Koha 3.2 Manual (fr)

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Chapter 1. Administration

1.1. PrÃ©fÃ©rences systÃ¨me globales

Les prÃ©fÃ©rences systÃ¨me globales contrÃ´lent la faÃ§on dont koha fonctionne en gÃ©nÃ©ral. DÃ©finissez ces prÃ©fÃ©rences avant tout le reste dans Koha.

Lorsque vous Ã©ditez les prÃ©fÃ©rences, une mention '(modifiÃ©)' apparaÃ®t Ã cÃ´tÃ© du paramÃ¨tre que vous avez changÃ© jusqu'Ã ce que vous cliquiez le bouton 'Enregistrer tout':

1.1.1. Acquisitions

1.1.1.1. RenewSerialAddsSuggestion

Valeur par dÃ©faut : Don't add

Asks: ___ a suggestion for a biblio when its attached serial is renewed.

Valeurs :

- Add
- Don't add

1.1.2. Administration

These preferences are general settings for your system.

1.1.2.1. Interface options

These preference are related to your Koha interface

1.1.2.1.1. DebugLevel

Valeur par dÃ©faut : lots of

Asks: Show ___ debugging information in the browser when an internal error occurs.

Valeurs :

- lots of - will show as much information as possble
- no - will only show basic error messages
- some - will show only some of the information available

1.1.2.1.2. delimiter

This preference determines how reports exported from Koha will seperate data.

Valeur par dÃ©faut : semincolons

Asks: Separate columns in an exported report file with ___ by default.

Valeurs :

- #'s
- backslashes
- commas
- semincolons
- slashes

tabs

1.1.2.1.3. KohaAdminEmailAddress

This is the default From: address for emails unless there is one for the particular branch, and is referred to when an internal error occurs.

Asks: Use ___ as the email address for the administrator of Koha.

1.1.2.1.4. noItemTypeImages

Valeur par dÃ©faut : Show

Asks: ___ itemtype icons in the catalog.

Valeurs :

Shows

Don't show

1.1.2.1.5. virtualshelves

Valeur par dÃ©faut : Allow

Asks: ___ staff and patrons to create and view saved lists of books.

Valeurs :

Allow

Don't Allow

1.1.2.2. Login options

These preferences are related to logging into your Koha system

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1.1.2.2.1. AutoLocation

Valeur par dÃ©faut : Don't require

Asks: ___ staff to log in from a computer in the IP address range specified by their library (if any).

Set IP address range in the library administration area

Get there: More > Administration > Basic Parameters > Libraries & Groups

Valeurs :

Don't require

Require

1.1.2.2.2. IndependantBranches

Valeur par dÃ©faut : Don't prevent

Asks: ___ staff (but not superlibrarians) from modifying objects (holds, items, patrons, etc.) belonging to other libraries.

Valeurs :

Don't prevent

Prevent

1.1.2.2.3. insecure

Valeur par dÃ©faut : Don't allow

Asks: ___ staff to access the staff client without logging in.

Valeurs :

Allow

Don't alow

Enabling this is dangerous, and should not be done in production environments.

1.1.2.2.4. SessionStorage

Valeur par dÃ©faut : in the MySQL database

Asks: Store login session information ___

Valeurs :

as temporary files

in the MySQL database

in the PostgreSQL database

PostgreSQL is not yet supported.

1.1.2.2.5. timeout

Valeur par dÃ©faut : 12000000

Asks: Automatically log out users after ___ seconds of inactivity.

1.1.3. Authorities

1.1.3.1. BiblioAddsAuthorities

Valeur par dÃ©faut : allow

Asks: When editing records, ___ them too automatically create new authority records if needed, rather than having to reference existing authorities.

Valeurs :

allow

This setting allows you to type values in the fields controlled by authorities and then adds a new authority if one does not exist

don't allow

This setting will lock the authority controlled fields, forcing you to search for an authority versus allowing you to type the information in yourself.

1.1.3.2. dontmerge

Valeur par dÃ©faut : Don't

Asks: ___ automatically update attached biblios when changing an authority record.

Valeurs :

Do

Don't

If this is set to not merge you will need to ask your administrator to enable the merge_authorities.pl cronjob.

1.1.4. Cataloging

1.1.4.1. Display

1.1.4.1.1. authoritysep

Valeur par dÃ©faut : --

Asks: Separate multiple displayed authors, series or subjects with ___.

1.1.4.1.2. hide_marc

Valeur par dÃ©faut : Display

Asks: ___ MARC tag numbers, subfield codes and indicators in MARC views.

Valeurs :

Display -- shows the tag numbers on the cataloging interface

Don't display -- shows just descriptive text when cataloging

1.1.4.1.3. IntranetBiblioDefaultView

Valeur par dÃ©faut : ISBD form

Asks: By default, display biblio records in ___

Valeurs :

ISBD form -- displays records in the staff client in the old card catalog format

MARC form -- displays records in the staff client in MARC

normal form -- visual display in the staff client (for the average person)

1.1.4.1.4. ISBD

Valeur par dÃ©faut : MARC21 Default Appendix or UNIMARC Default Appendix

Asks: Use the following as the ISBD template:

Allows you to customize ISBD view for your system.

1.1.4.1.5. LabelMARCView

Valeur par dÃ©faut : Don't

Asks: ___ collapse repeated tags of the same type into one tag entry.

Valeurs :

Do -- will combine all identical tag numbers under one heading in the MARC view in the OPAC and Staff Client

Don't -- will list all of the tags individually in the MARC view in the OPAC and Staff Client

---

1.1.4.1.6. OPACSerialIssueDisplayCount

Valeur par dÃ©faut : 3

Asks: Show the ___ previous issues of a serial on the OPAC.

1.1.4.1.7. OpacSuppression

Valeur par dÃ©faut : Don't hide

Asks: ___ items marked as suppressed from OPAC search results.

Valeurs :

  Don't hide -- will show items in OPAC search results if they are marked suppressed

  Hide -- will not show items in OPAC search results if they're marked as suppressed

> Each bib record with items you want to hide from the OPAC simply need to have the 942n field set to 1. The index then hides it from display in OPAC but will still display it in the Staff Client

> If this preference is set to 'hide' and you have the 942n field set to 1, it will hide the entire bib record - not just an individual item.
> You must have the Suppress index set up in Zebra and at least one suppressed item, or your searches will be broken.

1.1.4.1.8. StaffSerialIssueDisplayCount

Valeur par dÃ©faut : 3

Asks: Show the ___ previous issues of a serial on the staff client.

1.1.4.1.9. SubscriptionHistory

Valeur par dÃ©faut : a full list

Asks: When showing the subscription information for a biblio, show ___ of the serial issues.

Valeurs :

  a full list

  a summary

1.1.4.1.10. URLLinkText

Valeur par dÃ©faut : Online Resource

Asks: Show ___ as the text of links embedded in MARC records.

This value will show in place of the URL for data entered in the 856$u field if no other label is defined in the 856 filed.

1.1.4.2. Interface

1.1.4.2.1. advancedMARCeditor

Valeur par dÃ©faut : Don't display

Asks: ___ descriptions of fields and subfields in the MARC editor.

Valeurs :

  Display

  Don't display

1.1.4.2.2. DefaultClassificationSource

Valeur par dÃ©faut : Dewey Decimal System

Asks: Use ___ as the default classification source.

Valeurs :

ANSCR (Sound Recordings)

Dewey Decimal Classification

Library of Congress Classification

Other/Generic Classification Scheme

SuDoc Classification (U.S. GPO)

Universal Decimal Classification

1.1.4.3. Record Structure

1.1.4.3.1. autoBarcode

Valeur par dÃ©faut : generated in the form <branchcode>yymm0001

Asks: Barcodes are ___

Valeurs :

generated in the form <branchcode>yymm0001

generated in the form <year>-0001

<year>-0002. generated in the form 1, 2, 3

not generated automatically

1.1.4.3.2. item-level_itypes

Valeur par dÃ©faut : specific item

Asks: Use the item type of the ___ as the authoritative item type (for determining circulation and fines rules, etc).

Valeurs :

biblio record

specifc item

1.1.4.3.3. itemcallnumber

Valeur par dÃ©faut : 082ab

Asks: Map the MARC subfield to an item's callnumber.

This can contain multiple subfields to look in; for instance 082ab would look in 082 subfields a and b.

Examples: Dewey: 082ab or 092ab; LOC: 050ab or 090ab; from the item record: 852hi

---

1.1.4.3.4. marcflavour

Valeur par dÃ©faut : MARC21

Asks: Interpret and store MARC records in the ___ format.

Valeurs :

- MARC21
- UNIMARC

1.1.4.3.5. MARCOrgCode

Valeur par dÃ©faut : OSt

Asks: Fill in the MARC organization code ___ by default in new MARC records (leave blank to disable).

Learn More: MARC Code list for Organizations

1.1.4.3.6. z3950NormalizeAuthor & z3950AuthorAuthFields

Defaults: Don't copy & 701,702,700

Asks: ___ authors from the UNIMARC ___ tags (separated by commas) to the correct author tags when importing a record using Z39.50.

Values for z3950NormalizeAuthor:

- Copy
- Don't copy

1.1.4.4. Spine Labels

1.1.4.4.1. SpineLabelAutoPrint

Valeur par dÃ©faut : don't

Asks: When using the quick spine label printer, ___ automatically pop up a print dialog.

Valeurs :

- do
- don't

1.1.4.4.2. SpineLabelFormat

Valeur par dÃ©faut : <itemcallnumber><copynumber>

Asks: Include the following fields on a quick-printed spine label: (Enter in columns from the biblio, biblioitems or items tables, surrounded by < and >.)

1.1.5. Circulation

1.1.5.1. Checkout Policy

1.1.5.1.1. AllowNotForLoanOverride

Valeur par dÃ©faut : Allow

Asks: ___ staff to override and check out items that are marked as not for loan.

Valeurs :

- Allow
- Don't allow

1.1.5.1.2. AllowRenewalLimitOverride

Valeur par dÃ©faut : Allow

Asks: ___ staff to manually override the renewal limit and renew a checkout when it would go over the renewal limit.

Valeurs :

Allow

Don't allow

1.1.5.1.3. AutomaticItemReturn

Valeur par dÃ©faut : Do

Asks: ___ automatically transfer items to their home branch when they are returned.

Valeurs :

Do

Don't

1.1.5.1.4. ceilingDueDate

Valeur par dÃ©faut : no value

Asks: Make all checkouts due on or before ___

Enter the date to match the format you set in your localization preferences (iso = YYYY-MM-DD or metric = MM/DD/YYYY)

Get there: More > Administration > Global system preferences > I18N/L10N > dateformat

1.1.5.1.5. CircControl

Valeur par dÃ©faut : the library the item is from

Asks: Use the checkout and fines rules of ___

Valeurs :

the library the item is from

the library the patron is from

the library you are logged in at

1.1.5.1.6. globalDueDate

Valeur par dÃ©faut : no value

Asks: Make all checkouts have a due date of ___

Enter the date to match the format you set in your localization preferences (iso = YYYY-MM-DD or metric = MM/DD/YYYY)

Get there: More > Administration > Global system preferences > I18N/L10N > dateformat

1.1.5.1.7. HomeOrHoldingBranch

Valeur par dÃ©faut : the library the item was checked out from

Asks: Use the checkout and fines rules of ___

Valeurs :

the library the item is from

the library the item was checked out from

It is not recommend that this setting be changed after initial setup of Koha
This preference does nothing unless the IndependantBranchespreference is turned ON.

Get there: More > Administration > Global System Preferences > Admin > IndependantBranches

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1.1.5.1.8. InProcessingToShelvingCart

Valeur par dÃ©faut : Don't move

Asks: ___ items that have the location PROC to the location CART when they are checked in.

Valeurs :

Don't move

Move

1.1.5.1.9. IssuingInProcess

Valeur par dÃ©faut : Don't prevent

Asks: ___ patrons from checking out an item whose rental charge would take them over the limit.

Valeurs :

Don't prevent

Prevent

Example: Your library has a $5 limit set for 'fines' (ie, after incurring $5 in fines, a patron can no longer check out items). A patron comes to the desk with 5 items to check out (4 books and a video) The patron has $4 in charges already on their account. One of the videos has a rental charge of $1, therefore making the total fines on the patron's account suddenly $5 (the limit).

1.1.5.1.10. maxoutstanding

Valeur par dÃ©faut : 5

Asks: Prevent patrons from making holds on the OPAC if they owe more than ___ USD in fines.

1.1.5.1.11. NewItemsDefaultLocation

Asks: When items are created, give them the temporary location of ___ (should be a location code, or blank to disable).

1.1.5.1.12. noissuescharge

Valeur par dÃ©faut : 5

Asks: Prevent patrons from checking out books if they have more than ___ USD in fines.

1.1.5.1.13. RenewalPeriodBase

Valeur par dÃ©faut : the old due date of the checkout

Asks: When renewing checkouts, base the new due date on ___

Valeurs :

the old due date of the checkout

the current date

1.1.5.1.14. ReturnBeforeExpiry

Valeur par dÃ©faut : Don't require

Asks: ___ patrons to return books before their accounts expire (by restricting due dates to before the patron's expiration date).

