
Koha 18.11 Training Documentation

NEKLS staff

Jun 13, 2019

CONTENTS:

1	Koha 18.11 Trainng Overview	1
2	Koha 18.11 Trainng Part 1	3
2.1	Koha homepage	3
2.2	Cataloging	4
2.3	Circulation	6
3	Koha 18.11 Trainng Part 2	9
3.1	Fines changes	9
3.2	Holds/Requests	11
3.3	OPAC	15
4	Koha 18.11 Trainng Part 3	17
4.1	Searching, results, and details	17
4.2	Patrons	22
4.3	Reports	24
4.4	Tools/Administration	25
5	Indices and tables	35

**CHAPTER
ONE**

KOHA 18.11 TRAINNG OVERVIEW

Next Search Catalog will upgrade to Koha 18.11 on the evening of June 15, 2019.

The following pages cover most of the changes that will be added by this upgrade.

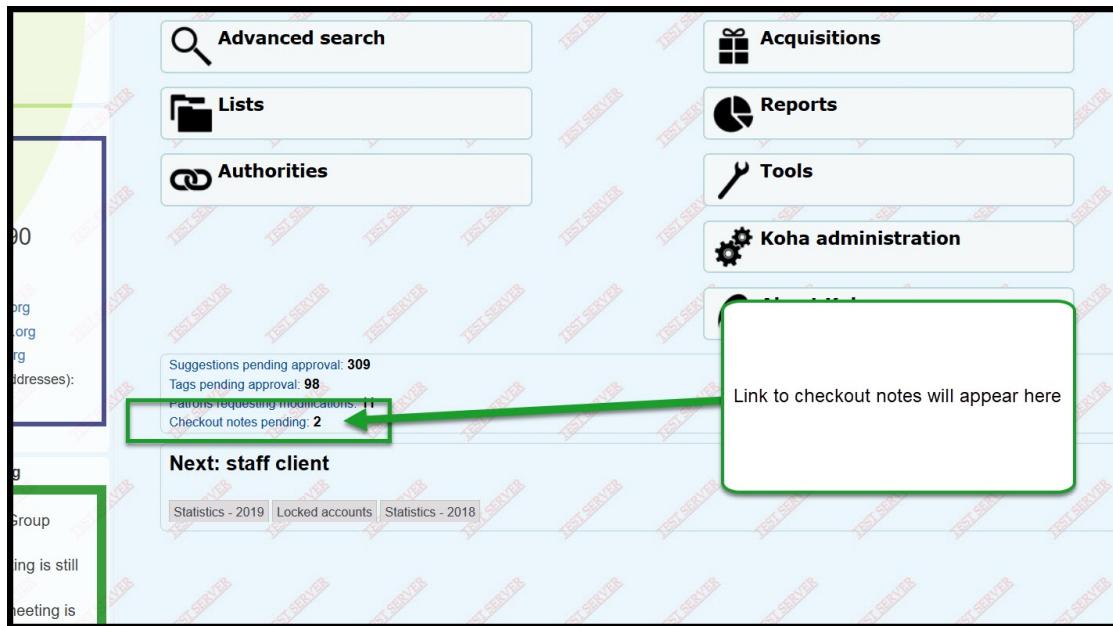
KOHA 18.11 TRAINNG PART 1

2.1 Koha homepage

2.1.1 Patron notes on staff dashboard

In Koha 17.05 we added a feature that allows patrons put a note or a comment on an item they have checked out - something along the lines of "When I got this home I realized that there were pages missing" etc. One of the complaints we had about this feature was that there was no built in mechanism to inform staff that one of these notes had been placed.

In an attempt to fix this problem, when a patron leaves a note on an item they have checked out, those notes will appear on the homepage in the staff client:



While this table is a good step in the right direction, the problem we will have is that nothing on the table indicates where the item was checked out or which library owns the item:

! TEST SERVER !

Enter patron card number or partial name:

Check out Check in Renew Search the catalog Submit

Checkout notes

Select all Clear all Hide seen Show all

Showing 1 to 6 of 6 Show 20 entries First Previous Next Last Search

Title	Note	Date	Set by	Status	Actions
ATCH ILL--john brown - (0003000016764)	Humanities book for Feb 7	01/29/2019	1003001002953	Not seen	<input type="button" value="Mark seen"/> <input type="button" value="Mark not seen"/>
Pete the cat and his four groovy buttons - Litwin, Eric. (0003033012124)	Overdue .. due to a death in the family. Terribly sorry.	02/06/2019	10030008057002	Not seen	<input type="button" value="Mark seen"/> <input type="button" value="Mark not seen"/>
Venom - (0003016013705)	Due to ice we can't make it there. If weather permits we bring back this Friday	02/06/2019	10030008032330	Not seen	<input type="button" value="Mark seen"/> <input type="button" value="Mark not seen"/>
Little Einsteins. - (0003033039021)	I will get these back tomorrow. There was a death in the family and we were not in town for funeral services. I will pay tomorrow.	02/06/2019	10030008057002	Not seen	<input type="button" value="Mark seen"/> <input type="button" value="Mark not seen"/>
Tangerine /- Bloor, Edward, (00107000226707)	This book has a cracked spine	05/14/2019	FROSTX021	Not seen	<input type="button" value="Mark seen"/> <input type="button" value="Mark not seen"/>
Peppermint - (0003008201830)	The disc skips	06/03/2019	FROSTX022	Not seen	<input type="button" value="Mark seen"/> <input type="button" value="Mark not seen"/>

Showing 1 to 6 of 6 First Previous Next Last

2.2 Cataloging

2.2.1 Z39.50

- Focus on ISBN field

Currently when you open a Z39.50 search window, the first thing you have to do is to put the cursor into an input field before you can start searching. With the update, the cursor will automatically start in the ISBN field when the Z39.50 window opens.

Koha - Z39.50/SRU search results - Mozilla Firefox

Z39.50/SRU search

ISBN:

ISSN:

Title:

Author:

Subject heading:

Keyword (any):

LC call number:

Control no.:

Dewey:

Standard ID:

Clear search form

Cursor will default to the ISBN field when this window opens

KANSAS LIBRARY CATALOG
 KING COUNTY, WA
 MILWAUKEE PUBLIC LIBRARY
 MULTNOMAH COUNTY PUBLIC LIBRARY (OR)
 OCEAN STATE LIBRARIES (RI)
 OHIOLINK (OH)
 PITTSBURG STATE UNIVERSITY CONSORTIA
 SOUTHEAST KANSAS LIBRARY SYSTEM (SEKNFIND)
 AMICUS (CANADA NATIONAL CATALOG)
 BERKELEY PUBLIC LIBRARY
 CANTON PUBLIC LIBRARY
 CUYAHOGA COUNTY PUBLIC LIBRARY
 DISTRICT OF COLUMBIA PUBLIC LIBRARY
 LIBRARY OF CONGRESS
 LONDON PUBLIC LIBRARY
 SACRAMENTO PUBLIC LIBRARY
 SAN FRANCISCO PUBLIC LIBRARY

Search Cancel

- Additional columns in Z39.50 results

We can now configure the interface to show additional Marc fields on the results page when doing a Z39.50 search:

The screenshot shows a search results page for 'You see'. A green box highlights the 'Additional fields column' which includes fields like 300\$a, 264, 245\$h, etc. Another green box highlights a connection timeout message: 'Connection timeout to catalog.multicoll.org'.

OCEAN LIBRARIES (RI)	DAY OF THE JACKAL	Forsyth, Frederick			
DALLAS PUBLIC LIBRARY	Day of the jackal				
SOUTHEAST KANSAS LIBRARY SYSTEM (SEKLN-IND)	Day of the jackal				
COLORADO UNIFIED CATALOG	Day of the jackal		Widescreen.	0783226853	

Additional fields column
Includes 300\$a, 264, 245\$h, etc.

* Connection timeout to catalog.multicoll.org

ISBN
8401462215 (coJet) | 8401464196 (vol221/6)

Additional fields

300:
507 pages : 18 cm.
336:
text txt rdacontent.
264:
Barcelona : Plaza & Janes Editores, 1998.
264:
©1972
300:
380 p.
260:
NP ND
245\$h:
[videorecording]
300:
1 videodisc (DVD) (ca. 50 min.) :
sd., col., 4 3/4 in. + 1 booklet (24 p. :
col. ill., col. map)
260:
[United States] HIT Entertainment, c2001.
245\$h:
[dvd]
300:
1 videodisc (143 min.) : sd., col.,
4 3/4 in.
260:

(The cataloging committee will ultimately decide which fields shall be displayed here. For the purposes of this demonstration we've added 245\$h, 300\$a, and 264\$a,\$b,\$c)

2.2.2 Add item reversion

There is a reversion on the Add/Edit items page. I have been told that this change is in preparation for some changes coming soon to the cataloging interface.

The screenshot shows the 'Add item' form with various fields. A green box highlights a gap between a label (e.g., 'y - Koha item type') and its corresponding input field. A callout bubble points to this gap with the text: 'The gap between the label and the input box is a reversion'.

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	<input type="text"/> DVD
a - Home Library	<input type="text"/> Ottawa Library
b - Current location	<input type="text"/> Northeast Kansas Library System
c - Shelving location	<input type="text"/> Adult
d - Date acquired	<input type="text"/> 2010-04-28
e - Source of acquisition	<input type="text"/> AMAZON - DONATION
g - Cost, normal purchase price	<input type="text"/> 20.00
o - Full call number	<input type="text"/> DVD F DAY
p - Barcode	<input type="text"/> 33080001464240
t - Copy number	<input type="text"/>
v - Cost, replacement price	<input type="text"/> 20.00
x - Non-public note	<input type="text"/> GIFT: VANGENT, INC.
y - Koha item type	<input type="text"/> MOVIES
z - Public note	<input type="text"/> RATED PG

Save changes | Add a new item | Cancel

2.2.3 Cataloging add record problem

There is also a change on the Add/Edit record page. Again, we've been told that this change is in preparation for some future changes coming soon to the cataloging interface.

Editing the day of the jackal [videorecording (DVD)] / Universal ; Fred Zinnemann's film ; a John Woolf production ; directed by Fred Zinnemann ; produced by John Woolf ; screenplay Kenneth Ross. (Record number 361303)

Save Q Z39.50/SRU search Settings Cancel

0	1	2	3	4	5	6	7	8	9
000	? - LEADER	fixed length control field	03139cgm a2200613il 4500						
001	? - CONTROL NUMBER	control field	ocm39021169						
008	? - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION	fixed length control field	980427s1998 cau143 vlgeng d						
010	? □ □ - LIBRARY OF CONGRESS CONTROL NUMBER	LC control number							
020	? □ □ - INTERNATIONAL STANDARD BOOK NUMBER	International Standard Book Number	0783226853						
020	? □ □ - INTERNATIONAL STANDARD BOOK NUMBER	International Standard Book Number	9780783226859						
022	? □ □ - INTERNATIONAL STANDARD SERIAL NUMBER	International Standard Serial Number							
024	? 1 0 - OTHER STANDARD IDENTIFIER	Standard number or code	025192026126						
	a	Source of number or code							
	c	Terms of availability							
	d	Additional codes following the standard number or code							
	e	Qualifying information							

2.3 Circulation

2.3.1 Collection code in checkout table

Collection codes will not appear on the check-out table when checking out items to patrons:

2.3.2 Circulation history - click barcode goes to item record

When you click on a patron's circulation history, you will now be able to click on the item barcode number to go straight to the item record rather than having to go to the bibliographic record and then search for the item barcode number.

