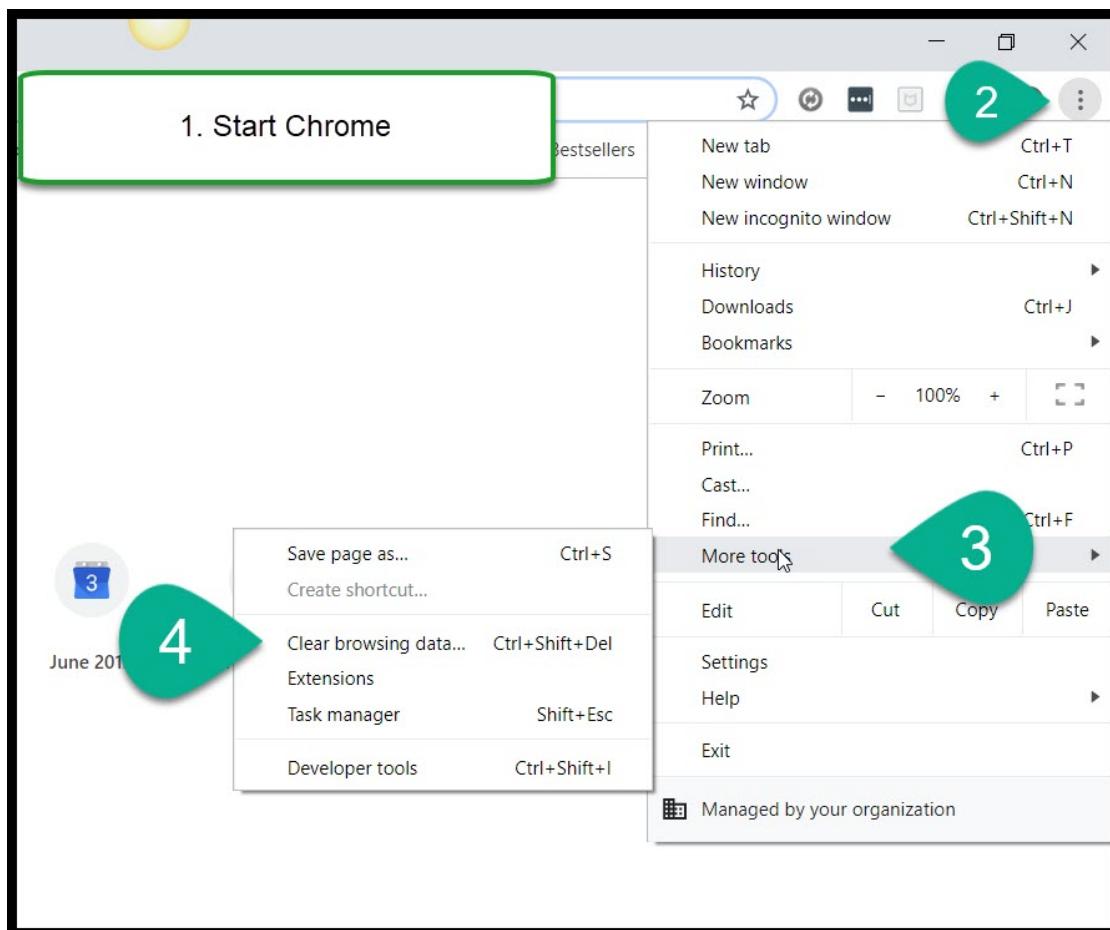


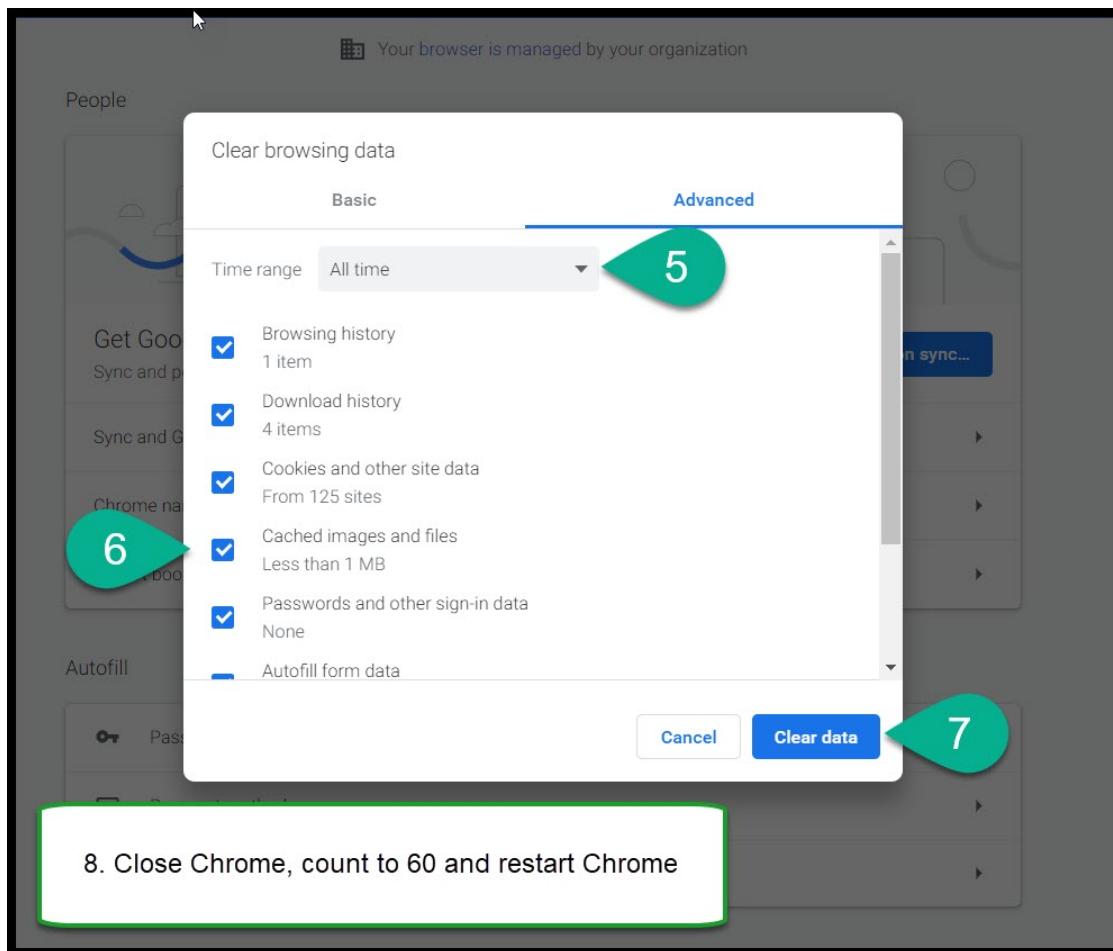
1.1.4 Chrome - Method #2

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

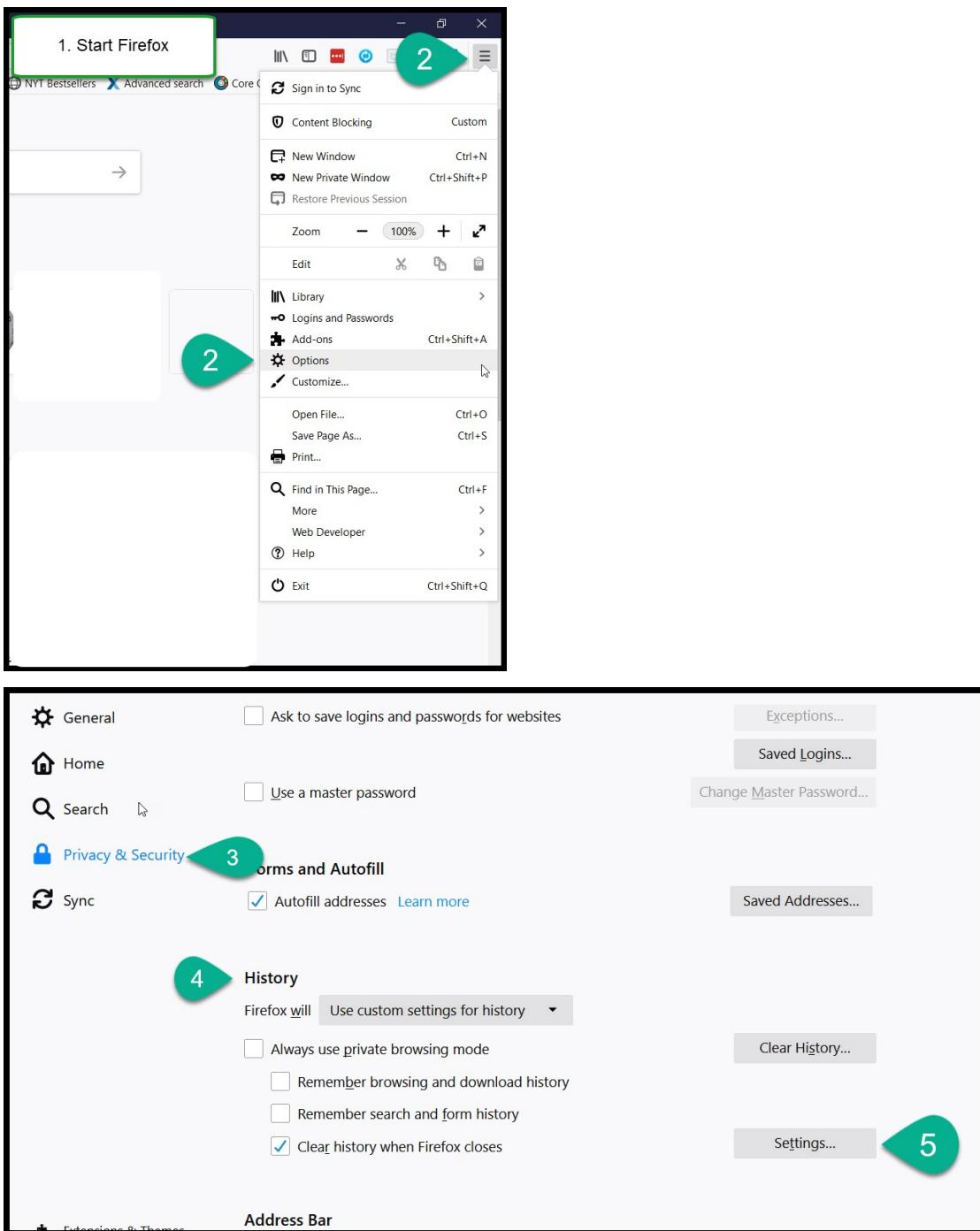


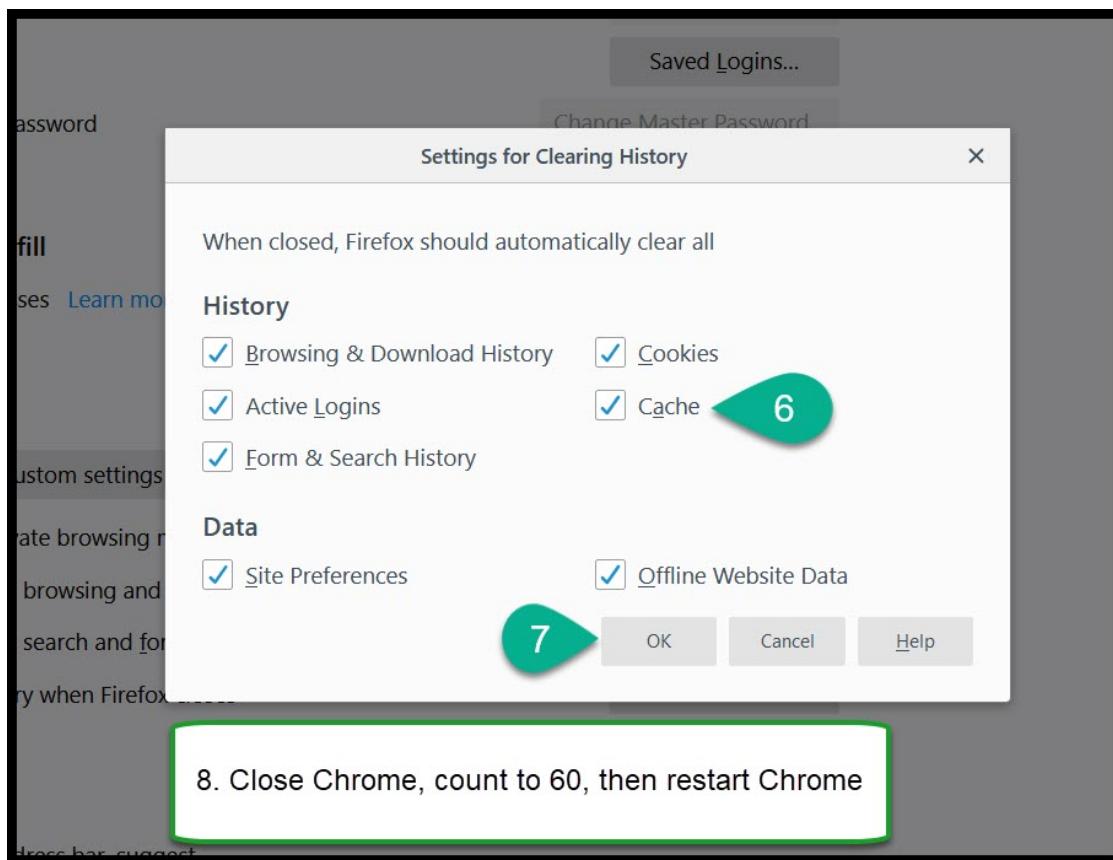


1.1.5 Firefox - Method #3

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.

Video on this topic:

Watch a YouTube video about the upgrade and clearing your cache.

<https://youtu.be/h4zTNGkxPyI>

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:

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

Next Search Catalog 19.05 training Documentation

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

Next: search Self checkout system

Item checked out

You are logged in as Maria Frosty.

Messages for you

OPAC note

Check out or renew an item:

✓ Finish