Valeurs :

Don't require

Require

1.1.5.1.15. ReturnToShelvingCart

Valeur par dÃ©faut : Don't move

Asks: ___ all items to the location CART when they are checked in.

Valeurs :

Don't move

Move

1.1.5.1.16. TransfersMaxDaysWarning

Valeur par dÃ©faut : 3

Asks: Show a warning on the "Transfers to Recieve" screen if the transfer has not been received ___ days after it is sent.

1.1.5.1.17. UseBranchTransferLimits & BranchTransferLimitsType

Defaults: Don't enforce & collection code

Asks: ___ branch transfer limits based on ___

UseBranchTransferLimits Valeurs :

Don't enforce

Enforce

BranchTransferLimitsType Valeurs :

collection code

item type

1.1.5.1.18. useDaysMode

Valeur par dÃ©faut : Don't include

Asks: ___ days when the library in closed when calculating due dates.

Valeurs :

Don't include

Include

1.1.5.2. Fines Policy

1.1.5.2.1. finesCalendar

Valeur par dÃ©faut : not including the days the library is closed

Asks: Calculate fines based on days overdue ___

Valeurs :

directly

not including the days the library is closed

1.1.5.2.2. finesMode

Valeur par dÃ©faut : Calculate (but only for mailing to the admin)

Asks: ___ fines

Valeurs :

Calculate (but only for mailing to the admin)

Calculate and charge

Don't calculate

Requires that you have the fines cron job running (misc/cronjobs/fines.pl)

1.1.5.3. Holds Policy

1.1.5.3.1. AllowHoldDateInFuture

Valeur par dÃ©faut : Allow

Asks: ___ hold requests to be placed that do not enter the waiting list until a certain future date.

Valeurs :

Allow

Don't allow

1.1.5.3.2. AllowHoldsOnDamagedItems

Valeur par dÃ©faut : Allow

Asks: ___ hold requests to be placed on damaged items.

Valeurs :

Allow

Don't allow

1.1.5.3.3. AllowHoldPolicyOverride

Valeur par dÃ©faut : Allow

Asks: ___ staff to override hold policies when placing holds.

Valeurs :

Allow

Don't allow

1.1.5.3.4. AllowOnShelfHolds

Valeur par dÃ©faut : Allow

Asks: ___ hold requests to be placed on items that are not checked out.

Valeurs :

Allow

Don't Allow

1.1.5.3.5. canreservefromotherbranches

Valeur par dÃ©faut : Allow

Asks: ___ a user from one library to place a hold on an item from another library

Valeurs :

Allow

Don't allow (with independant branches)

1.1.5.3.6. maxreserves

Valeur par dÃ©faut : 50

Asks: Patrons can only have ___ holds at once.

1.1.5.3.7. OPACAllowHoldDateInFuture

Valeur par dÃ©faut : Allow

Asks: ___ patrons to place holds that don't enter the waiting list until a certain future date.

Valeurs :

Allow

AllowHoldDateInFuture must also be enabled for this to work

Don't allow

1.1.5.3.8. ReservesNeedReturns

Valeur par dÃ©faut : Don't automatically

Asks: ___ mark holds as found and waiting when a hold is placed specifically on them and they are already checked in.

Valeurs :

Automatically

Don't automatically

1.1.5.3.9. StaticHoldsQueueWeight & RandomizeHoldsQueueWeight

Defaults: 0 & in that order

Asks: Satisfy holds from the libraries ___ (as branchcodes, separated by commas; if empty, uses all libraries) ___

RandomizeHoldsQueueWeight Valeurs :

- in random order
- in that order

1.1.5.4. Interface

1.1.5.4.1. AllowAllMessageDeletion

Valeur par dÃ©faut : Don't allow

Asks: ___ staff to delete messages added from other libraries.

Valeurs :

- Allow
- Don't allow

1.1.5.4.2. CircAutocompl

Valeur par dÃ©faut : Try

Asks: ___ to automatically fill in the member when entering a patron search on the circulation screen.

Valeurs :

- Don't try
- Try

1.1.5.4.3. FilterBeforeOverdueReport & DisplayClearScreenButton

FilterBeforeOverdueReport Valeur par dÃ©faut : Don't require

DisplayClearScreenButton Valeur par dÃ©faut : Show

Asks: ___ staff to choose which checkouts to show before running the overdues report. ___ a button to clear the current patron from the screen on the circulation screen.

FilterBeforeOverdueReport Valeurs :

- Don't require
- Require

DisplayClearScreenButton Valeurs :

- Don't show
- Show

1.1.5.4.4. itemBarcodeInputFilter

Valeur par dÃ©faut : Don't filter

Asks: ___ scanned patron barcodes.

Valeurs :

Convert from CueCat format

Don't filter

Remove spaces from

Remove the first number from T-prefix style

1.1.5.4.5. numReturnedItemsToShow

Valeur par dÃ©faut : 20

Asks : Show the ___ last returned items on the checkin screen.

1.1.5.4.6. previousIssuesDefaultSortOrder

Valeur par dÃ©faut : earliest to latest

Asks: Sort previous checkouts on the circulation page from ___ due date.

Valeurs :

earliest to latest

latest to earliest

1.1.5.4.7. ReservesMaxPickUpDelay

Valeur par dÃ©faut : 7

Asks: Mark a hold as problematic if it has been waiting for more than ___ days.

1.1.5.4.8. SpecifyDueDate

Valeur par dÃ©faut : Allow

Asks: ___ staff to specify a due date for a checkout.

Due dates are calculated using your circulation and fines rules, but staff can override that if you allow them to specific a due date at checkout.

Valeurs :

Allow

Don't allow

1.1.5.4.9. todaysIssuesDefaultSortOrder

Valeur par dÃ©faut : latest to earliest

Asks: Sort today's checkouts on the circulation page from ___ due date.

Valeurs :

earliest to latest

latest to earliest

1.1.5.5. Self Checkout

1.1.5.5.1. ShowPatronImageInWebBasedSelfCheck

Valeur par dÃ©faut : Don't show

Asks ___ the patron's picture (if one has been added) when they use the web-based self checkout.

Valeurs :

Don't show

Show

1.1.6. Enhanced Content

Always read the terms of service associated with external data sources to be sure that you are using the products within the allowed limits.
If you have more than one source of cover images set up, Koha will use the first available.

1.1.6.1. All

1.1.6.1.1. FRBRizeEditions

Valeur par dÃ©faut : Don't show

Asks: ___ other editions of an item on the staff client

Valeurs :

Don't show

Show

This preference pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.

Requires that you turn on one or more of the ISBN services (ThingISNBN, XISBN, PinesISBN)

1.1.6.1.2. OPACFRBRizeEditions

Valeur par dÃ©faut : Don't show

Asks: ___ other editions of an item on the OPAC.

Valeurs :

Don't show

Show

This preference pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.

Requires that you turn on one or more of the ISBN services (ThingISNBN, XISBN, PinesISBN)

1.1.6.2. Amazon

1.1.6.2.1. AmazonEnabled

Valeur par dÃ©faut : Don't use

Asks: ___ data from Amazon on the staff interface (including reviews and "Search Inside" links on item detail pages).

Valeurs :

Don't use

Use

This requires that you have signed up for and entered an access key.

Sign up at: http://aws.amazon.com/

Set your enter your key in the AWSAccessKeyID system preference

Get there: More > Administration > Global system preferences > Enhanced Content > Amazon > AWSAccessKeyID

1.1.6.2.2. OPACAmazonEnabled

Valeur par dÃ©faut : Don't use

Asks: ___ data from Amazon on the OPAC (including reviews and "Search Inside" links on item detail pages).

Valeurs :

Don't use

Use

This requires that you have signed up for and entered an access key.

Sign up at: http://aws.amazon.com/

Set your enter your key in the AWSAccessKeyID system preference

Get there: More > Administration > Global system preferences > Enhanced Content > Amazon > AWSAccessKeyID

1.1.6.2.3. AmazonLocale

Valeur par dÃ©faut : American

Asks: Use Amazon data from its ___ website.

Value:

American

British

Canadian

French

German

Japanese

1.1.6.2.4. AWSAccessKeyID

Asks: Access Amazon content using the access key ___

Sign up at: http://aws.amazon.com/

1.1.6.2.5. AmazonAssocTag

Asks: Put the associate tag ___ on links to Amazon.

This can net your library referral fees if a patron decides to buy an item after clicking through to Amazon from your site.

Sign up at: http://aws.amazon.com/

1.1.6.2.6. AmazonCoverImages

Valeur par dÃ©faut : Don't show

Asks: ___ cover images from Amazon on search results and item detail pages on the staff interface.

Valeurs :

- Don't show
- Show

Requires that AmazonEnabled is set to 'Use'

1.1.6.2.7. AmazonReviews

Valeur par dÃ©faut : Don't show

Asks: ___ reviews from Amazon on item detail pages on the staff interface.

Valeurs :

- Don't show
- Show

Requires that AmazonEnabled is set to 'Use'

1.1.6.2.8. AmazonSimilarItems

Valeur par dÃ©faut : Don't show

Asks: ___ similar items, as determined by Amazon, on item detail pages on the staff interface.

Valeurs :

- Don't show
- Show

This will use Amazon data to determine if you have similar items in your collection - it will not show items that you do not already have cataloged at your library.

Requires that AmazonEnabled is set to 'Use'

1.1.6.2.9. OPACAmazonCoverImages

Valeur par dÃ©faut : Don't show

Asks: ___ cover images from Amazon on search results and item detail pages on the OPAC.

Valeurs :

- Don't show
- Show

Requires that OPACAmazonEnabled is set to 'Use'

1.1.6.2.10. OPACAmazonSimilarItems

Valeur par dÃ©faut : Don't show

Asks: ___ similar items, as determined by Amazon, on item detail pages on the OPAC.

Valeurs :

- Don't show
- Show

This will use Amazon data to determine if you have similar items in your collection - it will not show items that you do not already have cataloged at your library.

Requires that OPACAmazonEnabled is set to 'Use'

1.1.6.2.11. OPACAmazonReviews

Valeur par dÃ©faut : Don't show

Asks: ___ reviews from Amazon on item detail pages on the OPAC.

Valeurs :

Don't show

Show

Requires that OPACAmazonEnabled is set to 'Use'

1.1.6.3. BabelthÃ¨que

1.1.6.3.1. Babeltheque

Valeur par dÃ©faut : Don't

Asks: ___ include information (such as reviews and citations) from BabelthÃ¨que in item detail pages on the OPAC.

Valeurs :

Do

Don't

1.1.6.4. Baker & Taylor

This is a pay service, you must contact Baker & Taylor to subscribe to this service before setting these options.

1.1.6.4.1. BakerTaylorEnabled

Valeur par dÃ©faut : Don't add

Asks: ___ Baker and Taylor links and cover images to the OPAC and staff client. This requires that you have entered in a username and password (which can be seen in image links).

Valeurs :

Add

Don't add

To use this you will need to also set the BakerTaylorUsername & BakerTaylorPassword system preferences

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1.1.6.4.2. BakerTaylorBookstoreURL

Asks: Baker and Taylor "My Library Bookstore" links should be accessed at https:// ___ isbn

This should be filled in with something like ocls.mylibrarybookstore.com/MLB/actions/searchHandler.do?nextPage=bookDetails&parentNum=10923&key=

Leave it blank to disable these links.
Be sure to get this information from Baker & Taylor when subscribing.

1.1.6.4.3. BakerTaylorUsername & BakerTaylorPassword

Asks: Access Baker and Taylor using username ___ and password ___

Be sure to get this information from Baker & Taylor when subscribing.

1.1.6.5. Google

1.1.6.5.1. GoogleJackets

Valeur par dÃ©faut : Don't add

Asks: ___ cover images from Google Books to search results and item detail pages on the OPAC.

Valeurs :

Add

Don't add

1.1.6.6. LibraryThing

LibraryThing for Libraries is a pay service. You must first contact LibraryThing directly for pricing and subscription information. Learn more at http://www.librarything.com/forlibraries

1.1.6.6.1. ThingISBN

Valeur par dÃ©faut : Don't use

Asks: ___ the ThingISBN service to show other editions of a title

Valeurs :

Don't use

Use

Requires FRBRizeEditions and/or OPACFRBRizeEditions set to 'show'
This is separate from Library Thing for Libraries and does not have a cost associated with it.

1.1.6.6.2. LibraryThingForLibrariesEnabled

Deault: Don't show

Asks: ___ reviews, similar items, and tags from Library Thing for Libraries on item detail pages on the OPAC.

Valeurs :

Don't show

Show

If this is set to 'show' you will need to enter a value in the 'LibraryThingForLibrariesID' system preference.

1.1.6.6.3. LibraryThingForLibrariesID

Asks: Access Library Thing for Libraries using the customer ID ___

This value is provided to you when you sign up for LibraryThing for Libraries.