Ernest (Emie) Frosty (FROSTX021)

Hold Contact Method: Text
Category: Child (CHILD)
Home library: Northeast Kansas Library System
Borrower number: 262889
Updated on 05/14/2019 13:21

Circulation history

Date	Title	Author	Call no.	Barcode	Number of renewals	Checked out on	Item location	Last checked in	Due date	Status
05/14/2019 13:01	Tangerine /	Bloor, Edward,	JF-BLOCR	00107000229700	0	05/14/2019 12:57	Northeast Kansas Library System	06/04/2019 23:59	06/04/2019	Checked out
05/14/2019 12:57	Anna, Banana, and the friendship split /	Rissi, Anica Mrose,	JF-I RISSI	00030100253700	0	05/14/2019 12:57	Northeast Kansas Library System	06/04/2019 23:59	06/04/2019	Checked out
05/14/2019 12:57	Starring Jules (in drama-rama) /	Ain, Beth Levine.	JF-I AIN	00030100188510	0	05/14/2019 12:57	Northeast Kansas Library System	06/04/2019 23:59	06/04/2019	Checked out
05/14/2019 13:57	The Meg			00030082018230	0	05/14/2019 13:57	Atchison Public Library	05/21/2019 23:59	05/21/2019	Checked out

2.3.3 Patron information in left column is now hidden

A patron's contact information will no longer appear in the column on the left hand side of the page.

- Before:

Home > Circulation > Checkouts > Robert (Bob) Frosty (FROSTX011)

Robert (Bob) Frosty (FROSTX011)

1616 Pumpkin Vine Ln
Lawrence, KS 66047
785-838-4090
george@neklis.org
Category: Adult (ADULT)
Home library: Northeast Kansas Library System
Borrower number: 265150

Circulation history

Check out

Batch check out

Details

Fines and fees

Circulation history

Holds history

Checkout settings

0 Checkouts 0 Holds Restrictions

Patron has nothing checked out.

- After:

SEARCH CATALOG

A service of NEKLS

Check out **Check in** **Renew** **Search the catalog**

Home > Circulation > Checkouts > Robert (Bob) Frosty (FROSTX011)

Robert (Bob) Frosty (FROSTX011)

Category: Adult (ADULT)
Home library: Northeast Kansas Library System
Borrower number: 262879
Updated on 05/12/2019 23:10

Check out

Batch check out

Details

Fines and fees

Circulation history

Holds history

Modification log

Check out **+ Add child** **Change password**

Cannot check out!

Overdues: Patron has ITEMS OVERDUE. See [Details](#)

Fees & Charges: Patron has outstanding fees & charges of 12.86. **Checkouts are BLOCKED because fine**

Messages:

+ Add a new message

1 Checkout(s) **0 Holds** **Restrictions**

▼ Number of checkouts by item type

• MOVIES: 1

Column visibility **Excel** **CSV** **Copy** **Print**

Due date	Title	Item type	Collection	Location	Hold

Previous checkouts

After

Patron contact information is only available on the patron's "Details" page

- Patron's contact information will still appear on the patron's "Details" page:

Home > Patrons > Patron details for Robert (Bob) Frosty (FROSTX011)

Robert (Bob) Frosty (FROSTX011)

Category: Adult (ADULT)
Home library: Northeast Kansas Library System
Borrower number: 262879
Updated on 05/12/2019 23:10

[Edit](#) [+ Add child](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [Add message](#) [More](#)

Fees & Charges: Patron has outstanding fees & charges of 12.86. Checkouts are BLOCKED because fine balance is OVER THE LIMIT. [Make payment](#) [Pay all fines](#)

Robert Frosty (FROSTX011)

Contact information

"Bob"
1616 Pumpkin Vine Ln
Lawrence, KS 66047

Primary phone: 785-838-4090
Primary email: george@neklis.org
Date of birth: 01/01/1900 (119 years)

Contact information still appears on the patron's "Details" page

Expiration date:	05/12/2020
Library:	Northeast Kansas Library System
Privacy Pref:	Default
Show checkouts to guarantor	No
Username:	FROSTX011
Password:	*****
OPAC note:	OPAC note

Additional attributes and identifiers

[+ Add](#)

Patron messaging preferences

	Days in advance	Text message	Email	Digests only
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-
Email check-in receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	-
Email check-out/renewal receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	-

Alternate address

- [Check out](#)
- [Batch check out](#)
- Details**
- [Fines and fees](#)
- [Circulation history](#)
- [Holds history](#)
- [Modification log](#)
- [Notices](#)
- [Statistics](#)
- [Files](#)
- [Purchase suggestions](#)

KOHA 18.11 TRAINNG PART 2

3.1 Fines changes

3.1.1 Item “Lost” twice by the same patron isn’t billed the second time

This cannot be shown, but this is an outline of the circumstances:

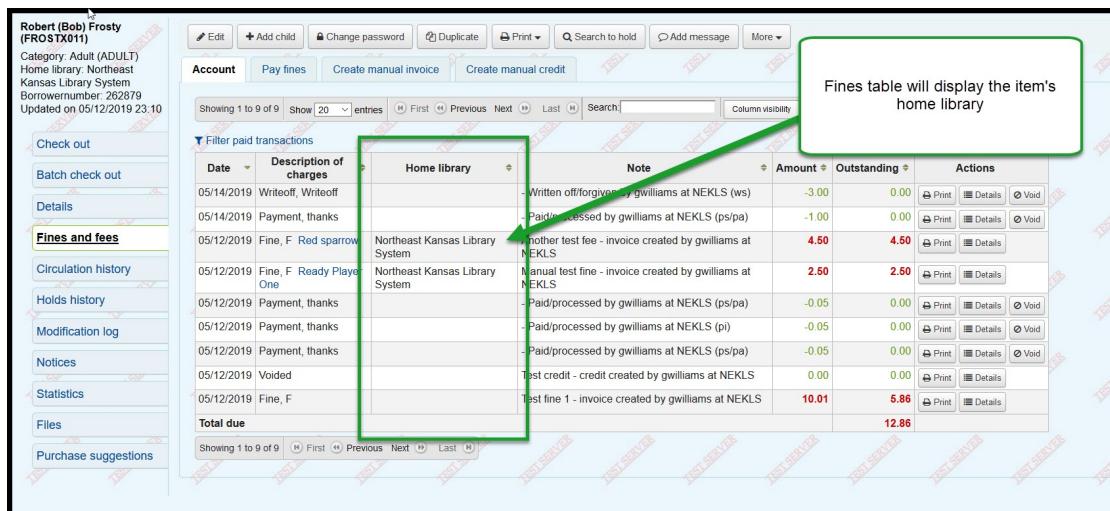
1. Patron checks out an item and returns it more than 45 days overdue and is billed for the item
2. Patron returns the item and the cost of the item is refunded
3. Patron checks out the item again and keeps it more than 45 days overdue again
4. Up until now, Koha has not been able to bill the patron for the second time the item has been declared “Lost”

3.1.2 Paying fines on accounts with credits

Also can’t be shown. If a patron had a fee and a credit, a bug would sometimes cause additional payments to fail.

3.1.3 Item home branch shows in fee table

The patron’s fines table will now show item home library information.



A screenshot of the Koha Fines and fees screen for patron 'Robert (Bob) Frosty (FROSTX011)'. The screen shows a table of transactions with a green box highlighting the 'Home library' column. A callout bubble points to the 'Home library' column with the text 'Fines table will display the item's home library'.

Date	Description of charges	Home library	Note	Amount	Outstanding	Actions
05/14/2019	Writeoff, Writeoff		- Written off/forgiven by gwiliams at NEKLS (ws)	-3.00	0.00	
05/14/2019	Payment, thanks		- Paid/processed by gwiliams at NEKLS (ps/pa)	-1.00	0.00	
05/12/2019	Fine, F Ready Player One	Northeast Kansas Library System	- Another test fee - invoice created by gwiliams at NEKLS	4.50	4.50	
05/12/2019	Payment, thanks	Northeast Kansas Library System	- Manual test fine - invoice created by gwiliams at NEKLS	2.50	2.50	
05/12/2019	Payment, thanks		- Paid/processed by gwiliams at NEKLS (ps/pa)	-0.05	0.00	
05/12/2019	Payment, thanks		- Paid/processed by gwiliams at NEKLS (pi)	0.05	0.00	
05/12/2019	Payment, thanks		- Paid/processed by gwiliams at NEKLS (ps/pa)	-0.05	0.00	
05/12/2019	Voided		- Test credit - credit created by gwiliams at NEKLS	0.00	0.00	
05/12/2019	Fine, F		- Test fine 1 - invoice created by gwiliams at NEKLS	10.01	5.86	
Total due						12.86

3.1.4 Writeoff selected

Multiple fee lines can be written off at once with the new “Write off selected” button.

Robert (Bob) Frosty
(FROSTX011)
Category: Adult (ADULT)
Home library: Northeast
Kansas Library System
Borrower number: 262879
Updated on 05/12/2019 23:10

Fines and fees

- Check out
- Batch check out
- Details
- Fines and fees**
- Circulation history
- Holds history
- Modification log
- Notices
- Statistics
- Files
- Purchase

Account Pay fines Create manual invoice Create manual credit

Select all | Clear all

Fines & charges	Description	Payment note	Account type	Amount	Amount outstanding
<input checked="" type="checkbox"/> Pay	Fine , F		F	10.01	5.86
<input type="checkbox"/> Pay	Fine , F (Ready Player One)		F	2.50	2.50
<input checked="" type="checkbox"/> Pay	Fine , F (Red sparrow)		F	4.50	4.50
				Total due:	12.86

Pay amount Write off all Pay selected Write off selected Cancel

Write-off selected works like "Pay selected"

Select which lines to write-off with the checkboxes, then click "Write off selected" to apply the write-off only to the fees that are checked.

3.1.5 Void credits and writoffs

It is now possible to void writeoffs and credits. This should simplify some of the payment issues we've had as the accounts rewrite has been underway.