Holds (1) Fines and charges (0.00)

Checkouts for Maria Frosty (4 total)

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

Scan a new item or enter its barcode Submit

After

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.

Next: search Self checkout system

You are logged in as Maria Frosty.

Messages for you

OPAC note

Check out or renew an item:

✓ Finish

Holds (1 total)

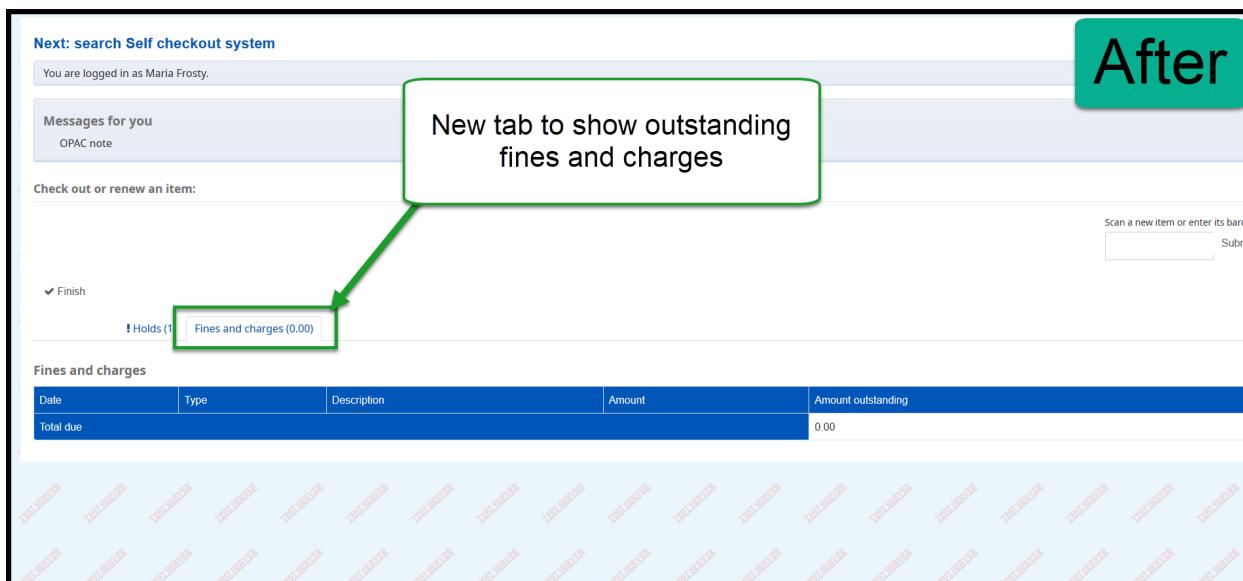
Holds (1 total)

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

Scan a new item or enter its barcode Submit

After

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 system?**
- A: Contact us at nexthelp@nekls.org for more information.

1.2.2 Video on this topic:

Watch a YouTube video about changes to the self-check system.

https://youtu.be/-6x1_j7-mKI

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:

