

The background of the book cover features a top-down view of a white computer keyboard and a white mouse on a light-colored surface. Green ivy leaves are scattered across the top and right sides of the image. A semi-transparent green rectangular box is centered over the keyboard area, containing the title and subtitle text.

OPEN ACCESS EDITION

Unleashing Koha The Complete Library Solution

A handbook for Library Science students and professionals who wish to learn Koha ILS from scratch.

WRITTEN BY
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SUBEESH GOPINATHAN

Unleashing Koha

The Complete Library Solution

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Subeesh Gopinathan**

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How we learn and grow

आचार्यात् पादमादत्ते पादं शिष्यः स्वमेधया ।
सब्रह्मचारिभ्यः पादं पादं कालक्रमेण च ॥

*AchAryAt pAdamAdatte, pAdam shiShyaH swamedhayA |
sa-brahmachAribhyaH pAdam, pAdam kAlakrameNa cha ||*

*“One fourth from the teacher, one fourth from own intelligence,
One fourth from classmates, and one fourth only with time.”*

Mahābhārata Udyoga Parva 44:16

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Preface

Koha, the Free library management software is a trendsetter in the library automation market since its initial release in 2000. Koha has outwitted other proprietary automation software in popularity and features. Many libraries with the scarcity of funds for the purchase of highly-priced proprietary software could start the automation process with Koha. The Koha project carries the true spirit of Free Software philosophy. A dedicated community of volunteers from different countries are working for the development of the software. Day by day, new features, functions and improvements are added to the software with the help of the software community. Koha offers hope for libraries and users by providing a new generation library automation solution with the support of cutting edge technologies.

The Koha community has developed many resources for learning, including comprehensive documentation, and video tutorials. Learning Koha is comfortable for newbies by attending a training programme with hands-on training. Later they can improve their expertise with the help of community developed learning resources. This book prepared for Library Science students and professionals who wish to learn Koha from scratch. Evolution of Koha, the popularity of Koha in India, guidelines for the installation, usage of all modules, maintenance, and the community resources to keep in touch with the latest developments have been discussed in the book.

10 June 2020

Authors

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Introduction to Koha

Learning objectives

Explain the concept of Free/Open Source software.

Trace the evolution of Koha ILS.

Give an overview of Koha in India.

Introduction

Evolution of Free and Open Source software movements made history in software development and distribution. Software developers and users could benefit from the free availability of software and source code. Softwares for all segments of society; both personal and enterprise use, have been developed by the Free and Open Source software community. Libraries are also beneficiaries of Free and Open Source software. Free/Open Source Integrated Library Systems, digital libraries, reference management tools, and content management systems are more popular among library professionals.

Evolution of Koha

Free Software is those which are available free with source code. Free does not mean free of cost, it denotes '**Freedom**'. According to the Free Software Foundation, "*Free software*" means software that respects users' freedom and community. The users have the freedom to run, copy, distribute, study, change, and improve the software. With these freedoms, the users (both individually and collectively) control the program and what it does for them". The two terms, "Free" and "Open Source" is used synonymously for the free distribution of software. Free and Open Source software movements are two ideological groups working for freedom in software development and distribution. In the article "Why Open Source Misses the Point of Free Software," Richard Stallman explains: "The two terms describe almost the same category of software, but they stand for views based on fundamentally different values. Open source is a development methodology; Free software is a social movement". Both groups strongly believe in community participation in software development and the Free availability of source code.

Koha Open Source library management system is a new entrant into the library automation marketplace in India. The initial development of Koha started on September 6, 1999, by Catipo Communications, following a request from Horowhenua Library Trust, New Zealand. Horowhenua

Library Trust implemented Koha on January 1, 2000. The Trust released Koha under the most popular and flexible GNU General Public License to get support from the global community and to ensure the future development of the software. In 2000, Koha deployed in St. Joseph's College, Devagiri, in Kerala state, India, and is considered as the first Koha installation in India.



Koha is a Māori term for a gift. Māori people, the indigenous population of New Zealand. Many library professionals think that the term Koha is an acronym (e.g. *ASCII*, *NASA*) and used to write KOHA. Koha is a term with meaning, not an acronym. So don't write KOHA.

Proprietary library automation software had full dominance in the Indian market. Libraries have no control over the proprietary library software and data. By purchasing a proprietary automation system, libraries do not get ownership of the software. Library only gets the privilege to use the software till the end of the service period. Often the software vendors do not give provision to export data of books, users, and circulation. In certain instances, libraries have to make an additional payment to terminate the existing software service and get back the data if they like to switch over to a new one.

Koha in India

The adoption rate of Open Source library management systems in India is comparatively slow due to a variety of reasons ranging from lack of awareness among library professionals to low computer literacy skills. Compared to other Free/Open Source library management systems, Koha is relatively more popular in India due to its active users' community. Many prestigious library automation projects in India have adopted Koha due to its capability to handle Indian languages. Delhi Public Library started using Koha in 2007. The Library has a collection of over one million books. During the initial stages, a significant portion of the records from the CDS/ISIS database was exported to Koha. A good number of libraries with national importance migrated to Koha and attracted attention among other libraries. IIMs, IITs, ICAR, Central and State Universities are the pioneers who adopted Koha in India. It leads to more Koha adoption among other libraries in India.

Koha installation and support

Koha makes use of Free/Open Source components like MySQL/MariaDB database management system, Apache web server, Perl programming language, and Linux operating system; either Debian/Ubuntu. There is no need to invest an additional amount for preparing a technical platform for Koha installation. The majority of proprietary library management systems need compatible commercial applications to run the System. In such a situation, libraries have to spend more amount on buying database applications (e.g. MS SQL, Oracle Database), Operating Systems (e.g. Windows), and anti-virus programs to protect the system.

The majority of library professionals in India are not familiar with the use of Linux Operating systems. Installation and maintenance of Koha are difficult for library professionals because of the Linux-based installation procedures. Koha support using community resources is convenient for libraries with IT experts. Detailed user manuals, installation procedures, data migration assistance, active discussion forums, and blogs that are beneficial for libraries would help to maintain Koha with in-house support. Support from commercial Koha service providers is very helpful in data migration from legacy software, customization, development, online hosting, and maintenance.

Conclusion

Koha has now become a mature library automation software due to its strong community support. Any type of library can adopt Koha without any hesitation. Free and Open Source software is going through constant changes and taking new features and functions day by day. Koha releases frequent updates with bug fixes and security enhancement. Library professionals should keep in touch with new software developments for the efficient management of Koha for the day-to-day activities in the library.

Exercise

1. Visit Koha's home page <https://koha-community.org/>, and get familiar with information organized there.
2. Visit the online catalog of Delhi Public Library, <http://delhipubliclibrary.in>. Search and find records in Indian languages.

For further reading

History of Koha

<https://koha-community.org/about/history/>

V, Vimal Kumar. and Jasimudeen S. "Adoption and User Perceptions of Koha Library Management System in India". *Annals of Library and Information Studies (ALIS)* 59.4 (2012): 223-30. NISCAIR.

Stallman, Richard. "Why open source" misses the point of free software." (2007)

<https://www.gnu.org/philosophy/open-source-misses-the-point.html.en>

Installation of Koha

Learning objectives

How to choose the suitable Linux operating system for Koha.

Know about the selection of hardware for Koha installation.

Understand about Koha installation.

Introduction

Most of the Free/Open Source software for enterprises is developed to run on the Linux operating systems. Koha is a Free Software and developers recommend it to install on Debian/Ubuntu Linux. Koha has a web interface and depends on other tools like MySQL/MariaDB database server, Zebra search engine, and Apache webserver. The server denotes a computer where the application software is installed and running. Koha source code is written using the Perl programming language. A server computer enables/offers software services to its users through a local network/Internet. Users in the network can access the software services from the server computer through client computers. If Koha is installed in a desktop/ workstation/ server computer and made available in the campus network, we can call it a Koha server.

Suitable Linux distribution for Koha

Hundreds of Linux-based operating systems is available with a variety of features. Varieties of Linux operating systems are known as distributions or distro (e.g. Arch Linux, Debian, Ubuntu, Fedora, etc.). All of the Linux distributions are built on the Linux kernel. The look and feel of Linux distributions vary depending on the desktop interfaces (e.g. GNOME, KDE, XFCE). Koha software development is based on Debian Linux. Developers of Koha strongly recommend Debian for Koha installation. A Linux beginner can use Debian (www.debian.org) based user-friendly Linux operating systems like Ubuntu (<https://ubuntu.com/>). A stable version of Ubuntu is recommended for Koha installation. The stable version of Ubuntu is released every two years and they offer extended support for up to five years. You can find the "LTS" shortcode with every long-term support version number (e.g. 18.04 LTS, 20.04 LTS). Interim releases of Ubuntu (e.g. 19.10) have only nine months of life and are not suitable for Koha installation. Koha does not work with the RedHat family of Linux distributions. Debian/Ubuntu and RedHat Linux distributions have lot of differences in architecture.



Ubuntu releases both desktop and server editions every six months. Ubuntu desktop edition is available with a graphical interface like GNOME. The server edition of Ubuntu is available with text mode (only commands will work). Ubuntu LTS (Long Term Support) version is released every two years in April month. Ubuntu LTS edition has five years of life. It means that an LTS edition will get updates for a minimum of five years.

Hardware selection for Koha

Library professionals need to acquire basic knowledge of hardware selection for the installation of Koha. For hardware selection, consider budget, the number of records, the number of users, and the transactions to be handled by Koha. Here are the suitable hardware requirements for various library environments.

Desktop PC: The majority of libraries in India choose a desktop computer for Koha installation. Library professionals switch off the PC before closing the library and the next day they will switch on the PC to work with Koha. Libraries having budget constraints, lack of higher hardware resources, and power backup would like to follow this method regardless of the number of records and transactions with Koha. Such libraries can't offer 24x7 OPAC services with Koha on a desktop PC.



Ubuntu Linux is available in different flavors; Xubuntu, Lubuntu, Kubuntu, etc. Ubuntu flavors are using the same Ubuntu base and software repositories. They keep differences in user interfaces (GUI), artwork and default programs. Ubuntu uses a graphical interface called GNOME, Kubuntu uses KDE as GUI, Xubuntu uses XFCE and Lubuntu uses LXQt. XFCE and LXDE desktops are known for fast performance due to their lightweight architecture.

Libraries with a small collection (e.g. up to 25000 books) can consider a desktop with an i5 processor and a minimum of 8 GB RAM. Intel Core is a line of middle to high-end central processing units (CPU) for computers from Intel Corporation. Core processors include the Intel Core i3, Intel Core i5, Intel Core i7, and Intel Core i9 for desktop and laptop computers. Each processor is available with multiple speeds. Processor speed is measured in gigahertz (GHz), the speed at which the processor operates. For example, the Core i5 processor is available in various speed rates, starting from 1.90 GHz to 3.80 GHz. Also available with various cache sizes, 3 MB, 4 MB, or 6 MB. Intel Core processors are also available for the server and workstation are known as Xeon processors. The price and performance of the same core processors change based on the number of cores, clock speed, and cache size. So specifically mention the speed and generation of

the processor while preparing the purchase suggestion—for example, Intel Core i5 Processor 8th generation 3.20 GHz, 6 MB cache. A processor's onboard cache is used to speed up access to data and instructions between the CPU and RAM. Cache size is also an essential factor to determine the performance of the computer.

Buy a desktop computer without preloaded Windows. It increases the cost of the computer. So it is better to buy a computer without any Operating System. While placing the order, specify the computer with the FreeDOS operating system. FreeDOS is a Free operating system. Use Debian/Ubuntu Linux with a lightweight desktop for the optimum performance of hardware. Ubuntu/Debian has heavyweight desktops (e.g. GNOME, KDE), and such desktops consume a sizeable processing power of your computer. Either choose Debian Linux with XFCE desktop or Xubuntu/Lubuntu for Koha installation. Opt SSD (Solid State Drives) over traditional HDD as storage for fast performance. Desktop computers are not built for 24x7 service and are not suitable to make Koha available on the Internet.

Workstation PC: A workstation computer is better than a desktop computer in terms of performance and durability. Libraries want heavy-duty desktop machines that can opt for workstation computers. It can handle library tasks with a large number of records, users, transactions, and multiple library branches. Popular computer manufacturers produce a workstation PC with different brand names. For example, Dell Precision, Lenovo Thinkstation, and HP Z belong to the workstation category.

Server computer: Libraries with excellent IT infrastructure can choose a server-class computer for Koha installation. Server computers built for 24x7 hours continuous working and can offer seamless Koha service. It is observed that libraries with a small collection buy heavy-duty server computers and switch them on and off in the evening when the library closes. This practice affects the performance and reduces the lifespan of the server computer. Desktop/workstation computers are enough to serve the purpose of such libraries.

Server class computers are available with various specifications. Libraries with small-size collections can choose entry-level server computers for Koha installation. For example, HP Proliant ML series tower server computers cost below Rs. 80000. Servers can be classified as tower, rack, and blade based on their physical shape. Towers server built in a box chassis. Entry-level users can choose a tower server and convenient to manage in small enterprises.

Cloud computing: Cloud computing services are becoming more convenient for all types of libraries. Libraries can be relieved from hardware maintenance if they choose cloud hosting. Libraries can hire cloud services from service providers like Amazon, Google, and Microsoft. It can also choose virtual servers with Debian/Ubuntu operating systems from the cloud for Koha installation.



Ubuntu project maintains a list of the certified computer hardware suitable to run Ubuntu Linux. The site retains lists of devices compatible with Ubuntu Linux. Users can find ideal servers, workstations, and desktops to install Koha from the Ubuntu Certified Hardware list (<https://certification.ubuntu.com>).

Installation of Koha

Koha Wiki (<https://wiki.koha-community.org>) gives detailed directions to install Koha on Debian and Ubuntu. Check the Wiki and make sure which versions of Debian and Ubuntu are required for the installation of current versions of Koha. Koha releases a major version every six months; in May and November. For example, Koha version 19.05 was released in May 2019. Koha project releases monthly updates containing security updates and bug fixes. Koha provides a **Stable** and **Old Stable** branch for users. The latest release is called the **Stable** branch. Old Stable is one version behind the current stable release. The Old Stable release is preferred for the installation because of the more number of updates since its release. Koha version 19.05.10 means it has been updated ten times since its release. Each monthly update of Koha contains bug fixes and security updates. Koha Wiki updates frequently and adds timely changes to installation instructions. So one can strictly follow Koha Wiki for the installation.



Perl is a general-purpose, high-level programming language used for a variety of applications including web development, programming, GUI development, and more. Larry Wall created Perl.

Koha Live DVD

The Koha Live DVD is a useful tool for learning and training purposes. Most of the Koha Live DVD is packed with Debian/Ubuntu operating systems and a recent version of Koha. Live DVDs can be used either in live mode or can be installed on a computer permanently. Live DVD is not advisable to be installed for production purposes. For learning purposes, the live method is helpful. Koha Live DVD can be booted into the computer; the user can try Linux and Koha. The live mode gives the experience of a real-life Linux installation and Koha. It does not get installed permanently on computer storage. Data entered by the user in live mode do not get permanently saved into the computer storage, and it vanishes after the reboot. Koha Live DVDs are available for download. Here is the link to a popular Koha Live DVD; <https://sourceforge.net/projects/kohalivedvd/>. Koha Live DVD is easy to use and helpful for students and library professionals who would like to learn Koha.

Conclusion

Installation of Linux is a complicated process for library professionals. A Linux and Koha expert can manage the installation process very well. It will be good to consult an expert or any Koha service provider for the installation. Library professionals who are curious to learn the installation process, are advised not to try it on the computer on which Koha is running for the library. It is better to try the installation on another computer.

Exercise

1. Visit Koha Wiki and go through the installation steps for Debian, <https://wiki.koha-community.org/wiki/Debian>
2. Visit <https://www.debian.org/CD/> and download Debian with XFCE desktop and burn on a CD.
3. Visit the Lubuntu website <https://lubuntu.net/downloads/> and download the current LTS version. Write on a DVD.
4. Install Debian and Lubuntu on a PC.

For further reading

Which Intel Core CPU is the best? How do I decide between a Core i3, i5, i7 or i9?

<https://www.pcworld.idg.com.au/article/633263/which-intel-core-cpu-best-how-do-decide-between-core-i3-i5-i7-i9/>

How to Buy the Right CPU: A Guide for 2020

<https://www.tomshardware.com/reviews/cpu-buying-guide,5643.html>

Ubuntu Certified hardware

<https://certification.ubuntu.com>

Debian Linux

<https://www.debian.org/>

Lubuntu Linux

<https://lubuntu.net/>

Xubuntu Linux

<https://xubuntu.org/>

Koha on Debian

https://wiki.koha-community.org/wiki/Koha_on_Debian

Koha on Ubuntu packages

https://wiki.koha-community.org/wiki/Koha_on_ubuntu_-_packages

Koha administration

Learning objective

Learn the initial settings of Koha.

Introduction

After the installation of Koha, the user needs to configure the software to get ready for work. Post-installation configuration loads sample data and it makes the job easy. Koha users can create sample item types, user categories, notices, and slips, and the like. Tuning Koha software to suit the requirements of the library is a prerequisite to start with Koha.

Prepare Koha for use

Koha has a web-based interface (it looks like a website). Users have to access Koha using a web browser (e.g. Mozilla Firefox, Google Chrome).

The image shows the Koha staff client login interface. At the top, there is the Koha logo, which consists of a stylized 'k' followed by the word 'koha' in a serif font. Below the logo, the text 'OPEN-SOURCE INTEGRATED LIBRARY SYSTEM' is displayed. The login form contains three input fields: 'Username:' with a text box, 'Password:' with a text box, and 'Library:' with a dropdown menu. The dropdown menu is currently set to 'My library'. A 'Login' button is located at the bottom right of the form.

Koha staff client login

Koha offers two interfaces; **Staff Client** and **OPAC** (Online Public Access Catalogue). The Librarian has to login into the staff client to manage activities like cataloguing, circulation, reports etc. If you

are using a computer where Koha is installed, enter the local address (<http://127.0.1.1:8080>) of the Koha staff client in the address bar of the browser. Bookmark the Koha staff client and OPAC addresses on the browser toolbar to avoid manually entering the URL every time. Enter the username and password to step inside the Koha staff client. The local address of the online catalogue (OPAC) is <http://127.0.1.1>.



Koha uses an Apache web server and uses two different ports for Staff Client and OPAC. Port number 8080 is assigned to Staff Client and port number 80 for OPAC by default. Use the port numbers with localhost, private and other addresses. For example, <http://192.168.1.2:8080> for staff clients. No need to add Apache default port number 80 with OPAC URL, e.g. <http://192.168.1.2>.

Koha administration

After the installation of Koha, we need to create initial settings. Then only, Koha will be ready for the day-to-day operations. The creation of library branches, item types, patron categories, circulation, and fine rules are the basic parameters to work with Koha.

Visit **Koha > Administration**

Koha administration

Global system preferences

Manage global system preferences like MARC flavor, date format, administrator email, and templates.

Hint:
Configure these parameters in the order they appear.

Basic parameters

- Libraries**
Define libraries.
- Library groups**
Define hierarchical library groups.
- Item types**
Define item types used for circulation rules.
- Authorized values**
Define categories and authorized values for them.

Catalog

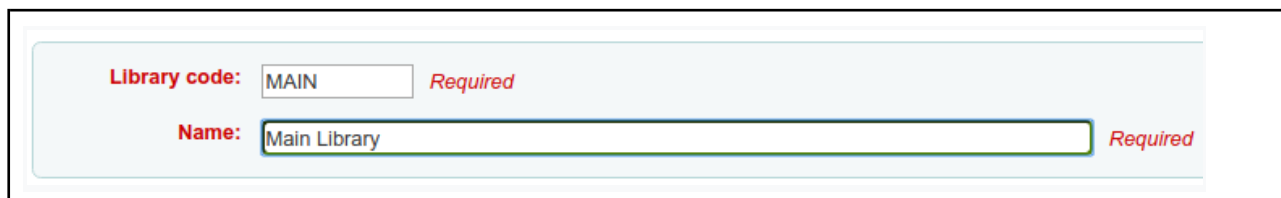
- MARC bibliographic framework**
Create and manage Bibliographic frameworks that define the characteristics of your MARC Records (field and subfield definitions) as well as templates for the MARC editor.
- Koha to MARC mapping**
Define the mapping between the Koha transactional database (SQL) and the MARC Bibliographic records.
- MARC Bibliographic framework test**
Checks the MARC structure. If you change your MARC Bibliographic framework it's recommended that you run this tool to test for errors in your definition.
- Authority types**
Create and manage Authorities frameworks that define the characteristics of your MARC Records (field and subfield definitions).
- Classification sources**
Define classification sources (i.e. call number schemes) used by your collection. Also define filing rules used for sorting call numbers and splitting rules for splitting them.
- Record matching rules**

Koha administration page

Create a new library

Koha facilitates the management of single/multiple library branches. Multiple branches are convenient for Universities and Colleges with more than one library branches (central and department libraries). To create a new library, open

Koha Administration > Basic parameters > Libraries > New library




Library code: Required

Name: Required

Enter the library code first. Coin a short term for your library branch code. Remember to limit the branch code to ten characters or less. For example, **MGUL** for **Mahatma Gandhi University Library**. Don't use special characters and put space between branch code. The software uses the branch code as a unique identifier to recognize the particular library branch. We can't simply change the library code, once you enter bibliographic and patron details.

Next, give the name of your library. Koha users can edit the library's name at any time. The Library name will appear in many places like the OPAC and also on the staff client along with bibliographic details.

Enter the other details of the library branch. It is helpful to individualize the library branches.