Robert (Bob) Frosty
(FROSTX011)
Category: Adult (ADULT)
Home library: Northeast
Kansas Library System
Borrower number: 262879
Updated on 05/12/2019 23:10

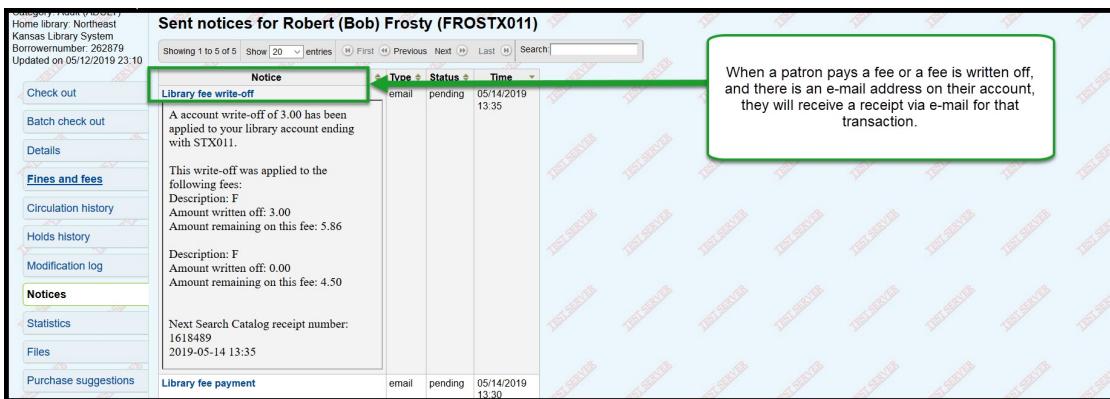
Check out

Filler paid transactions

Y	Home library	Note	Amount	Outstanding	Actions
		This credit has already been voided	-32.00	-32.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
05/12/2019	Fine, F Ready Player One	- Written off/given by gwilliams at NEKLS (ws)	-3.00	0.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
05/12/2019	Payment, thanks	- Paid/processed by gwilliams at NEKLS (ps/pa)	-1.00	0.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
05/12/2019	Payment, thanks	- Paid/processed by gwilliams at NEKLS (pi)	-0.05	0.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
05/12/2019	Payment, thanks	- Paid/processed by gwilliams at NEKLS (rs/ra)	-0.05	0.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
05/12/2019	Voided	Test credit - credit created by gwilliams at NEKLS	0.00	0.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
05/12/2019	Fine, F	test line 1 - invoice created by gwilliams at NEKLS	10.01	5.86	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Void"/>
Total due				-19.14	

3.1.6 Email receipts for payments

When a patron pays a fee or a fee is written off, AND the patron has an e-mail address, the patron will receive an e-mail receipt for the payment/writeoff.



A screenshot of the Koha interface showing 'Sent notices for Robert (Bob) Frosty (FROSTX011)'. The table has columns: Notice, Type, Status, and Time. A green box highlights the 'Notice' column header. A callout bubble states: 'When a patron pays a fee or a fee is written off, and there is an e-mail address on their account, they will receive a receipt via e-mail for that transaction.'

Notice	Type	Status	Time
Library fee write-off	email	pending	05/14/2019 13:35
A account write-off of 3.00 has been applied to your library account ending with STX011.			
This write-off was applied to the following fee:			
Description: F			
Amount written off: 3.00			
Amount remaining on this fee: 5.86			
Description: F			
Amount written off: 0.00			
Amount remaining on this fee: 4.50			
Next Search Catalog receipt number: 1618489			
2019-05-14 13:35			
Library fee payment	email	pending	05/14/2019 13:30

- This is a global system setting - currently the messages cannot be configured on a library-by-library basis.

3.2 Holds/Requests

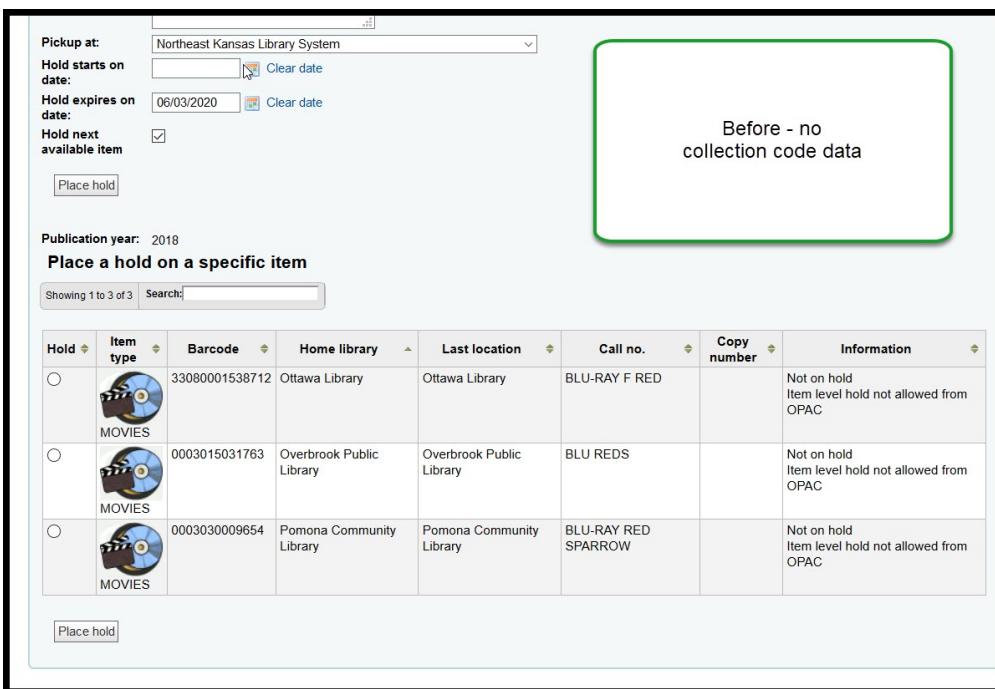
3.2.1 BUG! - cannot place item level Requests

This is a bug and should be fixed soon. Our tentative date for the upgrade is June 15 and I will keep an eye on this bug and ask that we not be upgraded until it is fixed. I'm pretty confident, though, that it should be fixed by June 15 (it may actually be fixed by May 15).

3.2.2 Collection code added to holds table

Collection codes will be added to the holds table in a separate column:

Before:



The screenshot shows the 'Place a hold on a specific item' screen. It includes fields for Pickup at, Hold starts on date, Hold expires on date, and Hold next available item. Below this is a table of items with columns: Hold, Item type, Barcode, Home library, Last location, Call no., Copy number, and Information. A green box highlights the 'Before - no collection code data' message.

Before - no collection code data

Hold	Item type	Barcode	Home library	Last location	Call no.	Copy number	Information
<input type="radio"/>	MOVIES	33080001538712	Ottawa Library	Ottawa Library	BLU-RAY F RED		Not on hold Item level hold not allowed from OPAC
<input type="radio"/>	MOVIES	0003015031763	Overbrook Public Library	Overbrook Public Library	BLU REDS		Not on hold Item level hold not allowed from OPAC
<input type="radio"/>	MOVIES	000303009654	Pomona Community Library	Pomona Community Library	BLU-RAY RED SPARROW		Not on hold Item level hold not allowed from OPAC

After:

type:
Hold starts on
Hold expires on
Hold next available item

Publication year: 2018
Place a hold on a specific item
Showing 1 to 3 of 3 Search:

Hold	Item type	Barcode	Home library	Last location	Collection	Call no.	Copy number	Item level hold
<input type="radio"/>	MOVIES	33080001538712	Ottawa Library	Ottawa Library	Blu-Ray	BLU-RAY F RED		Not on hold Item level hold not allowed from 02/06/2019
<input type="radio"/>	MOVIES	0003015031763	Overbrook Public Library	Basehor Community Library	Blu-Ray	BLU REDS		In transit from Basehor Community Library 02/06/2019 Not on hold Item level hold not allowed from 02/06/2019
<input type="radio"/>	MOVIES	0003030009654	Pomona Community Library	Pomona Community Library	Blu-Ray	BLU-RAY RED SPARROW		Not on hold Item level hold not allowed from 02/06/2019

3.2.3 Split holds queue

The layout of the holds queue is going to look radically different. It will show the holds for each library in a separate group.

Before:

Place a hold on Captain Marvel (Street date June 11, 2019)

Patron:

Enter patron card number or partial name:

 Search

Existing holds

Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1 ▼		- request placed by BONNCIRC at BONNERSPGS	05/13/2019	05/13/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
2 ▼			05/13/2019	05/13/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
3 ▼			05/13/2019	05/13/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
4 ▼			05/14/2019	05/14/2020	Tonganoxie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
5 ▼			05/14/2019	05/14/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
6 ▼			05/14/2019	05/14/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
7 ▼		- request placed by LANSTECH at LANSING	05/14/2019	05/14/2020	Lansing Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
8 ▼			05/14/2019		Osawatomie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
9 ▼			05/14/2019		Osawatomie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
10 ▼			05/14/2019		Osawatomie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
11 ▼		- request placed by SABETECH at SABETHA	05/14/2019	05/14/2020	Sabetha, Mary Cotton Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
12 ▼		- request placed by LEAVTECH at LEAVENWRTH	05/14/2019	05/14/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
13 ▼		- request placed by LINWTECH at LINWOOD	05/14/2019	05/14/2020	Linwood Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
14 ▼		- request placed by LEAVCIRC at LEAVENWRTH	05/14/2019	05/14/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
15 ▼			05/15/2019		Dorphan County Library - Troy	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
16 ▼			05/16/2019	05/16/2020	Overbrook Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
17 ▼			05/16/2019	05/16/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
18 ▼			05/18/2019	05/18/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
19 ▼			05/18/2019	05/18/2020	Lansing Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
20 ▼		- request placed by SABETECH at SABETHA	05/18/2019	05/18/2020	Sabetha, Mary Cotton Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
21 ▼			05/19/2019	05/19/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
22 ▼			05/19/2019	05/19/2020	Baldwin City Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
23 ▼			05/19/2019	05/19/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
24 ▼			05/19/2019	05/19/2020	Hiawatha, Morrill Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
25 ▼			05/19/2019	05/19/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
26 ▼			05/20/2019	05/20/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
27 ▼			05/20/2019	05/20/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
28 ▼		- request placed by LEAVTECH at LEAVENWRTH	05/20/2019	05/20/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
29 ▼			05/20/2019	05/20/2020	Rossville Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
30 ▼		- request placed by baldtech at BALDWIN	05/20/2019	05/20/2020	Baldwin City Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
31 ▼		- request placed by LYNDTECH at LYNDON	05/21/2019	05/21/2020	Lyndon Carnegie Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
32 ▼			05/21/2019	05/21/2020	Baldwin City Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
33 ▼			05/21/2019	05/21/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
34 ▼			05/23/2019	05/23/2020	Williamsburg Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
35 ▼			05/23/2019	05/23/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
36 ▼			05/23/2019	05/23/2020	Hiawatha, Morrill Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
37 ▼			05/23/2019	05/23/2020	Doniphan County Library - Wathena	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
38 ▼			05/23/2019	05/23/2020	Osage City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
39 ▼		- request placed by BONNCIRC at BONNERSPGS	05/24/2019	05/24/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
40 ▼			05/24/2019	05/24/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
41 ▼			05/24/2019	05/24/2020	Tonganoxie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
42 ▼			05/25/2019	05/25/2020	Meriden-Ozawkie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
43 ▼			05/27/2019	05/27/2020	Lyndon Carnegie Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
44 ▼			05/28/2019	05/28/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
45 ▼			05/28/2019	05/28/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
46 ▼			05/28/2019	05/28/2020	Leavenworth Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
47 ▼			05/28/2019	05/28/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
48 ▼			05/28/2019	05/28/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
49 ▼			05/28/2019	05/28/2020	Tonganoxie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
50 ▼			05/29/2019	05/29/2020	Bonner Springs City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
51 ▼			05/29/2019	05/29/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
52 ▼			05/29/2019	05/29/2020	Basehor Community Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
53 ▼			05/29/2019	05/29/2020	Osage City Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
54 ▼		- request placed by SILVTECH at SILVERLAKE	05/29/2019	05/29/2020	Silver Lake Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date
55 ▼			05/29/2019	05/29/2020	Tonganoxie Public Library	<input checked="" type="checkbox"/> Next available <input checked="" type="checkbox"/> Suspend until [] <input type="checkbox"/> Clear date