1.1.6.6.4. LibraryThingForLibrariesTabbedView

Valeur par dÃ©faut : in line with bibliographic information

Asks: Show Library Thing for Libraries content ___

Valeurs :

in line with bibliographic information

in tabs

1.1.6.7. OCLC

1.1.6.7.1. XISBN

Valeur par dÃ©faut : Don't use

Asks: ___ the OCLC xISBN service to show other editions of a title

Valeurs :

- Don't use
- Use
  - Requires FRBRizeEditions and/or OPACFRBRizeEditions set to 'show'

1.1.6.7.2. OCLCAffiliateID

Asks: Use the OCLC affiliate ID ___ to access the xISBN service.

> Unless you have signed up for an ID with OCLC, you are limited to 500 requests per day. Available at: http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp

---

1.1.6.7.3. XISBNDailyLimit

Valeur par dÃ©faut : 499

Asks: Only use the xISBN service ___ times a day.

> Unless you have signed up for an ID with OCLC, you are limited to 500 requests per day. Available at: http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp

---

1.1.6.8. Syndetics

Syndetics is a pay service. You must first contact Syndetics directly for pricing and subscription information.

1.1.6.8.1. SyndeticsEnabled

Valeur par dÃ©faut : Don't use

Asks: ___ content from Syndetics.

Valeurs :

- Don't use
- Use
  - Requires that you enter your SyndeticsClientCode before this content will appear.

1.1.6.8.2. SyndeticsClientCode

Asks: Use the client code ___ to access Syndetics.

> You will need to get your client code directly from Syndetics.

1.1.6.8.3. SyndeticsCoverImages & SyndeticsCoverImageSize

SyndeticsCoverImages Valeur par dÃ©faut : Don't show

SyndeticsCoverImageSize Valeur par dÃ©faut : medium

Asks: ___ cover images from Syndetics on search results and item detail pages on the OPAC in a ___ size.

SyndeticsCoverImages Valeurs :

Don't show

Show

SyndeticsCoverImageSize Valeurs :

medium

large

1.1.6.8.4. SyndeticsAuthorNotes

Valeur par dÃ©faut : Don't show

Asks: ___ notes about the author of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.8.5. SyndeticsAwards

Valeur par dÃ©faut : Don't show

Asks: ___ information from Syndetics about the awards a title has won on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.8.6. SyndeticsEditions

Valeur par dÃ©faut : Don't show

Asks: ___ information about other editions of a title from Syndetics on item detail pages on the OPAC

Valeurs :

Don't show

Show

Requires OPACFRBRizeEditions set to 'show'

1.1.6.8.7. SyndeticsExcerpt

Valeur par dÃ©faut : Don't show

Asks: ___ excerpts from of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.8.8. SyndeticsReviews

Valeur par dÃ©faut : Don't show

Asks: ___ reviews of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.8.9. SyndeticsSeries

Valeur par dÃ©faut : Don't show

Asks: ___ information on other books in a title's series from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.8.10. SyndeticsSummary

Valeur par dÃ©faut : Don't show

Asks: ___ a summary of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.8.11. SyndeticsTOC

Valeur par dÃ©faut : Don't show

Asks: ___ the table of contents of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.6.9. Tagging

1.1.6.9.1. TagsEnabled

Valeur par dÃ©faut : Allow

Asks: ___ patrons and staff to put tags on items.

Valeurs :

Allow

Don't allow

1.1.6.9.2. TagsModeration

Valeur par dÃ©faut : Don't require

Asks: ___ that tags submitted by patrons be reviewed by a staff member before being shown.

Valeurs :

Don't require

Require

When moderation is required all tags go through the tag moderation tool before becoming visible.

Get there: More > Tools > Tags

1.1.6.9.3. TagsShowOnList

Valeur par dÃ©faut : 6

Asks: Show ___ tags on search results on the OPAC.

Set the value to 0 (zero) to turn this feature off.

1.1.6.9.4. TagsInputOnList

Valeur par dÃ©faut : Allow

Asks: ___ patrons to input tags on search results on the OPAC.

Valeurs :

Allow

Don't allow

1.1.6.9.5. TagsShowOnDetail

Valeur par dÃ©faut : 10

Asks: Show ___ tags on item detail pages on the OPAC.

Set the value to 0 (zero) to turn this feature off.

1.1.6.9.6. TagsInputOnDetail

Valeur par dÃ©faut : Allow

Asks: ___ patrons to input tags on item detail pages on the OPAC.

Valeurs :

Allow

Don't allow

1.1.6.9.7. TagsExternalDictionary

Asks: Allow tags in the dictionary of the ispell executable ___ on the server to be approved without moderation.

Enter the path on your server to a local ispell executable, used to set $Lingua::Ispell::path.

An example would be /usr/bin/ispell

1.1.7. I18N/L10N

1.1.7.1. dateformat

Valeur par dÃ©faut : mm/dd/yyyy

Asks: Format dates like ___

Valeurs :

dd/mm/yyyy

mm/dd/yyyy

yyyy/mm/dd

1.1.7.2. opaclanguagesdisplay

Valeur par dÃ©faut : Don't allow

Asks: ___ patrons to change the language they see on the OPAC.

Valeurs :

Allow

Don't allow

1.1.8. Local Use

1.1.9. Logs

Logs keep track of transaction on the system. You can decide which actions you want to log and which you don't using these preferences.

1.1.9.1. BorrowersLog

Valeur par dÃ©faut : Log

Asks: ___ changes to patron records.

Valeurs :

Don't log

Log

1.1.9.2. CataloguingLog

Valeur par dÃ©faut : Don't log

Asks: ___ any changes to bibliographic or item records.

Valeurs :

Don't log

Log

Since this occurs whenever a book is cataloged, edited, or checked in or out it can be very resource intensive - slowing down your system.

1.1.9.3. FinesLog

Valeur par dÃ©faut : Log

Asks: ___ when overdue fines are charged or automatically forgiven.

Valeurs :

- Don't log
- Log

1.1.9.4. IssueLog

Valeur par dÃ©faut : Log

Asks: ___ when items are checked out.

Valeurs :

- Don't log
- Log

1.1.9.5. LetterLog

Valeur par dÃ©faut : Log

Asks: ___ when an automatic claim notice is sent.

Valeurs :

- Don't log
- Log
  - This log tracks all notices that go to patrons including the overdue notices.

1.1.9.6. ReturnLog

Valeur par dÃ©faut : Log

Asks: ___ when items are returned.

Valeurs :

- Don't log
- Log

1.1.9.7. SubscriptionLog

Valeur par dÃ©faut : Log

Asks: ___ when serials are added, deleted or changed.

Valeurs :

- Don't log
- Log

1.1.10. OPAC

1.1.10.1. Appearance

These preferences control how things appear in the OPAC.

1.1.10.1.1. AuthorisedValueImages

Valeur par dÃ©faut : Don't show

Asks: ___ images for authorized values (such as lost statuses and locations) in search results and item detail pages on the OPAC.

Valeurs :

- Don't show
- Show

Get there: More > Administration > Authorized Values

1.1.10.1.2. BiblioDefaultView

Valeur par dÃ©faut : don't

Asks: When patrons click on a link to another website from your OPAC (like Amazon or OCLC), ___ open the website in a new window.

Valeurs :

- Do
- Don't

1.1.10.1.3. DisplayOPACiconsXSLT

Valeur par dÃ©faut : Don't show

Asks: On pages displayed with XSLT stylesheets on the OPAC, ___ icons for itemtype and authorized values.

Valeurs :

- Don't show
- Show

1.1.10.1.4. hidelostitems

Valeur par dÃ©faut : Don't show

Asks: ___ lost items on search and detail pages.

Valeurs :

- Don't show
- Show

1.1.10.1.5. LibraryName

Asks: Show ___ as the name of the library on the OPAC.

> This value will appear in the title bar of the browser
> Edit 'opacheader' if you'd like to add a library name above your search box on the OPAC

1.1.10.1.6. OPACBaseURL

Asks: The OPAC is located at http:// ___

This must be filled in correctly for RSS, unAPI, and search plugins to work.
This must be filled in to show 'OPAC View' links from bib records in the staff client:

1.1.10.1.7. opaccolorstylesheet

Valeur par dÃ©faut : colors.css

Asks: Include the additional CSS stylesheet /css/ ___ on all pages in the OPAC

Leave this field blank to disable it

1.1.10.1.8. opaccredits

Asks: Include the following HTML in the footer of all pages in the OPAC:

Click the 'Click to edit; link to enter HTML to appear at the bottom of every page in the OPAC

1.1.10.1.9. OPACDisplayRequestPriority

Valeur par dÃ©faut : Don't

Asks: ___ patrons the priority level of their holds in the OPAC.

Valeurs :

Don't show

Show

1.1.10.1.10. opacheader

Asks: Include the following HTML in the header of all pages in the OPAC

This value will appear above the main content of your page
Edit 'LibraryName' if you'd like to edit the contents of the <title> tag

---

1.1.10.1.11. OpacHighlightedWords

Valeur par dÃ©faut : Don't highlight

Asks: ___ words the patron searched for in their search results.

Valeurs :

Don't highlight

Highlight

1.1.10.1.12. opaclanguages

Valeur par dÃ©faut : English

Asks: Enable the following languages on the OPAC

Valeurs :

English

To install additional languages you need to run misc/translation/install-code.pl. For example, to install French you would run the following command *install-code.pl fr-FR* to make the templates, once they exist and are in the right place then they will show up as an option in this preference.

1.1.10.1.13. opaclanguagesdisplay

Valeur par dÃ©faut : Don't allow

Asks: ___ patrons to select their language on the OPAC.

Valeurs :

Allow

Don't allow

1.1.10.1.14. opaclayoutstylesheet

Valeur par dÃ©faut : opac.css

Asks: Use the CSS stylesheet /css/ ___ on all pages in the OPAC, instead of the default

Leave this field blank to disable it

1.1.10.1.15. OpacMaintenance

Valeur par dÃ©faut : Don't show

Asks: ___

Valeurs :

Don't show

Show

1.1.10.1.16. OpacMainUserBlock

Valeur par dÃ©faut : Welcome to Koha... <hr>

Asks: Show the following HTML in its own column on the main page of the OPAC

HTML entered in this field will appear in the center of the main page of your OPAC

1.1.10.1.17. OpacNav

Valeur par dÃ©faut : Important links here.

Asks: Show the following HTML on the left hand column of all pages on the OPAC (generally navigation links)

1.1.10.1.18. OPACSearchForTitleIn

Valeur par dÃ©faut : Other Libraries (WorldCat) Other Databases (Google Scholar) Online Stores (Bookfinder.com)

Asks: Include a "More Searches" box on the detail pages of items on the OPAC, with the following HTML (leave blank to disable)

The placeholders {TITLE}, {ISBN} and {AUTHOR} will be replaced with information from the displayed record.

1.1.10.1.19. OPACShowCheckoutName

Valeur par dÃ©faut : Don't show

Asks: ___ the name of the patron that has an item checked out on item detail pages on the OPAC.

Valeurs :

Don't show

Show

1.1.10.1.20. opacsmallimage

Asks: Use the image at ___ in the OPAC header, instead of the Koha logo. If this image is a different size than the Koha logo, you will need to customize the CSS.

> This should be a complete URL, starting with http://

1.1.10.1.21. opacstylesheet

Asks: Use the remote CSS stylesheet /css/ ___ on all pages in the OPAC, instead of the default.

> This should be a complete URL, starting with http://

1.1.10.1.22. opacthemes

Valeur par dÃ©faut : prog

Asks: Use the ___ theme on the OPAC.

Valeurs :

- prog

1.1.10.1.23. OPACURLOpenInNewWindow

Valeur par dÃ©faut : don't

Asks: When patrons click on a link to another website from your OPAC (like Amazon or OCLC), ___ open the website in a new window.

Valeurs :

- do
- don't

1.1.10.1.24. OPACUserCSS

Asks: Include the following CSS on all pages in the OPAC

1.1.10.1.25. opacuserjs

Asks: Include the following JavaScript on all pages in the OPAC

1.1.10.1.26. XSLTDetailsDisplay

Valeur par dÃ©faut : normally

Asks: Show item details pages on the OPAC ___

Valeurs :

- normally
- using XSLT stylesheets
  - XSLT stylesheets enable more detail to be displayed on the detail pages in the OPAC

1.1.10.2. Features

1.1.10.2.1. OpacAuthorities

Valeur par dÃ©faut : Allow

Asks: ___ patrons to search your authority records.

Valeurs :

- Allow

    A link to Browse by Subject will appear at the top of your OPAC

- Don't allow

1.1.10.2.2. opacbookbag

Valeur par dÃ©faut : Allow

Asks: ___ patrons to store items in a temporary "Cart" on the OPAC.

Valeurs :

- Allow
- Don't allow

1.1.10.2.3. OPACFinesTab

Valeur par dÃ©faut : Allow

Asks: ___ patrons to access the Fines tab on the My Account page on the OPAC.

Valeurs :

- Allow
- Don't allow

1.1.10.2.4. OpacPasswordChange

Valeur par dÃ©faut : Allow

Asks: ___ patrons to change their own password on the OPAC.

Valeurs :

- Allow
- Don't allow

    Enabling this will break LDAP authentication.

1.1.10.2.5. OPACPatronDetails

Valeur par dÃ©faut : Allow

Asks: ___ patrons to notify the library of changes to their contact information from the OPAC.