Address line 1:

Address line 2:

Address line 3:

City:

State:

ZIP/Postal code:

Click on the submit button to save the library branch details.

Create item types

Create item types to organize library collection based on the physical characteristics or nature of the content (e.g., book, patent, report, thesis, reference, etc.). Koha is preloaded with some commonly used item types. After the installation, the user can add popular item types with the help of the web installer. Here we will learn how to add new item types;

Koha > Administration > Basic parameters > Item types

Enter a shortcode for the new item type. Coin a code that reflects the name of the item type; e.g. **REP** for **Reports**, **BBK** for **Book Bank**. The Koha software recognizes the item type using that shortcode.

Enter a description for the item type. Choose an ideal icon for the newly created item type from available galleries.



Do not use item types to represent subjects. Koha offers different ways to represent subjects or keywords for documents. **Collection Code** at **Koha Administration > Authorised Values** useful for organising the documents based on the collection.

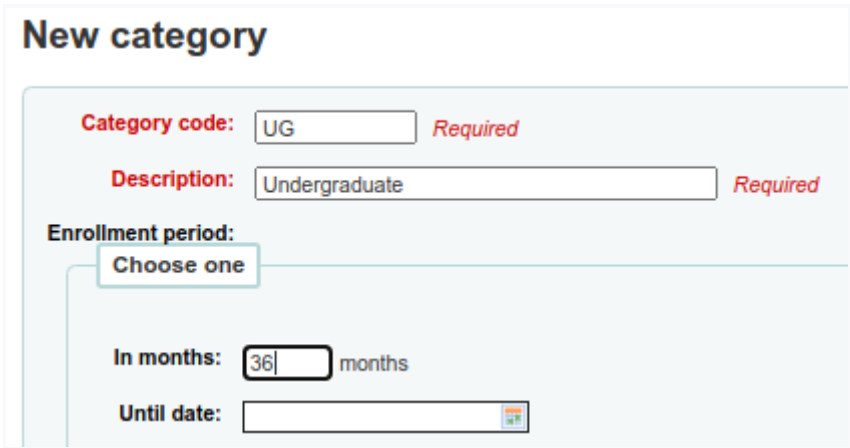
Other important options:

Hide in OPAC: Hide the item types from OPAC search.

Note for loan: Restrict item from circulation.

Add patron categories

The term '**Patron**' in Koha denotes library users (e.g., Teachers, Students, Research scholars, etc.). Visit **Administration > Patron Categories** to create new patron categories. Library can categorise patrons based on the programme they joined, e.g. UG, PG, etc.



New category

Category code: *Required*

Description: *Required*

Enrollment period:

In months: months

Until date:

Category code: Enter a shortcode for the patron category they represent.

Description: Description of the patron category.

Enrollment period: Duration of the membership in months.



Don't enter values in both **In months** and **Until date** fields in the '**Enrollment period**' section.



Koha uses certain terms popular in other countries. See the terms used by Koha and the equivalent term put in the brackets. **Check Out** (Issue), **Check-in** (Return), **Hold** (Reservation), **Barcode** (Accession number), **Label** (Barcode sticker), **Patron** (Library user).

Age required: years

Upperage limit: years

Enrollment fee:

Overdue notice required:

Age required: Minimum age required to join the library.

Upper age limit: The maximum age for the patron category.

Enrollment fee: A membership fee is required to pay at the time of admission.

Overdue notice required: Select **Yes** to enable messaging facility (SMS, Email) to library users.

Lost items in staff client:

Hold fee:

Category type: *Required*

Lost items in staff client: Whether to display lost items in the staff client.

Hold fee: Fee for Hold (reserve) books as per library rule.

Category type: Select a suitable category (e.g. Adult for UG students).

	Days in advance	Email	Digests only ⓘ
Item due	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advance notice	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hold filled	-	<input checked="" type="checkbox"/>	-
Item check-in	-	<input checked="" type="checkbox"/>	-
Item checkout	-	<input checked="" type="checkbox"/>	-

Choose the various contexts in which notifications from Koha are sent to users. Choose to receive their notices either as a single email or digest by checking the boxes. **'Digest only'** mode delivers the similar nature notices, generated on the same day, into one email instead of multiple emails for each alert. For example, information on all overdue to a person on the same day in one email. This feature helps to avoid receiving emails from libraries in the spam box.



Koha depends on a third party MTA (Mail Transfer Agent) to send mail to users. A

lot of Free and Open Source MTA is available. e.g. Exim, Sendmail and Postfix.

Need to install any MTA and add an email account to enable the mail system.

Koha generates notices, and the MTA sends the mails to users. Libraries can use Gmail accounts with an MTA to send email notices from Koha. Gmail allows sending a limited number of email from a free account. Check whether the daily email quota exceeds the permitted numbers. Hire a paid version of Gmail account if the number of emails from Koha exceeds the free limit.

Optimise Koha to send emails

We need to tune Koha to send emails. Visit the following places and optimise the settings.

Enable email messaging in Koha

Apply the following command in a Terminal.

```
sudo koha-email-enable library
```

Enabled Enhanced Messaging preferences

Visit **Koha Administration > Global System Preferences > Patrons > Enhancedmessagingpreferences > Allow.**

Enable overdue Notice/Status triggers

Visit **Tools > Overdue Notice/status triggers.**

Customize email notices

Visit **Tools > Notices&Slips**



Koha can send notices via SMS. We need to hire an SMS service with a Perl driver.

Perl driver connects SMS service to Koha. In India, Unicel offers SMS services with Perl driver. 'eSMS' is another SMS service suitable for Koha but limited to government-funded libraries in Kerala state, India.

Circulation and fine rules

Rules for the circulation of library items among library users can be defined here.

Koha > Administration > Patrons and circulation > Circulation and fines rules

Here we are going to create a circulation rule for Faculty members to borrow books.

Select a library : Standard rules for all libraries 1							
Patron category	Item type	Actions	Note	Current checkouts allowed	Current on-site checkouts allowed	Loan period	Unit
Undergraduate 2	Books 3	Save Clear		5 4		20 5	Days 6

See the description of each option.

1. **Select a library:** Create a rule either for all libraries or for individual libraries.
2. **Patron category:** Select the Patron category applicable.
3. **Item Type:** Select the Item Type to circulate.
4. **Current checkout allowed:** Enter the maximum number of books borrowed by users.
5. **Load period:** Maximum number of days the user can hold the document for reading.
6. **Unit:** Select the unit of time (Days/hours).

Loan period	Unit	Hard due date	Fine amount	Fine charging interval	When to charge
20	Days ▼	Before ▼ (DD/MM/YYYY)	5 1	1 2	End of interval ▼

1. **Fine amount:** Overdue charge for items as per library rule.
2. **Fine charging interval:** Intervals to consider for charging and calculating the fine amount.

Renewals allowed (count)	Renewal period	No renewal before	Automatic renewal	No automatic renewal after	No automatic renewal after (hard limit)	Holds allowed (total)
2 1	20 2		No ▼		(DD/MM/YYYY)	3 3

1. **Renewals allowed (count):** This shows how many times the patron can renew the item.
2. **Renewal period:** The number of days patrons can hold the items after the renewal.
3. **Holds allowed (total):** The maximum number of books a patron can reserve.

Save the circulation and fine rule after entering the values. The rule can be edited if any changes need to be made.

Select a library : Standard rules for all libraries Clone these rules to: Main Library Clone

Patron category	Item type	Actions	Note	Current checkouts allowed	Current on-site checkouts allowed	Loan period	Unit
Undergraduate	Books	Edit Delete		5	Unlimited	20	Days
Undergraduate	Books	Save Clear		5		20	Days

Edit mode appears on the bottom of circulation and fine rules option. Modify the rule and save.

Conclusion

Post-installation configuration of Koha is a significant process. Write down in advance the codes used for library branches, patron categories, and item types. Keep a systematic schema and use a specific number of alphabets (3 or 4) in codes for the Koha administration section. The user can start the routine library works with Koha after finishing the basic parameters.

Exercise

1. Create a library branch in Koha with details.
2. Create two item types (e.g. Ph.D. Theses, Reports) for your library.
3. Create two patron categories; for UG and PG students.
4. Create circulation fine rules for UG and PG students.

For further reading

KISS your Koha patron categories

<http://blog.l2c2.co.in/index.php/2020/04/02/kiss-your-koha-patron-categories/>

Configure email with MTA

<http://kohageek.blogspot.com/search/label/MTA>

Sending email alerts via GMAIL : a marriage of convenience or is it???

<http://blog.l2c2.co.in/index.php/tag/gmail/>

Cataloguing

Learning objectives

Give an introduction to the cataloging process with Koha.

Introduce how to create, edit and delete catalog records.

Introduction

The Cataloguing module of Koha helps to build a catalog of library collections: books, periodicals, reports, theses, dissertations, etc. Koha supports both UNIMARC and MARC 21 formats for the description of the library collection. We need to specify one format at the time of the post-installation configuration. Libraries can enter bibliographic details in both English and other languages. Koha supports Indian regional languages due to UNICODE support. Library professionals can enter the bibliographic information either manually or can copy the catalogue from other sources (e.g. Library of Congress). The cataloguing module of Koha is very comprehensive in terms of description and display of bibliographic information.

Creation of Biblio and Items

The Koha cataloguing process includes two segments, the creation of **Biblio** (Bibliographic details of records) and **Item** information. Bibliographic details usually include ISBN, call number, author, title, etc. Item information contains the price, date of purchase, accession number (barcode), etc.

There are different methods to populate catalogue details into Koha. Three prominent ways to enter the details to catalogue: add the details manually, import from MARC file, and import using the Z39.50 protocol.



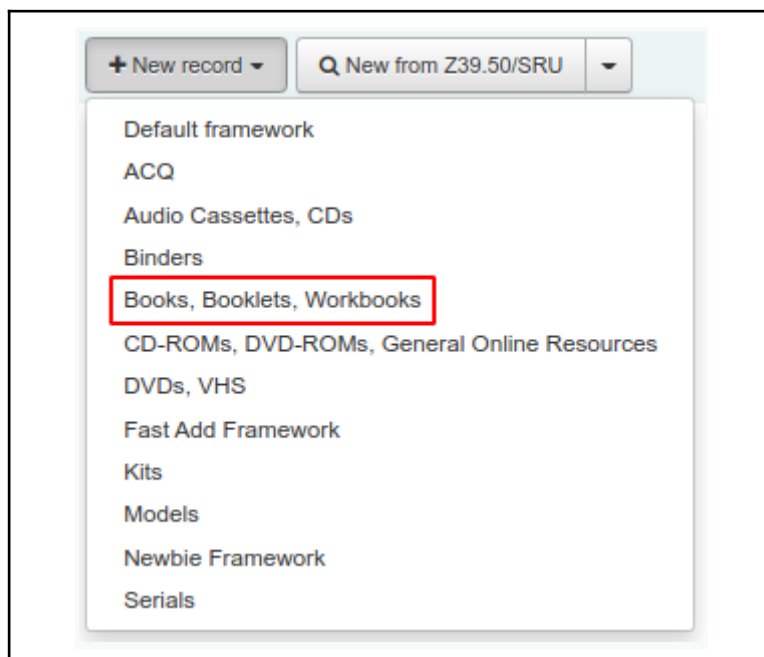
Z39.50 is an international standard, a client-server communications protocol for

searching and retrieving information from a database over a TCP/IP computer network. Z39.50 is part of integrated library systems. Many libraries use Z39.50 to download bibliographic details from library automation software. Koha has added a few Z39.50 servers as default. Koha users can add more such servers to Koha. IRSpy website maintains a directory of Z39.50 servers all over the world, <http://irspy.indexdata.com>.

Here we are going to create a new catalogue record entering the details from scratch. Open the catalogue module,

Cataloguing > New record > Books, Booklets, Workbooks

Choose a framework ideal for cataloguing the document.



The screenshot shows a 'New record' dropdown menu with the following options:

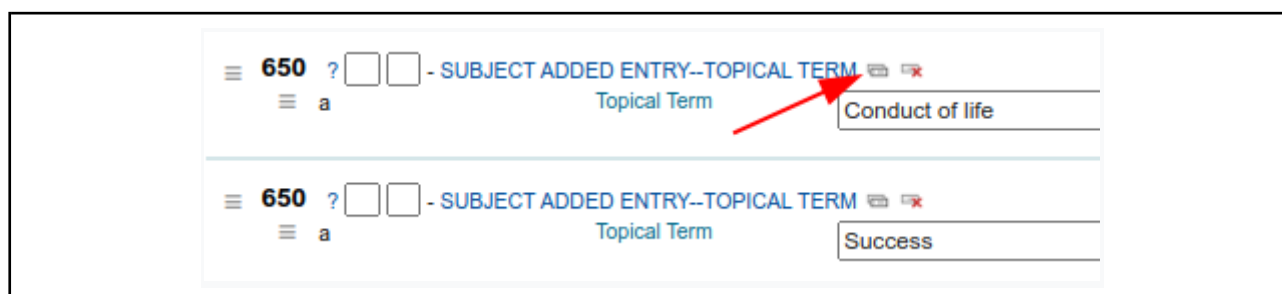
- Default framework
- ACQ
- Audio Cassettes, CDs
- Binders
- Books, Booklets, Workbooks** (highlighted with a red box)
- CD-ROMs, DVD-ROMs, General Online Resources
- DVDs, VHS
- Fast Add Framework
- Kits
- Models
- Newbie Framework
- Serials

Enter the bibliographic details of the book.



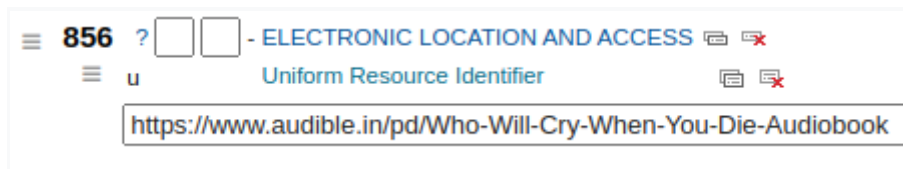
The screenshot shows the bibliographic details form for a new record. The title field is filled with 'Who will cry when you die?' and the subtitle field is filled with 'Life lessons from the Monk who sold his Ferrari.'.

Make use of the Repeatable feature to generate additional fields and subfields.



The screenshot shows the '650' subject added entry form. The 'Topical Term' field is filled with 'Conduct of life' and the 'Success' field is filled with 'Success'.

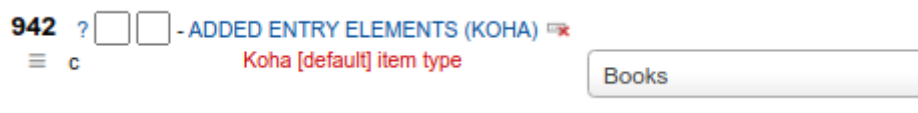
Use the **856\$u** field to enter the URL (Uniform Resource Locator) associated with a document. The URL of the ebook, audiobook or supporting website can be entered here. The library users can access the digital objects along with the book from the online catalog.



The screenshot shows a form field for the 856\$u field. The label is "856 ?" followed by a small box. Below it, the text "u" is followed by "Uniform Resource Identifier". To the right, there are icons for a document and a red 'x'. The input field contains the URL "https://www.audible.in/pd/Who-Will-Cry-When-You-Die-Audiobook".

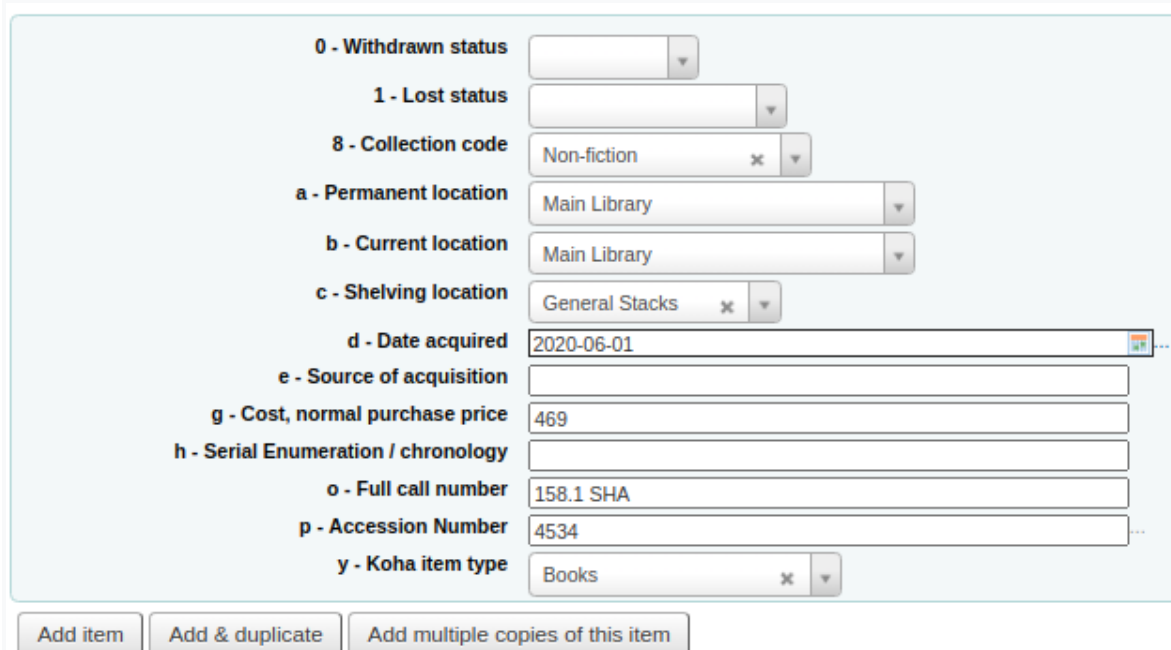
Enter the Item Type of the book.

To manage the Item Types, visit **Koha > Administration > Item Types**.



The screenshot shows a form field for the 942\$c field. The label is "942 ?" followed by a small box. Below it, the text "c" is followed by "Koha [default] item type". To the right, there is a button labeled "Books".

Save the **Biblio** after entering the details. It leads to the **Item** information page. Where we will enter the details regarding the copy of the book.



The screenshot shows the Item information page in Koha. It contains several fields for item details:

- 0 - Withdrawn status: dropdown menu
- 1 - Lost status: dropdown menu
- 8 - Collection code: dropdown menu (Non-fiction)
- a - Permanent location: dropdown menu (Main Library)
- b - Current location: dropdown menu (Main Library)
- c - Shelving location: dropdown menu (General Stacks)
- d - Date acquired: text field (2020-06-01)
- e - Source of acquisition: text field
- g - Cost, normal purchase price: text field (469)
- h - Serial Enumeration / chronology: text field
- o - Full call number: text field (158.1 SHA)
- p - Accession Number: text field (4534)
- y - Koha item type: dropdown menu (Books)

At the bottom, there are three buttons: "Add item", "Add & duplicate", and "Add multiple copies of this item".

d - Date acquired: Enter the date of purchase.

g - Cost, normal purchase price: Enter the price of the book.

o - Full call number: Enter the call number of the book. Add other information to book number to make the item unique (e.g. copy number, edition).

p - Accession Number (Barcode): Enter barcode (Accession number).

y - Koha item type: Select item type for copies of the book.

Click on **Add item** to save the item.

Search the online catalogue and find the book and see the item information.



Koha item type option in **Item information** is helpful to divide multiple copies of the book to various item types. For example, when we add five copies of a book to the catalogue, cataloguer can assign item type **Book** for four copies and **Reference** to one copy.

Open the online catalogue in a new tab of the browser and search for the record we have saved. See the Biblio and Item information on the online catalogue interface.

Home - Details for: Who Will Cry When You Die? Life Lessons From The Monk Who Sold His Ferrari

Normal view MARC view ISBD view

Who Will Cry When You Die? Life Lessons From The Monk Who Sold His Ferrari
by Sharma, Robin

Published by : Jaico Publishing House (Mumbai)
Physical details: 256p.
ISBN: 9788179922323.
Subject(s): Conduct of life | Success
Year: 2003

Tags from this library: No tags from this library for this title. Add tag(s)

★ ★ ★ ★ ★ Average rating: 0.0 (0 votes)

Holdings (1) Comments (0)

Item type	Current location	Call number	Status	Date due	Barcode
Books	Main Library General Stacks	158.1 SHA (Browse shelf)	Available		4534

Add another copy of the book

Often libraries buy copies of the books that are already available in the library, probably due to the demand from the user community. Sometimes we get new edition (in case of subject/textbooks) of the existing book, then we have to create a new record. If the editions and other details are the same, then we can add copies to the existing record. In such a context, we have to find and select the available record with items and add additional copies to the existing Biblio.

Search for the book either using the Barcode (Accession Number) or using other details like author and title.

Enter search keywords:

[Check out](#) [Check in](#) [Renew](#) [Search patrons](#) [Search the catalog](#)

It displays the bibliographic details of the book with item information.

Click **Edit** > **Edit items** to add a new copy of the book.

Who Will Cry When You Die? Life Lessons From The Monk Who Sold His Ferrari
 By: **Sharma, Robin**
 Material type: **Book**
 Publisher: **Mumbai**
 Description: **256p.**
 ISBN: **9788179922323**
 Subject(s): **Conduct of life | Success**
 DDC classification: **638.9**
 Online resource: **No**
 MARC Preview: **View**

Holdings **Comments**

Edit dropdown menu:

- Edit record
- Edit items**
- Edit items in batch
- Delete items in a batch
- Attach item
- Upload image
- Edit as new (duplicate)
- Replace record via Z39.50/SRU
- Delete record
- Delete all items

Enter the item information of the second copy of the book. Remember to enter the call number with the copy number (158.1 SHA, W;1 for the second copy of the book).

Search the online catalogue and find the book and see the item information.