3.2. Holds/Requests

Koha 18.11 Training Documentation

After:

Place a hold on Alpha

Patron:						
Enter patron card number or partial name: <input type="text"/> <input type="button" value="Search"/>						
Existing holds						
Atchison Public Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1			12/29/2018	12/29/2019	Atchison Public Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Basehor Community Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
Waiting			12/12/2018	02/08/2019	Item waiting at Basehor Community Library since 02/01/2019	<input type="button" value="0003012081166"/> <input checked="" type="button" value="Revert waiting status"/>
1			12/14/2018	12/14/2019	Basehor Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Bonner Springs City Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
Waiting			01/25/2019	02/11/2019	Item waiting at Bonner Springs City Library since 02/04/2019	<input type="button" value="0003009076221"/> <input checked="" type="button" value="Revert waiting status"/>
Centralia Community Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1			01/04/2019	01/04/2020	Centralia Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Doniphan County Library - Troy						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1			12/14/2018	12/14/2019	Doniphan County Library - Troy	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Hiawatha, Morrill Public Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1			12/21/2018	12/21/2019	Hiawatha, Morrill Public Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
2			01/13/2019	01/13/2020	Hiawatha, Morrill Public Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Lansing Community Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
In transit			12/01/2018	12/01/2019	Item being transferred to Lansing Community Library	<input type="button" value="1BERN00016880"/> <input checked="" type="button" value="Revert transit status"/>
1			12/01/2018	12/01/2019	Lansing Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
2			12/01/2018	12/01/2019	Lansing Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
3			12/17/2018	12/17/2019	Lansing Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
4			01/03/2019	01/03/2020	Lansing Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Lyndon Carnegie Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
Waiting			11/14/2018	01/25/2019	Item waiting at Lyndon Carnegie Library since 01/18/2019	<input type="button" value="0003005014957"/> <input checked="" type="button" value="Revert waiting status"/>
Osage City Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
Waiting			11/27/2018	02/11/2019	Item waiting at Osage City Library since 02/04/2019	<input type="button" value="0003035019242"/> <input checked="" type="button" value="Revert waiting status"/>
Oswawatomie Public Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
In transit			11/13/2018	11/13/2019	Item being transferred to Oswawatomie Public Library	<input type="button" value="0003027034458"/> <input checked="" type="button" value="Revert transit status"/>
Ottawa Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
Waiting			11/27/2018	02/13/2019	Item waiting at Ottawa Library since 02/06/2019	<input type="button" value="ILEA000400375"/> <input checked="" type="button" value="Revert waiting status"/>
Rossville Community Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1			12/29/2018	12/29/2019	Rossville Community Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>
Sabetha, Mary Cotton Library						
Priority	Patron	Notes	Date	Expiration	Pickup library	Details
1			01/23/2019	01/23/2020	Sabetha, Mary Cotton Library	<input type="button" value="Next available"/> <input checked="" type="button" value="Suspend until"/> <input type="button" value="Clear date"/>

3.3 OPAC

3.3.1 Many CSS elements have changed - so if something looks weird or doesn't look right, be sure to let us know. Dan and I should be able to change anything that doesn't work correctly caused by changes to the CSS.

3.3.2 Cart opens with one click

Currently you have to click twice to open the cart on the OPAC. Only one click will be necessary after the upgrade.

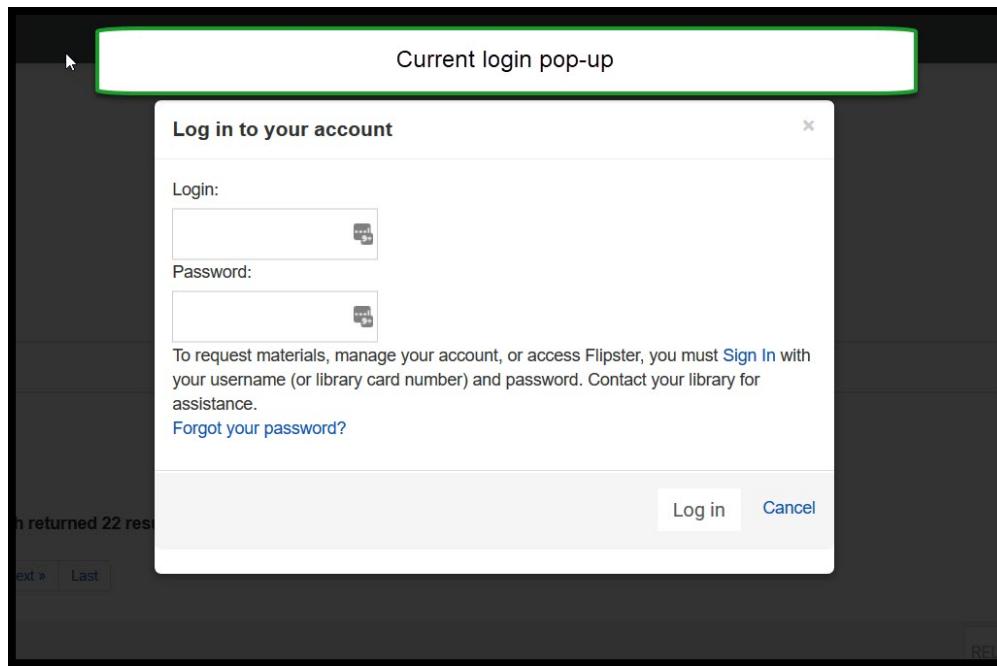
Before:

After:

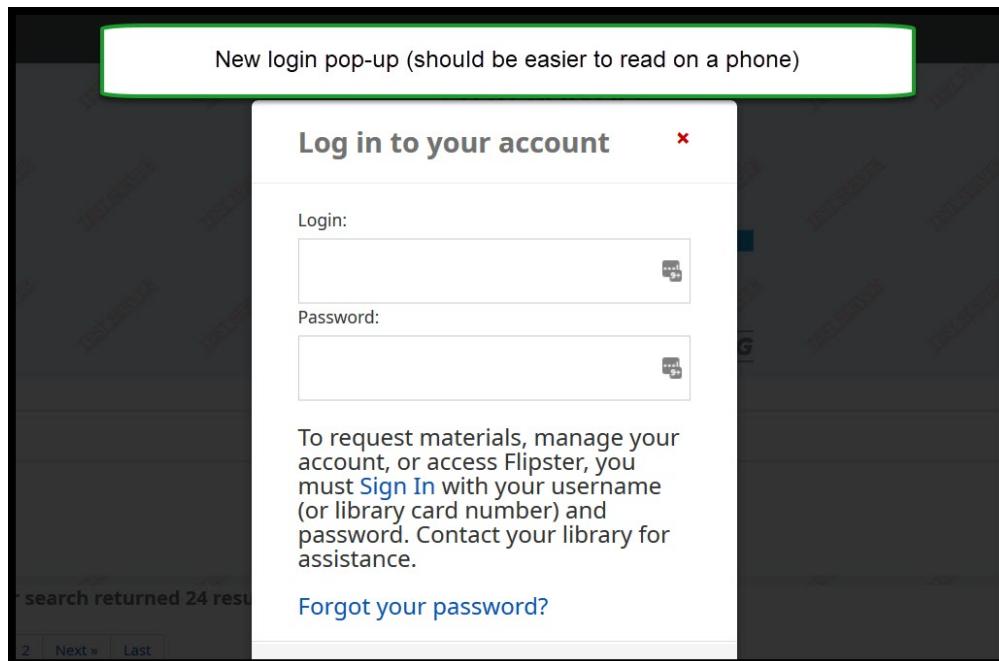
3.3.3 Login modal has changed

The Login window for patrons has changed. This will look different to patrons.

Before:



After:



3.3.4 *Logging in during search keeps you in search*

Currently if a patron does a search in the OPAC before they log into their account, once they log in, they have to re-run the search. In the new version, after logging in, the patron will be redirected to the search they were in the middle of.

Before:

After:

3.3.5 *Expanded data for branchcode and userid in pages when a user is logged in*

This is a behind the scenes thing, but it can make some parts of the OPAC customizable on a branch-by-branch basis

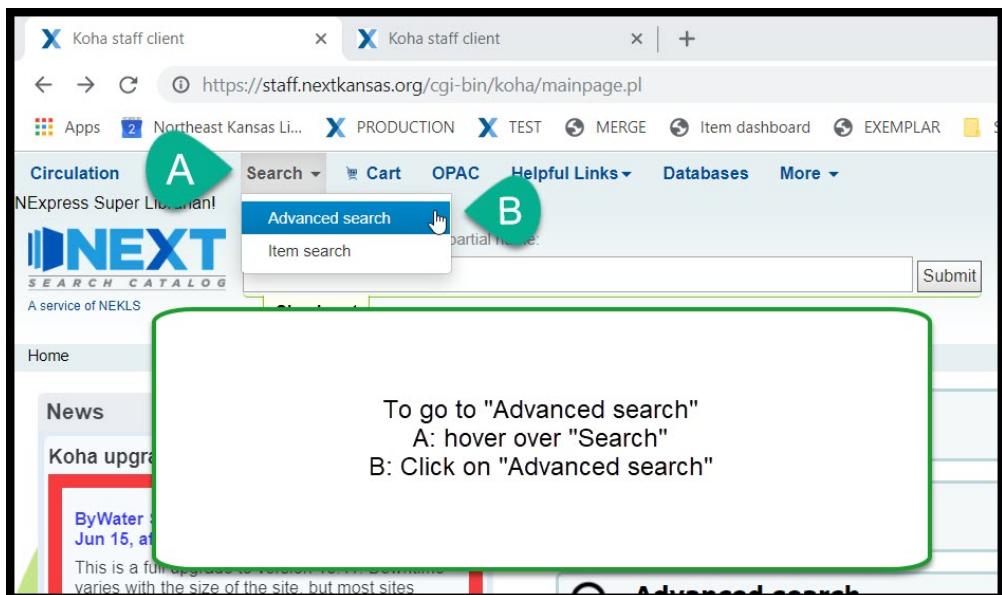
KOHA 18.11 TRAINNG PART 3

4.1 Searching, results, and details

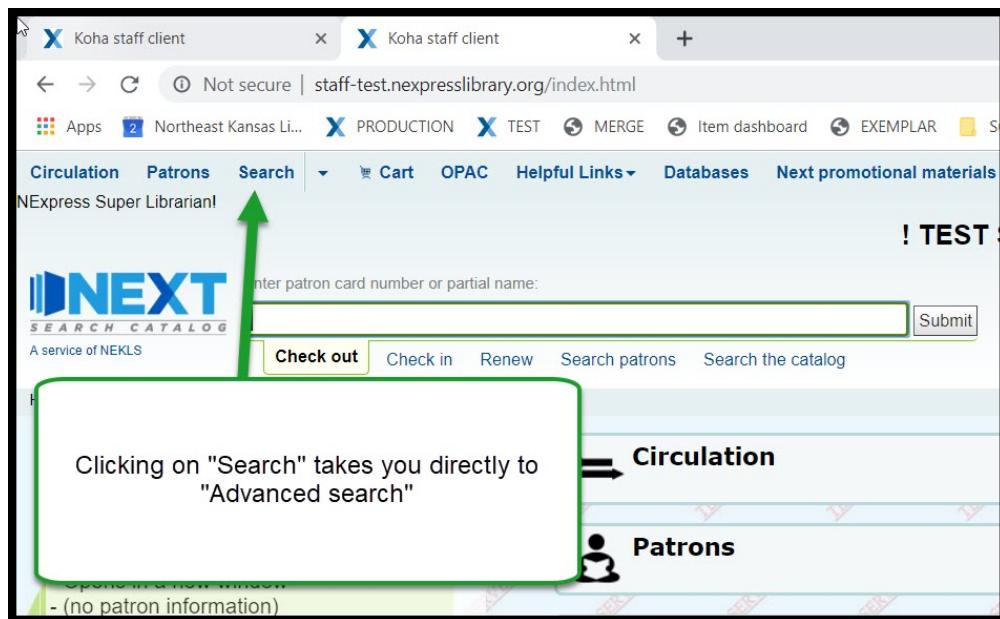
4.1.1 Split “Advanced search” button in Staff

Beginning with Koha 18.05, in order to get to “Advanced search” you have to hover the mouse pointer over “Search” and then select “Advanced search” from the options. With the new version, just clicking on “Search” will take you to the “Advanced search” page.