Valeurs :

- Allow
- Don't allow

1.1.10.2.6. opacreadinghistory

Valeur par dÃ©faut : Allow

Asks: ___ patrons to see what books they have checked out in the past.

Enabling this will make it so that patrons can view their circulation history in the OPAC.
This data is stored in the system regardless of your choice.

1.1.10.2.7. OPACShelfBrowser

Valeur par dÃ©faut : Show

Asks: ___ a shelf browser on item details pages, allowing patrons to see what's near that item on the shelf.

Valeurs :

Don't show

Show

This uses up a fairly large amount of resources on your server, and should be avoided if your collection has a large number of items.

1.1.10.2.8. OpacTopissue

Valeur par dÃ©faut : Don't allow

Asks: ___ patrons to access a list of the most checked out items on the OPAC.

Valeurs :

Allow

A link to Most Popular will appear at the top of your OPAC

Don't allow

This is somewhat experimental, and should be avoided if your collection has a large number of items.

1.1.10.2.9. opacuserlogin

Valeur par dÃ©faut : Allow

Asks: ___ patrons to log in to their accounts on the OPAC.

Valeurs :

Allow

Don't allow

The OPAC will still be searchable if patrons can't log in, this just disables the patron account access via the OPAC

1.1.10.2.10. RequestOnOpac

Valeur par dÃ©faut : Allow

Asks: ___ patrons to place holds on items from the OPAC.

Valeurs :

Allow

Don't allow

1.1.10.2.11. reviewson

Valeur par dÃ©faut : Allow

Asks: ___ patrons to make comments on items on the OPAC.

Valeurs :

Allow

Patrons comments/reviews all require moderation before they appear in the OPAC

Don't allow

1.1.10.2.12. suggestion

Valeur par dÃ©faut : Allow

Asks: ___ patrons to make purchase suggestions on the OPAC.

Valeurs :

Allow

Don't allow

1.1.10.3. Policy

1.1.10.3.1. AnonSuggestions

Valeur par dÃ©faut : Don't allow

Asks: ___ patrons that aren't logged in to make purchase suggestions.

Valeurs :

Allow

Don't allow

1.1.10.3.2. OPACFineNoRenewals

Valeur par dÃ©faut : 99999

Asks: Only allow patrons to renew their own books on the OPAC if they have less than ___ USD in fines

Leave this field blank to disable

1.1.10.3.3. OPACItemHolds

Valeur par dÃ©faut : Allow

Asks: ___ patrons to place holds on specific items in the OPAC.

Valeurs :

Allow

Patrons can place holds on specific items as well as the next available item.

Don't allow

If this is disabled, users can only put a hold on the next available item.

1.1.10.3.4. OpacRenewalAllowed

Valeur par dÃ©faut : Don't allow

Asks: ___ patrons to renew their own books on the OPAC.

Valeurs :

- Allow
- Don't allow
  - Staff will still be able to renew items for patrons via the staf client

---

1.1.10.3.5. OPACViewOthersSuggestions

Valeur par dÃ©faut : Don't show

Asks: ___ purchase suggestions from other patrons on the OPAC.

Valeurs :

- Don't show
- Show

1.1.10.3.6. SearchMyLibraryFirst

Valeur par dÃ©faut : Don't limit

Asks: ___ patrons' searches to the library they are registered at.

Valeurs :

- Don't limit
  - Searching the OPAC will show results from all libraries
- Limit
  - Patrons will still be able to search other libraries via the Advanced search page - but will be limited to searches for their library only from the basic search box

---

1.1.10.3.7. singleBranchMode

Valeur par dÃ©faut : Don't allow

Asks: ___ patrons to select their branch on the OPAC.

Valeurs :

- Allow
- Don't allow

1.1.11. Patrons

1.1.11.1. AddPatronLists

Valeur par dÃ©faut : specific categories

Asks: List ___ under the new patron menu.

Valeurs :

- general patron types
- specific categories

1.1.11.2. AutoEmailOpacUser & AutoEmailPrimaryAddress

AutoEmailOpacUser Valeur par dÃ©faut : Don't send

AutoEmailPrimaryAddress Valeur par dÃ©faut : alternate

Asks: ___ an email to newly created patrons with their account details at their ___ email address.

AutoEmailOpacUser Valeurs :

- Don't send
- Send

AutoEmailPrimaryAddress Valeurs :

- alternate
- first valid
- home
- work

1.1.11.3. autoMemberNum

Valeur par dÃ©faut : Do

Asks: ___ default the card number field on the patron addition screen to the next available card number

Valeurs :

- Do
  - If the largest currently used card number is 26345000012941, then this field will default to 26345000012942 for the next patron
- Don't

1.1.11.4. BorrowerMandatoryField

Valeur par dÃ©faut : surname|cardnumber|barcode

Asks: The following database columns must be filled in on the patron entry screen ___

> Separate columns with |
> For help with field names, ask your system administrator or view the database structure associated with the borrowers table.

1.1.11.5. borrowerRelationship

Valeur par dÃ©faut : father|mother

Asks: Guarantors can be the following of those they guarantee ___

> Input multiple choices separated by |

1.1.11.6. BorrowersTitles

Valeur par dÃ©faut : Mr|Mrs|Miss|Ms

Asks: Borrowers can have the following titles ___

Input multiple choices separated by |

1.1.11.7. checkdigit

Valeur par dÃ©faut : Don't

Asks: ___ check and construct borrower card numbers in the Katipo style.

Valeurs :

Do

Don't

This overrides autoMemberNum if on.

1.1.11.8. EnhancedMessagingPreferences

Valeur par dÃ©faut : Allow

Asks: ___ patrons to choose which notices they recive and when they receive them.

Valeurs :

Allow

Don't allow

This only applies to certain kinds of notices, overdue notices will be sent based on the library's rules, not the patron's choice.

1.1.11.9. ExtendedPatronAttributes

Valeur par dÃ©faut : Enable

Asks: ___ searching, editing and display of custom attributes on patrons.

Valeurs :

Don't enable

Enable

Use custom attirbutes for fields that the default patron record does not support such as driver's license number or student ID number.

1.1.11.10. intranetreadinghistory

Valeur par dÃ©faut : Allow

Asks: ___ staff to access a patron's checkout history

Valeurs :

Allow

Don't allow

This data is stored in the system regardless of your choice.

1.1.11.11. MaxFine

Valeur par dÃ©faut : 9999

Asks: The late fine for a specific checkout will only go up to ___ USD.

1.1.11.12. memberofinstitution

Valeur par dÃ©faut : Don't

Asks: ___ allow patrons to be linked to institutions

Valeurs :

- Do
- Don't

> In order to allow this, the library must have Institution patrons to link members to

1.1.11.13. minPasswordLength

Valeur par dÃ©faut : 3

Asks: Login passwords for staff and patrons must be at least ___ characters long.

> This applies to both the staff login and the patron OPAC login.

1.1.11.14. NotifyBorrowerDeparture

Valeur par dÃ©faut : 30

Asks: Show a notice that a patron is about to expire ___ days beforehand.

> This notice will appear on the patron's record in the staff client.

1.1.11.15. patronimages

Valeur par dÃ©faut : Allow

Asks: ___ images to be uploaded and shown for patrons on the staff client.

Valeurs :

- Allow
- Don't allow

1.1.11.16. PatronsPerPage

Valeur par dÃ©faut : 20

Asks: By default, show ___ results per page in the staff client.

1.1.11.17. SMSSendDriver

Asks: Use the SMS::Send:: ___ driver to send SMS messages.

Some examples of values are:

- SMS::Send::Us::Ipipi
- SMS::Send::US::TMobile
- SMS::Send::US::Verizon

Additional values can be found here: http://search.cpan.org/search?query=sms%3A%3Asend&mode=all

> You must allow EnhancedMessagingPreferences for this to work.

Get there: More > Administration > Global system preferences > Patrons > EnhancedMessagingPreferences

1.1.11.18. uppercasesurnames

Valeur par dÃ©faut : Don't

Asks: ___ store and display surnames (last names) in upper case.

Valeurs :

- Do
- Don't

1.1.12. Searching

1.1.12.1. Features

1.1.12.1.1. NoZebra

Valeur par dÃ©faut : Use

Asks: ___ the Zebra search engine. Searches are very slow on even modest sized collections when Zebra is off.

Valeurs :

- Don't use
- Use

1.1.12.1.2. NoZebraIndexes

Valeur par dÃ©faut : See Appendix A - Section 2

1.1.12.1.3. OpacGroupResults

Valeur par dÃ©faut : Don't use

Asks: ___ PazPar2 to group similar results on the OPAC.

Valeurs :

- Don't use
- Use
  - This requires that PazPar2 is set up and running.

1.1.12.1.4. QueryAutoTruncate

Valeur par dÃ©faut : automatically

Asks: Perform wildcard searching (where, for example, Har would match Harry and harp) ___ (The * character would be used like so: Har* or *logging.)

Valeurs :

- automatically
- only if * is added

1.1.12.1.5. QueryFuzzy

Valeur par dÃ©faut : Try

Asks: ___ to match similarly spelled words in a search (for example, a search for flang would also match flange and fang)

Valeurs :

Don't try

Try

Requires that NoZebra is set to 'Use'

Get there: More > Administration > Global System Preferences > Cataloging > NoZebra

---

1.1.12.1.6. QueryRemoveStopwords

Valeur par dÃ©faut : Don't remove

Asks: ___ stopwords specified in Koha from searches.

Valeurs :

Don't remove

If NoZebra is set to 'Use' leave this preference set to 'Don't remove'

Remove

Requires that you have updated your Koha stopwords list

Get there: More > Administration > Stop Words

Requires that NoZebra is set to 'Don't use'
Zebra, on its own, handles a few of the most common stopwords

---

1.1.12.1.7. QueryStemming

Valeur par dÃ©faut : Try

Asks: ___ to match words of the same base in a search

Valeurs :

Don't try

Try

A search for enabling would also match enable and enabled

Requires that NoZebra is set to 'Use'

Get there: More > Administration > Global System Preferences > Cataloging > NoZebra

---

1.1.12.1.8. QueryWeightFields

Valeur par dÃ©faut : Enable

Asks: ___ ranking of search results by relevance

Valeurs :

Disable

Enable

Requires that NoZebra is set to 'Use'

Get there: More > Administration > Global System Preferences > Cataloging > NoZebra

---

1.1.12.2. Results Display

1.1.12.2.1. defaultSortField & defaultSortOrder

defaultSortField Valeur par dÃ©faut : author

defaultSortOrder Valeur par dÃ©faut : ascending

Asks: By default, sort search results in the staff client by ___, ____

defaultSortField Valeurs :

- author
- call number
- date added
- date of publication
- relevance
- title
- total number of checkouts

defaultSortOrder Valeurs :

- ascending
- descending
- from A to Z
- from Z to A

1.1.12.2.2. numSearchResults

Valeur par dÃ©faut : 20

Asks: By default, show ___ results per page in the staff client.

1.1.12.2.3. OPACdefaultSortField

Valeur par dÃ©faut : ascending

Asks: By default, sort search results in the OPAC by ___

Valeurs :

- ascending
- author
- call number
- date added
- date of publication
- descending
- from A to Z
- from Z to A
- relevance

title

total number of checkouts

1.1.12.2.4. OPACItemsResultsDisplay

Valeur par dÃ©faut : 20

Asks: By default, show ___ results per page in the OPAC.

1.1.12.2.5. OPACnumSearchResults

Valeur par dÃ©faut : Don't show

Asks: ___ an item's branch, location and call number in OPAC search results.

Valeurs :

- Don't show
- Show

1.1.12.2.6. XSLTResultsDisplay

Valeur par dÃ©faut : using XSLT stylesheets

Asks: Show search results ___

Valeurs :

- normally
- using XSLT stylesheets
  - XSLT stylesheets enable more detail to be displayed on the search results in the OPAC

1.1.12.3. Search Form

1.1.12.3.1. AdvancedSearchTypes

Valeur par dÃ©faut : itemtype

Asks: Show checkboxes to search by ___ on the OPAC and staff advanced search pages.

Valeurs :

- collection code
- itemtype

1.1.12.3.2. expandedSearchOption

Valeur par dÃ©faut : don't show

Asks: By default, ___ "More options" on the OPAC and staff advanced search pages.

Valeurs :

- don't show
- show

1.1.13. Staff Client

1.1.13.1. Appearance

1.1.13.1.1. intranet_includes

Valeur par dÃ©faut : includes

Asks: Use include files from the ___ directory in the template directory, instead of includes/. (Leave blank to disable)

1.1.13.1.2. intranetcolorstylesheet

Asks: Include the stylesheet /intranet-tmpl/prog/en/css/ ___ on all pages in the staff interface.

Leave this field blank to disable.

1.1.13.1.3. IntranetmainUserblock

Asks: Show the following HTML in its own column on the main page of the staff client

1.1.13.1.4. IntranetNav

Asks: Show the following HTML in the More menu at the top of each page on the staff client (should be a list of links or blank)

1.1.13.1.5. intranetstylesheet

Asks: Include the stylesheet at ___ on all pages in the staff interface, instead of the default.