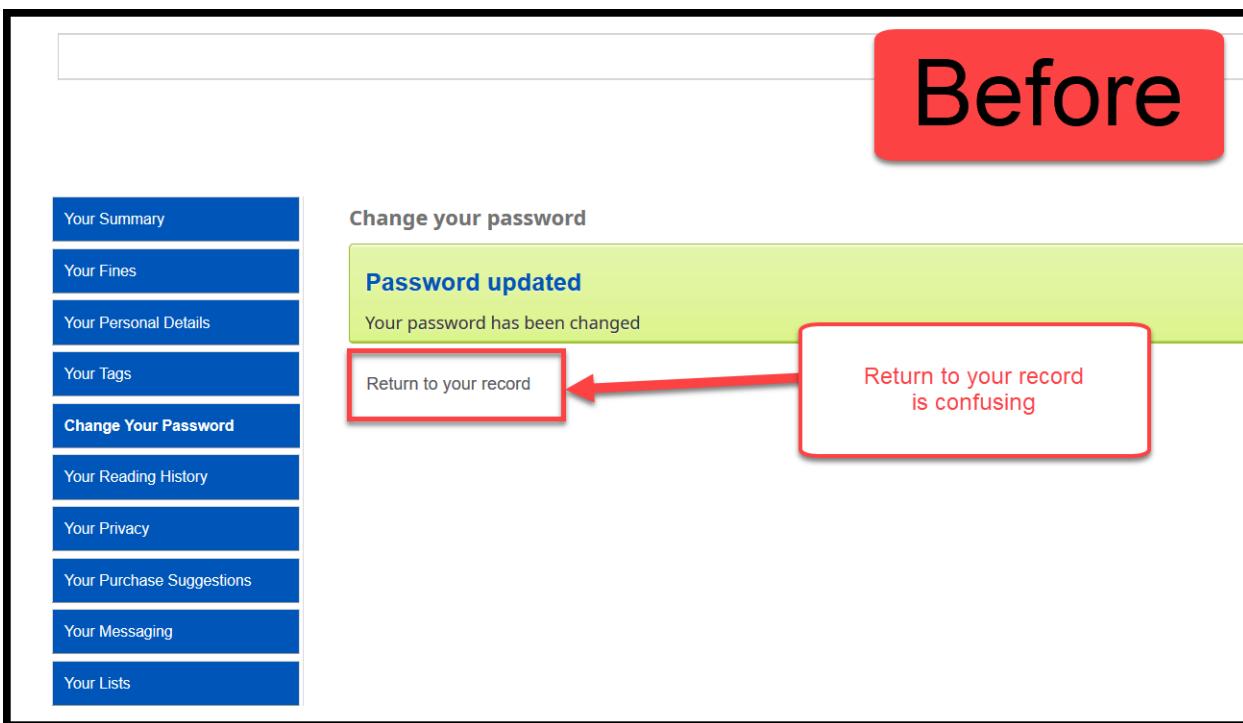
New password:

Re-type new password:

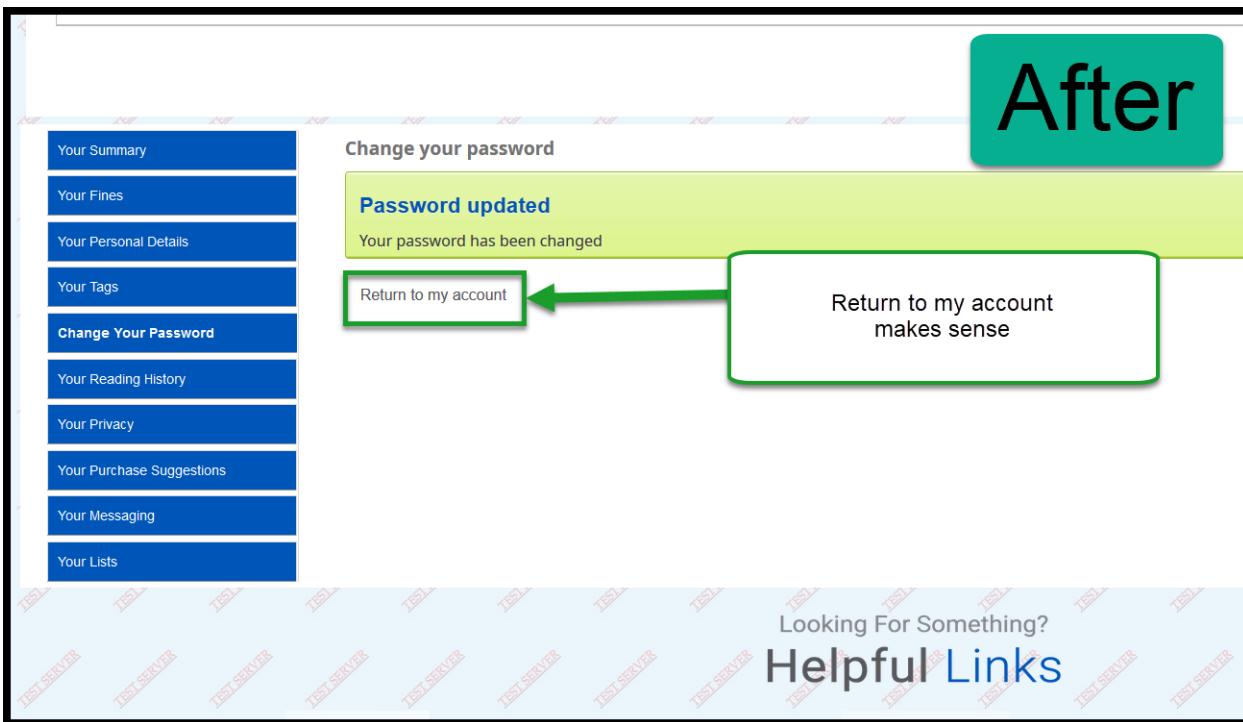
Change password Cancel

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:

The screenshot shows the 'Before' state of the Next Search Catalog interface. At the top right, there is a red button labeled 'Before'. The main content area displays a table of fines and charges. A callout box with a red border contains the following text: "Clicking on a column header sorts each column but the default order is random and can change each time the page is loaded." Below this text are three icons: a hand pointing at a screen labeled 'Digital Media', a magnifying glass icon labeled 'Resources & Reference', and a question mark inside a circle labeled 'Help'. At the bottom right, it says "POWERED BY NEKLS".

Fines and charges				
	Date	Description	Fine amount	Amount outstanding
Your Fines	06/19/2019	Writeoff , Writeoff	-50.00	0.00
Your Personal Details	06/19/2019	Lost item , Another test fine	50.00	0.00
Your Tags	06/19/2019	Writeoff , Writeoff	-35.00	0.00
Change Your Password	06/19/2019	Writeoff , Writeoff	-18.00	0.00
Your Reading History	06/19/2019	Writeoff , Writeoff	-4.50	0.00
Your Privacy	06/19/2019	Writeoff , Writeoff	-2.50	0.00
Your Purchase Suggestions	06/19/2019	Writeoff , Writeoff	-10.01	0.00
Your Messaging	06/19/2019	Lost item	35.00	0.00
Your Lists	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	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 search

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

POWERED BY NEKLS

AFTER:

The screenshot shows the 'Fines and charges' section of the catalog. The table has columns for Date, Type, Description, Amount, and Amount outstanding. The rows show various transactions like item returns, lost items, and writeoffs. A green box highlights the table area. A green callout bubble with the text 'After the upgrade, the columns will sort with the newest dates at the top of the table.' is positioned over the table. The total due amount 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

? Help

POWERED BY NEKLS

1.3.3 Video on this topic:

Watch a YouTube video about some minor changes to the OPAC that patrons may notice.

<https://youtu.be/UaKDr0hKhh8>

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 interface to the new staff client interface for managing purchase suggestions.

Before (OPAC View): A red box labeled "Before" highlights the "Suggestions pending approval count" area. A green arrow points from the OPAC's "News" section to the staff client's "Suggestions pending approval count" area. The OPAC news section contains a message about the Koha 19.05 upgrade and its impact on the staff client.

Suggestions pending approval count: A red box highlights the "Suggestions pending approval: 272" and "Comments pending approval: 1" counts on the staff client's home page.

Next: staff client: A red box highlights the "Next: staff client" link on the staff client's home page.

High demand requests at your library: A red box highlights the "High demand requests at your library" section, which lists titles with multiple requests for pickup.

Request information for your library: A red box highlights the "Request information for your library" section, which provides details about titles with high demand and suggests purchasing additional copies.

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:

The screenshot shows the patron's messaging history. A green box highlights the message: "A 'New suggestion' message will appear on the patron's 'Notices' tab." Another green box highlights the message content: "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."

Notices Tab Content:

- Suggested by:**
 - Sean Frosty
 - FROSTX019
 - 785-838-4090
 - george@nekls.org
- Title suggested:**
 - 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

Message Headers:

From:	gwilliams	To:	gwilliams@nekls.org
Subject:	New suggestion	Date:	10/21/2019 02:30

Message Content:

This is a test message from the Northeast Kansas Library System. It contains a new suggestion made by Sean Frosty (FROSTX019). The suggestion is for a book titled "test1" by Author: Test1. The suggestion is pending approval.

Message Footer:

Test message from the Northeast Kansas Library System. This message was sent to gwilliams@gwilliams.com on 10/21/2019 at 02:30.

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

Video on this topic:

Watch a YouTube video about changes to the OPAC purchase suggestions.

<https://youtu.be/y0SdXk8XO60>

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 notifications. A green arrow highlights the 'Important contact information' box on the left, which contains links for Next support, NEKLS contact info, and a new training documentation site. A green box highlights the 'Suggestions pending approval: 245' and 'Patrons requesting modifications: 1' notifications at the bottom left. A green callout box points to the 'Patrons requesting modifications' count, with the text 'Check "Patrons requesting notifications" regularly' inside.

! TEST SERVER !

Circulation Patrons Search Cart OPAC Helpful Links Databases More gwiliams | Northeast Kansas Library System Help
NExpress Super Librarian!

! TEST SERVER !

NEX**T** SEARCH CATALOG Enter patron card number or partial name: Submit

Check out Check in Renew Search patrons Search the catalog

Home

News
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](#)

Posted on 09/24/2018 Edit | Delete | New

New training and documentation site

New training and documentation site - still in draft
<https://northeast-kansas-library-system.github.io/next/training/>
PDF version
https://northeast-kansas-library-system.github.io/next/training/_NextSearchCatalogStaffTraining.pdf

Posted on 03/28/2019 Edit | Delete | New

Circulation
Patrons
Advanced search
Lists
Course reserves
Authorities

Cataloging
Serials
Acquisitions
Reports
Tools
Koha administration

Suggestions pending approval: 245
Patrons requesting modifications: 1

Next: staff client

High demand requests Statistics - 2019 Locked accounts Statistics - 2018 Hoopla help

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.