Before:



After:



4.1.2 Facets for CCODE - Staff and OPAC

Collection codes will be added to the search facets on the left hand side of the screen.

Before:

Home > Catalog > Search for 'kw,wrld: horses'

Refine your search

Availability
Limit to currently available items

Authors
Hartley Edwards, Elw...
Murray, Julie,
Sterry, Paul.
Stone, Lynn M.
Van Cleaf, Kristin,
[Show more](#)

Home libraries
Basehor Community Library
Lyndon Carnegie Library
Ottawa Library
Prairie Hills Schools -
Sabetha Elementary School
Wellsville City Library
[Show more](#)

Item types
BOOK
MOVIES
NEW BOOK

Locations
Adult
Childrens
Young Adult

Series

8252 result(s) found for 'kw,wrld: horses' in Next: search Catalog.

Select all | Clear all | Unhighlight | Add to cart | Add to list | Place hold | Browse selected

	Results
<input type="checkbox"/>	1. Horses Publisher: Chartwell Books 1998 Length: 64 p. : 20 cm. Holds (0) Add to cart Edit record Edit items OPAC view
<input type="checkbox"/>	2. Horses

Before

After:

A screenshot of the Koha Catalog search results page. The search term is 'kw,wrld: Horses'. The results count is 8259. On the left, there are facets for Availability (Limit to currently available items), Authors (Hartley Edwards, Elw..., Murray, Julie, Sterry, Paul, Stone, Lynn M., Van Cleaf, Kristin, Show more), Collections (Biography, Easy Reader, Fiction, Non-Fiction, Picture Book, Show more), Home libraries (Baldwin City Public Library, Basehor Community Library, Ottawa Library, Prairie Hills Schools - Sabetha Elementary School, Wellsville City Library, Show more), and Item types. A green arrow points from the 'Collections' facet to the 'After' annotation. The 'After' annotation is enclosed in a green rounded rectangle and contains the text: 'Collection codes now appear in search facets'. The main search results table shows the first result: '1. Horses' by Edison, N.J. Chartwell Books 1998, with a thumbnail image of a horse.

4.1.3 Cart sorting and printing

If you sort items in the cart, you can print them in the order you sort them in.

A screenshot of the Koha 'Your cart' page. The cart contains four items, each with a checkbox and a title. The titles are: 'Horses - Chartwell Books Edison, N.J. - 64 p. : 20 cm. A nonfiction', 'Horses / by Sheri Doyle. Pebble plus. Farm animals Doyle, Sheri.', 'Horses / Tammy Everts & Bobbie Kalman. Crabapples Everts, Tammy, - Crabtree Pub. Co., New York : - 32 p. : 25 cm. Includes index.', and 'Horses : a level two reader / by Cynthia Klingel and Robert B. Noyed. The wonders of reading. A level two reader. Wonder books. Klingel, Cynthia Fitterer. - Child's World, Chanhassen, MN : - 24 p. : 24 cm.'. A green box highlights the text: 'If you sort items in the cart, you can print them in the order you sort them in.'

4.1.4 Holdings count

Tab will show a holdings count. Production 0003008201343 - test 0003012081166; test 0003008201777.

Before:

The screenshot shows the Koha 18.11 interface for the book "Harry Potter and the deathly hallows /". The Holdings tab is highlighted with a green box. A callout box labeled "Before" points to the Holdings tab. The interface includes a sidebar with links like "Normal", "MARC", "ISBD", "Items", "Holds (0)", "Checkout history", and "Modification log". The main content area displays the book's details, including author(s), additional author(s), series, publisher, description, ISBN, other titles, ARLexile score, subjects, OPAC view, lists that include this title, MARC Preview, and a Holdings tab. The Holdings tab shows a table with columns for Item type, Current location, Home library, Collection, Call number, and Status. One item is listed: Atchison Public Library, Young Adult, Fiction, YA ROWLING, Checked Out, 100303.

After:

The screenshot shows the Koha 18.11 interface for the book "Harry Potter and the deathly hallows /". The Holdings tab is highlighted with a green box. A callout box labeled "After" points to the Holdings tab, and another callout box labeled "Item count appears on Holding tab" points to the tab label. The interface includes a sidebar with links like "Normal", "MARC", "ISBD", "Items", "Holds (0)", "Checkout history", "Modification log", and "Rota". The main content area displays the book's details, including author(s), additional author(s), series, publisher, description, ISBN, other titles, subjects, OPAC view, lists that include this title, MARC Preview, and a Holdings tab. The Holdings tab shows a table with columns for Item type, Current location, Home library, Collection, Call number, and Status. Three items are listed: Atchison Public Library, Young Adult, Fiction, YA ROWLING, Available; Atchison Public Library, Childrens, Fiction, JF ROWLING, Available; and Atchison Public Library, Childrens, Fiction, JF ROWLING, Available.

4.1.5 Date accessioned

Date accessioned is visible on details page - and sortable

Before:

Before:

After:

After:

Before:

After:

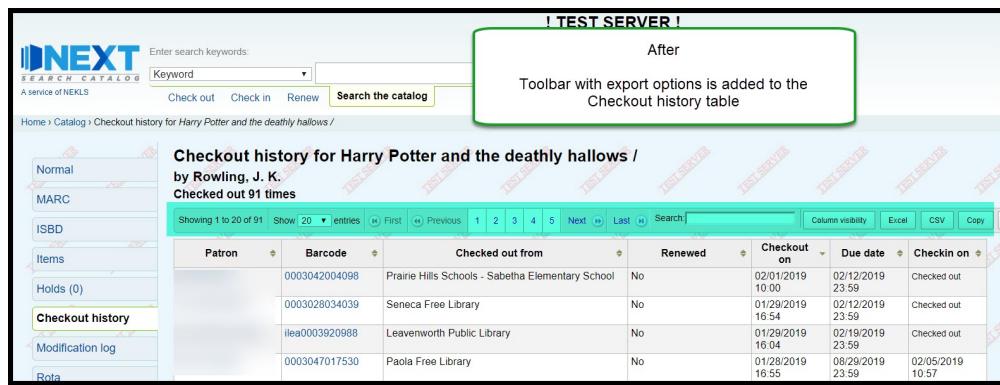
4.1.6 Checkout history toolbar

An expanded toolbar will be added to the checkout history table:

Before:

Patron	Barcode	Checked out from	Renewed	Checkout on	Due date	Checkin on
	0003000048577	Atchison Public Library	No	06/01/2019 11:28	06/22/2019 23:59	Checked out
	ilea0003981749	Leavenworth Public Library	No	05/29/2019 17:08	06/19/2019 23:59	Checked out
	0003018028980	Wellsville City Library	No	05/29/2019 10:28	06/12/2019 23:59	Checked out
	0003027023003	Eudora Public Library	No	05/28/2019 11:34	06/11/2019 23:59	06/01/2019 12:37
	3FN90000041998	Basehor Community Library	No	05/28/2019 10:53	06/11/2019 23:59	Checked out

After:



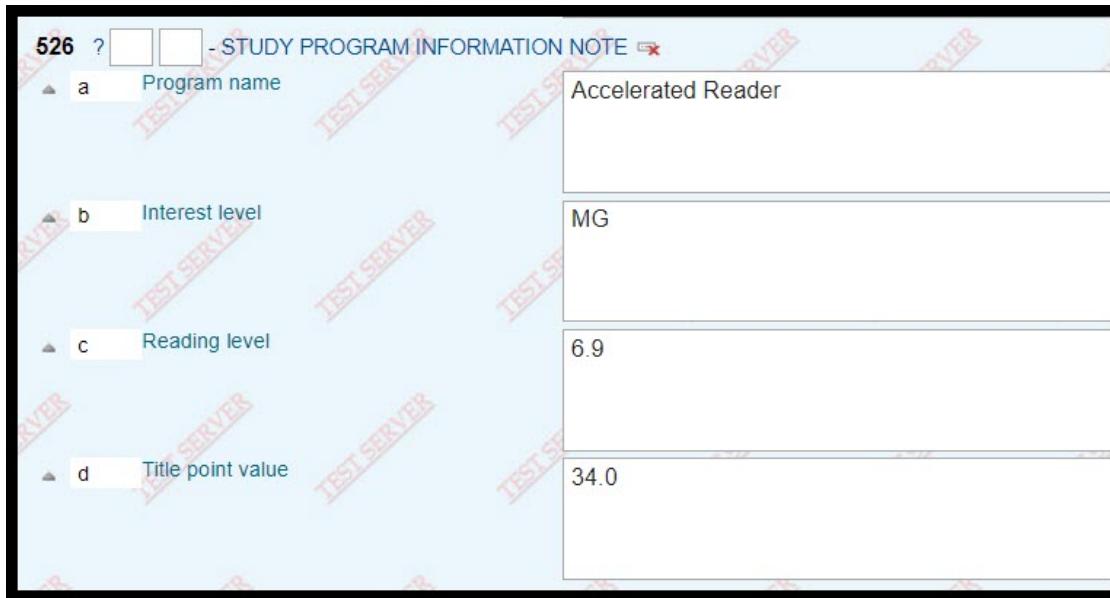
The screenshot shows the Koha Catalog search interface. On the left, there is a sidebar with links: Normal, MARC, ISBD, Items, Holds (0), Checkout history (which is highlighted in yellow), Modification log, and Rota. The main area displays a table titled "Checkout history for Harry Potter and the deathly hallows / by Rowling, J. K. Checked out 91 times". The table has columns: Patron, Barcode, Checked out from, Renewed, Checkout on, Due date, and Checkin on. The data in the table is as follows:

Patron	Barcode	Checked out from	Renewed	Checkout on	Due date	Checkin on
	0003042004098	Prairie Hills Schools - Sabetha Elementary School	No	02/01/2019 10:00	02/12/2019 23:59	Checked out
	0003028034039	Seneca Free Library	No	01/29/2019 16:54	02/12/2019 23:59	Checked out
	lee0003920988	Leavenworth Public Library	No	01/29/2019 16:04	02/19/2019 23:59	Checked out
	0003047017530	Paola Free Library	No	01/28/2019 16:55	08/29/2019 23:59	02/05/2019 10:57

A green box labeled "After" is overlaid on the top right, containing the text: "Toolbar with export options is added to the Checkout history table".