Who Will Cry When You Die? Life Lessons From The Monk Who Sold His Ferrari
 by **Sharma, Robin**
 Published by: **Jaico Publishing House (Mumbai)**
 Physical details: **256p.**
 ISBN: **9788179922323**
 Subject(s): **Conduct of life | Success**
 Year: **2003**

Tags from this library: No tags from this library for this title. [Add tag\(s\)](#)

★ ★ ★ ★ ★ Average rating: 0.0 (0 votes)

Holdings (2) **Comments (0)**

Item type	Current location	Collection	Call number	Status	Date due	Barcode
Books	Main Library General Stacks		158.1 SHA (Browse shelf)	Available		4534
Books	Main Library General Stacks	Non-fiction	158.1 SHA;1 (Browse shelf)	Available		4535

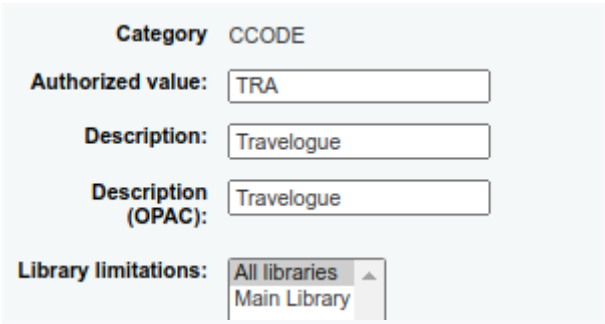
Two copies of the same book will be visible on the OPAC.

Use of Authorised values with cataloguing

Collection management is easy and very convenient with **Authorized values**. Libraries need to generate a collection wise report of records. For example, an engineering college requires a collection wise (Mechanical, Civil, Computer, etc.) list of books. Such reports have to be submitted to accreditation agencies (e.g. AICTE, MCI) every year. In the same way, libraries can create various collections like biography, autobiography, and travelogue. If we add the collections to the Authorised values in advance, the cataloguer can add each record into various collections. To create new values to **Collection Code**, visit

Administration > Basic parameters > Authorized values > CCODE

Click on the Add button against the **CCODE** to add a new value.



The screenshot shows a form for adding a new authorized value. The form is titled 'Category CCODE'. It contains four fields: 'Authorized value:' with the text 'TRA', 'Description:' with the text 'Travelogue', 'Description (OPAC):' with the text 'Travelogue', and 'Library limitations:' with a dropdown menu showing 'All libraries' and 'Main Library'.


1. Enter a shortcode for the new collection.
2. Enter the description for the staff client.
3. Enter the description for OPAC.
4. Select the library branch code.
5. Save the new collection.

While adding Item information, a Collection Code can be selected.

0 - Withdrawn status	<input type="text"/>
1 - Lost status	<input type="text"/>
8 - Collection code	Travelo... x ▾
a - Permanent location	<input type="text"/>
b - Current location	Fiction
c - Shelving location	Non-fiction
d - Date acquired	Reference
e - Source of acquisition	Travelogue
g - Cost, normal purchase price	600.00
h - Serial Enumeration / chronology	<input type="text"/>
o - Full call number	917.9804/5 JON
p - Accession Number	4536
y - Koha item type	Books x ▾

Collection information is helpful for the library users to find the location of the book on the shelf. See the **Collection Code** on the online catalogue.

Home > Details for: Into the wild /



Into the wild /

by **Krakauer, Jon.**

Published by : Anchor Books, (New York :)


Physical details: 207 p. : maps ;

ISBN:9780307387172.

Subject(s): [Adventure and adventurers](#) | [Wayfaring life](#) | [Wayfaring life](#) | [Hitchhiking](#) | [Hitchhiking](#)

Year: 2007

Holdings (1) Title notes Comments (0)

Item type	Current location	Collection	Call number	Status	Date due	Barcode
 BOOK Books	Main Library General Stacks	Travelogue	917.9804/5 JON (Browse shelf)	Available		4537

Enable a new field into Biblio

Koha users can enable or disable fields from the **Biblio** part. For example, **245\$b** for **Remainder of title/Subtitle**. Imagine that **245\$b** hidden in Biblio. Here are the steps to follow to enable the 245\$b field and make it visible in Biblio.

Visit **Koha > Administration > MARC bibliographic framework**

Click on the **Actions** button against the desired Bibliographic framework. Select the **MARC structure**.

BKS	Books, Booklets, Workbooks	Actions ▼ <input checked="" type="checkbox"/> MARC structure Edit Delete Export Import
CF	CD-ROMs, DVD-ROMs, General Online Resources	
FA	Fast Add Framework	
IR	Binders	
VT	Videos	

Search for the specific MARC field.

Tag ▲	Lib	Repeatable	Mandatory	Auth value	Indicator 1	Indicator 2	Actions
245	TITLE STATEMENT	No	Yes				1
246	VARYING FORM OF TITLE	Yes	No				
247	FORMER TITLE	Yes	No				
250	EDITION STATEMENT	No	No				

Edit tag
 View subfields 2
 Edit subfields
 Delete

1. Click on the **Actions** button.
2. Click on **View subfields** to enter inside the details.

Subfield	Text	Constraints	Actions
6	Linkage	subfield ignored	Edit Delete
8	Field link and sequence number	subfield ignored	Edit Delete
a	Title	Tab:0, Koha field: biblio.title, Not repeatable, Mandatory,	Edit Delete
b	Remainder of title	subfield ignored	Edit Delete
c	Statement of responsibility, etc	subfield ignored	Edit Delete

Click on the **Edit** button against b Remainder of title.

Tag 245 Subfield constraints

6 8 a **b** c d e f g h k n p s New

Basic constraints

Subfield code:

Text for librarian:

Text for OPAC:

Repeatable: ☐

Mandatory: ☐

Managed in tab: (Ignore means that the subfield does not display in the record editor)

Whole MARC tags are organized into ten tabs (0 to 10) on the MARC Bibliographic framework in Koha. Select the tab number from **Managed in tab** list to display the field on a particular tab. Select **Ignore** option to hide the field.

Open the Biblio and select the specific MARC Bibliographic Framework. See the field (245\$b) that appeared on the Biblio.

245 ? ☐ ☐ - TITLE STATEMENT

a Title

b Remainder of title

Who Will Cry When You Die?

Life Lessons From The Monk Who Sold His Ferrari

Edit a catalogue record

Librarians need to edit the details of books due to various reasons; e.g. to correct the errors, to add the missing information.

Search the document details, open the record, and edit the details.

Enter search keywords:

bc:4534

[Check out](#)
[Check in](#)
[Renew](#)
[Search patrons](#)
[Search the catalog](#)



Use the search operator **bc:** to search and retrieve the correct record using the the accession number. Example, **bc:2210** will retrieve the document with 2210 accession number.

You can also search and find the record using either accession number/title/author details.

Enter search keywords:

Robin Sharma

[Check out](#)
[Check in](#)
[Renew](#)
[Search patrons](#)
[Search the catalog](#)

Who Will Cr
By: Sharma,
 Material type:
 Publisher: Mum
 Description: 25
 ISBN: 9788179
 Subject(s): Con
 DDC classificat
 Online resource
 MARC Preview

Edit record **1**
 Edit items **2**
 Edit items in batch
 Delete items in a batch
 Attach item
 Upload image
 Edit as new (duplicate)
 Replace record via Z39.50/SRU
 Delete record
 Delete all items

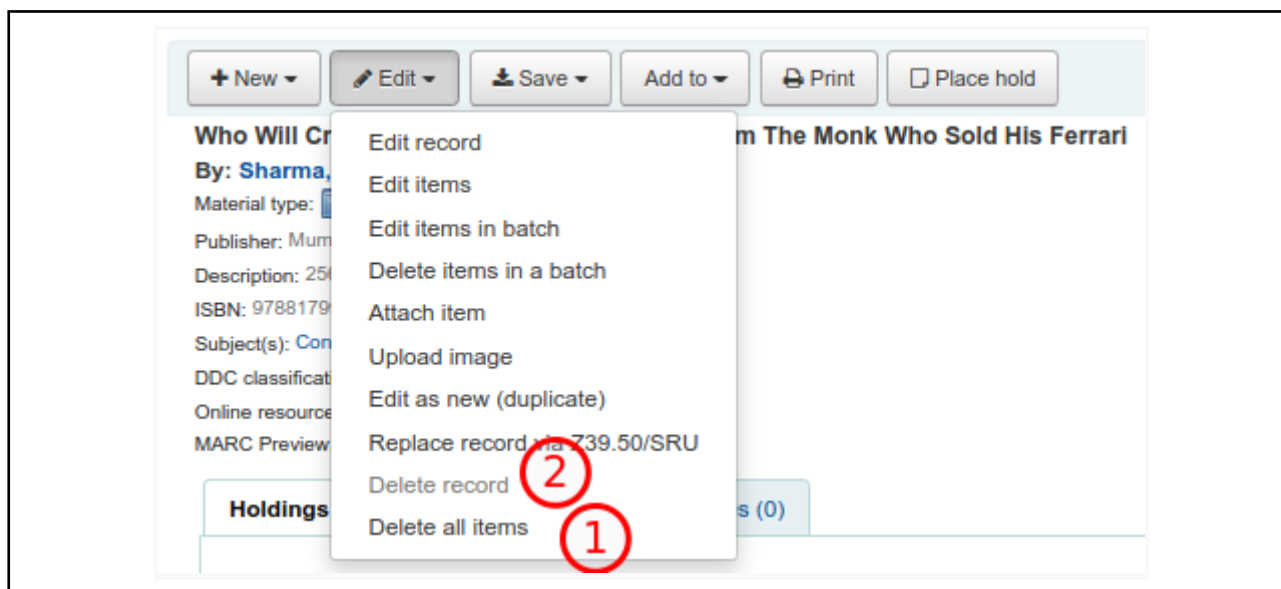
m The Monk Who Sold His Ferrari

s (0)

1. Select **Edit > Edit record** for edit the **Biblio** details.
2. Select **Edit > Edit items** to edit the **Item** information.

Delete catalogue record

Search and find the record. First, delete the Items, and next delete the record.



Koha allows deleting a Biblio only after deleting all the items with the record.

Batch item modification

This feature is useful for library professionals to change a particular aspect in an Item in bulk mode. For example, an item type of a batch of records can be changed into another one in one stretch. This feature is available at **Koha > Tools > Batch item modification**.

Or scan items one by one

Barcode list (one barcode per line):

4534
4535
4536
4538
4539
4555

1

Use default values

☐ Populate fields with default values from default framework

2

Continue Cancel

1. Enter the barcodes of the items, otherwise enter a text file containing barcodes.
2. Click on the **Continue** button.

The screen moves to the item edit page. Make changes in item information.

t - Copy number

u - Uniform Resource Identifier

v - Cost, replacement price

w - Price effective from

x - Non-public note

y - Koha item type

z - Public note

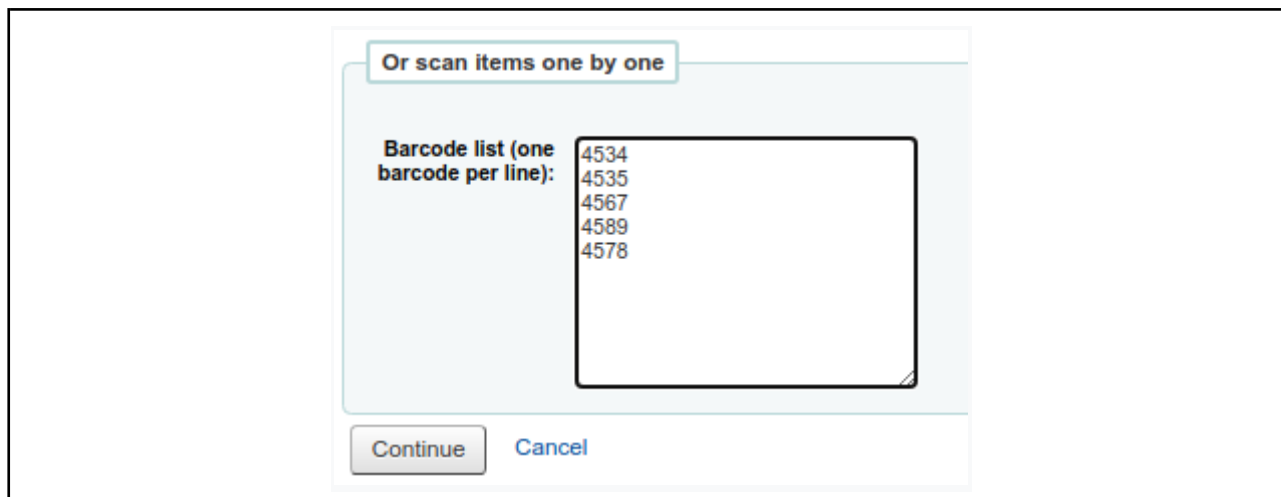
Reference

Save Cancel

Save the item information. The changes take effects in all of the records in the batch. Search the records in Staff Client or OPAC to see the changes.

Batch item deletion

This feature allows you to delete a group of items. Visit **Koha > Tools > Batch item deletion**.



The next screen will list out the items to delete. Select the items fully or partially to delete.

Label creation

Label Creator assists to generate barcodes, and spine labels. Here we are going to learn to create barcodes suitable to print on a self-adhesive paper containing 65 labels in an A4 sheet (NovaJet paper), which can be used for Inkjet or laser printing.

Open, **Tools > Label creator**. We need to create a Template and Layout to define the barcode on paper.

Create a new template

The template defines the paper and barcode measures. Open **Tools > Label creator > New > Label Template**. See the measures of 65 stickers on A4 adhesive paper.

Template ID: 24

Template code: NovJet 13x5 Label

Template description: Default description

Units: US Inches

Page height: 11.81 in

Page width: 8.26 in

Label width: 1.58 in

Label height: 0.9 in

Top page margin: 0.3 in

Left page margin: 0.1 in

Top text margin: 0.52 in

Left text margin: 0.1 in

Number of columns: 5

Number of rows: 13

Gap between columns: 0.03 in

Gap between rows: -0.02 in

Profile: No Profile/N/A

Save Cancel

Create a new layout

A layout is used to define the fields (e.g. barcode, call number) that want to appear on your labels. Use the below format to prepare a layout for a label with an accession number and call number. Open **Tools > Label creator > New > Layout**.

Layout name: Nova Jet 13x5 Label

Choose barcode type (encoding): Code 39

Choose layout type: Biblio/Barcode

Layout name: The name of Layout.

Choose the barcode type: Barcode encoding type.

Choose layout type: Select the combination of information to display on the label.

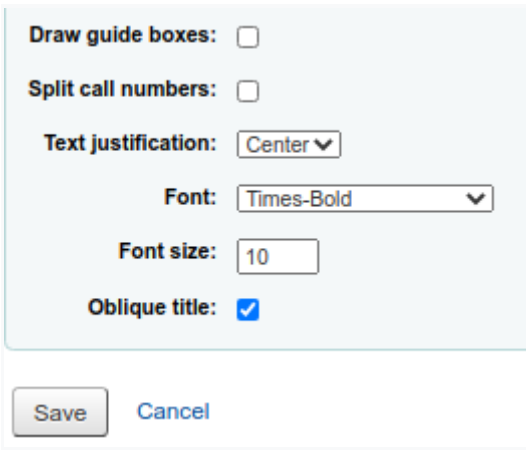
Bibliographic data to print

☒ Choose order of text fields to print

1 itemcallnumber title author

☐ List Fields

Choose the bibliographic elements to be included on the label. Choose **List Fields** to enter the MARC fields of the bibliographic information (e.g. 952o or Item Call Number).



Draw guide boxes: ☐

Split call numbers: ☐

Text justification: Center ▾

Font: Times-Bold ▾

Font size: 10

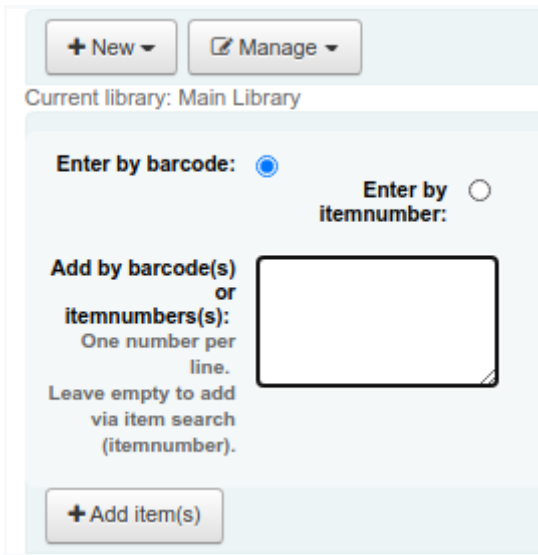
Oblique title: ☒

Save Cancel

Choose font type and size.

Create a new label batch

Add a few record details to generate labels. Open **Tools > Label creator > New > Label batch**.



+ New ▾ Manage ▾

Current library: Main Library

Enter by barcode: ☒ Enter by itemnumber: ☐

Add by barcode(s) or itemnumbers(s):

One number per line.

Leave empty to add via item search (itemnumber).

+ Add item(s)

Either add the barcodes of the records into the box or search and find the records by clicking on **Add item(s)** button.

Search for items

Barcode

Added on or after date:

(DD/MM/YYYY)

Added on or before date:

(DD/MM/YYYY)

Various search options are available to find and select the records to generate labels.

Search results

Results 1 through 3 of 3

☒ Select all
 ☒ Clear all

Who Will Cry When You Die?

by Sharma, Robin [BK], Jaico Publishing House Mumbai 2003, 256p., ISBN: 9788179922323

Add item	Call number	Accession date	Barcode	Select
<input type="button" value="+ Add"/>	158.1 SHA;1	2020-05-08	4535	<input type="checkbox"/>
<input type="button" value="+ Add"/>	158.1 SHA	2020-05-08	4534	<input type="checkbox"/>

Select and add the records.

Enter by barcode: ☐

Enter by itemnumber: ☒

Add by barcode(s) or itemnumbers(s):
One number per line.
Leave empty to add via item search (itemnumber).

Biblio number of the records added to the box. Click on **Add items(s)** to the next step.

[+ Add item\(s\)](#)
[Save description](#)
[Remove selected items](#)
[Delete batch](#)
[Remove duplicates](#)
[Export selected items](#)
[Export full batch](#)

Items in batch number 2

Showing 1 to 5 of 5 Show entries < Previous Next > Search: [Clear filter](#)

Label number	Summary	Item type	Call number	Barcode	Actions	Select
1	Who Will Cry When You Die Sharma, Robin	Books	158.1 SHA;1	4535	Delete Export	<input type="checkbox"/>
2	Who Will Cry When You Die Sharma, Robin	Books	158.1 SHA	4534	Delete Export	<input type="checkbox"/>

Click on **Export full batch** to select all the records.

1 batch to export

Select a template to be applied:

Select a layout to be applied:

Enter starting label position (for PDF):

[Export](#) [Cancel](#)

Choose the Template and Layout.

Click on the following links to download the exported batch(es).

Label Batch Number 3

[Download as PDF](#)
[Download as CSV](#)
[Download as XML](#)

[Done](#)

Download the label sheet by clicking on **Download as PDF**.

 4 5 3 5 158.1 SHA;1	 4 5 3 4 158.1 SHA	 4 5 3 7 917.9804/5
--	--	--

Open the saved PDF file. Print the labels.

The same way, make changes in Layout and prepare spine label.



Koha users can make use of other label creators. gLabels is Free software and distributed under the terms of the GNU General Public License (GPL). It supports various peel-off papers. Koha users can print labels with ordinary laser/inkjet printers. Apply the command on the terminal to install gLabels,

```
sudo apt install glabels
```

Inventory (Stocktaking)

Inventory feature assists the libraries in stock taking. After the inventory process is over, the library gets a picture of missing books. Here are the steps to initiate stocktaking with Koha.

Prepare text file of barcodes

Prepare a text file of barcodes (accession number) either using barcode scanner visiting shelves. Otherwise, prepare the text file with barcodes manually. If you have collected the barcodes in other formats like a spreadsheet, copy them into the text file.

```
File Edit Search View Document Help
4537
BV1004
BV1005
2536
2537
2539
2540
2541
2542
```

Inventory process

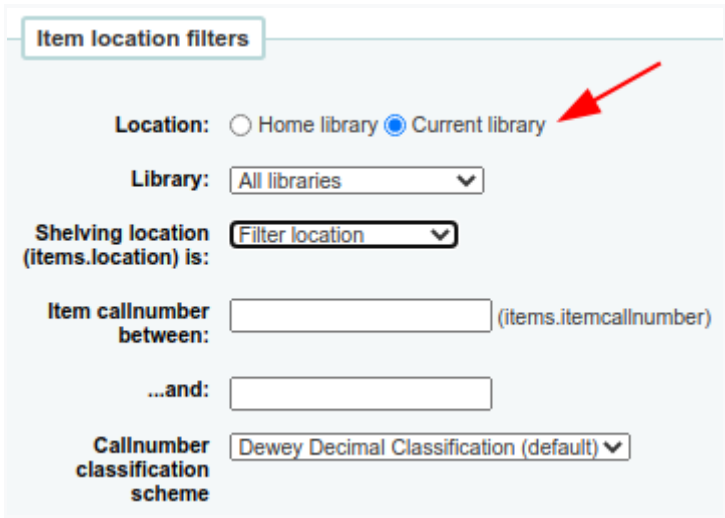
Visit the Tools > Inventory and upload the text file.