Next Search Catalog 19.05 training Documentation

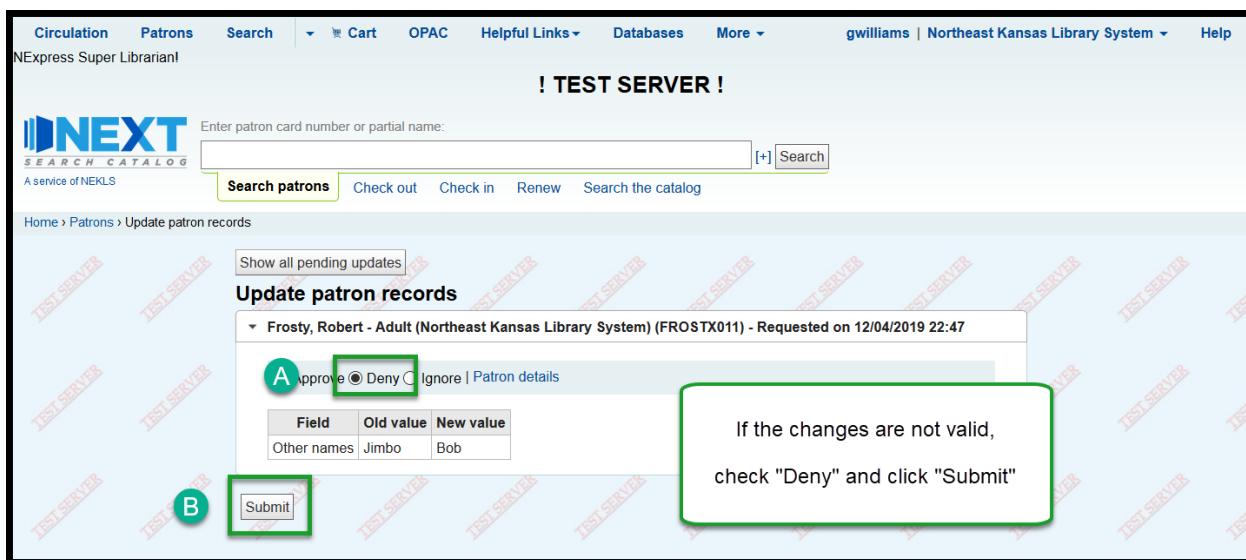
The screenshot shows the 'Update patron records' page for a patron named Frosty, Robert. A table displays a change from 'Old value' (Jimbo) to 'New value' (Bob). A green arrow points from a callout box to this table, with the text 'Verify that the changes are appropriate'.

Field	Old value	New value
Other names	Jimbo	Bob

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.

The screenshot shows the 'Update patron records' page. A green callout box points to the 'Approve' radio button in the 'Patron details' section. Another green callout box points to the 'Submit' button at the bottom. Callouts A and B are also present, pointing to the 'Approve' button and the 'Submit' button respectively.

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.

Video on this topic:

Watch a YouTube video about changes to patron self-updating.

<https://youtu.be/5oC9gC1Imak>

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

After the upgrade the following item type descriptions will change:

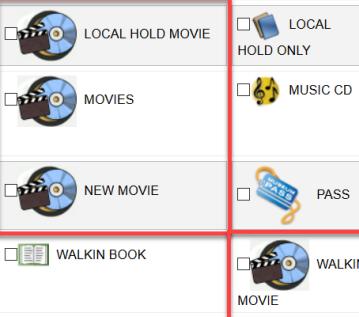
MOVIE becomes **VIDEO**

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:

Search | Fewer options | New search

Collection **Item type** Shelving location

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:

Before

OPAC - after:

and Keyword [+][-]

Search | Fewer options | New search

Collection **Item type** Shelving location

Limit to any of the following:

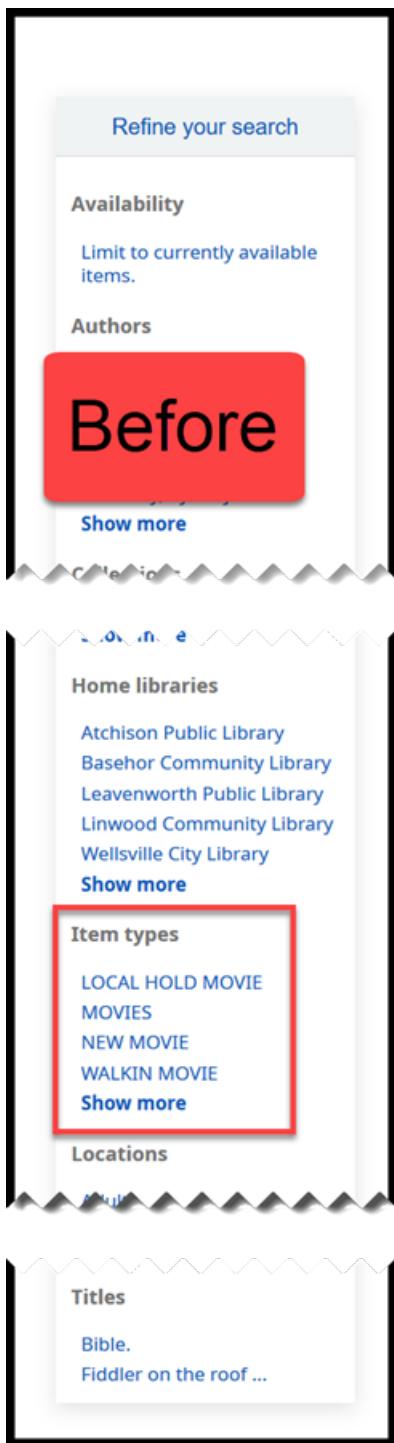
<input type="checkbox"/> Audiobooks	<input type="checkbox"/> Books	<input type="checkbox"/> Digital Content	<input type="checkbox"/> Equipment
<input type="checkbox"/> Highland CC Reserves	<input type="checkbox"/> Kit or Multi-part Set	<input type="checkbox"/> Music CD	<input type="checkbox"/> Magazine
<input type="checkbox"/> Pass	<input type="checkbox"/> Video	<input type="checkbox"/> Videogame	

Publication date range Location and availability: Sorting:

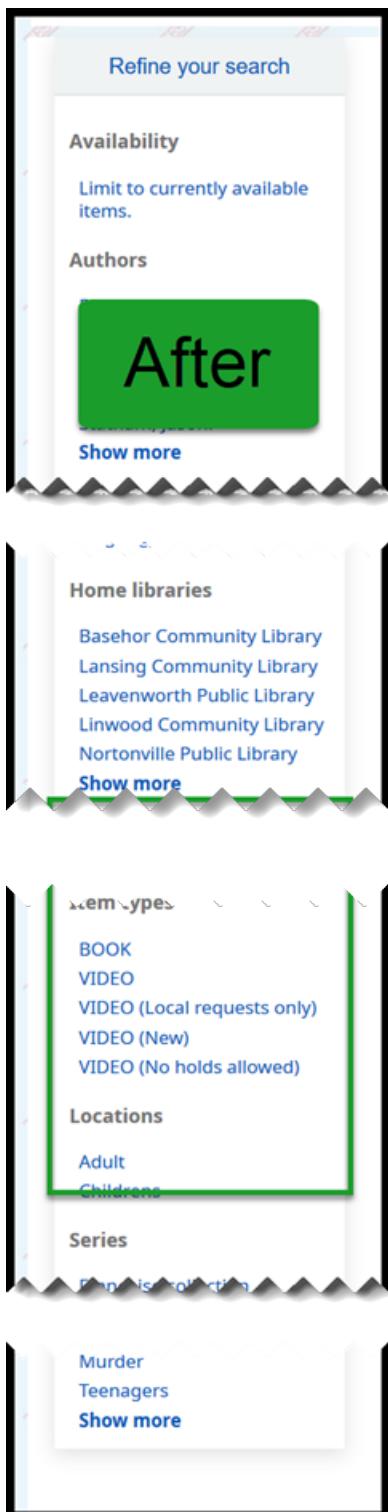
After

This will also affect the search facets.

Before:



After:



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.