This should be a complete URL, starting with http://

1.1.13.1.6. intranetuserjs

Asks: Include the following JavaScript on all pages in the staff interface

1.1.13.1.7. language

Valeur par dÃ©faut : English

Asks: Enable the following languages on the staff interface

Valeurs :

English

To install additional languages you need to run misc/translation/install-code.pl. For example, to install French you would run the following command *install-code.pl fr-FR* to make the templates, once they exist and are in the right place then they will show up as an option in this preference.

1.1.13.1.8. staffClientBaseURL

Asks: The staff client is located at http:// ___

1.1.13.1.9. template

Valeur par dÃ©faut : prog

Asks: Use the ___ theme on the staff interface.

Valeurs :

prog

1.1.13.1.10. yuipath

Valeur par dÃ©faut : included with Koha

Asks: Use the Yahoo UI libraries ___

Valeurs :

from Yahoo's servers

With this option there is less demand on your servers, but if the Internet goes down there will be issues

included with Koha

With this option calls are made faster, and they will still work if the Internet goes down

---

1.1.13.2. Options

1.1.13.2.1. viewISBD

Valeur par dÃ©faut : Allow

Asks: ___ staff to view records in ISBD form on the staff client.

Valeurs :

Allow

Don't allow

1.1.13.2.2. viewLabeledMARC

Valeur par dÃ©faut : Allow

Asks: ___ staff to view records in labeled MARC form on the staff client.

Valeurs :

Allow

Don't allow

1.1.13.2.3. viewMARC

Valeur par dÃ©faut : Allow

Asks: ___ staff to view records in plain MARC form on the staff client.

Valeurs :

Allow

Don't allow

1.1.13.2.4. HidePatronName

Valeur par dÃ©faut : Show

Asks: ___ the names of patrons that have items checked out or on hold on detail pages or the "Place Hold" screen.

Valeurs :

Don't show

Show

1.1.14. Web Services

1.1.14.1. OAI-PMH

1.1.14.1.1. OAI-PMH

Valeur par dÃ©faut : Disable

Asks: ___ Koha's OAI-PMH server.

Valeurs :

- Disable
- Enable

Learn more about OAI-PMH at: http://www.openarchives.org/pmh/

1.1.14.1.2. OAI-PMH:archiveID

Valeur par dÃ©faut : KOHA-OAI-TEST

Asks: Identify records at this site with the prefix ___ :

1.1.14.1.3. OAI-PMH:MaxCount

Valeur par dÃ©faut : 50

Asks: Only return ___ records at a time in response to a ListRecords or ListIdentifiers query.

1.2. ParamÃ¨tres de base

Configurez tous les paramÃ¨tres dans l'ordre dans lequel ils apparaissent.

1.2.1. BibliothÃ¨ques & Groupes

Lorsque vous allez paramÃ©trer votre installation Koha, vous pourrez ajouter des informations pour chaque bibliothÃ¨que partageant votre systÃ¨me. Ces informations sont utilisÃ©es dans diffÃ©rents modules de Koha.

Quand vous consultez cette page, vous voyez la liste des bibliothÃ¨ques et des groupes dÃ©jÃ ajoutÃ©s au systÃ¨me.

1.2.1.1. Ajouter un site

Pour ajouter une nouvelle bibliothÃ¨que:

- Cliquer 'Ajouter site'
- Remplir les informations demandÃ©es dans le formulaire qui s'ouvre
  - Parmi les champs, seuls 'Code du site' et 'Nom' sont obligatoires
    - Veillez Ã saisir l'adresse mail du site afin que les notifications soient bien envoyÃ©es Ã , et Ã partir de, la bonne adresse
    - Une adresse IP est obligatoire si vous avez activÃ© AutoLocation

1.2.1.2. Modifier/Supprimer un site

Vous ne pourrez pas supprimer un site qui a des lecteurs ou des exemplaires rattachÃ©s Ã ce site.

Chaque site a un lien 'Modifier' sur sa droite. Cliquer ce lien pour Ã©diter / modifier les dÃ©tails du site concernÃ©

Vous ne pouvez pas modifier le 'Code du site'

1.2.1.3. Ajouter un groupe

Pour ajouter un groupe par domaine de recherche ou par propriÃ©tÃ© des sites, cliquer le bouton 'Ajouter groupe'

Parmi les champ du formulaire de crÃ©ation de groupe, seuls 'Code catÃ©gorie' et 'Nom' sont obligatoires

---

1.2.1.3.1. Groupes par domaine de recherche

Les groupes par domaine de recherche vous permettent de faire une recherche sur tout un groupe de bibliothÃ¨ques en mÃªme temps plutÃ´t que rechercher dans une seule bibliothÃ¨que ou dans toutes les bibliothÃ¨ques.

Pour voir l'usage des Groupes par domaine de recherche, consultez la page de recherche avacnÃ©e sur l'interface professionnelle de Koha :

1.2.1.3.2. Groupes par propriÃ©tÃ© des sites

Vous pouvez attribuer des catÃ©gories spÃ©cifiques Ã vos bibliothÃ¨ques en ajoutant des groupes pour ces catÃ©gories

Les propriÃ©tÃ©s sont ajoutÃ©es au site via le formulaire de saisie ou de modification du site.

1.2.2. Types de document et codes de collection

Koha vous permet d'organiser votre collection par types de document et codes de collection. En gÃ©nÃ©ral le type de document se rÃ©fÃ¨re au support matÃ©riel (livre, cd, dvd, etc), mais peut Ãªtre utilisÃ© de n'importe quelle faÃ§on qui convienne Ã votre bibliothÃ¨que.

1.2.2.1. Ajouter des types de document

Pour ajouter un nouveau type de document, cliquez simplement le bouton 'Ajouter type de document' en haut de la page des types de documents.

- Dans le champ 'Type de document', entrez un code court pour votre type de document
- La Description est la dÃ©finition en texte du type de document
- Vous pouvez choisir d'associer une image Ã votre type de document
  - Vous pouvez choisir Ã partir de plusieurs collections d'images
  - Vous pouvez lier Ã une image distante
  - Ou vous pouvez ne pas avoir d'image associÃ©e au type de document

    Pour que les images des types de document apparaissent Ã l'OPAC vous devez positionner noItemTypeImages sur 'Montrer'

    Aller dans : Plus > Administration > PrÃ©fÃ©rences SystÃ¨me > Admin
- Pour les types de document non empruntables, cochez l'option 'exclu du prÃªt'
  - Les exemplaires marquÃ©s 'exclu du prÃªt' sont visibles dans le catalogue mais ne peuvent pas Ãªtre prÃªtÃ©s aux lecteurs
- Pour les types de documents dont le prÃªt est payant, saisissez le coÃ»t du prÃªt dans la zone 'CoÃ»t du prÃªt'

    Ne saisissez pas de symboles dans ce champ, uniquement des nombres et points dÃ©cimaux (ex. 5.00 â‚¬ doit Ãªtre saisi sous la forme 5 ou 5.00)
  - Ceci ajoutera le coÃ»t au lecteur lors du prÃªt
- Lorsque vous avez fini, cliquez le bouton 'Enregitrer les modifications'

    Tous les champs, Ã l'exception de 'Type de document' sont modifiables Ã partir de la liste des types de document
- Votre nouveau type de document apparaÃ®t dÃ©sormais dans la liste

---

1.2.2.2. Modifier les types de documents

Chaque type de document a un bouton Modifier sur sa ligne. Pour Ã©diter un type de document, cliquez simplement sur 'Modifier'.

Vous ne pourrez pas modifier le code que vous avez dÃ©fini pour 'Type de document' mais vous pourrez modifier la description.

1.2.2.3. Supprimer les types de documents

Chaque type de document a un bouton Supprimer sur sa ligne. Pour effacer un type de document, cliquez simplement sur 'Supprimer'.

Vous ne pourrez pas supprimer des types de documents utilisÃ©s dans des notices ou des exemplaires de la base.

1.2.3. Valeurs autorisÃ©es

Les valeurs autorisÃ©es peuvent Ãªtre utilisÃ©es dans plusieurs modules de Koha. Vous pouvez avoir besoin d'ajouter une catÃ©gorie de valeurs autorisÃ©es pour contrÃ´ler les valeurs saisies dans un champ MARC lors du catalogage.

1.2.3.1. CatÃ©gories existantes

Des catÃ©gories prÃ©-dÃ©finies sont installÃ©es dans Koha ; votre bibliothÃ¨que a des chances de les utiliser, par exemple 'Lost'.

Asort1

utilisÃ© pour des informations statistiques au niveau des acquisitions

Asort2

utilisÃ© pour des informations statistiques au niveau des acquisitions

BOR_NOTES

valeurs pour des notes personnalisÃ©es au lecteur qui peuvent apparaÃ®tre sur l'Ã©cran de circulation et Ã l'OPAC.

Bsort1

utilisÃ© pour des informations statistiques au niveau des adhÃ©rents

Bsort2

utilisÃ© pour des informations statistiques au niveau des adhÃ©rents

CART

is the shelving cart location, used by InProcessingToShelvingCart and ReturnToShelvingCart

CCODE

codes de collection (visibles au catalogage de la notice ou des exemplaires)

DAMAGED

descriptions pour les exemplaires marquÃ©s comme endommagÃ©s (visible au catalogage des exemplaires)

HINGS_AS

General Holdings: Acquisition Status Designator :: This data element specifies acquisition status for the unit at the time of the holdings report.a

HINGS_C

General Holdings: Completeness Designator

HINGS_PF

Physical Form Designators

HINGS_RD

General Holdings: Retention Designator :: This data element specifies the retention policy for the unit at the time of the holdings report.

HINGS_UT

General Holdings: Type of Unit Designator

LOC

Localisation (visible habituellement Ã l'ajout ou la modification d'exemplaire)

LOST

descriptions pour les exemplaires marquÃ©s comme perdus (visible Ã l'ajout ou la modification d'exemplaire)

MANUAL_INV

values for manual invoicing types

NOT_LOAN

raisons pour lesquelles un document est exclu du prÃªt (statuts de l'exemplaire)

PROC

the location to be used for NewItemsDefaultLocation (change description as desired), also the location expected by InProcessingToShelvingCart.

RESTRICTED

restricted status of an item

SUGGEST

listes des raisons de rejet ou d'acceptation d'une suggestion lecteur (visible Ã la gestion des suggestions)

WITHDRAWN

descriptions pour les exemplaires retirÃ©s (visible Ã l'ajout ou la modification d'exemplaire)

1.2.3.2. Ajouter une nouvelle catÃ©gorie de valeurs autorisÃ©es

En plus des catÃ©gories existantes prÃ©sentes par dÃ©faut dans Koha, les bibliothÃ¨ques peuvent ajouter leurs propres catÃ©gories de valeurs autorisÃ©es pour contrÃ´ler les valeurs qui sont entrÃ©es dans le systÃ¨me. Pour ajouter une nouvelle catÃ©gorie:

- Cliquez sur 'Ajouter catÃ©gorie'
- Limitez votre CatÃ©gorie Ã 11 caractÃ¨res (quelque chose de court indiquant clairement Ã quoi sert la catÃ©gorie)
- A l'ajout d'une nouvelle catÃ©gorie vous crÃ©ez au moins une valeur autorisÃ©e
  - Saisissez un code pour votre valeur autorisÃ©e dans le champ 'Valeur autorisÃ©e'
  - Utiliser le champ description pour donner l'intitulÃ© de la valeur
  - Utiliser le champ description (OPAC) pour prÃ©ciser l'intitulÃ© visible Ã l'opac

Cliquez 'Enregistrer'

Votre nouvelle catÃ©gorie et sa valeur vont apparaÃ®tre dans la liste des Valeurs autorisÃ©es

1.2.3.3. Ajouter une nouvelle valeur autorisÃ©e

De nouvelles valeurs autorisÃ©es peuvent Ãªtre ajoutÃ©es Ã une catÃ©gorie, existante ou nouvelle. Pour ajouter une valeur :

Cliquez 'Ajouter valeur autorisÃ©e pour...'

Saisissez un code pour votre valeur autorisÃ©e dans le champ 'Valeur autorisÃ©e'

Utiliser le champ description pour donner l'intitulÃ© de la valeur

Utiliser le champ description (OPAC) pour prÃ©ciser l'intitulÃ© visible Ã l'opac

Cliquez 'Enregistrer'

La nouvelle valeur va apparaÃ®tre dans la liste parmi les valeurs existantes.

1.3. AdhÃ©rents & Circulation

ParamÃ¨tres pour dÃ©terminer les informations adhÃ©rent et les rÃ¨gles de circulation.

1.3.1. CatÃ©gories adhÃ©rent

Les catÃ©gories d'adhÃ©rent vous permettent d'organiser vos lecteurs en fonction de diffÃ©rents rÃ´les, groupes d'Ã¢ge et types de lecteurs.

Les catÃ©gories de lecteur dont rattachÃ©es Ã ces six types de catÃ©gorie :

Adulte

Le type d'adhÃ©rent le plus habituel, pouvant Ãªtre utilisÃ© pour une catÃ©gorie globale AdhÃ©rents. Les adhÃ©rent de type Adulte peuvent Ãªtre garants des adhÃ©rents de type Enfant.