Inventory

Use a barcode file

Barcode file: No file chosen

Set inventory date to:



Item location filters

Location: ☐ Home library ☒ Current library

Library:

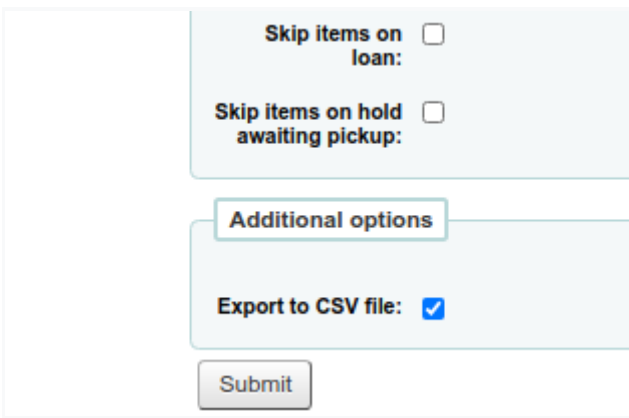
Shelving location (items.location) is:

Item callnumber between: (items.itemcallnumber)

...and:

Callnumber classification scheme:

Enable necessary filtering options.



Skip items on loan: ☐

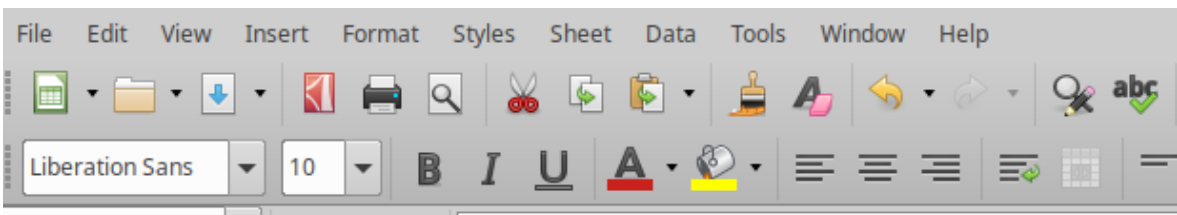
Skip items on hold awaiting pickup: ☐

Additional options

Export to CSV file: ☒

Submit

Check **Export to CSV file** box to generate the result in a CSV file. Click on **Submit** button to start the inventory process with Koha. The CSV file will be downloaded to the computer.



	C	D	E	F	G	H
1	Barcode	Item number (internal)	Permanent library	Shelving location	Call number	problem
2	4544	10	MAIN	General Stacks	917.9804/5 JON	missing
3	4543	9	MAIN	General Stacks	917.9804/5 JON	missing
4	4535	2	MAIN	General Stacks	158.1 SHA;1	missing
5	4541	7	MAIN	General Stacks	917.9804/5 JON	missing
6	4540	6	MAIN	General Stacks	917.9804/5 JON	missing
7	4534	1	MAIN	General Stacks	158.1 SHA	missing
8	4542	8	MAIN	General Stacks	917.9804/5 JON	missing

Open the CSV file. Inventory report with missing documents information available in the CSV file.

Conclusion

A cataloguer can describe a document in detail with the available MARC 21/UNIMARC format. Koha displays 999 MARC tags with the cataloguing module. Display of the whole MARC tags on the bibliographic framework may create confusion among cataloguers. The Koha users can customise the bibliographic framework by retaining the commonly used fields (e.g. ISBN, Author, Title, Place, Publisher, year) for the ease of cataloguing. Keep uniformity in bibliographic details for the generation of error-free bibliographic information and maximize the visibility of library collection among the user community.

Exercise

1. Create catalogue records of two books (your favourite books) and create three copies of the same.
2. Delete a catalogue record including all items and record.

For further reading

MARC standards

<http://www.loc.gov/marc/>

Z39.50A Primer on the Protocol: A Primer on the Protocol

https://www.niso.org/sites/default/files/2017-08/Z3950_primer.pdf

Patron management

Learning objectives

Creation of library and staff users.

Cancel/close membership.

Introduction

The management of library users and staff is part of the Patron module with Koha. It includes the creation, modification, suspension, and deletion of patrons. Management of overdue notifications by email and SMS is also handled by the patron module.

Add a patron

Here the term **patron** denotes the library user. Following are the steps to create normal library users like students and teachers. We are going to create a patron category for Faculty Members.

Make sure that you have created patron categories at **Koha Administration > Patron categories**.

To add a new patron, **Koha > Patrons > New patron**.



Select a patron category.

Patron Identity

Salutation:

Surname: *Required*

First name:

Date of birth: 

Age: 39 years 6 months

Initials:

Other name:

☐ Female ☐ Male ☒ None specified



To add more salutations like Dr., Prof, visit,

Koha Administration > Global system preferences > Patrons > BorrowersTitles

Contact

Guarantor surname:
Non-patron guarantor surname

Guarantor first name:
Non-patron guarantor first name

Primary phone:
Shows on transit slips

Secondary phone:

Other phone:

Primary email:
Shows on transit slips

Secondary email:

Enter the contact details of the patron to get notifications via email or SMS.

Library management

Card number: Required

Card number must be between 1 and 32 characters.
AutoMemberNum is set to enabled, but cardnumber is ma

Library: Main Library ▼ Required

Category: Faculty Member ▼ Required

Sort 1:

Sort 2:

Enter the library admission number or any other unique number in the **Card number** to identify the patron.

OPAC/Staff login

Username:

Password:

Minimum password length: 3

Confirm password:

If the OPAC is available in the campus network or on the Internet, give a username and password for users to login.



Filed names in red-colored letters are mandatory to fill. Librarians can define the mandatory fields. Visit **Koha > Administration > Global system preferences > Patrons > BorrowerMandatoryField**

After entering the patron details, save it. An image of the library user can be uploaded to the profile after saving the patron details.

Import patrons bulk

Koha allows importing patron details from a CSV file. This time-saving feature is useful for schools, colleges, and schools where a large number of patrons join every year. Here are the steps to import patron details available in a spreadsheet file.

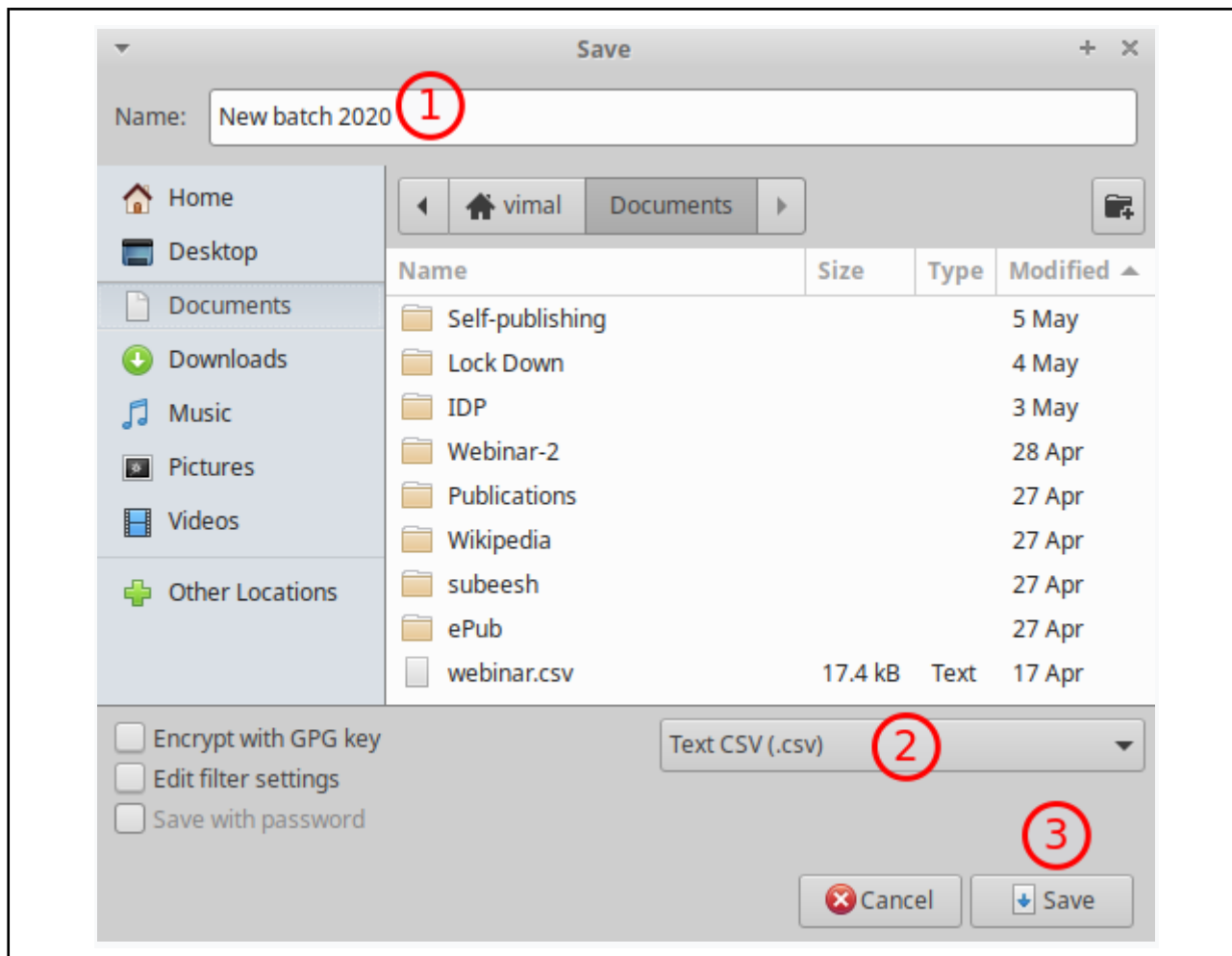
Prepare the patron list

Collect the details of patrons from the institution office. Often such information is maintained in a spreadsheet file. Decide which details to import (e.g. admission number, first name, surname, email, etc.). Copy the columns, which contains the desired patron details, into a new spreadsheet. The header of the spreadsheet contains the field names matching with the '**borrowers**' table in the Koha database. The table **borrowers** store patron information. Visit **Koha > Tools > Import patrons** to see all field names in the Koha database. Certain mandatory fields are also there. The mandatory fields are '**surname**', '**branchcode**', and '**categorycode**'. Very detailed instructions, to prepare the spreadsheet, are available at **Tools > Import patrons**. Here is a sample spreadsheet filled with patron details.

	A	B	C	D	E	F
1	cardnumber	surname	address	branchcode	categorycode	
2	8000	Jasimudeen S	Research Scholar	MAIN	RES	
3	8001	Prajeesh B	Research Scholar	MAIN	RES	
4	8002	Gireesh Kumar	Research Scholar	MAIN	RES	
5	8003	Siju Jose	Research Scholar	MAIN	RES	
6	8004	Geetha MP	Research Scholar	MAIN	RES	
7						

1. Field names should be the same as in the borrower's table in the Koha database. Field names are case sensitive. Don't put space between words.
2. Check the **Koha Administration > Libraries** and confirm the branch code.
3. Check the **Koha Administration > Patron categories** and confirm the category code.

If anything is wrong with the field names and mandatory fields in the spreadsheet, it will end up in the failure of patron import. Save the file into CSV format, **File > Save As**.



Upload the spreadsheet in CSV format into **Koha > Tools > Import patrons**.



First practice with a csv file with minimum fields. Later increase the number of fields and try to import. Field names are case sensitive. Strictly follow the field names as such in **Tools > Import patrons**.

Cancel/close library membership

The Librarian has to close the patron account after the expiry of the membership period. Options are available to add the reason to cancel membership. Librarian can enter a note about membership cancellation.

Search and find a patron account to close. Find **Patron restrictions** in the bottom of the profile page. Click on **Add manual restriction**.

Vimal Kumar V (100)

Main Library
 No city stored.
 No phone stored.
 No email stored.
 Category: Research Scholar (RES)
 Home library: Main Library
 Borrowernumber: 2
 Updated on 31/05/2020 12:52

[Edit](#) [+ Add guarantee](#) [Change password](#)

Checking out to Vimal Kumar V (100)
 Enter item barcode:
 [Check out](#)

[Checkout settings](#)

[0 Checkouts](#) [0 Holds](#) **Restrictions**

Patron is currently unrestricted.
[+ Add manual restriction](#)

Library membership of a student can be closed after the programme is over.

[0 Checkouts](#) [0 Holds](#) **Restrictions**

Patron is currently unrestricted.

Add manual restriction

Comment:

Expiration: [Clear date](#)

[Add restriction](#) [Cancel](#)

Comment: Add a note in the comment box. Give a reason for the cancellation of membership.

Expiration: For discharge of a student no need to enter anything in the **Expiration box**. Date to be filled for a short term suspension of library user (e.g. 6 months).

Add restriction: Click on the Add **restriction** button to save the changes.

Vimal Kumar V (100)

Main Library
 No city stored.
 No phone stored.
 No email stored.
 Category: Research Scholar (RES)
 Home library: Main Library
 Borrowernumber: 2
 Updated on 31/05/2020 12:58

Checking out to Vimal Kumar V (100)
Cannot check out!
 > **Restricted:** Patron's account is restricted with the explanation:
Programme finished on 2020
 View restrictions Override restriction temporarily

Messages:
 + Add a new message

0 Checkouts **0 Holds** **Restrictions**

Patron has nothing checked out.

The patron is not allowed to check out the books after the restriction is placed. The Librarian has the power to revoke the restriction.

0 Checkouts **0 Holds** **Restrictions**

Type	Comment	Expiration	Created	
Manual	Programme finished on 2020	Indefinite	31/05/2020	Remove

+ Add manual restriction

Librarians can lift the restriction on users. The cancelled membership of a UG student can be revoked when he joins the PG course in the same college in the next academic year.

Add a staff patron

Adding staff patrons in Koha will help the library staff in various sections to get individual login power to perform routine tasks with various modules (e.g. Circulation, Acquisition, Cataloging, etc.).

Open the patron account. Make sure that the user name and password are created for the user.

Go to **More > Set permissions**

The screenshot shows the 'Checking out to Vimal Kumar V (100)' form. At the top, there is a toolbar with buttons: Edit, Add guarantee, Change password, Duplicate, Print, Search to hold, Add message, and More. The 'More' button is clicked, opening a dropdown menu with the following options: Renew patron, Set permissions (highlighted with a red arrow), Delete, Update child to adult patron, and Export today's checked in barcodes. Below the toolbar, the form has a title 'Checking out to Vimal Kumar V (100)', a label 'Enter item barcode:', an input field, a 'Check out' button, and a 'Patron is an adult' status indicator. A 'Checkout settings' link is at the bottom left.

Select the modules to grant permission.

The screenshot shows the 'Set permissions for Vimal Kumar V' dialog box. It has a toolbar with buttons: Save, Cancel, Show all, Hide all, and a Filter input field. Below the toolbar, there is a list of permissions with checkboxes:

- ☐ Access to all librarian functions (*superlibrarian*)
This permission grants access to all areas. If selected, specific sub-permissions cannot be selected.
- ☐ Check out and check in items (*circulate*) [Show details](#)
- ☒ Staff access, allows viewing of catalogue in staff client (*catalogue*) *Required for staff login.*
- ☐ Manage Koha system settings (Administration panel) (*parameters*) [Show details](#)

 A red arrow points to the 'Check out and check in items' checkbox.

Check the desired modules. Selection of the **Catalogue** module is mandatory for staff login.

Conclusion

Patron module with Koha has robust features to manage user accounts. Staff patron management is convenient for libraries with many branches and sections. Umpteen options are available with the Patron module to manage users.

Exercise

1. Create the user account for two library users with username and passwords.
2. Create a staff patron with privileges on circulation, cataloguing, and reporting modules.
3. Close the membership of a patron.

Circulation module

Learning objectives

Understand the processes of check-in and check-out of books.

Know the processes of reservation of books.

Introduction

The check-in (issue), check-out (return), and reservation of books form the main processes in the circulation module. Remember to configure patron categories, patron notifications, notice templates, calendar, circulation, and fine rules for the well functioning of the Circulation Module.



Visit **Koha > Koha Administration > Global system preferences > Circulation**

Go through the various preferences regarding the Circulation module and configure it. Visit **Koha > Tools** and configure **Notices & Slips, Overdue notice/status triggers**, and **Calendar**.

Check-out (issue) of books

Circulation functions with Koha can be initiated from the universal box on the staff client. Otherwise, go to the circulation module by clicking the link from the Koha staff client home page.

Enter the patron card number/surname/first name to the **Check Out** option in a universal box. Libraries can make use of input devices like barcode/QR code/RFID readers to input accession numbers.


Enter patron card number or partial name:

Vimal

Submit

Check out Check in Renew Search patrons Search the catalog

Next, enter the accession number of the book and press the **Check Out** button.

Vimal Kumar V (100)

 Main Library
His library card

Edit
+ Add guarantee
Change password
Duplicate

Checking out to Vimal Kumar V (100)
 Enter item barcode:
 Check out
Checkout settings

Check-in (return) books

Enter the barcode of the book into the **Check-in** box.

Scan a barcode to check in:
 Submit
Check out **Check in** Renew Search patrons Search the catalog

Check in
 Enter item barcode:
 Check in
Checkin settings

Checked-in items
Columns Export

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Record-level itemtype	Item type	Patron	Note
31/05/2020 23:59	Into the wild /	Krakauer, Jon.	4540	Main Library	Main Library	General Stacks	917.9804/5 JON	Books	Books Travelogue	Vimal Kumar V, (Research Scholar)	

Give other barcodes to check-in.

Hold (Reservation) books

Reservation of books offers the facility for the users to hold the book that is either on shelves or checked out by other users. Here are the steps to reserve a book already issued to someone. First, search and find the book from the staff client to reserve.

New

Edit

Save

Add to

Print

Place hold

Into the wild /
By: Krakauer, Jon
Material type: Book
Publisher: New York : Anchor Books, [2007]
Description: 207 p. : maps
ISBN: 9780307387172
Subject(s): Adventure and adventurers | Wayfaring life | Wayfaring life | Hitchhiking | Hitchhiking
DDC classification: 917.9804/5
MARC Preview: [Show](#)

Holdings (1)

Descriptions


Acquisition details

Images (0)

Activate filters

Select all

Clear all

	Item type	Current location	Home library	Collection	Call number	Status
	BOOK Books	Main Library	Main Library General Stacks	Travelogue	917.9804/5 JON	Checked out to Vimal Kumar V (100) due 29/05/2020 23:59

Click on the **Place hold** button to proceed with the reservation process.

Place a hold on Into the wild /

Search patrons or clubs

Patrons

Clubs

Enter patron card number or partial name:

Enter the card number/name of the library user who wishes to reserve the book.

Hold details

Patron: Abin KI (2623)
Estimated priority: 1
Notes:
Pickup at: Main Library ▼
Hold expires on date: Clear date
Hold next available item ☐
Place hold

Place a hold on a specific item

Showing 1 to 1 of 1 Search:

Hold	Item type	Barcode	Home library	Last location	Collection	Call no.
	BOOK Books	4537	Main Library	Main Library	Travelogue	917.9804/5 JON

Place hold

Click on the **Place hold** button to confirm the reservation.

Place a hold on **Into the wild /**

Search patrons or clubs

Patrons Clubs
Enter patron card number or partial name:
 Search

Existing holds

Priority		Patron	Notes	Date	Expiration	Pickup library	Details			
1 ▼	↑ ↓	Mr Abin KI (2623)		09/05/2020	<input type="text"/>	Main Library ▼	Only item 4537	↑ ↓	×	Suspend until <input type="text"/> Clear date
2 ▼	↑ ↓	Jasimudeen S (102)		09/05/2020	<input type="text"/>	Main Library ▼	Next available	↑ ↓	×	Suspend until <input type="text"/> Clear date
3 ▼	↑ ↓	Mr Ramnath Raghathan (101)		09/05/2020	<input type="text"/>	Main Library ▼	Next available	↑ ↓	×	Suspend until <input type="text"/> Clear date

Update hold(s)

A queue generates when more than one user places the hold. See the priority list of patrons waiting to receive the book.

Conclusion

Remember to edit the content in notices templates (**Tools > Notices**) to add library details (e.g. contact information) and customise the message part if necessary. Run Koha on trial mode to check the due date and calculate fine precisely.

Exercises

1. Practice Check out and Check-in for two patrons.
2. Hold (Reserve) one book for three patrons.

Reports module

Learning objective

Give an insight into how the reports module works.

Know how to create reports.

Introduction

Report module helps the librarian to generate various types of reports regarding books, patrons, and circulation, etc. Different types of reports are available for the convenience of the users: ready to use reports and custom reports. Ready to use report tools can run with a graphical interface and the librarian can generate a report without the knowledge of SQL query.

Different ways to generate reports

Koha offers various possibilities to create reports. Users can generate reports for various purposes including data from various modules. Different tables in the Koha database store data on patrons, documents, and circulation. The report module helps to combine information from different tables in the Koha database and display using reports.



1. The guided report assists to generate reports through the step by step process by picking data fields.

2. The user can generate reports from SQL queries either by writing down the query or borrowing from other places.
3. Saved reports are organised in **Use Saved**.
4. Some frequently used reports are available.



Database schema website helps to familiarize with the structure of the Koha database. <http://schema.koha-community.org>. Familiarisation with the tables and fields will help to create SQL query for report generation.

Saved reports

Saved reports are listed inside, **Reports > Saved Reports** section. Users can run the saved reports at any time.

Saved reports

AllAccountsAcquisitionsCatalogCirculationPatronsSerials

Showing 1 to 10 of 10 Show 20 entriesFirstPreviousNextLastSearch:Clear filterColumnsExport

ID	Report name	Type	Group	Subgroup	Notes	Author	Creation date	Last edit	Last run	Public	JSON URL	Cache expiry (seconds)	Saved results	Actions
<input type="checkbox"/>	1	Accession Register	1	Catalog		(0)	07/05/2013	07/05/2013 15:03		No	/cgi-bin/koha/svc/report?id=1	300		<div>▶ Run</div>
<input type="checkbox"/>	2	Date wise List of Books	1	Catalog		(0)	07/05/2013	25/10/2014 13:00		No	/cgi-bin/koha/svc/report?id=2	0		<div>▶ Run</div>

Click on the **Run** button to initiate a saved report.