Video on this topic:

Watch a YouTube video about changes to the movie/video item types.

https://youtu.be/6D0E_9igN8w

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:

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

001 _0 - CONTROL NUMBER Required

002 _0 - control field

008 ?_ FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION Required

010 ?_0 - LIBRARY OF CONGRESS CONTROL NUMBER Required

020 ?_0 - INTERNATIONAL STANDARD BOOK NUMBER Required

021 a International Standard Book Number 067902984

022 ?_0 - INTERNATIONAL STANDARD BOOK NUMBER Required

023 a International Standard Book Number 9780679602989

024 ?_0 - INTERNATIONAL STANDARD SERIAL NUMBER Required

025 a International Standard Serial Number

026 ?_0 - OTHER STANDARD IDENTIFIER Required

027 a Source of number or code

028 ?_0 - PUBLISHER NUMBER Required

029 a Publisher number

030 ?_0 - SOURCE OF ACQUISITION Required

031 a System control number (OCoLC)38432032

037 ?_0 - CATALOGING SOURCE Required

040 a Original cataloging agency DLC

041 c Transcribing agency DLC

042 d Modifying agency IAK

043 d Modifying agency BAKER

044 d Modifying agency XY4

045 d Modifying agency BTCTA

046 d Modifying agency YDIXCP

047 d Modifying agency NIALS

048 d Modifying agency LQS

049 e Language of cataloging

050 e Description conventions

051 ?_0 - LANGUAGE CODE Required

052 ?_0 - GEOGRAPHIC AREA CODE Required

053 a Geographic area code n-us-

054 ?_0 - TIME PERIOD OF CONTENT Required

055 ?_0 - FORM OF MUSICAL COMPOSITION CODE Required

056 ?_0 - NUMBER OF MUSICAL INSTRUMENTS OR VOICES CODE Required

057 ?_0 - LIBRARY OF CONGRESS CALL NUMBER Required

058 a Classification number PN4874.T444

059 b Item number A3 1996

060 ?_0 - GPO ITEM NUMBER Required

061 a Classification number 070/.32

062 b Edition number 21

063 ?_0 - DEWEY DECIMAL CLASSIFICATION NUMBER Required

064 a Classification number 8

065 b Edition number 21

066 ?_0 - GOVERNMENT DOCUMENT CLASSIFICATION NUMBER Required

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 0-LEADER ↴									
a 00	fixed length control field	02251cam a220325 a 4500							
001 0-CONTROL NUMBER ↴									
a 00	control field	ocm38412032							
008 0-FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION ↴									
a 00	fixed length control field	988020619961972nyu	000 Oaeng						
010 1--LIBRARY OF CONGRESS CONTROL NUMBER ↴									
a a	LC control number	98012001							
020 1--INTERNATIONAL STANDARD BOOK NUMBER ↴									
a a	International Standard Book Number	0679602984							
020 1--INTERNATIONAL STANDARD BOOK NUMBER ↴									
a a	International Standard Book Number	9780679602989							
022 1--INTERNATIONAL STANDARD SERIAL NUMBER ↴									
a a	International Standard Serial Number								
024 1--OTHER STANDARD IDENTIFIER ↴									
a 2	Source of number or code								
a a	Standard number or code								
a c	Terms of availability								
a d	Additional codes following the standard number or code								
a q	Qualifying information								
027 1--STANDARD TECHNICAL REPORT NUMBER ↴									
028 1--PUBLISHER NUMBER ↴									
a a	Publisher number								
a b	Source								
035 1--SYSTEM CONTROL NUMBER ↴									
a a	System control number	OCULC38432032							
037 1--SOURCE OF ACQUISITION ↴									
040 1--CATALOGING SOURCE ↴									
a a	Original cataloging agency	DLC							
a c	Transcribing agency	DLC							
a d	Modifying agency	VAK							
a d	Modifying agency	BAKER							
a d	Modifying agency	XY4							
a d	Modifying agency	BTCIA							
a d	Modifying agency	YDIXCP							
a d	Modifying agency	NIALS							
a d	Modifying agency	LQS							
a b	Language of cataloging								
a e	Description conventions								
041 1--LANGUAGE CODE ↴									
043 1--GEOGRAPHIC AREA CODE ↴									
a a	Geographic area code	P-US							
045 1--TIME PERIOD OF CONTENT ↴									
047 1--FORM OF MUSICAL COMPOSITION CODE ↴									
048 1--NUMBER OF MUSICAL INSTRUMENTS OR VOICES CODE ↴									
050 1 0 LIBRARY OF CONGRESS CALL NUMBER ↴									
a a	Classification number	PN4874.T44							
a b	Item number	A3 1996							
074 1--GPO ITEM NUMBER ↴									
082 1 0 DEWEY DECIMAL CLASSIFICATION NUMBER ↴									
a a	Classification number	070/92							
a 2	Edition number	21							
a b	Item number								
082 1 1 4 DEWEY DECIMAL CLASSIFICATION NUMBER ↴									
a a	Classification number	B							
a 2	Edition number	21							
a b	Item number								
086 1--GOVERNMENT DOCUMENT CLASSIFICATION NUMBER ↴									

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

It is no longer necessary to click on the 000 and 008 fields to trigger them to auto-fill when creating Fast add/ILL records.
They now fill automatically and are hidden by default.

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:

Edit Item #1834751 / Barcode 0003012072153

Library, classification, and barcode (-)

- 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:
- p - Barcode: 0003012072153

Acquisition data (-)

- d - Date acquired: 2017-08-02
- e - Source of acquisition:
- g - Cost, normal purchase price:
- v - Cost, replacement price: 19.95

Statuses (-)

- 0 - Withdrawn status:
- 1 - Lost status:
- 4 - Damaged status:
- 7 - Not for loan:

Notes (-)

- x - Non-public note:
- z - Public note:
- 3 - Materials specified (bound volume or other part):

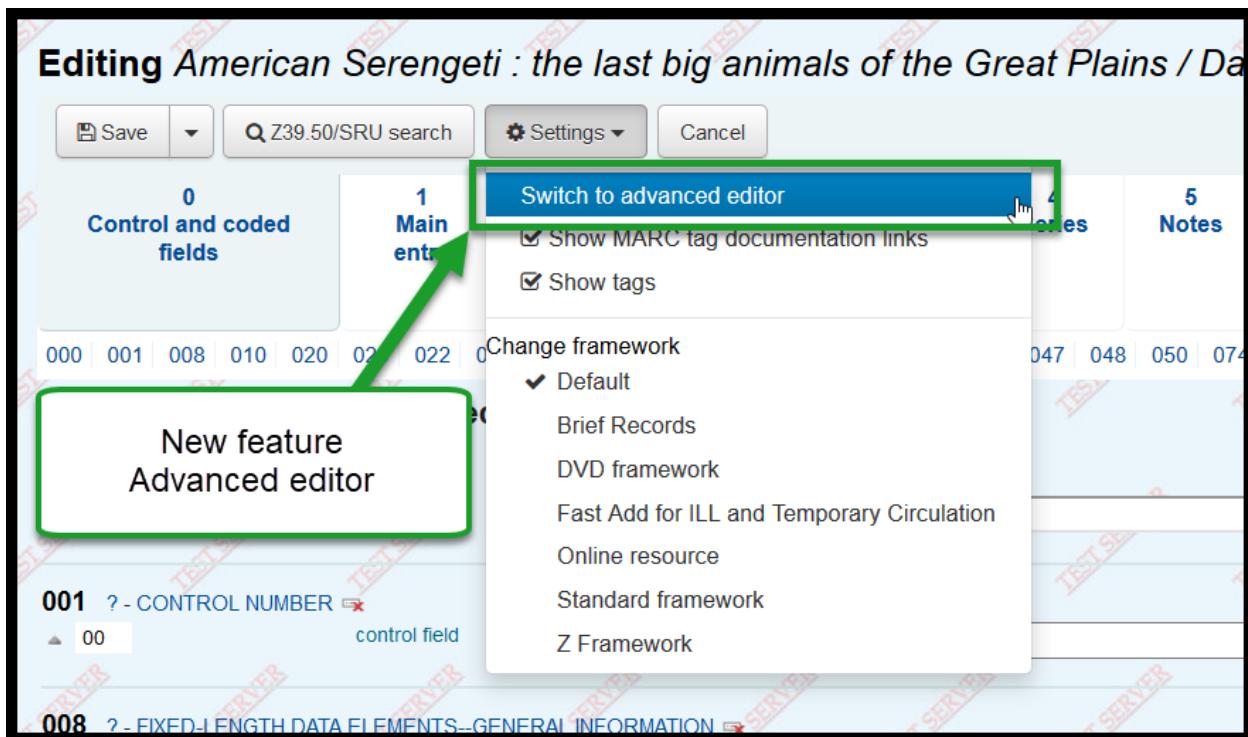
Buttons: Save changes | Add a new item | Cancel

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 ab _ _ b _ _ _ 0 0 1 0 eng d

020 - _ \$a070062466X
020 - _ \$a9780700624669
035 - _ \$a (OCoLC) 966395514
040 - _ \$a YDX \$b eng \$t rda \$c IDX \$d UOK
043 - _ \$anp-----
082 0 4 \$a591.50978 #223
100 1 \$aFlores, Dan L. \$g (Dan Louie), \$d1948- \$e author. \$g125452
245 1 0 \$aAmerican Serengeti : \$b the last big animals of the Great Plains / \$c Dan Flores.
264 - 1 \$aLawrence, Kansas : \$b University Press of Kansas, \$c 2016.
300 - _ \$a213 pages : \$b illustrations, maps ; \$c 23 cm
504 - _ \$a Includes bibliographical references (pages [185]-196) and index.
505 0 - \$a Introduction: American Serengeti -- 2. 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 - _ \$a "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 \$a Animals \$z Great Plains \$x History.
650 - 0 \$a Herbivores \$z Great Plains \$x History.
650 - 0 \$a Predatory animals \$z Great Plains \$x History.
650 - 0 \$a Natural history \$z Great Plains.
650 - 0 \$a Human-animal relationships \$z Great Plains \$x History.