4.1.7 526 now indexed

The 526 fields are the “Study program information note” fields in the Marc record. The most common thing we have stored in these fields are Accelerated Reader program information. 526\$a = program name; 526\$b = interest level; 526\$c = reading level; 526\$d = points. These fields will be indexed after the upgrade which will make them easier to search.



The screenshot shows the Koha Catalog search interface with the "526" field details for a book record. The field is broken down into subfields:

- a** Program name: Accelerated Reader
- b** Interest level: MG
- c** Reading level: 6.9
- d** Title point value: 34.0

4.2 Patrons

4.2.1 Guarantees sorted alphabetically

In previous versions of Koha, guarantees would be sorted in the order they were added to the adult's account. They will now sort alphabetically.

Contact information

1616 Pumpkin Vine Ln
Lawrence, KS 66047

Primary phone: 785-838-4090
Primary email: george@nekls.org
Date of birth: 01/01/1900 (119 years)

Guarantees:

- Darrell Frosty
- Jessica Frosty
- Tova Frosty

Additional attributes and identifiers

Patron messaging preferences

Guarantors will now sort alphabetically

4.2.2 Renewal date on details page

The date of the last time a patron's account was renewed has been added to the "Details" page.

Contact information

1616 Pumpkin Vine Ln
Lawrence, KS 66047

Primary phone: 785-838-4090
Primary email: george@nekls.org
Date of birth: 01/01/1900 (119 years)

Guarantees:

- Darrell Frosty
- Jessica Frosty
- Tova Frosty

Additional attributes and identifiers

Patron messaging preferences

	Days in advance	Text message	Email	Digests only
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-
Email check-in receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	-
Email check-out/renewal receipt	-	<input type="checkbox"/>	<input type="checkbox"/>	-

Library use

Renewal date: 06/03/2019
Expiration date: 06/03/2020
Card number: FROSTX012
Borrower number: 262880
Category: Adult (ADULT)
Registration date: 07/15/2016
Privacy Pref: Default
Show checkouts to guarantor: No
Username: FROSTX012
Password: *****
OPAC note: OPAC note

Alternate address

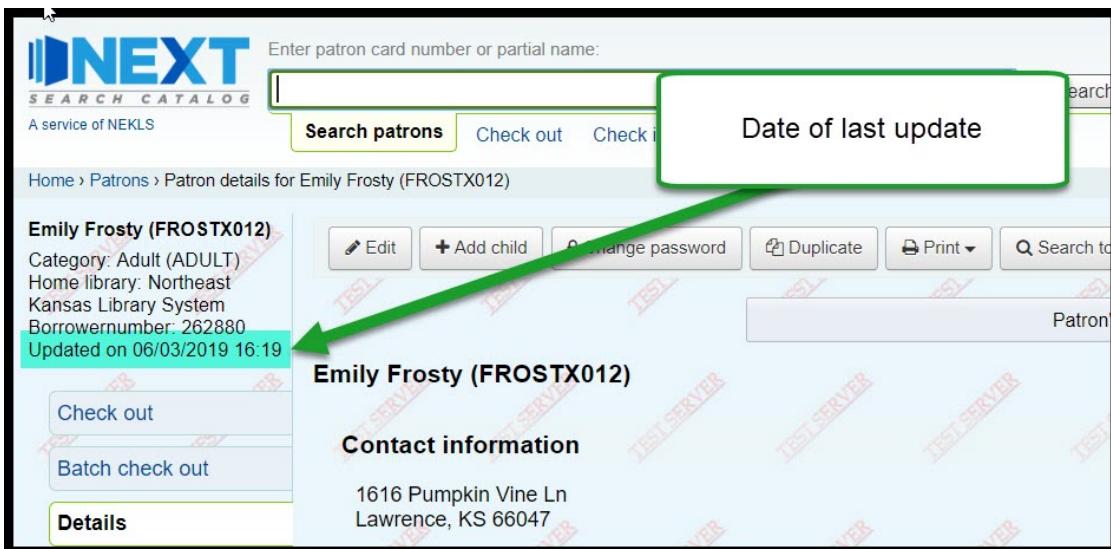
Contact note: Staff note

Alternative contact

SMS number:

4.2.3 Updated date in left column on all patrons where the information is displayed

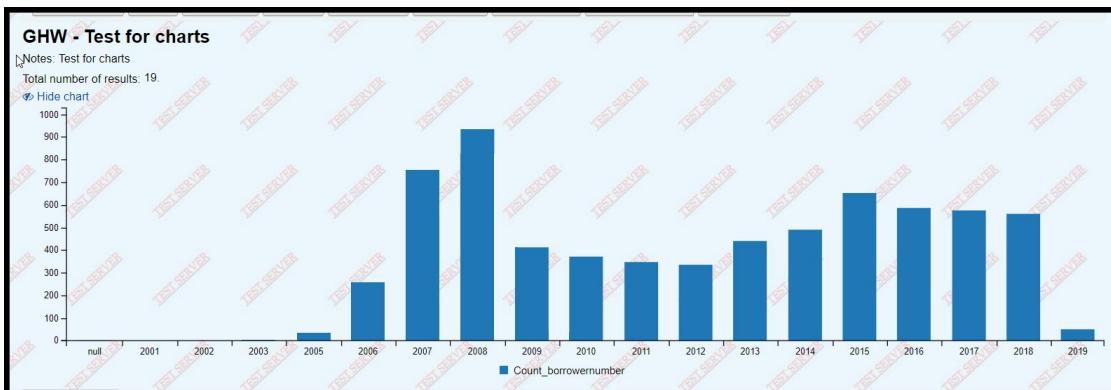
The date of the last time a patron's account was modified has been added to the information column on the left hand side of the page.



4.3 Reports

4.3.1 Create charts in Reports

Koha can now create charts from report data. Unfortunately there is not currently a way to download the charts it creates.



4.3.2 Codemirror

Koha now has a plugin called “Codemirror” which can help those writing reports in various ways. One example is by showing line numbers.

```

1 SELECT
2   branches.branchcode,
3   patrons.dateenrolled,
4   patrons.Count_borrowernumber
5 FROM
6   branches
7   LEFT JOIN (
8     SELECT
9       Count(borrowers.borrowernumber) AS `Count_borrowernumber`,
10      borrowers.branchcode,
11      Year(borrowers.dateenrolled) AS dateenrolled
12    FROM
13      borrowers
14    GROUP BY
15      borrowers.branchcode,
16      Year(borrowers.dateenrolled)
17  ) patrons
18  ON patrons.branchcode = branches.branchcode
19 WHERE
20   branches.branchcode = <>Select library|branches>
21 GROUP BY
22   branches.branchcode.
Required

```

Notes: Test for charts

SQL:

Update SQL Cancel

4.4 Tools/Administration

4.4.1 Circulation/fines/fees rules

- Notes on circulation rules The upgrade adds the ability to add a note to the circulation rules so that we'll be better able to track changes to circulation rules.

Circulation Rules Configuration									
Patron category		Item type	Actions		Note	Current checkouts allowed	Current on-site checkouts allowed	Loan period	Unit
Hide Column		Hide Column	Hide Column		Hide Column	Hide Column	Hide Column	Hide Column	Hide Column
Adult	All		Edit Delete			Unlimited	Unlimited	21	days
Adult-Digital only	All		Edit Delete			0	0	0	days
Book Club	BOOK		Edit Delete			Unlimited	Unlimited	21	days
Child	BORROWED FROM ANOTHER LIBRARY		Edit Delete			Unlimited	Unlimited	1	days
Minor-Digital only (age 00-11)	All		Edit Delete			0	0	0	days
Minor-Digital only (age 00-17)	All		Edit Delete			0	0	0	days

4.4.2 Inventory

- Items scanned out of order

For those using the inventory tool, when you upload a list of barcodes that have been scanned, the inventory tool will now tell you if the scanned items were out of order on the shelf.

25 items modified : date:lastseen set to 06/03/2019										
Number of potential barcodes read: 25										
Showing 1 to 20 of 20 Show 20 entries First Previous 1 Next Last Search										
Barcode	Call number	Library	Title	Not for loan	Lost	Damaged	Withdrawn	Last seen	Problems	
0003008001305	616.85 BRA	Northeast Kansas Library System Adult	Apps for autism : by Brady, Lois Jean,		0			06/03/2019	Item may be shelved out of order	
0003008200483	620.82 LUM	Northeast Kansas Library System Adult	Innovating for people :		0			01/04/2019	Missing (not scanned)	
0003008201222	650.1 HAK	Northeast Kansas Library System	Renew yourself / by Catherine Hakala-Ausperk		0			01/31/2019	Missing (not scanned)	
0003008201284	658 MAN	Northeast Kansas Library System Adult	Manager moments		0			02/05/2019	Missing (not scanned)	
0003008200540	658.15 TEM	Northeast Kansas Library System Adult	Achieving excellence in fundraising /		0			06/03/2019	Item may be shelved out of order	
0003008201246	658.3 FAL	Northeast Kansas Library	The performance appraisal tool kit : by		0			02/05/2019	Missing (not	

- Allow skipping items with waiting holds

This is also a new option with the inventory tool.

location on shelf:

Temporarily unavailable

Last inventory date: (Skip records marked as seen on or after this date.)