Create a report from SQL

Libraries can create reports from scratch with the help of the SQL query. Structured Query Language is a standard Database language that is used to create, maintain and retrieve the data from the relational database. The SQL query is the engine that runs behind Koha reports. Reports interact with the Koha database using the SQL query to fetch and display the report.

Koha projects maintain a library of SQL queries for reports at https://wiki.koha-community.org/wiki/SQL_Reports_Library. The link to the Report Library can be located on the left side of the Koha report page.

Let's check how to create a report using SQL query borrowed from Koha SQL Report Library. Visit the Koha SQL Report Library website and find a report. Copy the SQL query from the Koha SQL Report library website.

All Checked Out Books

- **Developer:** Nicole C. Baratta, ByWater Solutions
- **Module:** Circulation
- **Purpose:** A report to show you all items that are currently checked out and who they're checked out to
- **Status:** Complete

```
SELECT c.date_due, p.surname, p.firstname,
       p.phone, p.email, b.title, b.author,
       i.itemcallnumber, i.barcode, i.location
FROM issues c
LEFT JOIN items i ON (c.itemnumber=i.itemnumber)
LEFT JOIN borrowers p ON (c.borrowernumber=p.borrowernumber)
LEFT JOIN biblio b ON (i.biblionumber=b.biblionumber)
ORDER BY c.date_due ASC
```

Return to Koha Staff Client. To create a new report from SQL Query, open **Koha > Reports > Create from SQL**.

Create report from SQL

Report name: Required

Report group: ☒ Select

☐ or create:

Report subgroup: ☒ Select

☐ or create:

Report is public:

Cache expiry:

Notes:

SQL:

```
1 SELECT c.date_due, p.surname, p.firstname,
2       p.phone, p.email, b.title, b.author,
3       i.itemcallnumber, i.barcode, i.location
4 FROM issues c
5 LEFT JOIN items i ON (c.itemnumber=i.itemnumber)
6 LEFT JOIN borrowers p ON (c.borrowernumber=p.borrowernumber)
7 LEFT JOIN biblio b ON (i.biblionumber=b.biblionumber)
8 ORDER BY c.date_due ASC
```

1. Give a name for the report.
2. Select a category for the report.
3. Paste the SQL query into the SQL box.

Run the report and see the result.

Items currently Checked out

Total number of results: 3.

Batch operations with 3 visible records ▼

Rows per page: 20 ▼

issuedate	date_due	barcode	title	author	firstname	surname	cardnumber
2020-05-09 00:50:45	2020-05-29 23:59:00	4535	Who Will Cry When You Die?	Sharma, Robin		Jasimudeen S	102
2020-05-09 00:50:15	2020-05-29 23:59:00	4534	Who Will Cry When You Die?	Sharma, Robin		Abin KI	2623
2020-05-09 00:21:03	2020-05-29 23:59:00	4537	Into the wild /	Krakauer, Jon.		Vimal Kumar V	100

The User can either view or download the report result. The report can be downloaded as either CSV or ODS. CSV format is suitable to open with applications like MS Excel and LibreOffice Calc (Open Source Spreadsheet application). ODS (Open Document Spreadsheet) files can only be opened using LibreOffice/OpenOffice.

Conclusion

Report module offers flexible ways to generate reports for both ordinary and expert Koha users. SQL Report Library website offers hundreds of ready to use SQL queries for report generation.

Exercises

1. Visit the Koha SQL Report Library website. Find and copy a few SQL queries of reports and create reports.

For further reading

Koha Database schema

<http://schema.koha-community.org/>

SQL Report Library

https://wiki.koha-community.org/wiki/SQL_Reports_Library

Serials management

Learning objectives

Know the process of creating a periodical subscription.

Know how to receive a periodical issue.

Describe the procedure to manage bound volumes.

Introduction


The Serials module assists in managing the subscription of journals, magazines, newspapers etc. This module is helpful to record and track periodicals. Library users can quickly know the availability of periodicals through an online catalogue.

Create a subscription

The library can start to create a subscription of periodicals with Koha when the first issue arrives.

Create a Biblio

First, we need to create a catalogue record of the periodical. Only need to create a **Biblio** of the record. Open cataloguing module and create a Biblio, **Koha > Cataloguing**.

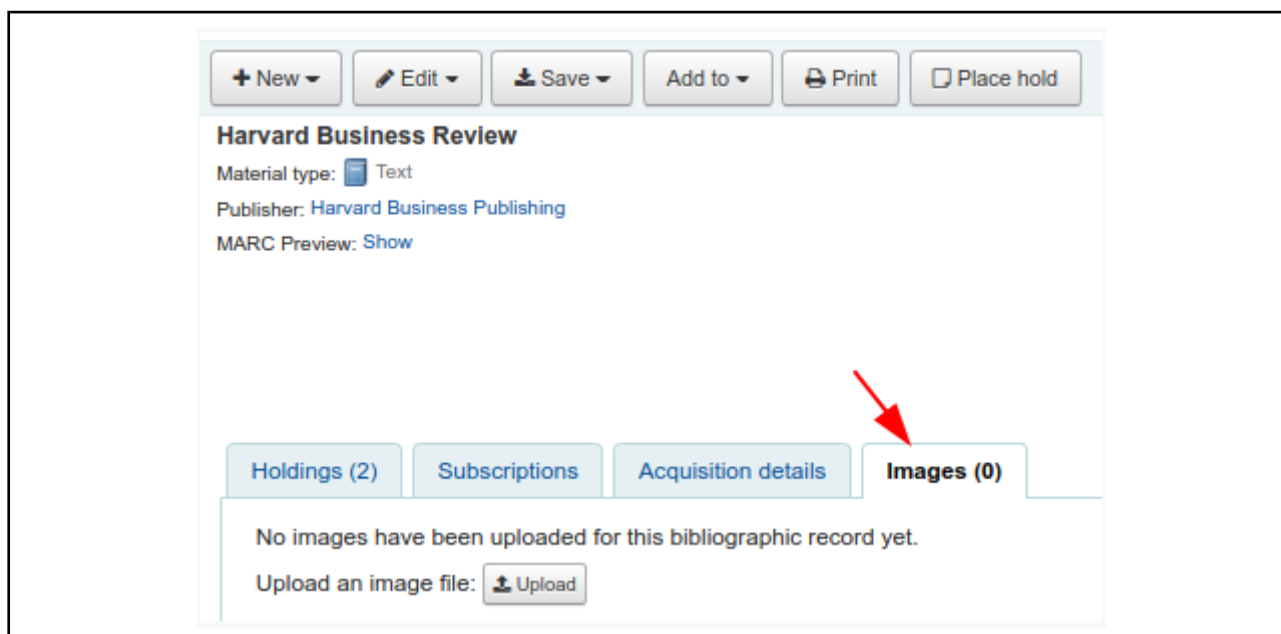


The screenshot shows the Koha Cataloguing interface. On the left, there are two tabs labeled 'a' and 'b'. The 'a' tab is selected. In the center, there is a label '245 ?' followed by a red star icon. To the right of this label is a text input field containing the text 'Harvard Business Review'. Below the input field, there is a label 'Title' in red. To the left of the input field, there is a label 'Remainder of title' in blue. The input field is currently empty, and the text 'Harvard Business Review' is visible in the field below it.

Enter the details of the journal including ISSN, title, publisher etc. Save the **Biblio**. No need to save the **Item information**.



Adding a journal jacket to catalogue records will be more attractive and users can easily recognise each journal while searching OPAC. Journal cover pictures can be collected from the publisher website. Upload the journal cover to the Biblio.



Harvard Business Review

Material type: Text

Publisher: Harvard Business Publishing

MARC Preview: Show

Holdings (2) Subscriptions Acquisition details **Images (0)**

No images have been uploaded for this bibliographic record yet.

Upload an image file:

Click on the **Images** tab. Upload the journal cover.

Add a vendor

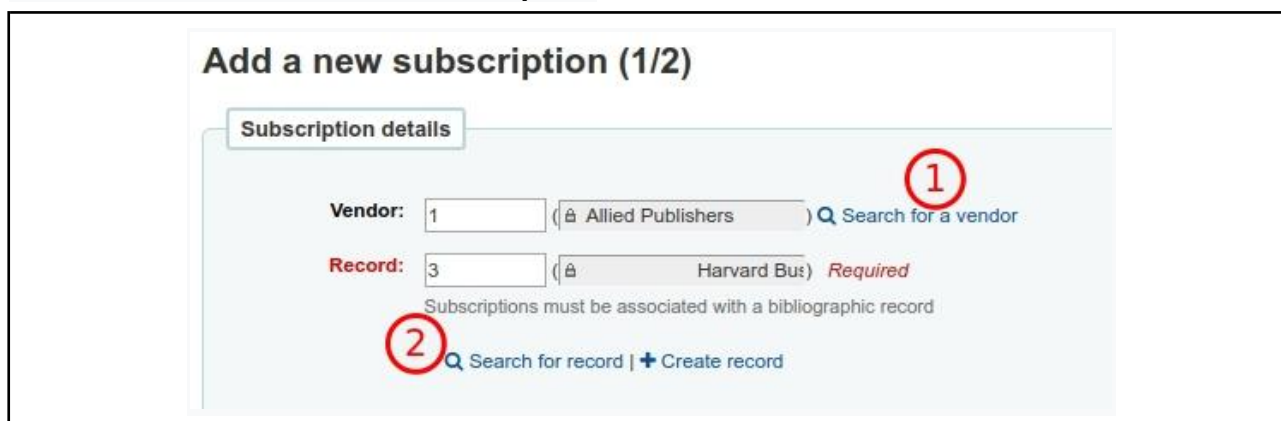
If the library is subscribing to the periodicals through a vendor, create a vendor/supplier.

Koha > Acquisitions > New vendor.

Add subscription details

Start the subscription in Koha when the first issue of the journal arrives.

Enter into **Koha > Serials > New subscription.**



Add a new subscription (1/2)

Subscription details

Vendor: 1 (Allied Publishers)

Record: 3 (Harvard Bus)

Subscriptions must be associated with a bibliographic record

1. Search and find the vendor.
2. Search and find the Biblio of the journal.

- ☐ Create an item record when receiving this serial
☒ Do not create an item record when receiving this serial

Decide whether we need to issue a barcode to each issue of the journal we received. Libraries that allow to check out old issues of periodicals for reading, can follow this practice.

Call number:
 Library:
 Public note:
 Nonpublic note:
 Patron notification:
Selecting a notice will allow patrons to subscribe to notifications when a new issue is received.
 Location:
 Item type:
 Grace period: day(s)
 Number of issues to display to staff:
 Number of issues to display to the public:

Call number: Item's call number of the journal.

Library: The name of the branch that subscribed to the journal.

Public note: Information on the OPAC for the patrons (e.g. Discontinuation of a particular volume)

Nonpublic note: Notes that are only visible to the librarians via the staff client (e.g. Payment details of subscription).

Patron notification: Notice sent to patrons on the arrival of new issues (Routing list).

Location: Shelving location of the journal.

Grace period: The number of days before an issue automatically moves from 'Expected' status to 'Late'.

The Staff and OPAC display options allow you to control how many issues appear by default on bibliographic records in the Staff Client and the OPAC.

Serials planning

First issue publication date: 01/01/2020 Required

Next issue publication date: 01/09/2020

Frequency: 1/2 months

Subscription length: issues 6 (enter amount in numerals)

Subscription start date: 01/01/2020

Subscription end date: 31/12/2020

Numbering pattern: Volume, Number Required

Locale: If empty, English is used

	Volume	Number
Last value:	15	1
Inner counter:	6	0

Show advanced pattern

Test prediction pattern

Previous Save subscription

First issue publication date: First issue of the journal after the subscription starts.

Frequency: Various frequencies of the journal (e.g. Weekly, monthly, quarterly etc.)

Subscription length: The number of issues or months in the subscription.

Subscription start date: The date on which the subscription begins.

Subscription end date: End date of the current subscription.

Numbering pattern: The numbering pattern is followed by the journal (e.g. Volume, Issue).

Locale: To display days, months, the season in regional language (e.g. Persian).

Click on the **Test prediction pattern** to get an idea of the issue numbering of the journal.

Prediction pattern

End date is not consistent with subscription length.

Please check issues that are NOT published (irregularities)

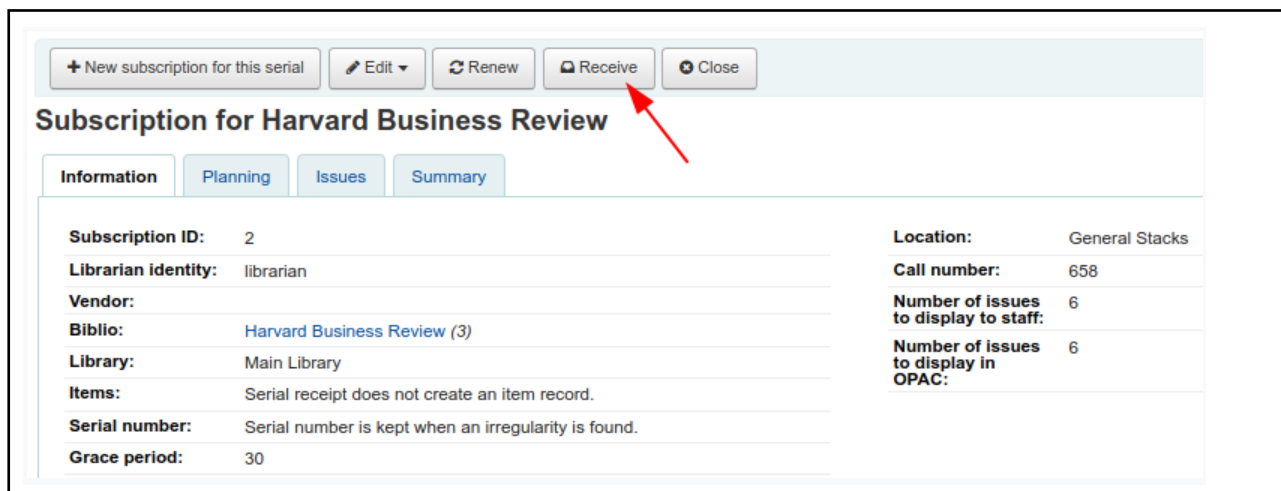
Number	Publication date	Not published
Vol 15, No 1	01/01/2020	
Vol 15, No 2	01/03/2020	<input type="checkbox"/>
Vol 15, No 3	01/05/2020	<input type="checkbox"/>
Vol 15, No 4	01/07/2020	<input type="checkbox"/>
Vol 15, No 5	01/09/2020	<input type="checkbox"/>
Vol 15, No 6	01/11/2020	<input type="checkbox"/>

Done

Click on the **Save subscription** button.

Receive the first issue of the journal

The subscription process in Koha starts after receiving the first issue of the journal.

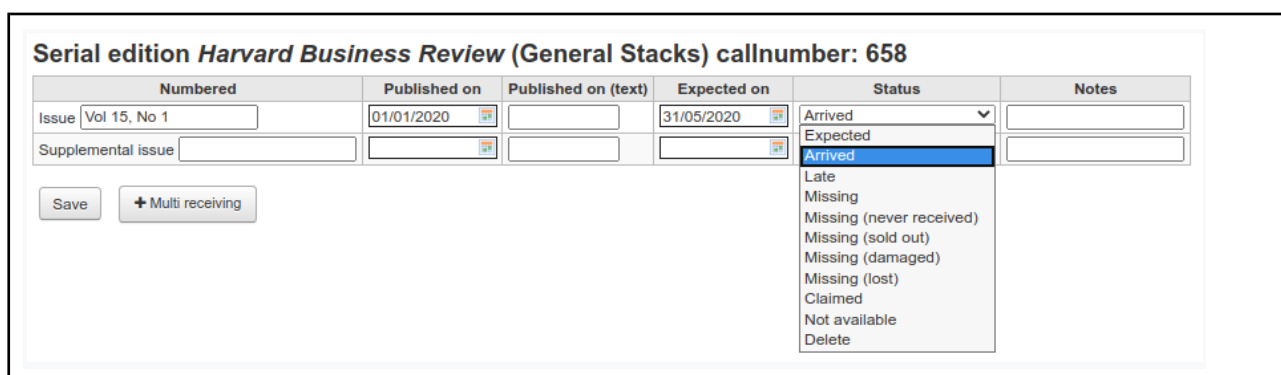


Subscription for Harvard Business Review

Information Planning Issues Summary

Subscription ID: 2
 Librarian identity: librarian
 Vendor:
 Biblio: [Harvard Business Review \(3\)](#)
 Library: Main Library
 Items: Serial receipt does not create an item record.
 Serial number: Serial number is kept when an irregularity is found.
 Grace period: 30

Location: General Stacks
 Call number: 658
 Number of issues to display to staff: 6
 Number of issues to display in OPAC: 6



Serial edition *Harvard Business Review* (General Stacks) callnumber: 658


Numbered	Published on	Published on (text)	Expected on	Status	Notes
Issue Vol 15, No 1	01/01/2020		31/05/2020	Arrived	
Supplemental issue				Expected	

Save + Multi receiving

Arrived
 Expected
 Late
 Missing
 Missing (never received)
 Missing (sold out)
 Missing (damaged)
 Missing (lost)
 Claimed
 Not available
 Delete

Change the status from **Expected** to **Arrived**. You can enter the speciality of the issue on the **Notes** section (e.g. Branding special issue).

The current issue of the journal is received and waiting for the next issue.



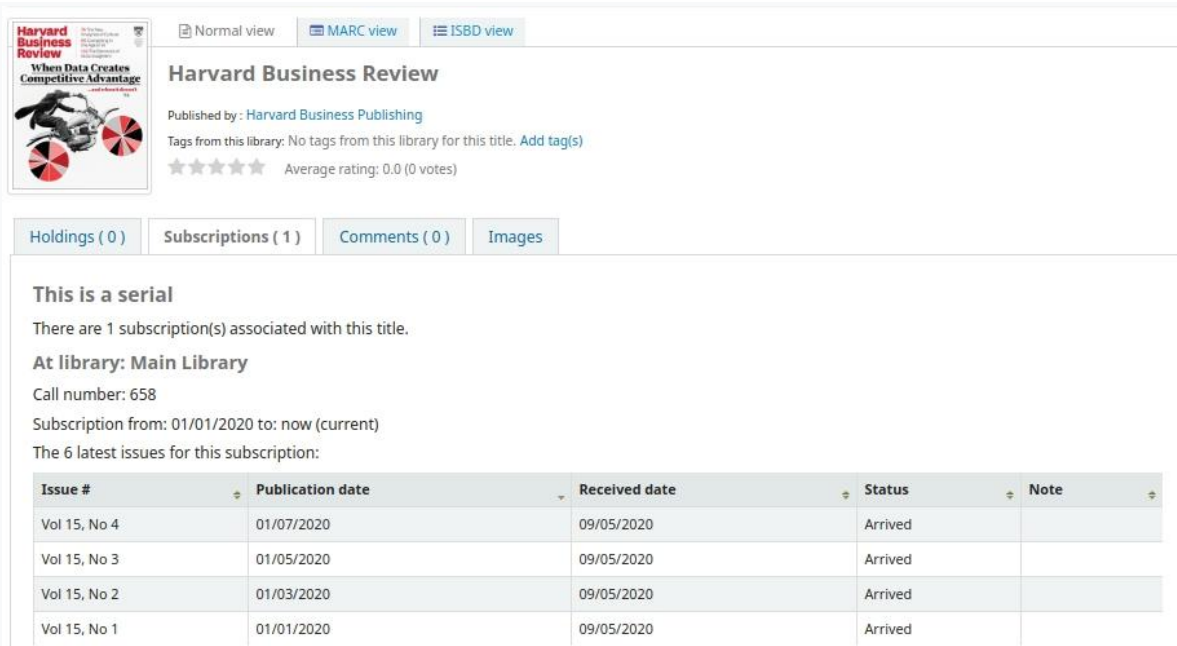
2020

Edit serials Generate next Multi receiving

Select all Clear all

Edit	Date published	Date published (text)	Date received	Number	Status	Notes	Library	Routing
<input checked="" type="checkbox"/>	01/03/2020		01/03/2020	Vol 15, No 2	Expected		Main Library	Print list
<input type="checkbox"/>	01/01/2020		09/05/2020	Vol 15, No 1	Arrived		Main Library	Print list

Search and find the journal at OPAC. See the bibliographic and holding details of the journal.



Normal view MARC view ISBD view

Harvard Business Review

Published by: [Harvard Business Publishing](#)

Tags from this library: No tags from this library for this title. [Add tag\(s\)](#)

★ ★ ★ ★ ★ Average rating: 0.0 (0 votes)

Holdings (0) Subscriptions (1) Comments (0) Images

This is a serial

There are 1 subscription(s) associated with this title.

At library: Main Library

Call number: 658

Subscription from: 01/01/2020 to: now (current)

The 6 latest issues for this subscription:

Issue #	Publication date	Received date	Status	Note
Vol 15, No 4	01/07/2020	09/05/2020	Arrived	
Vol 15, No 3	01/05/2020	09/05/2020	Arrived	
Vol 15, No 2	01/03/2020	09/05/2020	Arrived	
Vol 15, No 1	01/01/2020	09/05/2020	Arrived	

Manage bound volumes

Koha can handle bound volumes of periodicals. Users can understand the availability of bound volumes of periodicals along with the latest and previous issues.