035: [?] SYSTEM CONTROL NUMBER \$a: System control number

Video on this topic:

Watch a YouTube video about all of the changes in cataloging

<https://youtu.be/4LZcVE1g448>

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** sidebar:
 - 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
 - Show more**
- Search bar**: kw,wrld: John grisham guardians
- Results header**: 5 result(s) found for "kw,wrld: John grisham guardians" in Next: search Catalog.
- Results table** (5 rows):

	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 (right side)**:
 - 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.
 - Koha now shows items as “Available,” “On loan,” or “Unavailable.”
 - In transit or items on hold awaiting pickup now count as “Unavailable.”

1.6.2 Video on this topic:

Watch a YouTube video about searching changes

<https://youtu.be/o3yZm-4dGcU>

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.

1.7.2 Video on this topic:

Watch a YouTube video about reports that may not work.

<https://youtu.be/OAb5YK2MZ-E>

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 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' page. At the top, there are four buttons: 'Hold e-mail only', '5 Day advance e-mail + item due', '3 Day advance e-mail + item due', and 'Clear all'. Below these buttons is a dropdown menu set to 'Unknown'. A red arrow points from the text 'The "Digests only" buttons are disabled.' to the 'Digests only' column in the table below. Another red arrow points from the text 'When you check "Email" the "Digests only" checkbox will be automatically checked.' to the 'Email' column. A third red arrow points from the text 'When you uncheck "Email" the "Digests only" checkbox will be automatically unchecked.' to the 'Digests only' column.

	Days in advance	Text message	Email	Digests only	Do not notify
Item due	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Advance notice	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 type="checkbox"/>
Email check-out/renewal receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>

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.

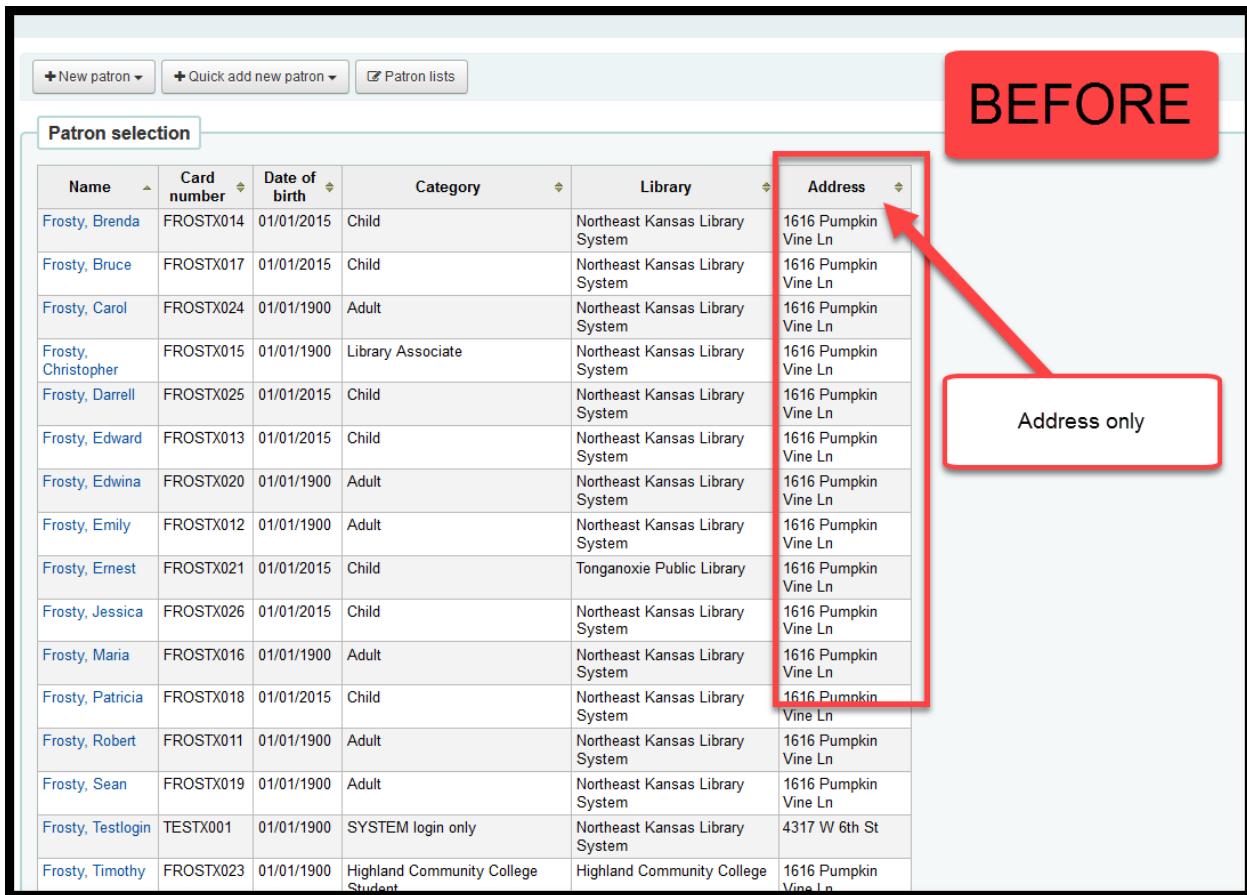
- A: Currently Koha does not have the ability to digest this message. A development is underway that would add that function to the system. When completed, this development would work similarly to the self-digesting “Email check-in receipt” and “Email check-out/renewal receipt” once-every-15-minutes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

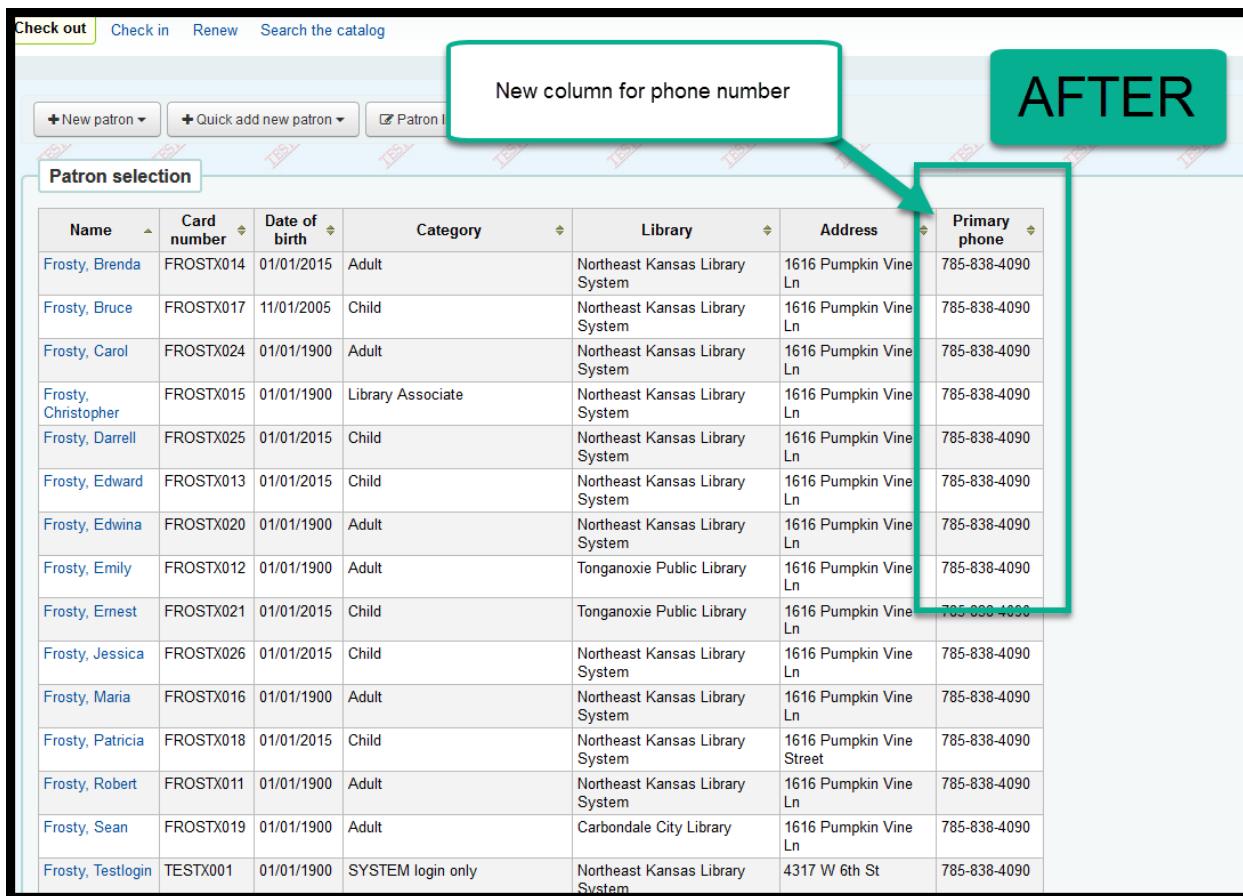
Here are some screen shots.

BEFORE:



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 points from the text "AFTER" to the 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:

Output

To screen in the browser: To a file: Named:

Submit

12 lines found.