Enfant

Les adhÃ©rents de type Enfant peuvnt Ãªtre rattachÃ©s Ã un garant.

BibliothÃ©caire

Les adhÃ©rents de ce type de catÃ©gorie font gÃ©nÃ©ralement partie de l'Ã©quipe de la bibliothÃ¨que.

CollectivitÃ©

Les adhÃ©rents de ce type de catÃ©gorie sont des collectivitÃ©s. Les collectivitÃ©s peuvent Ãªtre garants des adhÃ©rents de type Professionnel.

Professionnel

Les adhÃ©rents de tye Professionel peuvent Ãªtre liÃ©s aux adhÃ©rents CollectivitÃ©

Statistiques

Ce type de catÃ©gorie est utilisÃ© uniquement Ã des fins statistiques, par exemple pour la consultation sur place.

1.3.1.1. Ajouter une catÃ©gorie d'adhÃ©rent

Pour ajouter une nouvelle catÃ©gorie d'adhÃ©rent cliquez 'Ajouter catÃ©gorie' en haut de la page

Le 'Code catÃ©gorie' est un identifiant pour votre nouveau code.

Le code catÃ©gorie est limitÃ© Ã 10 caractÃ¨res (chiffres et lettres)

Saisissez le texte descriptif de la catÃ©gorie dans le champ 'Description'.

La durÃ©e d'inscription doit Ãªtre remplie si vous avez une durÃ©e d'inscription limitÃ©e pour vos lecteurs (ex les cartes Ã©tudiant expirent aprÃ¨s 12 mois)

Certaines catÃ©gories d'adhÃ©rent peuvent possÃ©der un Ã¢ge minimum requis, entrez cet Ã¢ge dans 'Age requis'

Certaines catÃ©gories d'adhÃ©rent peuvent Ã©galement possÃ©der un Ã¢ge maximum (par exemple les enfants), entrez cet Ã¢ge dans 'Limite d'Ã¢ge supÃ©rieure'

Si vous avez des frais d'inscription pour les lecteurs, vous pouvez saisir le montant dans le champ 'Frais d'inscription'

Ne saisissez que des nombres et dÃ©cimaux dans ce champ (le sÃ©parateur dÃ©cimal est le point)

Si vous voulez que vos adhÃ©rents reÃ§oivent des lettres de rappel, positionnez 'Message de retard demandÃ©' sur 'Oui'

Si la rÃ©servation de document est payante, saisissez le montant dans le champ 'CoÃ»t de rÃ©servation'.

Ne saisissez que des nombres et dÃ©cimaux dans ce champ (le sÃ©parateur dÃ©cimal est le point)

Dans le champ 'Type de catÃ©gorie' choisissez l'un des six types de catÃ©gories

Enfin vous pouvez attribuer par dÃ©faut des prÃ©fÃ©rences de notification avancÃ©e Ã une catÃ©gorie d'adhÃ©rent

Ceci nÃ©cessite que la prÃ©fÃ©rence systÃ¨me EnhancedMessagingPreferences soit activÃ©e

Allez dans : Plus > Administration > PrÃ©fÃ©rences systÃ¨me > AdhÃ©rents > EnhancedMessagingPreferences

Ceci peut Ãªtre modifiÃ© pour chaque lecteur individuellement, ce paramÃ©trage permet juste de configurer plus facilement les messages de faÃ§on globale pour toute une catÃ©gorie d'adhÃ©rent

---

1.3.2. Villes et communes

Vous pouvez dÃ©finir des villes ou communes de votre rÃ©gion afin que lors de l'ajout d'un nouvel adhÃ©rent la bibliothÃ¨que puisse choisir la ville dans une liste dÃ©roulante au lieu de taper la ville et le code postal.

1.3.2.1. Ajouter une commune

Pour ajouter une nouvelle commune, cliquez le bouton 'Ajouter commune' en haut de page et saisissez le nom de la commune et le code postal

Une fois que vous avez cliquÃ© 'Valider', votre commune est sauvegardÃ©e et apparaÃ®t dans la listesur la page des Villes et communes

Les communes peuvent Ãªtre modifiÃ©es et supprimÃ©es n'importe quand.

1.3.2.2. Visualiser les villes dans le formulaire d'ajout d'un adhÃ©rent

Si vous avez dÃ©fini des communes, Ã l'ajout ou la modification d'une fiche adhÃ©rent, vous voyez ces villes dans un menu dÃ©roulant qui vous permet de les choisir facilement.

Ceci vous permet d'ajouter facilement ces informations Ã la fiche adhÃ©rent en Ã©vitant les fautes de frappe toujours possibles et les erreurs de code postal.

1.3.3. Types de voies

Vous pouvez dÃ©finir des types de voies afin que lors de l'ajout d'un nouvel adhÃ©rent la bibliothÃ¨que puisse choisir le type de rue dans une liste dÃ©roulante au lieu de faire la saisie.

Si vous souhaitez que les types de voies soient toujours Ã©crits en abrÃ©gÃ© dans la fiche adhÃ©rent, vous saisissez ici les abrÃ©viations correspondantes, si vous souhaitez que les types de voies soient Ã©crits en toutes lettres, saisissez les ainsi.

1.3.3.1. Ajouter des types de voies

Pour ajouter un type de voie, cliquez 'Ajouter type de voie' et ensuite entrez le type de voie de la faÃ§on dont vous souhaitez qu'il s'affiche.

Une fois que vous avez soumis le formulaire, votre nouveau type de voie apparaÃ®t dans la liste sur la page Type de voie.

1.3.3.2. Visualiser les types de voies dans le formulaire d'ajout d'un adhÃ©rent

Lorsque vous ajoutez ou modifiez une fiche adhÃ©rent, si vous avez dÃ©fini des types de voies, il y aura un menu dÃ©roulant vous permettant des les choisir.

1.3.4. Attributs adhÃ©rent

Les attributs adhÃ©rent peuvent Ãªtre utilisÃ©s pour dÃ©finir des champs personnalisÃ©s pour les fiches adhÃ©rent. Un exemple d'utilisation peut Ãªtre un numÃ©ro Ã©tudiant, une filiÃ¨re d'Ã©tude...

1.3.4.1. Ajouter des attributs adhÃ©rent

Pour ajouter un nouvel attribut, cliquez le bouton 'Ajouter attribut adhÃ©rent' en haut de page.

Dans le champ 'Code d'attribut adhÃ©rent', entrez un code court pour identifier l'attribut

Ce champ est limitÃ© Ã 10 caractÃ¨res (chiffres et lettres uniquement)
Ce champ ne peut pas Ãªtre modifiÃ© une fois que l'attribut a Ã©tÃ© dÃ©fini

Dans le champ 'Description', entrez l'intitulÃ© du contenu du champ (texte libre)

Cochez la case 'RÃ©pÃ©table' pour pouvoir dÃ©finir plusieurs valeurs pour cet attribut dans la fiche adhÃ©rent

Ce paramÃ©trage ne peut pas Ãªtre modifiÃ© une fois que l'attribut a Ã©tÃ© dÃ©fini

Si 'Identifiant unique' est cochÃ©, l'attribut sera un identifiant unique, si une fiche adhÃ©rent comporte une valeur, la mÃªme valeur ne pourra pas Ãªtre attribuÃ©e Ã une autre fiche.

Ce paramÃ©trage ne peut pas Ãªtre modifiÃ© une fois que l'attribut a Ã©tÃ© dÃ©fini

Cochez 'Mot de passe autorisÃ©' pour donner la possibilitÃ© d'associer un mot de passe Ã cet attribut

Cochez 'Affichage Ã l'OPAC' pour afficher cet attribut sur la fiche dÃ©taillÃ©e d'un adhÃ©rent Ã l'OPAC.

Cliquez 'Interrogeable' pour pouvoir faire une recherche sur cet attribut dans la recherche lecteur en interface professionnelle

CatÃ©gorie de valeur autorisÃ©e : isi une catÃ©gorie est sÃ©lectionnÃ©e, seules les valeurs faisant partie de la liste de valeurs autorisÃ©es seront possibles pour cet attribut dans la fiche adhÃ©rent.

Vous aurez d'abord besoin d'ajouter une liste de valeurs autorisÃ©es pour qu'elle apparaisse dans ce menu dÃ©roulant

Allez dans : Plus > Administration > Catalogue > Valeurs autorisÃ©es

Une liste de valeurs autorisÃ©es n'est pas utilisÃ©e lors de l'import d'un lot d'adhÃ©rents.

Cliquez 'Enregistrer' pour sauvegarder votre nouvel attribut.

Une fois ajoutÃ© votre attribut est visible dans la liste des attributs, et Ã©galement dans le formulaire d'ajout / modification d'un adhÃ©rent.

1.3.4.2. Modifier / supprimer des attributs adhÃ©rents

Chaque ligne correspondat Ã un attribut adhÃ©rent a un lien Modifier et un lien Supprimer dans la liste des attributs

Certains champs de l'attribut ne pourront pas Ãªtre modifiÃ©s une fois crÃ©Ã©s :

Code d'attribut adhÃ©rent

RÃ©pÃ©table

Identifiant unique

Vous ne pourrez pas supprimer un attribut s'il est utilisÃ©.

1.3.5. RÃ¨gles de prÃªt et d'amendes

Ces rÃ¨gles dÃ©finissent la faÃ§on dont vos exemplaires circulent, comment et quand les amendes sont calculÃ©es, et comment les rÃ©servations sont gÃ©rÃ©es. Les rÃ¨gles s'appliquent de la plus spÃ©cifique Ã la plus gÃ©nÃ©rale, en utilisant la premiÃ¨re qui correspond, dans cet ordre :

mÃªme site, mÃªme catÃ©gorie d'adhÃ©rent, mÃªme type de document

mÃªme site, mÃªme catÃ©gorie d'adhÃ©rent, type de document par dÃ©faut

mÃªme site, catÃ©gorie d'adhÃ©rent par dÃ©faut, mÃªme type de document

mÃªme site, catÃ©gorie d'adhÃ©rent par dÃ©faut, type de document par dÃ©faut

site par dÃ©faut, mÃªme catÃ©gorie d'adhÃ©rent, mÃªme type de document

site par dÃ©faut, mÃªme catÃ©gorie d'adhÃ©rent, type de document par dÃ©faut

site par dÃ©faut, catÃ©gorie d'adhÃ©rent par dÃ©faut, mÃªme type de document

site par dÃ©faut, catÃ©gorie d'adhÃ©rent par dÃ©faut, type de document par dÃ©faut

Si vous n'avez qu'un seul site dans votre systÃ¨me, vous pouvez laisser la sÃ©lection du site sur 'Par dÃ©faut' ou choisir le nom de votre site et vÃ©rifier que les rÃ©sultats sont les mÃªmes.

1.3.5.1. RÃ¨gles de prÃªt par dÃ©faut

A l'aide du tableau des rÃ¨gles de prÃªt vous pouvez dÃ©finir des rÃ¨gles qui dÃ©pendent des combinaisons catÃ©gories d'adhÃ©rents / types de document. Pour dÃ©finir vos rÃ¨gles, choisissez un site Ã partir du menu dÃ©roulant :

Si vous laissez ce paramÃ¨tre 'Par dÃ©faut' les rÃ¨gles s'appliqueront Ã toutes les bibliothÃ¨ques.

A partir du tableau vous pouvez choisir n'importe quelle combinaison de catÃ©gories d'adhÃ©rent et de types de document pour y appliquer les rÃ¨gles :

Dans un premier temps choisissez Ã quelle catÃ©gorie d'adhÃ©rent s'appliquent la rÃ¨gle. Si vous laissez 'Par dÃ©faut' cela s'appliquera Ã toutes les catÃ©gories de lecteurs

Choisissez le 'Type de document' auquel s'applique la rÃ¨gle. Si vous laissez 'Par dÃ©faut' cela s'appliquera Ã tousles types de document

Limitez le nombre d'exemplaires qu'un adhÃ©rent peut emprunter en mÃªme temps en ajoutant une valeur dans le champ 'PrÃªts autorisÃ©s'

DÃ©finissez la durÃ©e du prÃªt en saisissant un nombre de jours dans le champ 'DurÃ©e de prÃªt'

'Montant de l'amende' contient le montant de la pÃ©nalitÃ© financiÃ¨re attribuÃ©e pour les documents en retard

Ne saisissez que des valeurs numÃ©riques (et dÃ©cimales, le sÃ©parateur est le point)

Saisissez la 'PÃ©riodicitÃ© de l'amende' en jours (ex. l'amende augmente tous les 1 jour, ou tous les 2 jours)

La 'PÃ©riode de grÃ¢ce' est la durÃ©e pendant laquelle un document peut Ãªtre en retard avant de commencer Ã compter des pÃ©nalitÃ©s

Vous pouvez attribuer des pÃ©nalitÃ©s en jours de suspension en saisissant des jours dans le champ 'Suspension en jours'.