First, create an item type for bound volume.

Administration > Item types > New item type.

Item type: Required

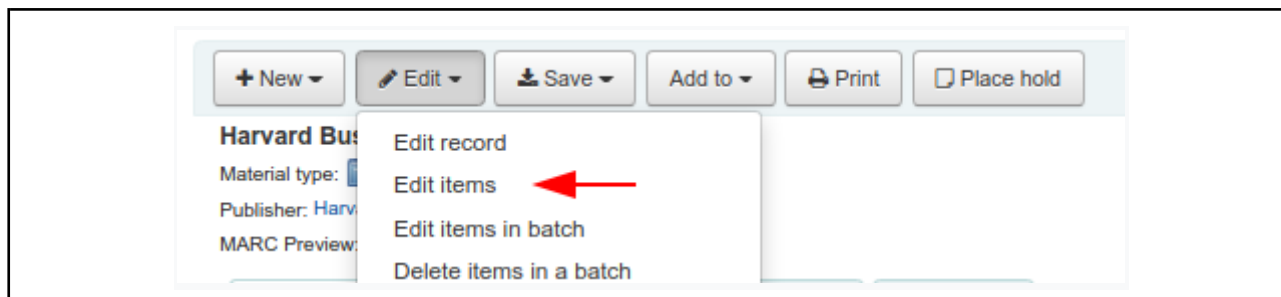
Description: Required

Next, find the Biblio of the journal to attach bound volume details.

Enter search keywords:

[Search system preferences](#) [Check out](#) [Search the catalog](#)

Create an item for the journal bound volume, **Edit > Edit items.**



Enter the details regarding the bound volume.

The screenshot shows a form for adding a new item. The fields are as follows:

- a - Permanent location:** Main Library
- b - Current location:** Main Library
- c - Shelving location:** General Stacks
- d - Date acquired:** 2020-05-09
- e - Source of acquisition:** (empty)
- g - Cost, normal purchase price:** (empty)
- h - Serial Enumeration / chronology:** Vol 14, No. 1-6 (circled 1)
- o - Full call number:** 658
- p - Accession Number:** BV105 (circled 2)
- y - Koha item type:** Bound Volume

At the bottom, there are three buttons: 'Add item' (circled 3), 'Add & duplicate', and 'Add multiple copies of this item'.

1. Enter the volume and issues contained in the bound volume.
2. The accession number of the bound volume.
3. Add the item.

See the bound volume details of the periodical at online catalogue.



Normal view
MARC view
ISBD view

Harvard Business Review

Published by : [Harvard Business Publishing](#)

Tags from this library: No tags from this library for this title. [Add tag\(s\)](#)

★★★★★ Average rating: 0.0 (0 votes)

Holdings (2)

Subscriptions (1)

Comments (0)

Images

Item type	Current location	Call number	Vol info	Status	Date due	Barcode
Bound Volume	Main Library <i>General Stacks</i>	658 (Browse shelf)	Vol 14, No. 1-6	Available		BV1005
Bound Volume	Main Library <i>General Stacks</i>	658 (Browse shelf)	Vol 13, No. 1-6	Available		BV1004

Information of the bound volume appears at the **Holdings** tab.

Conclusion

Management of periodicals is considered as one of the responsible tasks in libraries and Koha can handle it very well. Periodicals module can manage the subscription through both vendors and publishers. The libraries can manage the bound volumes of periodicals with the help of the serials module.

Exercise

1. Create a subscription of two journals with two different frequencies (Monthly, Weekly).

Acquisitions module

Learning objectives

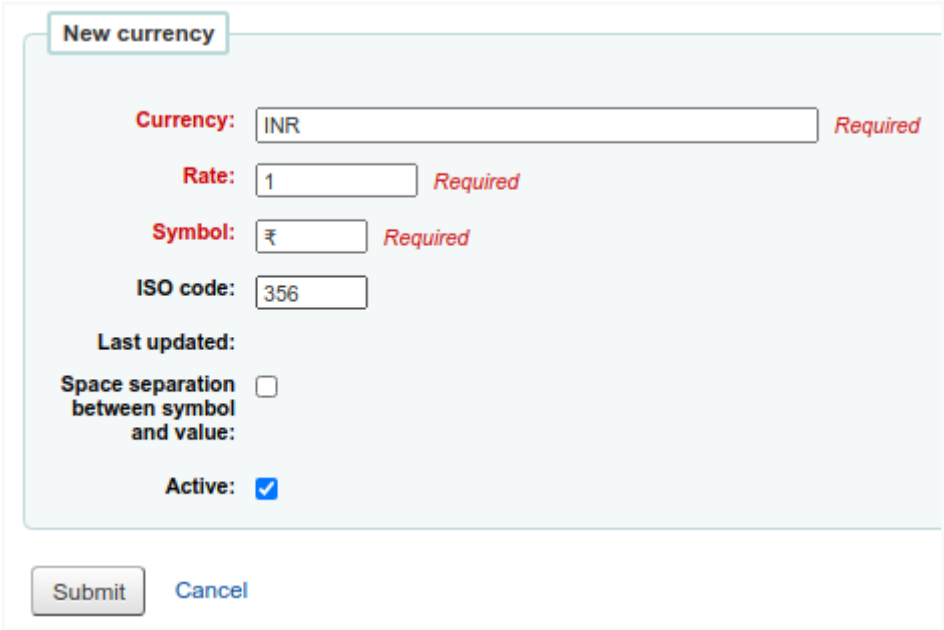
To get familiar with the acquisition process in Koha.

Introduction

Procurement of books goes through various stages. It requires systematic monitoring to avoid unnecessary delay. Acquisition module mechanises the procedures from receiving purchase suggestions to fast delivery of documents to the library users. Acquisition module can handle budget, vendors, ordering, and receiving of documents.

Define currency

Define an active/default currency for transactions to start the Acquisition module with Koha. Indian libraries follow transactions in Indian Rupees (INR). To define active currency go to **Administration > Acquisition parameters > Currencies and exchange rates > New currency**.



The screenshot shows the 'New currency' form in Koha. The form is titled 'New currency' and contains the following fields and options:

- Currency:** A text input field containing 'INR'. To the right of the field is the word 'Required' in red.
- Rate:** A text input field containing '1'. To the right of the field is the word 'Required' in red.
- Symbol:** A text input field containing '₹'. To the right of the field is the word 'Required' in red.
- ISO code:** A text input field containing '356'.
- Last updated:** A label with no input field.
- Space separation between symbol and value:** A label followed by an unchecked checkbox.
- Active:** A label followed by a checked checkbox.

At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

Enter the standard currency code, base rate, symbol, and ISO code. Don't forget to check on the **Active** box. Put the currency symbol by using the keyboard or copy from any website.

Define budget

Often libraries receive an allocation of money to meet the expenses from the parent institution. Libraries meet the expenses including salary, purchases, etc. from the budget allocation.

To create a new budget, go to **Administration > Acquisition parameters > Currencies and exchange rates > Budgets administration > New budget.**

Add budget

Start date: 01/04/2020 (DD/MM/YYYY) *Required*

End date: 31/03/2021 (DD/MM/YYYY) *Required*

Description: Budget 2020-21 *Required*

Total amount: 1000000

Make budget active: ☒

Lock budget: ☐

Save **Cancel**

Start date & End date: Define the period of the budget based on the nature of financial allocation (e.g. financial year, academic year).

Description: Give a meaningful description for the budget which should reflect nature and period of time.

Total amount: Total amount should not contain special characters like a comma.

Not allowed to create **Funds** after locking the budget.

Create fund

Libraries need to create funds in the budget for the purchase of library resources (books, e-resources). Libraries can create various funds based on the nature of the items and their purchase. Let's create a fund for book purchase.

Active budgets Inactive budgets

Showing 1 to 1 of 1 Show 20 entries « First < Previous Next > Last » Search: [Clear filter](#)

Budget name	Start date	End date	Locked	Total	Actions
Budget 2020-21	01/04/2020	31/03/2021		1.00	Actions ▼ Edit Delete Duplicate Close + Add fund

Showing 1 to 1 of 1 « First < Previous Next > Last »

Open the **Actions** button and click on **Add fund**.

Add Fund for Budget 'Budget 2020-21'

Fund code:

Fund name:

Amount:

Warning at (%): 0 to disable

Warning at (amount): 0 to disable

Owner: Librarian [Select owner](#) [Remove owner](#)

Users: [+ Add users](#)

Library:

Restrict access to:

Notes:

Statistic 1 done on:

Statistic 2 done on:

[Cancel](#)

Fund code: Give a **Fund code**.

Fund name: Description of the fund and it should reflect the nature of the fund.

Amount: Allot an amount to the fund.

Warning at (%): Alert to inform fund scarcity.

Owner: Select an **Owner** for the fund.

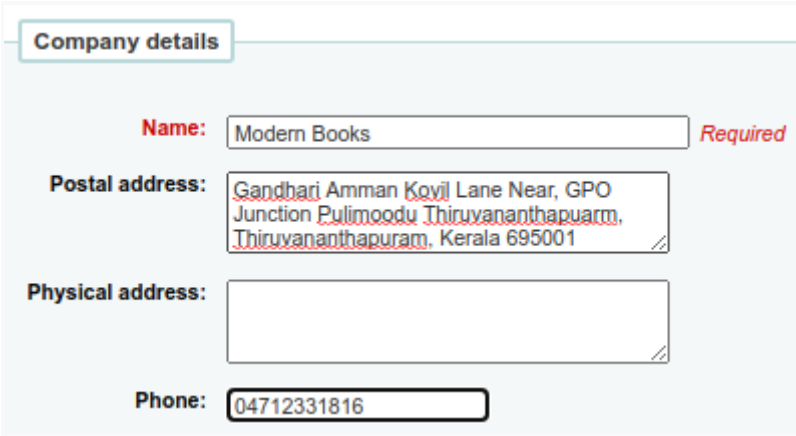
Library: Select the library.

Restrict access to: Restrict who can order from this fund by choosing either the 'owner', 'owner and users' or 'owner, users, and library'.

Create vendor

Libraries assign vendors (booksellers) to procure books and other resources. Order for books is placed through vendors.

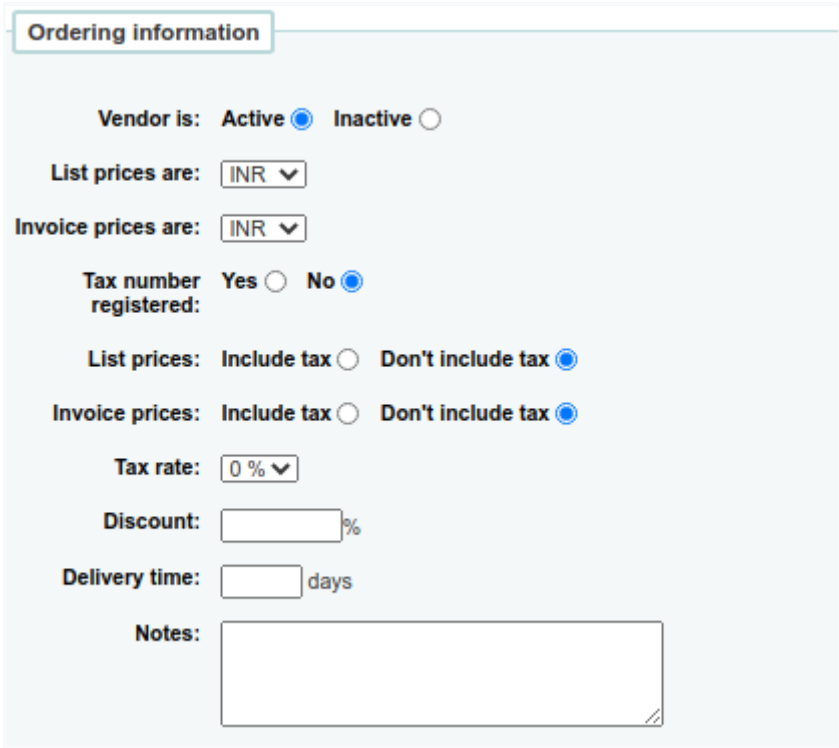
To create a vendor, **Acquisitions > New vendor**



The screenshot shows the 'Company details' section of a form. It includes the following fields:

- Name:** A text input field containing 'Modern Books'. To its right is a red 'Required' label.
- Postal address:** A text input field containing 'Gandhari Amman Kovil Lane Near, GPO Junction Pulimoodu Thiruvananthapuram, Thiruvananthapuram, Kerala 695001'.
- Physical address:** An empty text input field.
- Phone:** A text input field containing '04712331816'.

Enter details of the bookseller with contact information.



The screenshot shows the 'Ordering information' section of a form. It includes the following fields:

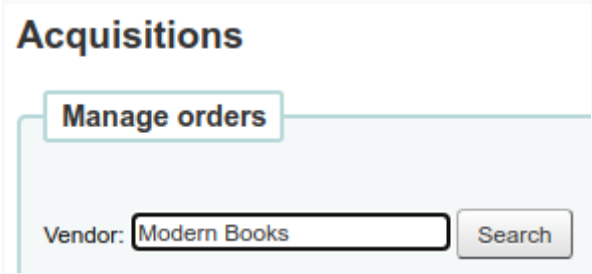
- Vendor is:** Radio buttons for 'Active' (selected) and 'Inactive'.
- List prices are:** A dropdown menu showing 'INR'.
- Invoice prices are:** A dropdown menu showing 'INR'.
- Tax number registered:** Radio buttons for 'Yes' and 'No' (selected).
- List prices:** Radio buttons for 'Include tax' and 'Don't include tax' (selected).
- Invoice prices:** Radio buttons for 'Include tax' and 'Don't include tax' (selected).
- Tax rate:** A dropdown menu showing '0 %'.
- Discount:** A text input field followed by a '%' symbol.
- Delivery time:** A text input field followed by the word 'days'.
- Notes:** A large text area for additional information.

Make the vendor **Active**.

Enter other details like discount rate and delivery time.

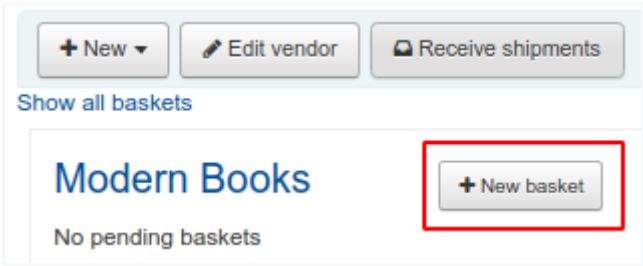
Place orders

Academic community places suggestions to purchase books. Library sorts out the titles and places the order to booksellers. Enter into the Acquisitions module, search and find out a vendor.



The screenshot shows the 'Acquisitions' module interface. Under the 'Manage orders' tab, there is a search bar with the text 'Vendor: Modern Books' and a 'Search' button.

Placing an order for books is the same as picking items to basket in a shop. First, we have to create a basket to enter the details of books to place an order. Click on the New **basket** button against the vendor name.



The screenshot shows the vendor 'Modern Books' page. At the top, there are buttons for '+ New', 'Edit vendor', and 'Receive shipments'. Below these is a link 'Show all baskets'. The vendor name 'Modern Books' is displayed, followed by 'No pending baskets'. A '+ New basket' button is highlighted with a red box.

Enter details of the basket.

Add a basket to Modern Books

Basket name: *Required*

Billing place:

Delivery place:

Vendor:

Internal note:

Vendor note:

Orders are standing: ☐ Standing orders do not close when received.

Create items when:

[Save](#) [Cancel](#)

Give a meaningful name to the basket.

Select, when we want to create an item and assign an accession number. The default option is that item creation at the time of **cataloguing the record**.

Order from a new (empty) record

Library staff has to add the details of the book into the basket.

[+ Add to basket](#)

[Edit basket](#)

[Delete this basket](#)

[Export as CSV](#)



Basket Management books (2) for Modern Books

Internal note: Book suggestions from the director, School of Management Studies.

Delivery place: Main Library

Billing place: Main Library


Created by: Librarian

Managed by: [+ Add user](#)

Managing library: No library [Set library](#)

It is possible to add details of books you wish to purchase from various ways. Here we are going to enter the details of a book from scratch.

Add order to basket

- From an existing record:
- From a suggestion
- From a subscription
- From a new (empty) record 
- From existing orders (copy)
- From an external source
- From a new file
- From a staged file
- From titles with highest hold ratios

Start going to enter the details of the book from scratch.

Catalog details

Title: *Required*

Author:

Publisher:

Edition:

Publication year:

ISBN:

Enter the bibliographical details of the book.

Accounting details

Quantity: *Required*

Fund: *Required* **Show inactive:** ☐

Currency:

Vendor price: (tax exclusive)

Uncertain price: ☐

Tax rate:

Discount: %

Retail price: (adjusted for INR, tax exclusive)

Replacement cost:

Budgeted cost: (tax exclusive)

Total: (budgeted cost * quantity)

Enter quantity, price, and discount of the book. Save the book details.

+ Add to basket

Edit basket

Delete this basket

Close this basket

Export as CSV

E-mail order

Basket Management books (2) for Modern Books

Internal note:	Book suggestions from the director, School of Management Studies.	Opened on:	31/05/2020
Delivery place:	Main Library	Orders are standing:	No
Billing place:	Main Library		
Created by:	Librarian		
Managed by:	+ Add user		


Click on the **Add to basket** button on the basket summary screen to enter other books details to purchase.


See the summary of items in the basket after saving the book details.

<div> + Add to basket + Edit basket + Delete this basket <div>Close this basket</div> Export as CSV E-mail order </div>							
No. ▲	Order	RRP tax exc.	Actual cost tax exc.	Actual cost tax inc.	Budgeted cost tax inc.	Replacement price	Total tax exc. (INR)
1	Who Says Elephants Can't Dance?: Inside IBM's Historic Turnaround by Gerstner, Louis V. - 978-0060523800 , Harper Business + Add internal note + Add vendor note	983.00	0.00	0.00	786.40	983.00	0.00
2	Jack: Straight from the Gut by Jack Welch - 978-0755311286 , Headline Book Publishing + Add internal note + Add vendor note	341.00	0.00	0.00	272.80	341.00	0.00
Total (GST 0)							0.00
Total (INR)							0.00

Close the basket after entering all the details of books to purchase.

Are you sure you want to close basket Management books?

Attach this basket to a new basket group with the same name ☒ 





When closing the basket, add the basket to a group for easy printing and retrieval. Check the box to **Attach this basket to a new basket group** added to the group list. It is possible to export a statement of the order in PDF format.

We can get the order statement either in PDF or CSV format.

Basket grouping for Modern Books

Open Closed 1

Showing 1 to 1 of 1 Show entries « First < Previous Next > Last » Search: ✕ Clear filter

Name ▲	Number	Billing place	Delivery place	Number of baskets	Action 2
Management books 2020	1	Main Library	Main Library	1	<input type="button" value="View"/> <input type="button" value="Reopen"/> <input type="button" value="Export as PDF"/> <input type="button" value="Export as CSV"/>

Showing 1 to 1 of 1 « First < Previous Next > Last »

No EDIFACT configuration for Modern Books

The library can send the order statement to the vendor.

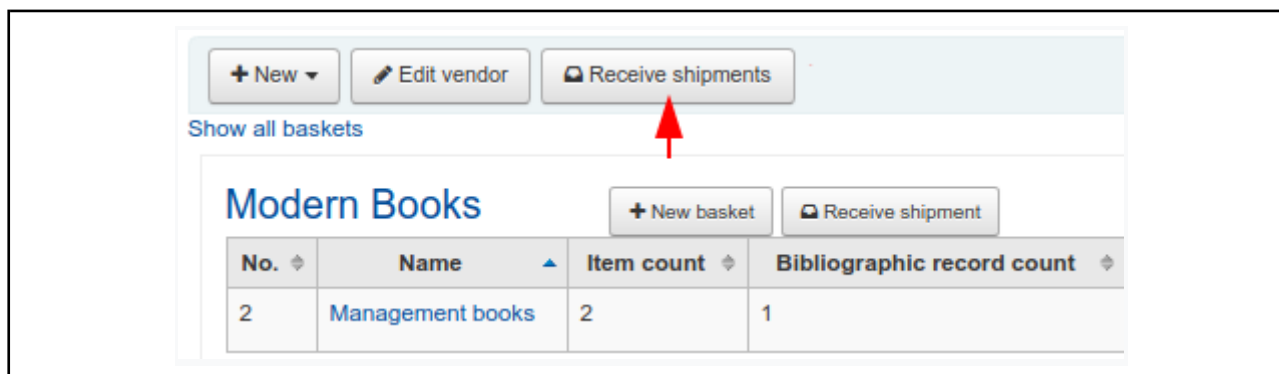
Order no. 1. Basket no. 1.

Billing at Main Library and delivery at Main Library

Document	Qty	RRP tax exc.	RRP tax inc.	Discount	Discount price	Tax rate	Total tax exc.	Total tax inc.
Who Says Elephants Can't Dance?: Inside IBM's Historic Turnaround Gerstner, Louis V. ISBN: 978-0060523800 published by Harper Business	1	983.00	983.00	20.00%	196.60	0.00%	786.40	786.40
Jack: Straight from the Gut Jack Welch ISBN: 978-0755311286 published by Headline Book Publishing	1	341.00	341.00	20.00%	68.20	0.00%	272.80	272.80

Receiving orders

The books receiving process can be started when they arrive from vendors. First, identify the vendor who has sent the books. Then go to the Acquisitions module and search the vendor.