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

BEFORE

AFTER:

Output

To screen in the browser: To a file: Named:

Submit

8 lines found.

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

AFTER

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.

1.8.6 Video on this topic:

Watch a YouTube video about patron changes.

<https://youtu.be/>

1.9 Koha Upgrade - Item statuses

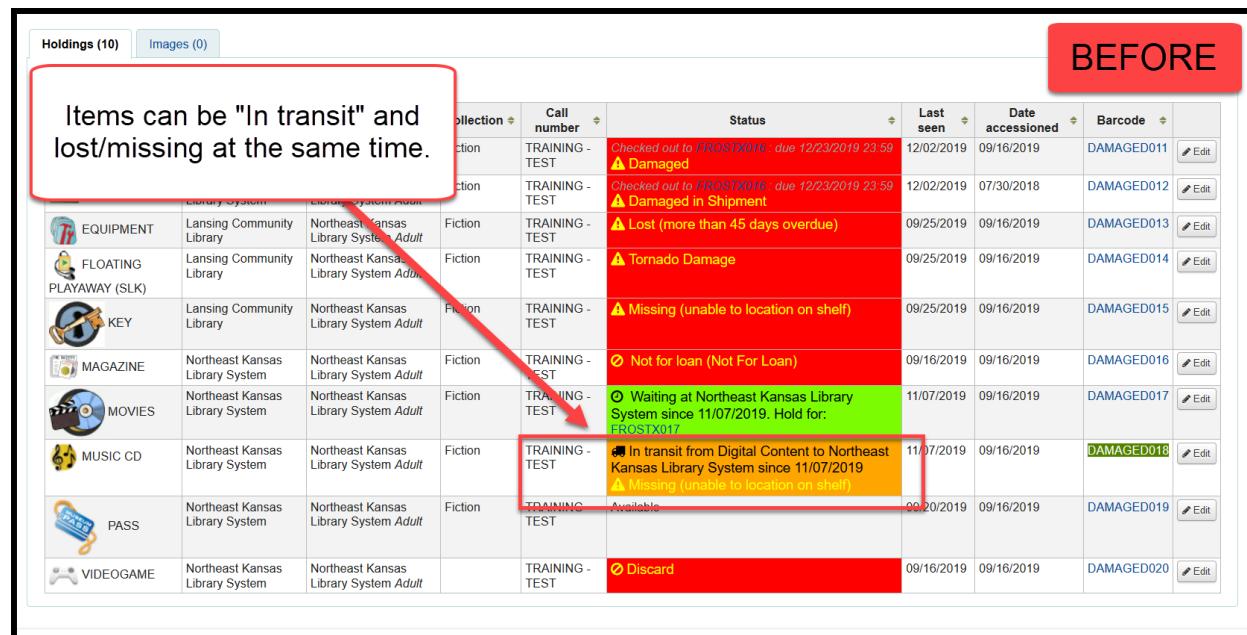
1.9.1 In transit items and lost and missing statuses

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			
Collection	TRAINING - TEST	Checked out to FROSTX016 due 12/23/2019 23:59 ▲ Damaged	12/02/2019	09/16/2019	DAMAGED011	<input type="button" value="Edit"/>		
Collection	TRAINING - TEST	Checked out to FROSTX016 due 12/23/2019 23:59 ▲ Damaged in Shipment	12/02/2019	07/30/2018	DAMAGED012	<input type="button" value="Edit"/>		
EQUIPMENT	Lansing Community Library	Northeast Kansas Library System Adult Fiction	TRAINING - TEST	▲ Lost (more than 45 days overdue)	09/25/2019	09/16/2019	DAMAGED013	<input type="button" value="Edit"/>
FLOATING PLAYAWAY (SLK)	Lansing Community Library	Northeast Kansas Library System Adult Fiction	TRAINING - TEST	▲ Tornado Damage	09/25/2019	09/16/2019	DAMAGED014	<input type="button" value="Edit"/>
KEY	Lansing Community Library	Northeast Kansas Library System Adult Fiction	TRAINING - TEST	▲ Missing (unable to location on shelf)	09/25/2019	09/16/2019	DAMAGED015	<input type="button" value="Edit"/>
MAGAZINE	Northeast Kansas Library System	Northeast Kansas Library System Adult Fiction	TRAINING - TEST	∅ Not for loan (Not For Loan)	09/16/2019	09/16/2019	DAMAGED016	<input type="button" value="Edit"/>
MOVIES	Northeast Kansas Library System	Northeast Kansas Library System Adult Fiction	TRAINING - TEST	∅ Waiting at Northeast Kansas Library System since 11/07/2019. Hold for: FROSTX017	11/07/2019	09/16/2019	DAMAGED017	<input type="button" value="Edit"/>
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 11/07/2019 ▲ Missing (unable to location on shelf)	11/07/2019	09/16/2019	DAMAGED018	<input type="button" value="Edit"/>
PASS	Northeast Kansas Library System	Northeast Kansas Library System Adult Fiction	TRAINING - TEST	Available	09/20/2019	09/16/2019	DAMAGED019	<input type="button" value="Edit"/>
VIDEOGAME	Northeast Kansas Library System	Northeast Kansas Library System Adult	TRAINING - TEST	∅ Discard	09/16/2019	09/16/2019	DAMAGED020	<input type="button" value="Edit"/>

AFTER:

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 Room	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Waiting at Northeast Kansas Library System since 12/02/2019. Hold for: PROSTX016
FLOATING PLAYAWAY (SLK)	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	⚠️ Lost (more than 45 days overdue)
KEY	Lansing Community Library	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	
MAGAZINE	Everest Barnes Reading Room	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	
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
PASS	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Checked out to PROSTX016 due 12/26/2019 23:59
VIDEO	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Available
VIDEOGAME	Northeast Kansas Library System	Northeast Kansas Library System Adult	Fiction	TRAINING - TEST	Available

e - Source of acquisition

g - Cost, normal purchase price 25.00

v - Cost, replacement price 25.00

Change status to any lost or missing status

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)

Missing (unable to location on shelf)

Save changes Add a new item Cancel

AFTER

Item type	Current location	Home library	Collection	Call number	Status	Last seen	Date accessioned	Barcode	
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	

1.9.2 Video on this topic:

Watch a YouTube video about changes in item statuses.

<https://youtu.be/OdtDrLggU8M>

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

The screenshot shows the 'Before' state of the application. On the left, a sidebar lists various patron management options: Check out, Batch check out, Details, Fines and fees (highlighted with a red box), Routing lists, Circulation history, Holds history, Modification log, and Notices. In the main content area, the 'Account' tab is selected. A red box highlights the 'Pay fines' button in the toolbar above the transaction table. The transaction table displays three entries: 'Account management fee, Account management fee test', 'Fine, Fine test', and 'Lost item, Lost item test'. Each entry includes a note, amount, outstanding amount, and action buttons for printing and viewing details.

After:

After

The screenshot shows the 'After' state of the application. The sidebar now includes an 'Accounting' tab (highlighted with a green box). The main content area features two tabs at the top: 'Transactions' and 'Make a payment' (highlighted with a green box). The transaction table has been updated with new columns: 'Account type', 'Barcode', 'Due date', and 'Return date'. The same three transactions from the previous screen are listed, with their details and actions.

1.10.2 New columns and layout of accounting information

A toolbar and some new columns have been added to the tables on the "Make a payment" and "Transactions" tabs.

The columns labeled "Return date" and "Account type" are problematically titled and may have their names changed before the upgrade

Next Search Catalog 19.05 training Documentation

BEFORE:

Before screenshot of the 'Pay fines' interface in Next Search Catalog 19.05. The interface shows a table of fines and charges. The 'Description' column header is highlighted with a red box. The 'Payment note' input box is also highlighted with a red box and labeled as a free and open text box. The column headers for the table are Fines & charges, Description, Payment note, Account type, Amount, and Amount outstanding.

Before screenshot of the 'Account' interface in Next Search Catalog 19.05. The interface shows a table of paid transactions. The 'Description of charges' column header is highlighted with a red box. The column headers for the table are Date, Description of charges, Home library, Note, Amount, Outstanding, and Actions.

AFTER:

Columns added:
Account type -- Date -- Barcode -- Due date -- Return date
A toolbar is also added to the table allowing for searches and exporting the table to a spreadsheet

AFTER

Enter patron card number or partial name:

AFTER

1.10.3 Ability to calculate how much change to give a patron

Work is being done in the Koha community to add features to the software that would allow libraries using integrated cash registers to connect those cash registers directly to Koha. Some of these features will be noticeable to us even though many of our libraries don't even have cash registers. This includes a new change calculator and the "Payment type" drop-down that was added in our last upgrade.

This is what these changes will look like to us:

Next Search Catalog 19.05 training Documentation

BEFORE:

The screenshot shows the 'Make a payment' dialog box. It includes fields for 'Total amount outstanding' (75.00), 'Collect from patron' (75.00), and a dropdown menu for 'Payment type'. A red box highlights the 'Payment type:' dropdown. Below the dialog, a red callout box states: 'Optional payment type drop-down was added during the last upgrade.'