'Renouvellements' permet d'indiquer le nombre de prolongations de prÃªt autorisÃ©es pour ce type de document et cette catÃ©gorie d'adhÃ©rent

'RÃ©servations' indique le nombre de rÃ©servations simultanÃ©es de ce type de document que peut faire un adhÃ©rent

Lorsque vous avez fini, cliquez 'Ajouter' pour enregistrer votre rÃ¨gle

Pour modifier une rÃ¨gle, il est nÃ©cessaire d'en crÃ©er une nouvelle pour la mÃªme catÃ©gorie d'adhÃ©rent et le mÃªme type de document

---

1.3.5.2. Nombres de prÃªts par dÃ©faut et politique de rÃ©servation

Vous pouvez dÃ©finir un nombre maximum de prÃªts, et une politique de rÃ©servation, qui seront utilisÃ©s si rien n'est dÃ©fini plus bas pour un type de document particulier ou une catÃ©gorie d'adhÃ©rent.

A partir de ce tableau vous pouvez dÃ©finir un paramÃ©trage par dÃ©faut qui s'appliquera Ã tous les types de document et toutes les catÃ©gories adhÃ©rents dans la bibliothÃ¨que.

Dans 'Nombre total de prÃªts autorisÃ©s' saisissez le nombre total de documents que les lecteurs peuvent emprunter Ã la fois

PrÃ©cisez Ã partir d'oÃ¹ les lecteurs peuvent rÃ©server Ã l'aide du menu 'Politique de rÃ©servation' :

A partir de tout site. Les lecteurs de toutes les bibliothÃ¨ques peuvent rÃ©server ce document (comportement par dÃ©faut si rien n'est prÃ©cisÃ©)

A partir du site de rattachement. Seuls les adhÃ©rents inscrits dans la bibliothÃ¨que possÃ©dant le document ont la possibilitÃ© de rÃ©server le document.

RÃ©servation non autorisÃ©e. Aucun lecteur n'a la possibilitÃ© de rÃ©server un document

---

1.3.5.3. PrÃªts par catÃ©gorie d'adhÃ©rent

Pour la bibliothÃ¨que, vous pouvez prÃ©ciser le nombre maximum de prÃªts qu'un lecteur d'une catÃ©gorie donnÃ©e peut avoir, indÃ©pendamment du type de document..

Si le nombre total de prÃªts autorisÃ©s pour une catÃ©gorie d'adhÃ©rent est laissÃ© vide, aucune limite ne s'applique, sauf si vous avez dÃ©fini une limite pour un type de document particulier.

1.3.5.4. RÃ¨gles de rÃ©servations

Pour la bibliothÃ¨que, vous pouvez ajouter des rÃ¨gles pour un type de document donnÃ©, indÃ©pendamment de la catÃ©gorie adhÃ©rent. Actuellement ceci concerne les rÃ©servations.

Les diffÃ©rentes rÃ¨gles ont les actions suivantes :

A partir de tout site. Les lecteurs de toutes les bibliothÃ¨ques peuvent rÃ©server ce document (comportement par dÃ©faut si rien n'est prÃ©cisÃ©)

A partir du site de rattachement. Seuls les adhÃ©rents inscrits dans la bibliothÃ¨que possÃ©dant le document ont la possibilitÃ© de rÃ©server un document de ce type

RÃ©servation non autorisÃ©e. Aucun lecteur n'a la possibilitÃ© de rÃ©server ce type de document

Notez que si la prÃ©fÃ©rence systÃ¨me AllowHoldPolicyOverride est positionnÃ©e sur 'allow', ces rÃ¨gles peuvent Ãªtre outrepassÃ©es lors des opÃ©rations de circulation.
Ces rÃ¨gles dont basÃ©es sur la bibliothÃ¨que de rattachement des adhÃ©rents, pas sur la bibliothÃ¨que de rattachement du professionnel effectuant la rÃ©servation.

1.3.6. Limitation de transfert entre bibliothÃ¨ques

Ces rÃ¨gles, basÃ©es sur le site qui envoie, le site qui rÃ©ceptionne et, selon la valeur choisie pour la prÃ©fÃ©rence systÃ¨me BranchTransferLimitsType le type de document (itemtype) ou le code de collection (ccode) des documents concernÃ©s, permettent de limiter le transfert des documents entre les bibliothÃ¨ques. Ces rÃ¨gles s'appliquent uniquement si la prÃ©fÃ©rence systÃ¨me UseBranchTransferLimits est positionnÃ©e sur 'enforce'.

Aller dans : Plus > Administration > PrÃ©fÃ©rences systÃ¨me > Circulation > UseBranchTransferLimits

Les limitations de transfert sont basÃ©es soit sur les codes de collection que vous avez dÃ©finis dans le module Valeurs autorisÃ©es au niveau de l'Administration.

Soit sur les types de document dÃ©finis dans le module Types de documents.

Les codes de collection apparaissent sour forme d'onglets au-dessus du tableau

Cochez les cases pour les documents qui ne doivent pas Ãªtre transfÃ©rÃ©s

Dans l'exemple ci-dessus aucun exemplaire de la collection Fiction ne peut Ãªtre transfÃ©rÃ© Ã partir de FRL. De plus, aucun exemplaire de la collection Fiction ne peut Ãªtre transfÃ©rÃ© de CPL vers FFL, FPL ou FRL.

1.3.7. Alertes de circulation

Les bibliothÃ¨ques peuvent dÃ©cider si elles souhaitent que les lecteurs soient automatiquement notifiÃ©s lors des actions de circulation (retours et prÃªts). Ces paramÃ¨tres sont basÃ©s sur les catÃ©gories adhÃ©rent et les types de documents.

Ces prÃ©fÃ©rences peuvent Ãªtre outrepassÃ©es par des modifications dans les prÃ©fÃ©rences individuelles de notifications pour les lecteurs.

Pour paramÃ©trer les alertes de circulation :

Choisissez votre site Ã partir du menu dÃ©roulant

Pour dÃ©finir les prÃ©fÃ©rences pour toutes les bibliothÃ¨ques, sÃ©lectionner la valeur 'Par dÃ©faut'

Par dÃ©faut tous les types de documents et toutes les catÃ©gories de lecteurs sont notifiÃ©s des retours et des prÃªts. Pour modifier ceci, cliquez sur la combinaison type de document / type de lecteur pour laquelle vous souhaitez stopper les notifications.

dans l'exemple ci-dessus, les Juveniles et les Kids ne recevront pas de notification de prÃªt

---

1.4. Catalogue

DÃ©finissez ces paramÃ¨tres avant de commencer Ã cataloguer dans Koha.

1.4.1. Grilles de catalogage MARC

ConsidÃ©rez les grilles comme des modÃ¨les pour la crÃ©ation de nouvelles notices bibliographiques. Koha est installÃ© avec quelques grilles prÃ©dÃ©finies qui peuvent Ãªtre modifiÃ©es ou supprimÃ©es, et les bibliothÃ©caires peuvent cÃ©rer leurs propres grilles pour des contenus spÃ©cifiques Ã leurs bibliothÃ¨ques.

Ne supprimez pas ou ne modifiez pas la grille par dÃ©faut, ceci pourrait gÃ©nÃ©rer des problÃ¨mes sur vos notices - crÃ©ez toujours une nouvelle grille basÃ©e sur la grille par dÃ©faut, ou modifiez les autres grilles.

1.4.1.1. Ajouter une nouvelle grille

Pour ajouter une nouvelle grille de catalogage

- Cliquez 'Ajouter grille de catalogage'
  - Saisissez un code d'au plus 4 caractÃ¨res
  - Utilisez le champ Description pour entrer une dÃ©finition plus dÃ©taillÃ©e de votre grille
- Cliquez 'Valider'
- Une fois votre grille ajoutÃ©e cliquez 'Structure MARC' sur la ligne dans la liste des grilles
  - Koha vous demande de choisir la grille sur laquelle vous voulez baser votre nouvelle grille ; ceci sera plus facile que de partir d'une grille vide
- Une fois que votre grille apparaÃ®t Ã l'Ã©cran vous pouvez modifier ou supprimer chaque champ en suivant les instructions pour modifier les sous-champs

---

1.4.1.2. Modifier les grilles existantes

Cliquez 'Modifier' sur la ligne de la grille dans la liste vous permet seulement de modifier la Description de la grille.

Pour Ã©diter les champs de la grille vous devez d'abord cliquer 'Structure MARC' et ensuite suivre les insctructions pour modifier les sous-champs

---

1.4.1.3. Modifier les sous-champs d'une grille

Les grilles sont constituÃ©es de champs et sous-champs MARC. Pour modifier la plupart des grilles vous devez Ã©diter les champs et les sous-champs. Cliquer 'Modifier' Ã la droite de chaque champ vous permet de modifier le texte associÃ© au champ.

- Chaque champ a un numÃ©ro de champ (qui est le code MARC)
  - Le 'Texte pour bib' est ce qui sera visible au niveau de l'interface professionnelle si vous avez activÃ© advancedMARCeditor pour afficher les intitulÃ©s
  - Le 'Texte pour OPAC' est ce qui sera affichÃ© sur la vue MARC Ã l'OPAC
  - Si vous cochez 'RÃ©pÃ©table', il y aura un signe plus au niveau du champ dans la grille de saisie vous permettant d'ajouter plusieurs valeurs pour ce champ
  - Si vous cochez 'Obligatoire' la notice ne pourra pas Ãªtre enregistrÃ©e tant que vous n'aurez pas saisi une valeur pour ce champ.
  - 'Valeur autorisÃ©e' vous permet de proposer une valeur autorisÃ©e que les catalogueurs peuvent choisir dans un menu dÃ©roulant Ã la saisie

Pour Ã©diter les sous-champs associÃ©s au champ, cliquez 'Sous-champs' Ã droite du champ dans la liste 'Structure MARC'

A partir de la liste des sous-champs vous pouvez cliquer 'Supprimer' Ã droite de chaque ligne pour supprimer le sous-champ

Pour Ã©diter les sous-champs cliquez le bouton 'Modifier les sous-champs'

Pour chaque sous-champ vous pouvez dÃ©finir :

Texte pour bibliothÃ©caire

ce qui est affichÃ© avant le sous-champ en interface professionnelle

Texte Ã l'OPAC

ce qui est affichÃ© avant le sous-champ Ã l'OPAC

si cette information n'est pas remplie, le texte pour bibliothÃ©caire est utilisÃ©

RÃ©pÃ©table

un signe plus sera affichÃ© au niveau du sous-champ dans la grille de saisie, vous permettant d'ajouter plusieurs valeurs pour ce sous-champ

Obligatoire

la notice ne pourra pas Ãªtre enregistrÃ©e tant que vous n'aurez pas saisi une valeur pour ce sous-champ.

GÃ©rÃ© dans l'onglet

dÃ©finit l'onglet dans lequel le sous-champ est visible. Tous les sous-champs d'un champ doivent Ãªtre gÃ©rÃ©s dans le mÃªme onglet, ou ignorÃ©s. Ignorer signifie que les sous-champs ne sont pas gÃ©rÃ©s.

Valeur par dÃ©faut

permet de dÃ©finir la valeur par dÃ©faut d'un sous-champ ; si le champ est reliÃ© Ã une liste de valeurs autorisÃ©es, la valeur par dÃ©faut doit Ãªtre la valeur autorisÃ©e et non sa description (ex : mettre fre et non FranÃ§ais pour la langue)

cachÃ©

vous permet de choisir parmi 19 conditions possibles de visibilitÃ© du sous-champ, dont 17 sont implÃ©mentÃ©es. Il s'agit des possibilitÃ©s suivantes :

-9 => Usage futur

-8 => Flag

-7 => OPAC !Intranet !Editeur PliÃ©

-6 => OPAC Intranet !Editeur !PliÃ©

-5 => OPAC Intranet !Editeur PliÃ©

-4 => OPAC !Intranet !Editeur !PliÃ©

-3 => OPAC !Intranet Editeur PliÃ©

-2 => OPAC !Intranet Editeur !PliÃ©

-1 => OPAC Intranet Editeur PliÃ©

0 => OPAC Intranet Editeur !PliÃ©

1 => !OPAC Intranet Editeur PliÃ©

2 => !OPAC !Intranet Editeur !PliÃ©

3 => !OPAC !Intranet Editeur PliÃ©

4 => !OPAC Intranet Editeur !PliÃ©

5 => !OPAC !Intranet !Editeur PliÃ©

6 => !OPAC Intranet !Editeur !PliÃ©

7 => !OPAC Intranet !Editeur PliÃ©

8 => !OPAC !Intranet !Editeur !PliÃ©

9 => Usage futur

(! signifie 'non visible', ou dans le cas de PliÃ© : 'non PliÃ©')

Est une URL

si la case est cochÃ©e, cela signifie que le sous-champ est une url et peut Ãªtre cliquÃ©

Lien

vous pouvez entrer ici le nom d'un index zebra. A l'affichage marc de la notice en interface professionnelle, vous verrez apparaÃ®tre Ã cÃ´tÃ© du sous-champ une petite loupe, qui vous permettra de rechercher la valeur du sous-champ dans l'index voulu. Ceci peut Ãªtre utilisÃ© principalement dans deux cas :

sur un sous-champ comme auteur (200f en UNIMARC, index zebra au), mettez 'au' ici, vous pourrez rebondir vers toutes les notices ayant ce mÃªme auteur

sur un champ qui est un lien (4XX) pour obtenir une autre notice. Par exemple, mettre 'ns' (index zebra pour l'issn) en 464$x vous permettra de retrouver les notices de pÃ©riodique avec cet issn

Cette valeur ne doit pas Ãªtre modifiÃ©e une fois que des notices ont Ã©tÃ© entrÃ©es dans la base

Lien Koha

Koha est compatible avec plusieurs formats MARC. Koha ne sait pas Ã quoi correspond le champ 245$a, ni 200$a (ces deux champs Ã©tant le titre, en MARC21 et en UNIMARC). Donc dans cette liste vous pouvez faire correspondre un sous-champ MARC Ã sa signification. Koha conserve la cohÃ©rence entre un sous-champ et sa signification. Quand un utilisateur veut rechercher le 'titre', ce lien est utilisÃ© pour trouver ce qui doit Ãªtre cherchÃ© (245 en MARC21, 200 en UNIMARC).