The screenshot shows the 'Modern Books' interface. At the top, there are three buttons: '+ New', 'Edit vendor', and 'Receive shipments'. Below these is a link 'Show all baskets'. The main section is titled 'Modern Books' and contains a table with columns: 'No.', 'Name', 'Item count', and 'Bibliographic record count'. The table has one row with '2' in the 'No.' column, 'Management books' in the 'Name' column, '2' in the 'Item count' column, and '1' in the 'Bibliographic record count' column. Above the table, there are two buttons: '+ New basket' and 'Receive shipment'. A red arrow points to the 'Receive shipments' button at the top of the interface.

Click on the **Receive shipment** button and start the receiving process of books.



The screenshot shows the 'Modern Books' interface after clicking the 'Receive shipments' button. The 'Receive shipments' button at the top is now highlighted with a red box. The table below has been updated with a new row: '1' in the 'No.' column, 'Management books 2020' in the 'Name' column, '3 (1 cancelled)' in the 'Item count' column, and '2' in the 'Bibliographic record count' column. The buttons '+ New basket' and 'Receive shipment' are still present above the table.

Receive a new shipment

Vendor invoice:

Shipment date:
(DD/MM/YYYY)

Shipping cost:

Shipping fund: ▼ **Show inactive:** ☐

Enter the **Vendor invoice** number and date.

Receipt summary for Modern Books [34/2020] on 09/05/2020
 Invoice number: 34/2020 Received by: librarian On: 09/05/2020

Pending orders

Showing 1 to 2 of 2 Show 10 entries ◀ First ◀ Previous Next ▶ Last ▶ Search: ✕ Clear filter

Basket ▲	Basket group ⇅	Order line ⇅	Summary ⇅	More	Replacement price ⇅	Quantity ⇅	Unit cost ⇅	Order cost ⇅	Fund ⇅		
Basket search	Basket group ⇅	Order line	Summary search		Replacement price	Quantity sea	Unit cos	Order cos	Fund se		
Management books 2020 (1)	Management books 2020 (1)	1	Who Says Elephants Can't Dance?: Inside IBM's Historic Turnaround by Gerstner, Louis V. – 978-0060523800 Publisher: Harper Business [Add internal note] [Add vendor note]	Order MARC Card	983.00	1	786.40	786.40	Book Fund 2020-21	Receive Transfer	Cancel order Cancel order and catalog record
Management books 2020 (1)	Management books 2020 (1)	2	Jack: Straight from the Gut by Jack Welch – 978-0755311286 Publisher: Headline Book Publishing [Add internal note] [Add vendor note]	Order MARC Card	341.00	1	272.80	272.80	Book Fund 2020-21	Receive Transfer	Cancel order Cancel order and catalog record

Receive the books by clicking on the **Receive** button on the right side.

The next page displays the quantity ordered and received. The librarian can make any changes in price.

Receive items from : Modern Books [34/2020] (order #1)

Catalog details

Title: Who Says Elephants Can't Dance?: Inside IBM's Historic Turnaround

Author: Gerstner, Louis V.

Copyright:

ISBN: 978-0060523800

Series:

Accounting details

Date received: 09/05/2020

Fund: Book Fund 2020-21
(Current: Budget 2020-21 - Book Fund 2020-21)

Ordered by: Librarian (1)

Quantity ordered: 1

Quantity received: 1

Tax rate: 0%

Retail price: 983.00 (adjusted for INR, tax exclusive)

Replacement price: 983.00

Budgeted cost: 786.40 (tax exclusive)

Actual cost: 786.40 (tax exclusive)

After receiving the books, the library can start the cataloguing process.

Already received

Showing 1 to 1 of 1 Show 10 entries « First < Previous Next > Last » Search: X Clear filter

Basket	Basket group	Order line	Holds	Summary	More	Replacement price	Quantity	Fund	Est cost	Actual cost	TOTAL	
Management books 2020 (1)	Management books 2020 (1)	1	0	Who Says Elephants Can't Dance?: Inside IBM's Historic Turnaround / Gerstner, Louis V. - 978-0060523800 Publisher: Harper Business [Add internal note] [Add vendor note]	Order MARC Card	983.00	1	Book Fund 2020-21	786.40	786.40	786.40	Cancel receipt
(Tax exc.) Subtotal for Book Fund 2020-21									786.40	786.40		
Total tax exc.											786.40	
Total (GST 0%)											0.00	
Total tax inc.											786.40	

The title of the book with a link leads to the cataloguing module. Enter the complete bibliographic details, item information and finish the process.

Expand all | Collapse all | Hide inactive budgets | Show inactive budgets | Filter by library ▼

Fund code	Fund name	Owner	Library	Amount	Ordered	Spent	Total available
Budget Budget 2020-21 [id=1]							
BK-2020-21	Book Fund 2020-21		Main Library	500,000.00	0.00	1,059.20	498,940.80
Total				500,000.00	0.00	1,059.20	498,940.80

Here is the status of the fund after receiving the orders. The fund status indicates the total amount spent and the remaining fund.

Conclusion

Acquisition module of Koha offers both traditional and latest ways to manage the procurement of books. Libraries can receive purchase suggestions from various sources and place orders. Budget and fund management are very flexible and give a precise picture of the fund.

Exercise

1. Create a budget and fund for book purchasing.
2. Create a vendor and place an order for two books.
3. Receive the orders and catalogue the books.

Koha OPAC

Learning objectives

Introduce the features of OPAC.

Give an overview of OPAC settings.

Guide to do OPAC minimal customisations.

Introduction

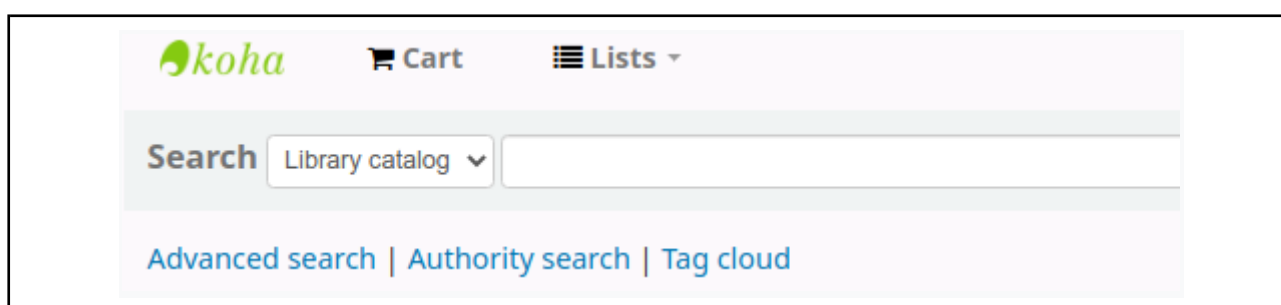
Koha OPAC (Online Public Access Catalogue) is the interface for library users and the public. Users primarily make use of OPAC search to know the availability of documents in the library. Besides, Koha OPAC can be converted as a library portal and publish information for user's attention. Koha OPAC provides enough room for customisation of the user interface.

Open OPAC interface

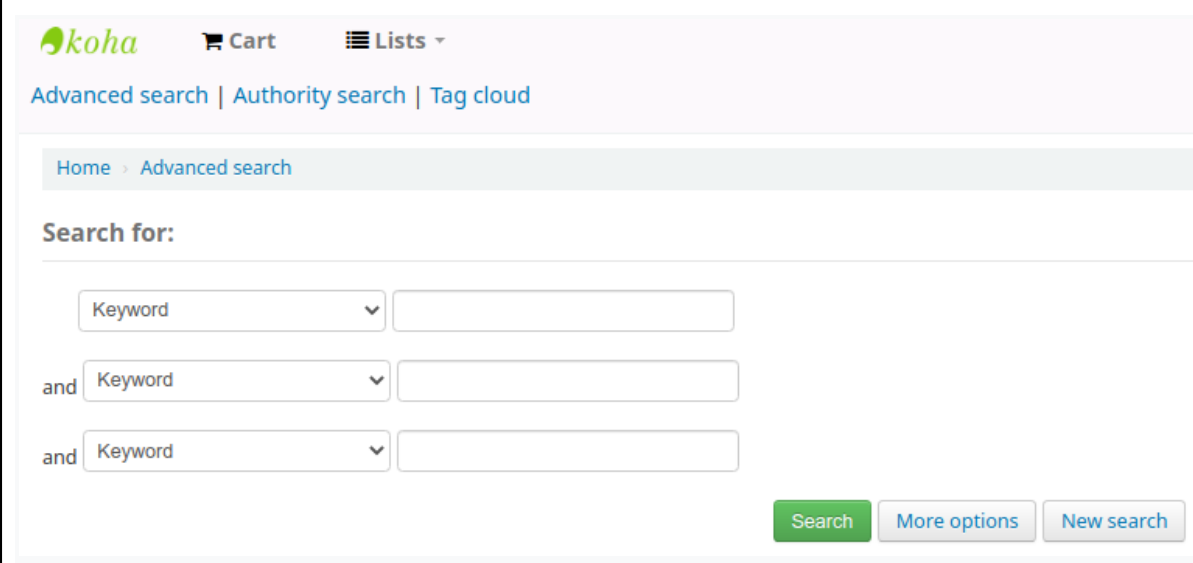
Koha OPAC interface is available in another port. The default port number is 80. If Koha is installed on the computer you are working on, then open the localhost, <http://127.0.1.1> using a browser. If Koha is installed on a computer in the network or cloud, enter the IP address (e.g. 192.168.1.1) or URL of the OPAC (e.g. mgucat.mgu.ac.in).

Searching

A box for a simple search on the OPAC home page.



Koha OPAC also provides an advanced search. Users can open the advanced search page from the link below the simple search box.



Koha Cart Lists

[Advanced search](#) | [Authority search](#) | [Tag cloud](#)

[Home](#) > [Advanced search](#)

Search for:

Keyword

and Keyword

and Keyword

The advanced search offers more options for a comprehensive result. Search filters are also available for a precise result. Users can filter the result based on library branches, items types, collection, authors, etc.

OPAC configuration

Configurations related to the OPAC can be found at **Koha Administration > Global System Preferences > OPAC**.

Prominent configurations

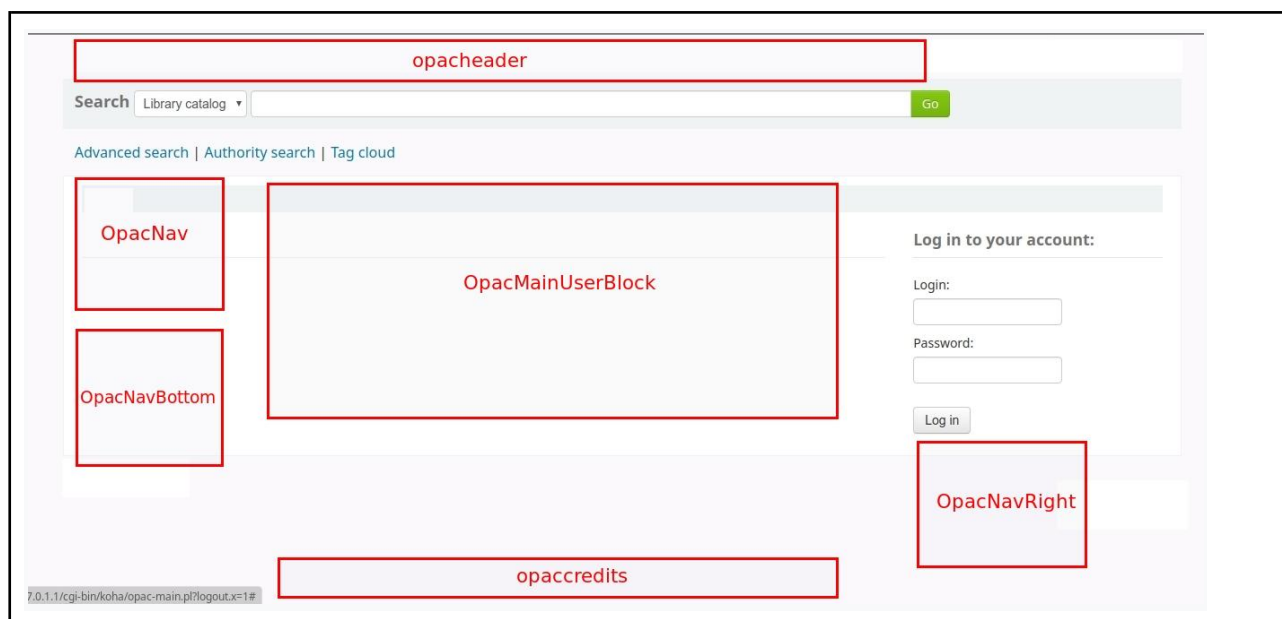
Here a few prominent configurations are introduced. Use the search and find feature in the browser to locate the configuration. Press **Ctrl + F** buttons to open the search box in the browser. Copy and paste the name of the configuration in the search box. Action buttons or text boxes can be found against each OPAC preference. Users can enable or disable each preference by clicking on the button. Save the preference after making the changes.

Name of the preference	Description
GoogleIndicTransliteration	GoogleIndicTransliteration on the OPAC. Helpful to search using regional languages.
LibraryName	Enter the library name in the box. Which displays the library name on the browser tab.
OpacFavicon	Make use of this preference to display the institution logo on the browser tab.
OpacMaintenance	Provision to disable OPAC at the time of maintenance.

OpacMaintenanceNotice	To give a maintenance notice to display.
OPACUserCSS	CSS (Cascading Style Sheets) is a style sheet language useful to beautify the OPAC interface. Koha users can apply CSS here to make the OPAC beautiful.
OPACUserJS	JavaScript can apply for OPAC modification. Koha project maintains a website to store readymade JQuery statements. Users can copy the queries from the JQuery library website to enable new features. JQuery Library URL, https://wiki.koha-community.org/wiki/JQuery_Library
opacuserlogin	Enable or Disable user login from OPAC from here.
suggestion	Enable to receive purchase suggestions from library users through OPAC.
OpacRenewalAllowed	Enable or disable the facility to renew books on the OPAC.
OpacPasswordChange	This option allows changing user passwords on the OPAC.
OpacAllowPublicListCreation	Permit users to create public lists on OPAC.
AnonSuggestions	Whether allow making purchase suggestions by users without logging in.

Customise OPAC regions

Koha OPAC can be customised in two ways; either by using the options in system preferences or using scripts like CSS. Users without knowledge on scripting, can manage the customisation using system preferences. Let's check the options for OPAC customisation at system preferences.



OPAC home editable blocks.

System preferences related to content in OPAC editable blocks.

Name of the preference	Description
opacheader	Display library name either as text or image on OPAC heading space.
OpacNav	The left-hand column of the main page. This space is suitable to add links to other websites using HTML.
OpacNavBottom	Another space below the OpacNAV.
OpacMainUserBlock	OpacMainUserBlock is the largest block on OPAC. It's customisable space. Library staff can add text and images using HTML.
opaccredits	Space at the footer.
OpacNavRight	Enter HTML that will appear below the login box on the right.
QuoteOfTheDay	Display random quotes on the OPAC home page.

Quote of the day in OPAC

Quote of the day feature in OPAC helps to display random quotes on the OPAC home page.

Enable the **QuoteOfTheDay** feature from System Preferences.

Add some quotes, **Tools > Edit quotes for QOTD feature**

Open OPAC interface and refresh the page to make visible the quotes on OPAC page.

Create web pages in Koha

Users can publish pages on Koha OPAC. Then OPAC can act as a library portal.

Very detailed documentation is available at Koha Wiki:

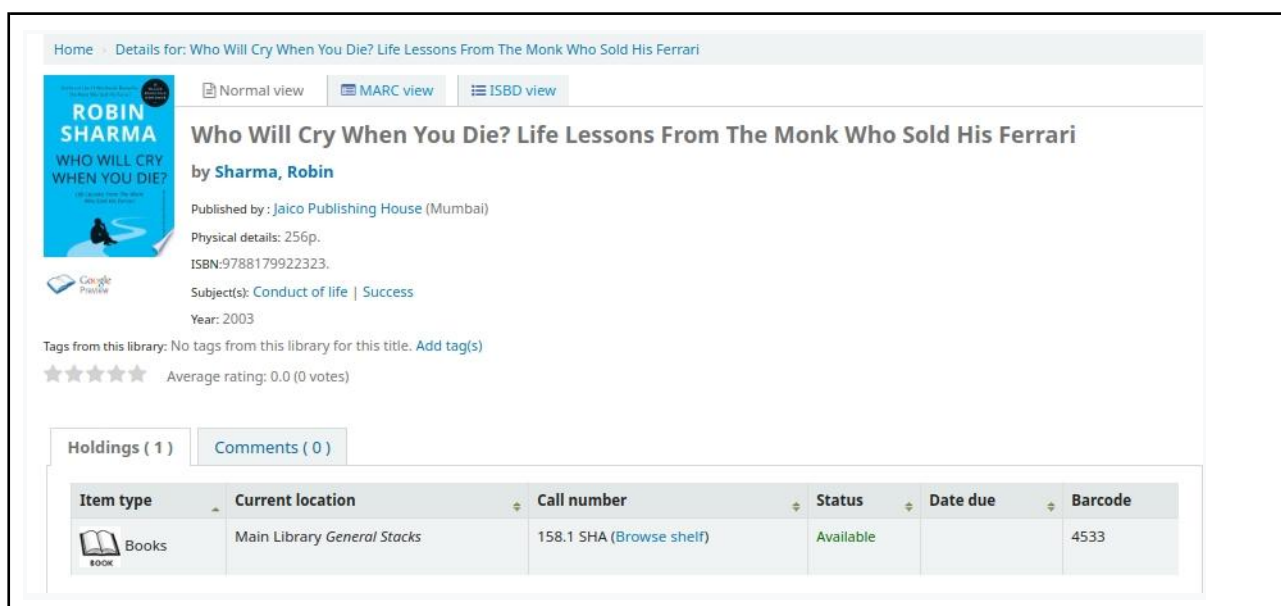
https://wiki.koha-community.org/wiki/Koha_as_a_CMS

Enhanced content

Enhanced content is useful to connect with other sources. Users can find prominent service providers like Amazon, Google, LibraryThing, etc. in the list at system preferences. Such services are primarily used to display book jackets along with record details.

Visit the option at **Koha Administration > Global system preferences > Enhanced content**.

Enable one service at a time. Otherwise, multiple book jackets will be displayed on OPAC.



Home > Details for: Who Will Cry When You Die? Life Lessons From The Monk Who Sold His Ferrari

Normal view MARC view ISBD view

Who Will Cry When You Die? Life Lessons From The Monk Who Sold His Ferrari
by Sharma, Robin

Published by: Jaico Publishing House (Mumbai)
Physical details: 256p.
ISBN: 9788179922323.
Subject(s): Conduct of life | Success
Year: 2003

Tags from this library: No tags from this library for this title. [Add tag\(s\)](#)

★ ★ ★ ★ ★ Average rating: 0.0 (0 votes)

Holdings (1) Comments (0)

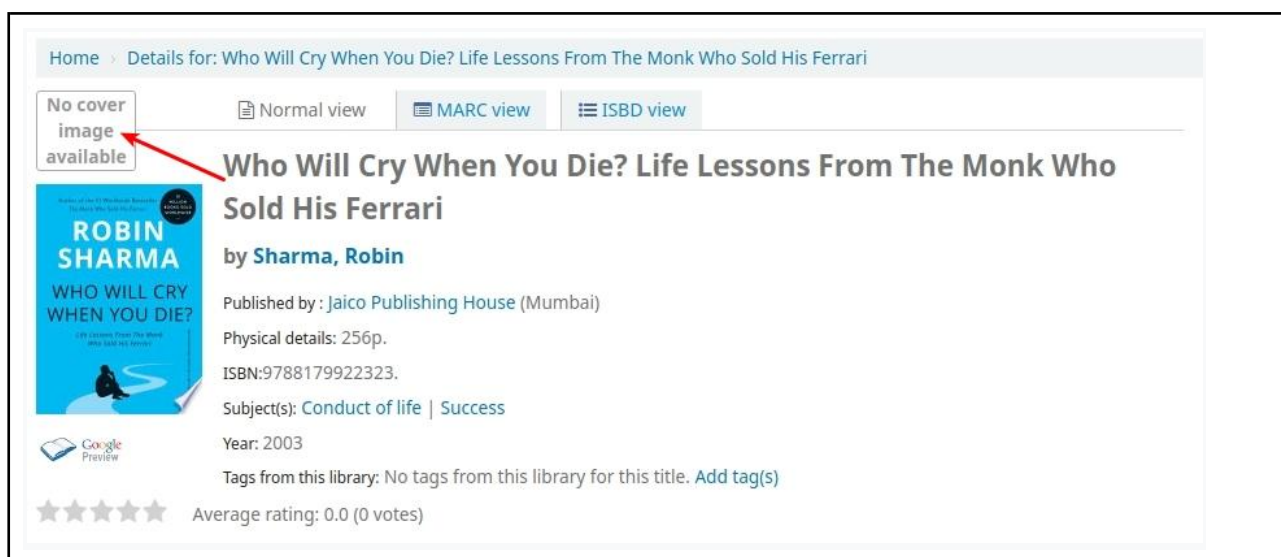
Item type	Current location	Call number	Status	Date due	Barcode
Books	Main Library General Stacks	158.1 SHA (Browse shelf)	Available		4533

Display of book jacket using Google Books

Use JQuery with OPAC

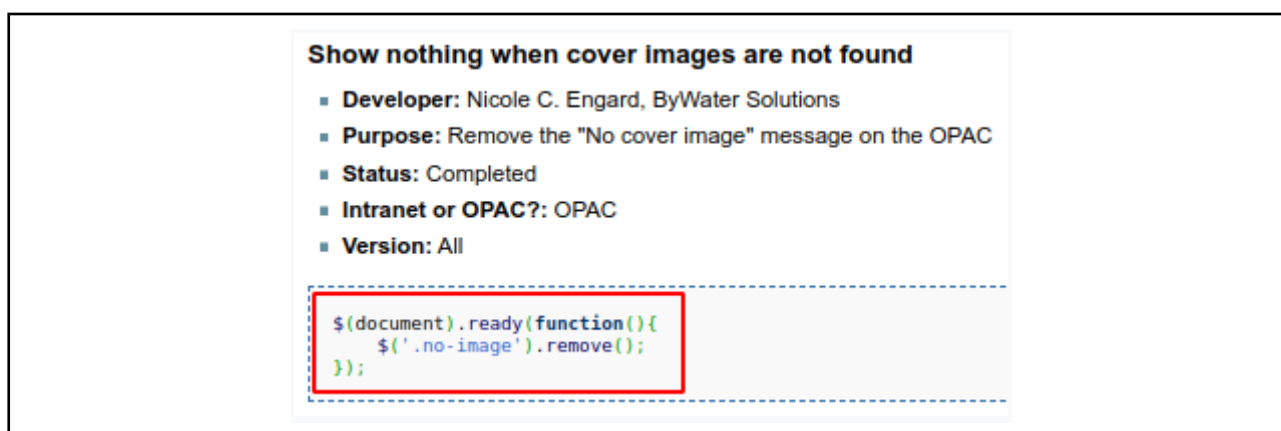
JQuery is an easy method to use JavaScript on websites. Koha makes use of JQuery to customize the look and feel of staff client and OPAC interfaces. Koha users can borrow readymade JQuery snippets from the Koha JQuery Library website. Here is an example of the application of JQuery on OPAC.