AFTER:

The screenshot shows the same 'Make a payment' dialog box, but with several changes highlighted by green boxes and arrows. A green box surrounds the 'Calculate change (optional)' button, with an arrow pointing to it from the left. Another green box surrounds the 'Payment type (optional):' label, with an arrow pointing to it from the left. A callout box on the right side contains the text: 'New "Calculate change (optional)" button' and 'The label for payment type has been updated to say "Payment type (optional)"'

AFTER

Amount paid: enter the amount that the patron wants to pay

Collect from patron: Enter the amount of money the patron gives you to pay the fee

Change to give: Koha will now calculate how much change to give the patron

In this example the patron is making a \$3.00 payment, they're paying with a \$50.00 bill, and the change to give the patron is \$47.00

When you click on "Confirm" a pop-up window will also appear to confirm the payment and the change needed

AFTER

If the "Collect from patron" amount is higher than the "Amount paid" this pop-up will appear to tell you how much change to give the patron.

By default in our system, the "Collect from patron" amount will always be the same as the "Amount paid" amount.

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:

```


| <h3>[% LibraryName   html %]</h3>                                                                                                                                   |                                                                                                                                 |                           |                                                                                                                               |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|---------------------------|-------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |
| <h2><u>Fee receipt</u></h2>                                                                                                                                         |                                                                                                                                 |                           |                                                                                                                               |
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |
| <h2>[% Branches.GetName( patron.branchcode )   html %]</h2>                                                                                                         |                                                                                                                                 |                           |                                                                                                                               |
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |
| Received with thanks from [% patron.firstname   html %] [% patron.surname   html %] <br /> Card number: [% patron.cardnumber   html %]<br />                        |                                                                                                                                 |                           |                                                                                                                               |
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |
| Date                                                                                                                                                                | Description of charges                                                                                                          | Note                      | Amount                                                                                                                        |
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |
| [% account.date   \$KohaDates %]                                                                                                                                    | [% PROCESS account_type_description account=account %] [%- IF account.description %], [% account.description   html %][% END %] | [% account.note   html %] | [% IF ( account.amountcredit ) %]<td class="credit">[% ELSE %]<td class="debit"> [% END %][% account.amount   \$Price %]</td> |
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |
| <td colspan="3">Total outstanding dues as on date: </td> [% IF ( totalcredit ) %]<td class="credit">[% ELSE %]<td class="debit">[% END %][% total   \$Price %]</td> |                                                                                                                                 |                           |                                                                                                                               |
|                                                                                                                                                                     |                                                                                                                                 |                           |                                                                                                                               |


```

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">
      <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>
```

(continues on next page)

(continued from previous page)

```
</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

1.10.5 Video on this topic:

Watch a YouTube video about changes in fees and fee payments.

https://youtu.be/B_dkuJXMktg

1.11 Koha Upgrade - Receipts

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

1.11.1 Print drop-down changes

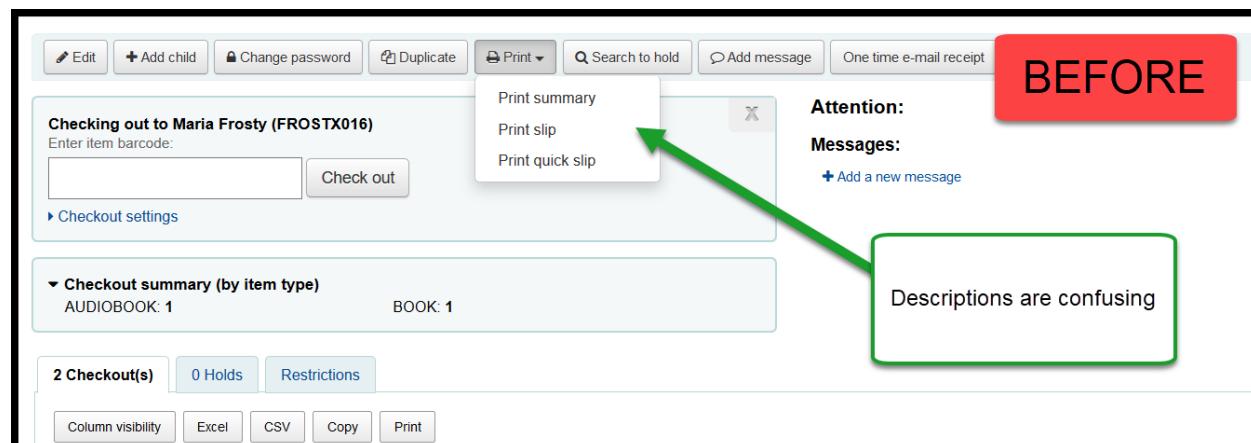
The text under the “Print” button doesn’t clearly describe what the options do. The text will be updated during the upgrade.

Print summary becomes **Full page-summary**

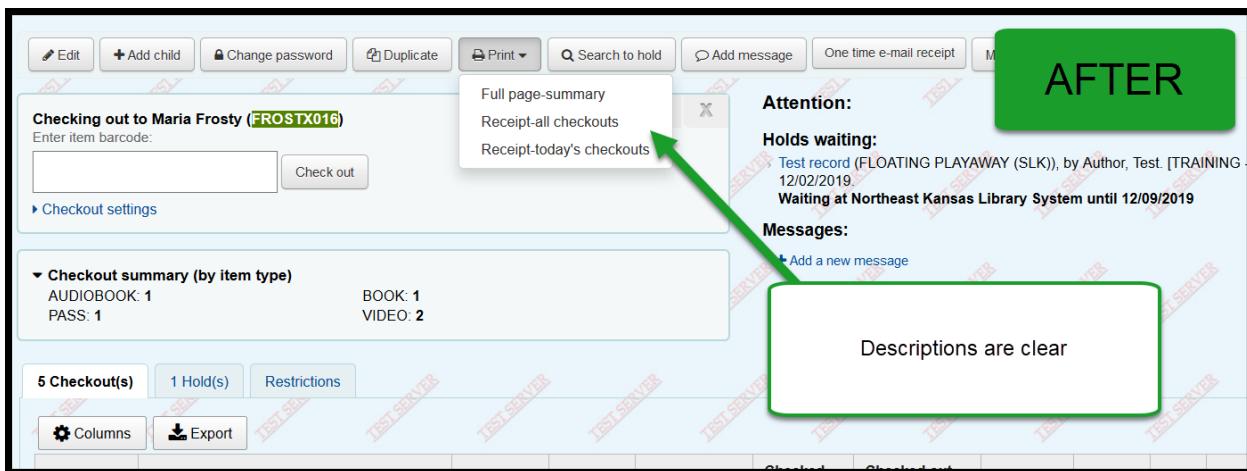
Print slip becomes **Receipt-all checkouts**

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

BEFORE:



AFTER:

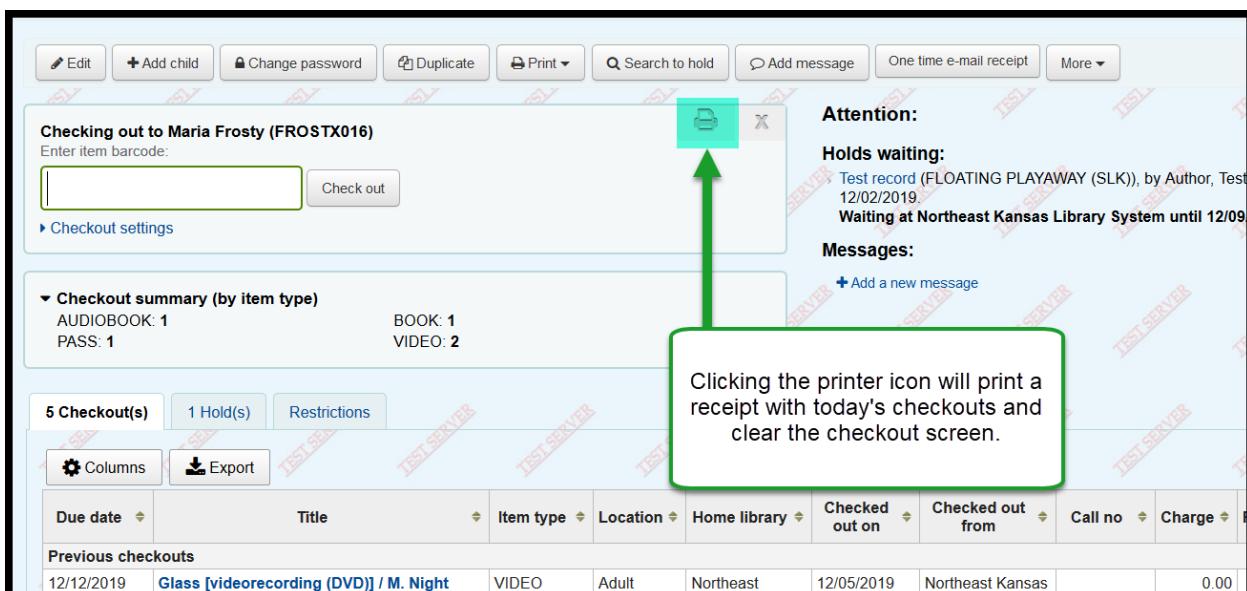


Frequently asked questions

- 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.



1.11.3 Video on this topic:

Watch a YouTube video about changes in printing receipts for patrons.

<https://youtu.be/qW3Ds1YjVRg>