Skip items on loan:

Skip items on hold awaiting pickup:

New option

Additional options

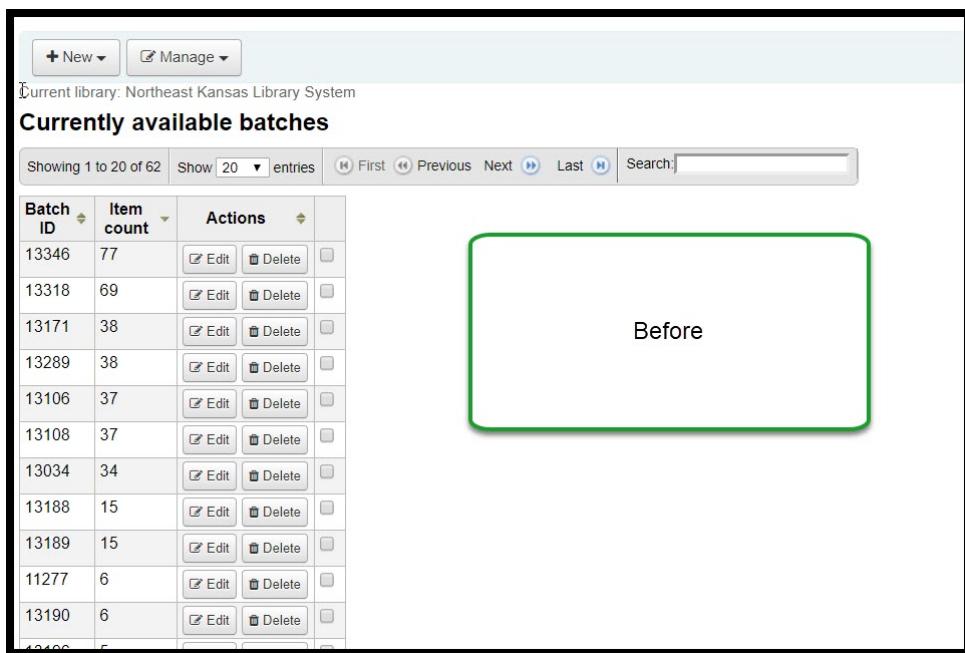
Export to CSV file:

Submit

4.4.3 Label creator and Card creator

- You will now be able to add descriptions to batches of labels and batches of patrons in the card creator tool

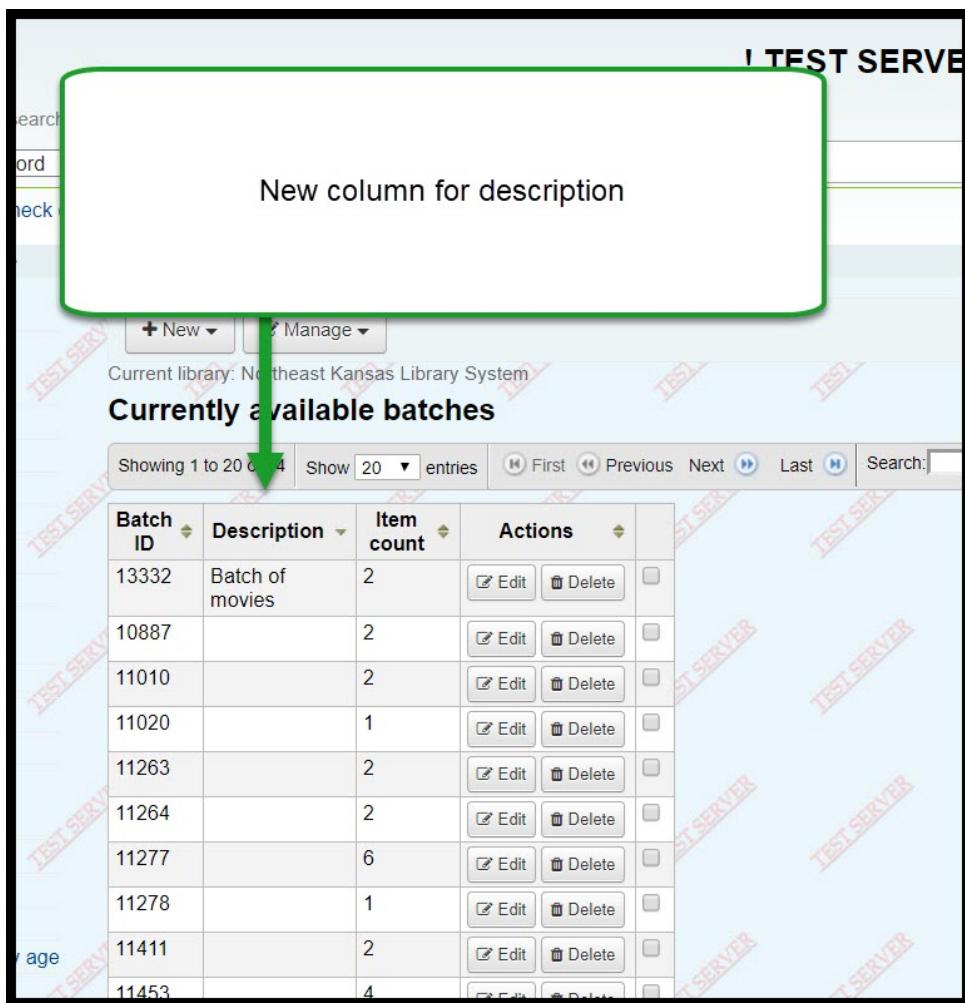
Before:



Before

Batch ID	Item count	Actions
13346	77	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13318	69	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13171	38	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13289	38	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13106	37	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13108	37	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13034	34	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13188	15	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13189	15	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11277	6	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13190	6	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
13100	5	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>

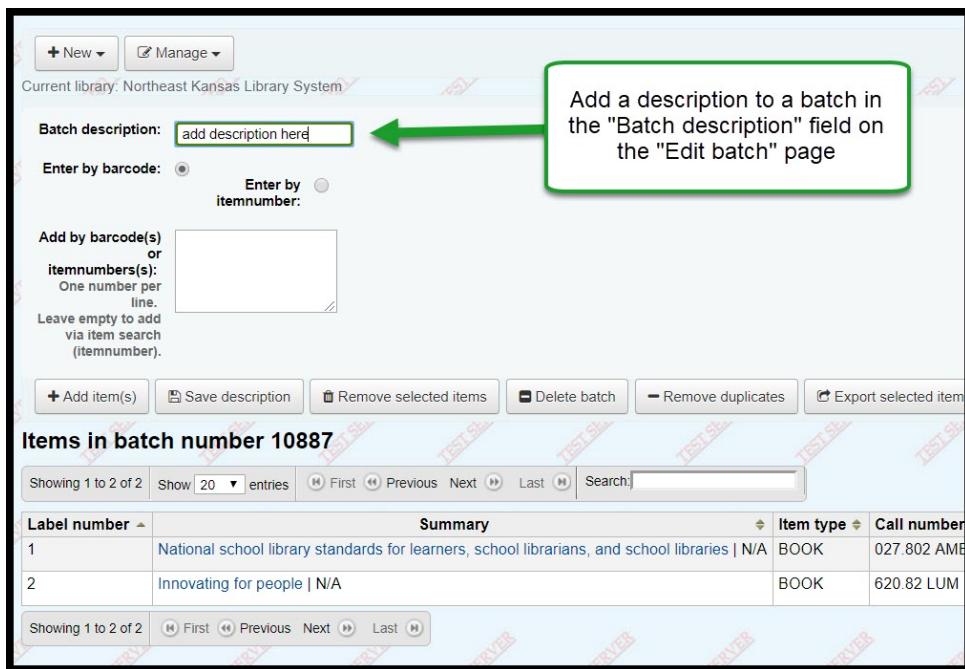
After:



New column for description

Batch ID	Description	Item count	Actions
13332	Batch of movies	2	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
10887		2	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11010		2	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11020		1	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11263		2	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11264		2	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11277		6	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11278		1	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11411		2	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>
11453		4	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/>

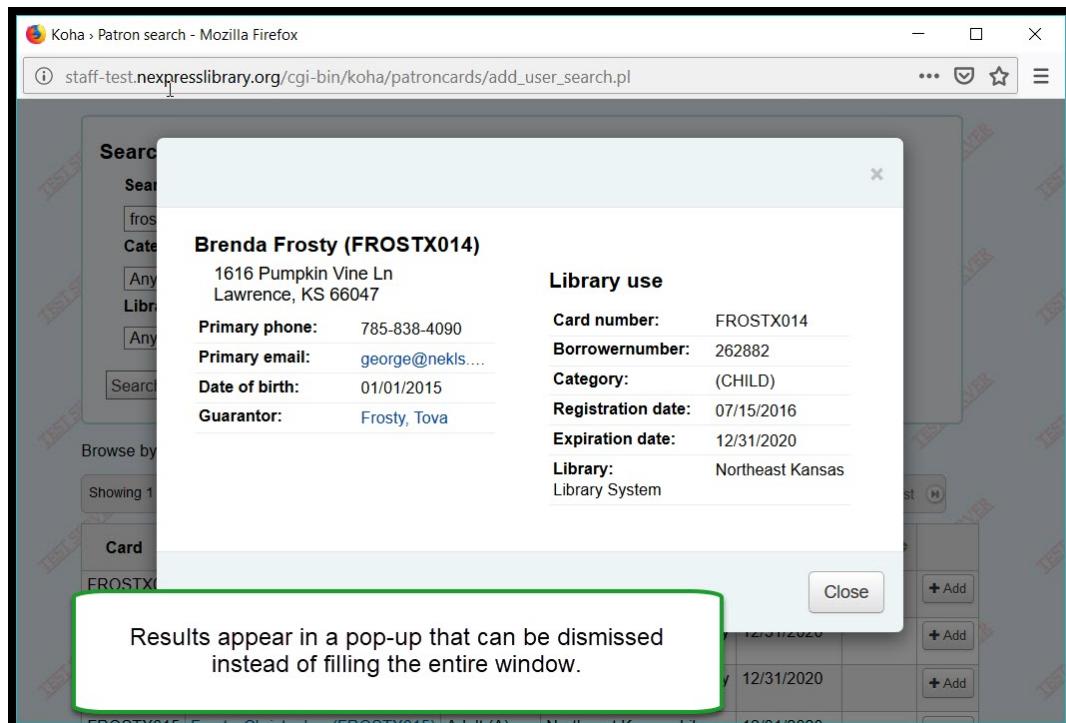
Add a name to a batch on the “Batch edit” pages



The screenshot shows the 'Edit batch' page in Koha. At the top, there are buttons for '+ New' and 'Manage'. Below that, it says 'Current library: Northeast Kansas Library System'. A green callout box points to the 'Batch description:' field, which contains the placeholder 'add description here'. To the right of the field is the text: 'Add a description to a batch in the "Batch description" field on the "Edit batch" page'. There are also fields for 'Enter by barcode:' and 'Enter by itemnumber:', and a section for 'Add by barcode(s) or itemnumbers(s):'. Below these are buttons for '+ Add item(s)', 'Save description', 'Remove selected items', 'Delete batch', 'Remove duplicates', and 'Export selected item'. The main area displays 'Items in batch number 10887' with a table showing two items. The table has columns for 'Label number', 'Summary', 'Item type', and 'Call number'. The first item is 'National school library standards for learners, school librarians, and school libraries | N/A' (BOOK, 027.802 AME). The second item is 'Innovating for people | N/A' (BOOK, 620.82 LUM).

- Pop-up when searching for patron in Card creator

When you want to add a patron to a batch in the card creator tool, if you have to search by name, if you choose the wrong patron you can't go back - you have to re-start the entire search. This bug has been fixed.



The screenshot shows a 'Patron search' page in Koha. The URL in the address bar is 'staff-test.nexpresslibrary.org/cgi-bin/koha/patroncards/add_user_search.pl'. A green callout box points to a pop-up window titled 'Brenda Frosty (FROSTX014)'. The pop-up displays patron details: '1616 Pumpkin Vine Ln Lawrence, KS 66047', 'Primary phone: 785-838-4090', 'Primary email: george@nekls....', 'Date of birth: 01/01/2015', 'Guarantor: Frosty, Tova', and 'Library use' information: 'Card number: FROSTX014', 'Borrower number: 262882', 'Category: (CHILD)', 'Registration date: 07/15/2016', 'Expiration date: 12/31/2020', and 'Library: Northeast Kansas Library System'. A 'Close' button is at the bottom right of the pop-up. The background shows the search results page with a list of patrons.