Application: Remove the "No cover image" message on the OPAC.



"No cover image" along with Google book cover.

Solution: Visit the Koha JQuery Library website: https://wiki.koha-community.org/wiki/JQuery_Library and find the script.



Copy the highlighted JQuery and paste it into,

Koha Administration > System preferences > OPAC > OPACUserJS

Save the preference. Check the change in OPAC.

Place a banner on OPAC header

A beautiful banner on the header of Koha OPAC can beautify the home page.

Create a banner for Koha OPAC.



To put the image in `/usr/share/koha/opac/htdocs` folder, apply the following command in a terminal.

```
sudo mv header.jpg /usr/share/koha/opac/htdocs
```

Open Koha and go to **System Preferences > OPAC > opacheader**

Apply the HTML code to display header image,

```

```

Save the changes. Open OPAC page and refresh the page to see the header.

Conclusion

Koha offers comprehensive features with OPAC. It can act as an interface for searching and can be converted as a library portal. Libraries can connect with third-party services like Amazon and Google to display book jackets and reviews, along with records. Koha users need to be familiar with HTML tags, CSS, and related tools to manage the OPAC customisation well.

Exercises

1. Visit the Koha JQuery Library website and find and apply useful queries to your Koha installation.

1.

Essential Debian/Ubuntu commands

Learning objectives

Get an understanding of the basic Debian/Ubuntu commands.

Build the capacity to install/remove a new package using APT commands.

Describe how to maintain the Debian/Ubuntu update.

Introduction

The knowledge of basic Linux commands will be an added advantage for library professionals working with Open Source software on Debian/Ubuntu. APT is a package management system used by Debian and Ubuntu. APT commands are helpful to maintain the Debian/Ubuntu operating system for the update, upgrade, install and uninstall software packages. An understanding of Debian/Ubuntu Linux operations is essential for the effective management of Koha.

How to apply Linux commands

The tool used to apply commands on a Linux operating system is called **Terminal**. Whatever may be the Linux, you can open **Terminal** in application launcher,

Applications > System Tools. The Terminal can also be opened using the short key, by pressing **Ctrl + Alt + T** buttons together.



Linux command Terminal

There are specific rules to be followed when using Linux commands. Otherwise, the Linux operating system will refuse to execute the commands. Beginners may find it a bit difficult when dealing with Linux commands in the initial stages. The lines of instructions for Linux must be case-sensitive. Whether the commands are in lower or upper case, they must be entered as such. Otherwise, the command will be misinterpreted and exit without implementation. Linux commands

can have multiple parts. Space should be placed between each part. The Linux operating system refuses to apply commands without proper syntax. Beginners of Linux should be careful to follow syntax while applying commands. Type the command on the terminal and press the **Enter** button to apply the command. If the command is applied correctly, the result will be displayed on the Terminal screen or jump to the next prompt. If the command is not valid, either error message or message suggestions will be displayed.

Some basic commands

Here are some basic commands to manage Debian/Ubuntu Linux. The below mentioned commands will help the library professionals to familiarise the application of Linux commands. The user has to apply the commands from the Terminal tool.

Know the Debian/Ubuntu version

It is important to know the version of Debian/Ubuntu Linux installed on your computer. Apply the following command,

```
lsb_release -a
```

Know the system information

This command displays details of the computer specifications.

```
lscpu
```

Know the current user

The following command will display the name of the current user who logged in.

```
whoami
```

To know the current working directory

The command will display the current location of the working directory.

```
pwd
```

To check the current system date and time correct

The user can validate the date and time by using the command.

```
date
```

Clear the screen

Working with commands makes the terminal screen shabby. It clears the screen filled with commands.

```
clear
```

To know the IP address of your computer

An Internet Protocol address (IP address) is a numerical name system assigned to each computer connected to a network that uses the Internet Protocol for communication. This system facilitates the easy identification of a computer in a network. The IP address is the same as a unique identification number (e.g. admission number) followed by a College to identify each student.

```
ip a
```

Identifying the IP address of the computer is helpful for libraries to make available Koha staff client and Online catalogue in campus network/Internet.

Sudo command

The administrator account in Linux is called **Root User**. The **Root User** has the ultimate power to do important tasks on Linux. By default, the root account password is locked in Ubuntu. This means that you cannot log in as root directly. Users are allowed to use the **sudo** command to become the root user. The sudo command stands for "**Super User DO**". The Debian/Ubuntu users have to apply commands with the **sudo** as a prefix. For example,

```
sudo apt update
```

Password will be asked whenever you apply the command with sudo. Type the password of the account created at the time of Ubuntu installation. The * symbol is symbolically displayed when a password enters on the Windows operating system. While typing a password in a Linux terminal, nothing will be seen on the screen. Type the password in the blank space and press the **Enter button**. The command will start running and display the result.



Once a command with `sudo` applies, it won't ask for the password for 15 minutes. After 15 minutes; the system will ask for the password again.

APT command

APT is a command-line tool for software package management with Debian and Ubuntu. APT stands for **Advanced Packaging Tool** (APT). It handles updating, installation, and upgrading of software packages.

Update the Package Index

Ubuntu software repositories are available all over the world where a collection of software packages are stored. Ubuntu software repositories are available in India too. Ubuntu users in India receive updates from the repositories for Indian users. The software repositories in the nearby places help the users to download the updates faster. Addresses of the software repositories are stored on the computer where Ubuntu is installed. For example, the new version/update of LibreOffice Software first appears in the software repository. The Ubuntu user needs to fetch the latest version packages from the software repository.

Type the following command to update the package index on your computer with the latest package information available in the repository. While using update commands, the user should make it sure that the computer has Internet access.

```
sudo apt update
```

Upgrade packages

Use the following command to download and install the latest version of the software and associated packages that are currently installed.

```
sudo apt upgrade
```

Install a specific package

The installation of packages using the apt tool is quite simple. For example, to install the Bluefish Editor, type the following,

```
sudo apt install bluefish
```

Install multiple packages

The user can install more than one package from the same command. For example, the following command will install packages '**bluefish**' and '**mousepad**'.

```
sudo apt install bluefish mousepad
```

Uninstall a package

Type the following command to remove the package installed in the computer,

```
sudo apt remove bluefish
```

Completely remove packages

To remove software packages including their configuration files, use the **purge** command as shown below.

```
sudo apt purge filezilla
```

Clean up disk space

The **clean** command is helpful to free up the disk space by cleaning downloaded .deb files from the local repository (/var/cache/apt/archives).

```
sudo apt clean
```

Apply autoremove command to clean up unwanted packages from the system.

```
sudo apt autoremove
```

The autoremove command will remove the unnecessary dependency packages to remain in the computer after the uninstallation of application software.

Install the software from the Debian package

There is also a way to install software that is not in the Ubuntu software repository. Software such as **Google Chrome** and **Anydesk** is not available in the Ubuntu software repository. The package file should be downloaded from the website. Select the package suitable for the architecture of the computer; 64-bit/32bit. Latest computers support 64-bit. Architecture type is always mentioned on the package file. Download the package file suitable for 64-bit architecture. Open the File Manager and move the package file from the Download folder to the Home folder. The extension of the Debian package is **.deb** and is similar to the **.exe** extension with the Windows application installer.



Apply the following command to install the Debian package of Google Chrome browser.

```
sudo dpkg -i google-chrome-stable_current_amd64.deb
```

The package **google-chrome-stable_current_amd64.deb** is lengthy and has a chance to get an error while typing. If the package name given is not correct, the installation attempt will fail. There is an easy way to enter the package name correctly. Press the Tab button after typing the first few lines of the package name (e.g. **sudo dpkg -i goo**), it will autofill the rest of the name. Another method to get the full file name is to put the * symbol after the few letters.

```
sudo dpkg -i google*
```

In some cases, the installation of a Debian package may fail due to the lack of additional software packages. In such a situation, apply the following command to download the missing packages to finish the installation.

```
sudo apt install -f
```

The software icon will appear along with the other applications after the installation. Open the application software by pressing the mouse on the icon.

Open a text file using Terminal

On many occasions, Linux users need to open files and make changes to it. First, make sure which text editor application is available on your computer. Text editor applications can be found at **Applications > Accessories**. Linux-based operating systems are using different applications for the default text editor. For example, GNOME uses **Gedit**. Install a new text editor, if you are not sure about the name of the default text editor. The **mousepad** is a lightweight text editor. To install Mousepad, apply the following command:

```
sudo apt install mousepad
```

Open a text file using Mousepad

First, find the location of the file to open. For example, apply the following command to open the **syslog** file located at **/var/log**. We use the **Mousepad** text editor to open the file.

```
sudo mousepad /var/log/syslog
```

Syslog file contains the running history of each movement in Linux.

MySQL commands

Koha makes use of MySQL/MariaDB as the database. MariaDB is a community-developed project derived from the MySQL database management system. MariaDB is a Free database management system licensed under the GNU General Public License.

Here are the few basic commands to be familiar with MySQL/MariaDB operations. Apply the following commands in a terminal.

Enter into MySQL

```
sudo mysql -u root -p
```

First, it will ask for the Debian/Ubuntu password, and after that, it will ask for MySQL/MariaDB Root user command.

Create a database

```
create database micky;
```

Show databases

```
show databases;
```

These commands will list out all databases.

Delete database

```
drop database micky;
```

Enter into a database

If you are working on a Koha Live DVD, try the following commands. The default name of the Koha database is **koha_library**. Try the commands in a test machine using Koha Live DVD. Don't try these commands on a Koha production system. It will badly affect the running instance of Koha.

```
use koha_library;
```

Display tables

```
show tables;
```

Show table structure

```
describe biblio;
```

This command will display the structure of the table called Biblio.

Show the content inside the table

```
SELECT * FROM biblio;
```

Exit from the MySQL/MariaDB console

```
exit
```

Conclusion

The apt commands are beneficial for the library professionals and system administrators to maintain Koha on Debian/Ubuntu. No need to learn by heart all the Linux commands. Search and

find commands with the help of Google when it is required. The more you use commands, the more familiar they become.

Exercise

1. Install Filezilla application using the apt command.
2. Visit anydesk.com website and download the .deb file. Install the package using dpkg command.

For further reading

About MariaDB server

<https://mariadb.org/about>

The Debian GNU/Linux FAQ

<https://www.debian.org/doc/manuals/debian-faq/index.en.html>

25 Useful Basic Commands of APT-GET and APT-CACHE for Package Management

<https://www.tecmint.com/useful-basic-commands-of-apt-get-and-apt-cache-for-package-management/>

How To Check Your IP Address in Ubuntu

<https://itsfoss.com/check-ip-address-ubuntu/>

Maintenance of Koha

Learning objectives

Get an understanding of updating to the latest version of Koha.

Learn how to manage database backup securely.

Learn to restore a database backup to a new Koha installation.

Introduction

Timely maintenance of Debian/Ubuntu and Koha is essential for the good health of Debian/Ubuntu and Koha. Regular updating of Linux and Koha are required to keep the system up to date. Backing up the Koha database is part of data security. If a crisis occurs, the process of restoring database backup to a new Koha installation is a life saving task.

Update Koha

Koha releases a new version every six months (May and November) with a bundle of new features. The current version is called **Stable** and the previous version is called **Old Stable**. Major releases of Koha receive monthly updates. Debian and Ubuntu also release updates frequently. Debian/Ubuntu update and upgrade commands are enough to upgrade Koha to the latest releases. Apply the following command in a terminal,

```
sudo apt update  
sudo apt upgrade
```

Clean the packages after the upgrade process over.,

```
sudo apt-get clean
```



Information regarding the installation and other technical details available at **Koha > About** page. We can find many tabs in this page. **Server information** tab gives information about the Koha version and the Linux platform Koha running. Warnings about Koha display at **System Information** tab.

Take Koha database backup

Koha stores all information regarding documents, patrons, circulation, and other things stored in the database. To a certain extent, taking the backup of the database and keeping it in another storage place is enough to secure the data. Here are the steps to grab the database backup of Koha. Apply the following command in a terminal,

```
sudo mysqldump -ukoha_library -p koha_library | xz > koha_library.sql.xz
```

Above mentioned is a single line command. Enter the Linux password first, then enter the password of the Koha database. The database backup will be generated and compressed into XZ format. Keep the database backup in other storage devices like flash (e.g. pen drive) or cloud storage.

Koha users can schedule the process for regular backup. Scheduling of backup is possible with a tool called Cron with Linux based operating systems. Cron helps to plan and schedule the tasks on a specific time as a one time task/repetitive basis. For example, the backup can be scheduled at 8 pm every day. Do a search in the web for cron in Linux and get familiar on how to apply.

Restore database backup to Koha

Assume that the existing Koha installation is collapsed (Don't let that happen) and the database backup is safe with you. Install Koha again. Follow the steps to restore the database backup to a new installation.

Remove the existing database in the new Koha installation.

```
sudo mysql -uroot -p
```

[Enter the Linux password and enter MySQL Root password]

Delete the existing database and create a blank one.

```
drop database koha_library;  
create database koha_library;  
quit;
```


Copy your database backup from your pen drive to the home folder. If the file is in compressed format, extract the backup file. The extension of the MySQL backup file will be .sql. Then restore the old backup to the new Koha installation.

Database Restoration

Apply the following commands in a Terminal one by one.

```
sudo mysql -uroot -p koha_library < koha_library.sql  
exit
```

Upgrade Database Schema

The database schema of old Koha should be upgraded to match with the new version. Apply following commands in a terminal one by one.

```
sudo service memcached restart  
sudo koha-upgrade-schema library
```

Rebuild the Zebra Index

Koha uses a third party search engine called Zebra for search and retrieval of records. Apply the following command in a terminal to refresh the search index.

```
sudo koha-rebuild-zebra -v -f library
```

After rebuilding the Zebra Index, Koha becomes ready to use.

Upgrade/migration from a very old version of Koha

Libraries stick on with old versions of Koha facing difficulties while trying to upgrade to the new version. Upgrading from very old versions to the latest version may result in data loss. Koha stops the official support for older versions after a specific period. New versions of Koha introduce a lot of improvements and new features. Changes in database structure are required to accommodate new features. For example, Koha version 3.18 was released in 2014, and it has 168 tables. Version 19.05, released in 2019, has 204 tables. Koha developers strongly recommend for the regular upgradation to recent versions. The database structure is also subject to changes during the upgrade process.

Direct upgradation from old versions (e.g. versions before version 3.18) to the latest version probably ends in data loss. Restoration of an old version of Koha is a challenging task. Data migration from a running instance of an old version of Koha is comparatively easy. Porting of bibliographic records to MARC format, patron details, and circulation details to CSV is possible. Then it can be imported into a new version of Koha. Following steps can follow to export essential data:

- ❖ Note down all configurations with Koha including branch code, item types codes, authorized values, circulation, and rules. Take screenshots of all configurations.
- ❖ Export bibliographic details (MARC format) into MARC. Export patron and circulation details into CSV format using reports.
- ❖ Install a new version of Koha. Create branch code, Patron categories, Authorised values, circulation match with the old version of Koha.
- ❖ Import MARC file, patron, and circulation details.

How to seek help from the Koha community?

Koha users rely on community members to clear doubts, errors, and problem-solving. Email discussion forums and social media groups are available for users to interact with Koha experts. Include a detailed description of the error/problem in the message in simple words. If possible, add a screenshot that describes the error with the message. Mention the database server details, version of Koha, and Linux-based operating system. Visit the **About Koha > Server information** tab to get the version details of Koha, database server, and Linux. A detailed message helps the Koha community members to get the exact picture of the problem, and the high chance of getting a reply with a solution.

Conclusion

Library professionals should be familiar with the maintenance activities of Koha like upgrading when a new release arrives, regular backup of the database, and restore the database when a crisis happens. Upgrading from a very old version to a new one is a challenging task. Seek the assistance of an expert to recover the data from the old database and migrate to the latest version.

Exercise

1. Visit the koha-community.org website and find the latest and previous Koha version release announcement. Go through release notes.

For further reading

Koha backup

<http://kohageek.blogspot.com/search/label/backup>

CronHowto

<https://help.ubuntu.com/community/CronHowto>

Move old Koha database to new installation

<http://kohageek.blogspot.com/search/label/Restore>

Understanding Zebra indexing

https://wiki.koha-community.org/wiki/Understanding_Zebra_indexing

Get updates on Koha

Learning objectives

Introduce various resources to keep in touch with Koha developments.

Introduction

Koha is a community-owned project, and the development is fast. Always expect new changes in technical matters, features, and functions. Koha users need to keep in touch with the developments. Then only successful Koha management is possible.

Helpful resources

Following resources are helpful to learn new things and get updates on Koha:

Koha Home page

The home page of the Koha ILS project is <http://koha-community.org>. Koha home page is a comprehensive information portal. User can find the following resources at the Koha home page:

Koha documentation: It contains complete Koha user manuals in various languages. User manual covers all Koha modules with screenshots. Previous FAQs merged with the user manual. URL: <https://koha-community.org/documentation>.

Koha Community Newsletter: The monthly newsletter discusses the latest developments, news, tips, coming, and past events.

Release notes: It lists out all features and changes available with the latest versions of Koha.

Following are the other places where Koha users get valuable information.

Bugzilla

Koha users can report bugs (software errors) and suggest new features.
URL: <https://bugs.koha-community.org>

Koha Wiki

Installation manuals and other tutorials available with Koha Wiki.
URL: <https://wiki.koha-community.org>

Koha DB schema

Koha database schema is made available to the public and is helpful to know the database structure, table, and field names. The information on database structure is useful at the time of report making.

URL: <http://schema.koha-community.org>.

Vimeo channel

Videos, tutorials, and other information from Koha users.

URL: <https://vimeo.com/channels/kohails>

Koha newbie guide

This newbie guide was created by B.W. Johnson. Little bit old one, but useful to get an overview of the Koha workflow for beginners.

URL: <http://staff.washington.edu/rmjost/Kohanewbieguide.pdf>

Koha Demo

Koha home page listed out demo instances for learners.

URL: <https://koha-community.org/demo/>

Koha mailing lists

Koha projects maintain different email lists for various purposes. The general mailing list is an excellent platform to interact with developers and users together. Users can put queries and receive answers from users and experts. Archives of the email discussion forums act as a useful reference source.

URL: <https://koha-community.org/support/koha-mailing-lists/>

Koha Users

There is an active Facebook group for Koha available. Answer the questions regarding Koha, to join the group.

URL: <https://www.facebook.com/groups/475420505905835/>

Koha Library System Project

The official Facebook group of Koha users.

URL: <https://www.facebook.com/groups/475420505905835/>

Koha Education

ByWater Solutions, a Koha service provider, offers Koha learning materials.

URL: <https://bywatersolutions.com/education>

Blog@L2C2 Technologies

A blog started by L2C2 Technologies and Indranil Das Gupta. Indranil Das Gupta is a pioneer of Koha from India.

URL: <http://blog.l2c2.co.in>

Catalyst Blog

A blog discusses both Open Source and Koha things. Catalyst is an Open Source software service provider from New Zealand.

URL: <https://www.catalyst.net.nz/about-us/blog>

Koha Geek

Koha tutorials, tips and tricks discussed in this blog.

URL: <http://kohageek.blogspot.in>

Librarian 2.0

A blog maintained by Mahesh P Pandallur, a young library professional from Kerala, India. His blog is useful for Koha users to learn and try new things.

URL: <http://libtechnophile.blogspot.com>

An online manual of Open Source tools

A website that contains Koha learning materials. The website is maintained by D.P. Tripathi, Assistant Librarian, Biju Patnaik Central Library, National Institute of Technology Rourkela, Odisha.

URL: <http://www.dptripathi.in/manual>

Know Gate

Find various Koha tutorials and technical documents developed by NISCAIR.

URL: <http://knowgate.niscair.res.in/blogs>

Koha paid support

Libraries that need paid support can use the listing available at Koha official website. Users can find commercial vendors in their country.

URL: <https://koha-community.org/support/paid-support>

Conclusion

The resources mentioned in this unit are helpful to keep in touch with the developments in the Koha ILS project. Latest updates are essential to maintain Koha well in the workplace. Participating

in the community discussions and involving in Koha social media groups are useful to update the knowledge level.