- Flexibility in call number splitting rules This change is impossible to demonstrate today - it's going to require a ton of set up, but, basically, the current process with the label creator is that you can have it split the call numbers where the spaces occur - so that REF 823.43 SHA has “REF” “823.43” and “SHA” all on separate

lines. This new feature would allow you to customize where the splits occur. It will, however require changing the frameworks so the 952\$2 is visible and then changing the selection for the 952\$2 on the items you want to create new labels for.

4.4.4 Lists

Sort list by date added

It will be possible with the new version to sort a list by the date an item was added in addition to title, author, and publication date. The default option will now be “Date added.”

Before:

Contents of James Bond

Title	Author	Date	Location
Casino royale	Fleming, Ian.	06/03/2019	Bonner Springs City Library (Adult) [F Fleming]
Diamonds are forever	Fleming, Ian.	06/03/2019	MYS FLEMING]
Dr No	Fleming, Ian.	06/03/2019	ult) [F FLEMING]
From Russia with love	Fleming, Ian.	06/03/2019	Bonner Springs City Library (Adult) [F FLEMING]
Live and let die	Fleming, Ian.	06/03/2019	Sabetha, Mary Cotton Library (Adult) [F Fleming]
Moonraker	Fleming, Ian.	06/03/2019	Atchison Public Library (Adult) [MYS FLEMING]
The man with the golden gun	Fleming, Ian.	06/03/2019	Paola Free Library (Adult) [F FLEMING] Winchester Public Library (Adult) [FIC FLEM] Atchison Public Library (Adult) [MYS FLEMING]
The spy who loved me	Fleming, Ian.	06/03/2019	Leavenworth Public Library (Adult) [F FLE]
Thunderball	Fleming, Ian.	06/03/2019	Leavenworth Public Library (Adult) [F FLE] Winchester Public Library (Adult) [FIC FLEM]
You only live twice	Fleming, Ian.	06/03/2019	Winchester Public Library (Adult) [FIC FLEM] Atchison Public Library (Adult) [MYS FLEMING]

Lists currently sort in Alphabetical order by title by defalt

After:

In the new version the default sort order for lists will be "Date added."

Title	Author	Date added	Call number
Casino Royale / Ian Fleming ; [artists, etc.] Henry Gammidge, Anthony Hern, John McClusky.	Fleming, Ian	06/03/2019	Ottawa Library Adult [GRAPHIC NOVEL F FLEMING, IAN]
Live and let die.	Fleming, Ian		
Moonraker / Ian Fleming.	Fleming, Ian		
Diamonds are forever / Ian Fleming.	Fleming, Ian		
From Russia with love / Ian Fleming.	Fleming, Ian		
Dr No / Ian Fleming.	Fleming, Ian		
Thunderball.	Fleming, Ian	06/03/2019	Leavenworth Public Library Adult [F FLE] Winchester Public Library Adult [FIC FLEM]
The spy who loved me / Ian Fleming.	Fleming, Ian	06/03/2019	Leavenworth Public Library Adult [F FLE]
You only live twice.	Fleming, Ian	06/03/2019	Winchester Public Library Adult [FIC FLEM] Atchison Public Library Adult [MYS FLEMING]
The man with the golden gun.	Fleming, Ian	06/03/2019	Paola Free Library Adult [F FLEMING] Winchester Public Library Adult [FIC FLEM] Atchison Public Library Adult [MYS FLEMING]

Date added will appear in the drop-down on the edit list page

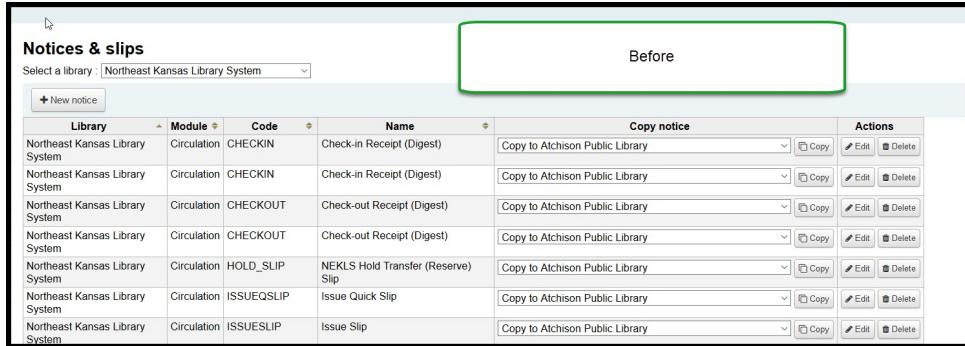
New option

4.4.5 Notices

- Table is searchable

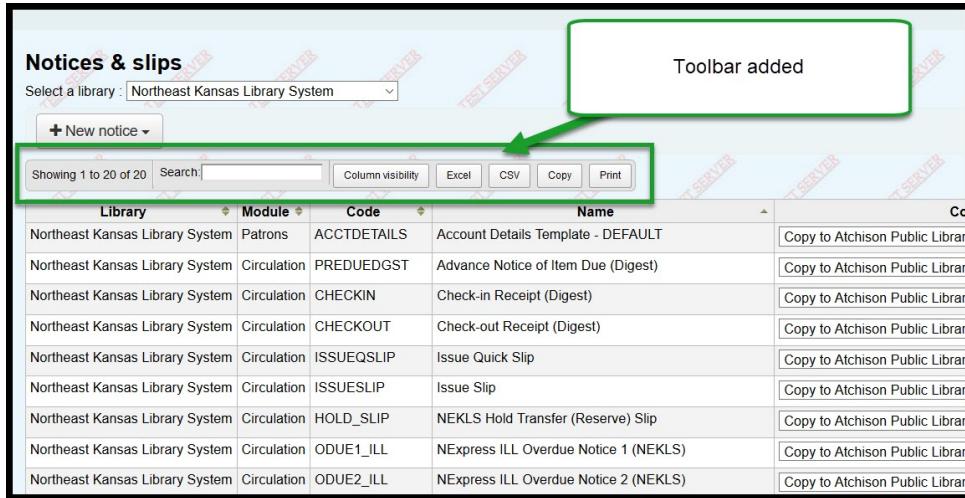
A toolbar has been added to the notices table - making the notices table searchable (at long last).

Before:



Library	Module	Code	Name	Copy notice	Actions
Northeast Kansas Library System	Circulation	CHECKIN	Check-in Receipt (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	CHECKIN	Check-in Receipt (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	CHECKOUT	Check-out Receipt (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	CHECKOUT	Check-out Receipt (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	HOLD_SLIP	NEKLS Hold Transfer (Reserve) Slip	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	ISSUEQSLIP	Issue Quick Slip	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	ISSUESLIP	Issue Slip	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

After:

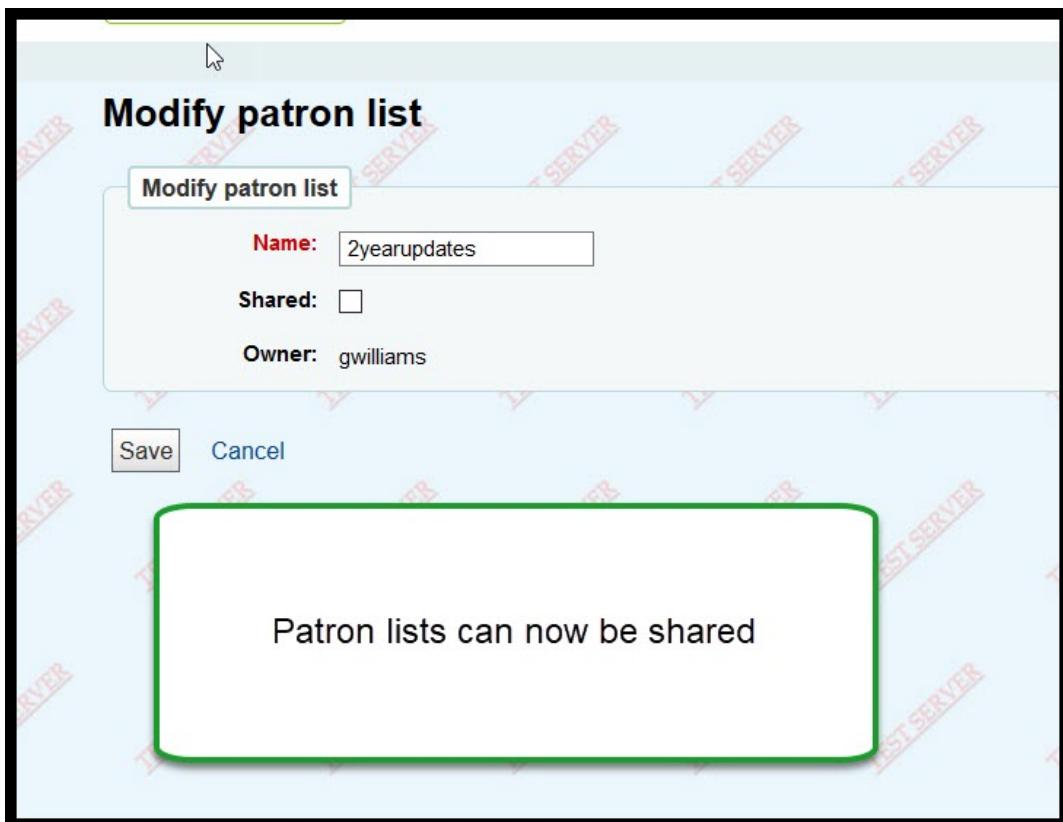


Library	Module	Code	Name	Copy notice	Actions
Northeast Kansas Library System	Patrons	ACCTDETAILS	Account Details Template - DEFAULT	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	PREDUEDGST	Advance Notice of Item Due (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	CHECKIN	Check-in Receipt (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	CHECKOUT	Check-out Receipt (Digest)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	ISSUEQSLIP	Issue Quick Slip	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	ISSUESLIP	Issue Slip	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	HOLD_SLIP	NEKLS Hold Transfer (Reserve) Slip	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	ODUE1_ILL	NExpress ILL Overdue Notice 1 (NEKLS)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Northeast Kansas Library System	Circulation	ODUE2_ILL	NExpress ILL Overdue Notice 2 (NEKLS)	Copy to Atchison Public Library	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

4.4.6 Patron lists

- Share patron lists between staff

Patron lists can now be shared among staff members with permission to view lists.



4.4.7 Batch item modification

- Holds column

A new column will show how many request are on an item that is being modified.

The screenshot shows the 'Batch item modification' interface. At the top, it says 'Batch item modification'. Below that is a table with the following columns:

	Title	Holds	Withdrawn status	Lost status	Damaged status		Total Checkouts
<input checked="" type="checkbox"/>	168 hours . , by Vanderkam, Laura.	0/1					
<input checked="" type="checkbox"/>	Special events . , by Harris, April L.	0/1					1
<input checked="" type="checkbox"/>	Race for relevance . , by Coerver, Harrison.	0					6
<input checked="" type="checkbox"/>	Apps for autism . , by Brady, Lois	0					2

A green box highlights the 'Holds' column header and the notes: "first digit = waiting holds" and "second digit = unfilled holds".

**CHAPTER
FIVE**

INDICES AND TABLES

- genindex
- modindex
- search