Valeur autorisÃ©e

signifie que la valeur ne doit pas Ãªtre tapÃ©e par le bibliothÃ©caire, mais doit Ãªtre choisie Ã partir d'un menu dÃ©roulant gÃ©nÃ©rÃ© par une liste de valeurs autorisÃ©es

Dans l'exemple ci-dessus, le sous-champ 608a affichera la liste de valeurs autorisÃ©es 'genre' lors de la saisie :

ThÃ©saurus

signifie que la valeur n'est pas libre, mais doit Ãªtre recherchÃ©e dans l'autoritÃ© / thÃ©saurus de la catÃ©gorie sÃ©lectionnÃ©e

Plugin

signifie que la valeur est calculÃ©e ou gÃ©rÃ©e par un plugin. Les plugins peuvent faire presque tout.

Par exemple, en UNIMARC, il y a un plugin pour chaque champ codÃ© 1XX. Le plugin est d'une grande aide pour le catalogueur ! Il y a aussi deux plugins (unimarc_field_210c and unimarc_field_225a) qui peuvent retrouver un Ã©diteur Ã partir d'une racine ISBN ainsi que la liste des collections pour cet Ã©diteur. Notez aussi le plugin unimarc_field_4XX.pl qui vous permet de rechercher le titre d'une notice Ã lier au niveau d'un champ 4XX.

Pour sauvegarder vos changements, cliquez simplement sur le bouton 'Enregistrer les modifications' en haut de l'Ã©cran.

1.4.2. Liens Koha => MARC

1.4.3. Liens intitulÃ©s => MARC

1.4.4. Validation grilles de catalogage

VÃ©rifie la structure MARC. Si vous modifiez votre grille de catalogage, il est recommandÃ© d'utiliser cet outil pour dÃ©tecter les erreurs dans le paramÃ©trage.

1.4.5. Types d'autoritÃ©

Les types d'autoritÃ© sont des grilles MARC pour les autoritÃ©s, et par consÃ©quent suivent les mÃªmes rÃ¨gles d'Ã©dition que celles dÃ©crites dans la section Grilles de catalogage MARC de ce manuel. Plusieurs grilles d'autoritÃ©s sont prÃ©-dÃ©finies lorsque vous installez Koha. Pour voir comment ajouter et modifier des types d'autoritÃ©, reportez-vous Ã la section Grilles de catalogage MARC de ce manuel.

1.4.6. Sources de classification

1.4.7. RÃ¨gles de concordance

1.5. Acquisitions

1.5.1. Devises et taux de change

Si vous passez des commandes Ã partir de plusieurs pays vous allez pouvoir saisir les taux de change entre devises pour que le module d'acquisitions calcule correctement les sommes.

Ces donnÃ©es ne sont pas mises Ã jour automatiquement, donc veillez Ã les maintenir Ã jour afin que vos comptes soient corrects

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1.5.2. Budgets, pÃ©riodes budgÃ©taires, planning

1.5.3. Budget racine

1.6. ParamÃ¨tres divers

1.6.1. Mots vides

Si NoZebra est positionnÃ© sur 'Use' cette option n'apparaÃ®tra pas dans le menu

Les mots vides dont les mots que vous souhaitez voir ignorÃ©s par la recherche. Koha possÃ¨de une liste prÃ©-dÃ©finie de mots vides que vous pouvez modifier dans le menu Mots vides du module administration.

Pour ajouter un nouveau mot vide Ã la liste, cliquez le bouton 'Ajouter mot vide' et ajouter le terme que vous souhaitez ignorer.

Si vous apportez des modifications Ã cette table, demandez Ã votre administrateur de lancer le script misc/batchRebuildBiblioTables.pl .

1.6.2. Serveurs Z39.50

Koha possÃ¨de un puissant outil d'import de notice au catalogage. Via Koha vous pouvez vous connecter Ã tout serveur Z39.50 accessible publiquement ou pour lequel vous avez les droits de connection.

Koha est installÃ© avec une liste par dÃ©faut de serveurs Z39.50 que vous pouvez complÃ©ter, modifier ou supprimer.

Pour trouver des serveurs additionnels vous pouvez utiliser IndexData's IRSpy: http://irspy.indexdata.com/find.html

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1.6.2.1. Ajouter un serveur Z39.50

A partir de la page Serveurs Z39.50, cliquez 'Ajouter serveur Z39.50'

Identifiant et Mote de passe sont nÃ©cessaires uniquement pour les serveurs protÃ©gÃ©s par mot de passe

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1.6.2.2. Quelques serveurs

Quelques serveurs Z39.50 :

- BNF z3950.bnf.fr:2211 TOUT
- SUDOC carmin.sudoc.abes.fr:10646 abes-z39-public

Les serveurs suivants sont utilisÃ©s par d'autres bibliothÃ¨ques avec Koha (en AmÃ©rique) :

- BIBLIOS z3950.biblios.net:210 bibliographic
- BIG COUNTRY KOHA bcls.kohalibrary.com:210 bcls_koha
- CUYAHOGA COUNTY PUBLIC webcat.cuyahoga.lib.oh.us:210 INNOPAC
- GREATER SUDBURY PUBLIC 216.223.90.51:210 INNOPAC
- HALIFAX PUBLIC catalogue.halifaxpubliclibraries.ca:210 horizon
- HALTON HILLS PUBLIC cat.hhpl.on.ca:210 halton_hills
- LIBRARY OF CONGRESS z3950.loc.gov:7090 Voyager
- LONDON PUBLIC LIBRARY catalogue.londonpubliclibrary.ca:210 INNOPAC
- MANITOBA PUBLIC library.gov.mb.ca:210 horizon
- MILTON PL cat.mpl.on.ca:210 horizon
- NATIONAL LIBRARY OF WALES cat.llgc.org.uk:210 default
- TORONTO PUBLIC symphony.torontopubliclibrary.ca:2200 unicorn
- TRI-UNI 129.97.129.194:7090 voyager
- VANCOUVER PUBLIC LIBRARY z3950.vpl.ca:210 Horizon

Chapter 2. Outils

2.1. Nouvelles

L'outil 'Nouvelles' permet aux bibliothÃ©caires de poster des nouvelles Ã l'OPAC et en interface professionnelle.

Pour ajouter des nouvelles soit Ã l'OPAC soit en interface professionnelle :

- Cliquez 'Ajouter entrÃ©e'
  - Dans 'AffichÃ© sur' choisissez de publier la nouvelle soit Ã l'OPAC soit sur l'interface bibliothÃ©caire.
  - Saisissez un titre pour la nouvelle
  - GrÃ¢ce aux champs Date de publication et Date d'expiration vous pouvez dÃ©terminer la durÃ©e de visibilitÃ© de la nouvelle
  - 'S'affiche en position' vous permet de dÃ©cider l'ordre d'affichage des nouvelles
  - Le champ 'Nouvelle' contient le texte de la nouvelle et vous permet l'usage de HTML pour la mettre en forme
- AprÃ¨s avoir rempli les champs, cliquez 'Valider'
- Les nouvelles Ã l'OPAC apparaissent au-dessus de OpacMainUserBlock
- Les nouvelles en interface professionnelle apparaissent tout Ã gauche de l'Ã©cran.

2.2. CrÃ©ateur d'Ã©tiquettes

2.3. CrÃ©ateur rapide d'Ã©tiquette de couverture

Pour utiliser cet outil vous n'avez besoin que du code barre du livre pour lequel vous souhaitez imprimer une Ã©tiquette pour la tranche.

- DÃ©finissez les champs que vous voulez imprimer sur l'Ã©tiquette dans la prÃ©fÃ©rence systÃ¨me SpineLabelFormat system preference
  - *Aller dans:* Plus > Administration > PrÃ©fÃ©rences systÃ¨me > Catalogage > SpineLabelFormat
- Formatez votre impression en Ã©ditant spinelabel.css qui se trouve dans koha-tmpl/intranet-tmpl/prog/en/css/

2.4. Patron Card Creator

2.5. Calendrier

Les bibliothÃ¨ques peuvent dÃ©finir les jours de fermeture et les vacances Ã prendre en compte dans le calcul des dates de retour. Vous pouvez utiliser le Calendrier de la faÃ§on souhaitÃ©e en activant les prÃ©fÃ©rences systÃ¨me appropriÃ©es :

- *Aller dans :* Plus > Administration > PrÃ©fÃ©rences systÃ¨me > Circulation > useDaysMode
  - Choisissez la faÃ§on de calculer les dates de retour - soit inclure les jours de fermeture de la bibliothÃ¨que dans le calcul, ou ne pas les inclure
- *Aller dans :* Plus > Administration > PrÃ©fÃ©rences systÃ¨me > Circulation > finescalendar
  - Ceci vÃ©rifiera les dates de vacances avant de calculer les amendes

2.5.1. Ajouter des Ã©vÃ©nements

Avant d'ajouter des Ã©vÃ©nements; choisissez le site auquel vont s'appliquer les fermetures. Lors de l'ajout d'un Ã©vÃ©nÃ©ment vous pourrez choisir si vous souhaitez appliquer cette fermeture Ã un seul site ou Ã tous les sites. Pour ajouter une fermeture, simplement :

- Cliquez dans le calendrier sur la date Ã laquelle vous voulez appliquer la fermeture
- Dans le formulaire qui apparaÃ®t au-dessus du calendrier, saisissez les informations relatives Ã la fermeture
  - Le Site est rempli automatiquement Ã partir de la bibliothÃ¨que que vous avez choisie dans le menu dÃ©roulant en haut de page
  - Le nom du jour est Ã©galement rempli automatiquement Ã partir du jour cliquÃ© sur le calendrier
  - Dans la description saisissez la raison pour laquelle le site est fermÃ©
  - Ensuite vous pouvez choisir si ce jour fermÃ© est unique ou rÃ©pÃ©tÃ©
  - Enfin dÃ©cidez si ce jour fermÃ© s'applique Ã toutes les bibliothÃ¨ques ou uniquement Ã celle que vous avez prÃ©cÃ©demment choisie
- AprÃ¨s avoir enregistrÃ© vous voyez l'Ã©vÃ©nement listÃ© dans le rÃ©capitulatif en-dessous du calendrier.

2.5.2. Modifier des fermetures

Pour modifier un Ã©vÃ©nement :

- Cliquez sur le jour que vous voulez modifier dans le calendrier (en cliquant la date dans le calendrier, pas dans le rÃ©capitulatif)
- A partir de ce formulaire vous pouvez modifier ce jour de fermeture ou le supprimer complÃ¨tement. Ces deux actions nÃ©cessitent que vous cliquiez le bouton 'Enregistrer' pour prendre en compte les changements.
- Cliquer sur des jours de fermeture rÃ©pÃ©tables propose des options lÃ©gÃ¨rement diffÃ©rentes :
  - Dans le formulaire ci-dessus vous remarquez qu'il y a maintenant une option 'CrÃ©er une exception Ã ce jour de fermeture' ; choisir cette option vous permet d'indiquer que ce jour n'est pas fermÃ© alors que la bibliothÃ¨que est ordinairement fermÃ©e Ã cette date.

2.5.3. Aide additionnelle

A l'ajout ou modification d'un Ã©vÃ©nement vous pouvez obtenir une aide en cliquant le signe plus bleu Ã cÃ´tÃ© des diffÃ©rentes options du formulaire.

2.6. Commentaires

Tous les commentaires ajoutÃ©s par les lecteurs aux notices bibliographiques Ã l'OPAC requiÃ¨rent une modÃ©ration par la bibliothÃ¨que. Pour modÃ©rer un commentaire cliquez simplement 'Approuver' ou 'Supprimer' Ã droite du commentaire en attente de modÃ©ration.

S'il n'y a pas de commentaire Ã modÃ©rer, vous verrez un message disant juste :

2.7. Tag Moderation

En fonction des prÃ©fÃ©rences systÃ¨me pour les tags, les bibliothÃ©caires peuvent avoir besoin d'approuver les tags avant qu'ils soient publiÃ©s Ã l'OPAC. Ceci est fait via l'outil Tags.

La premiÃ¨re fois que vous allez sur cette page, vous avez accÃ¨s Ã une liste de tags en attente d'approbation ou de rejet par la bibliothÃ¨que.

- Pour approuver un tag, vous pouvez soit cliquer le bouton 'Approuver' au niveau du terme, soit cocher tous les termes que vous souhaitez approuver et cliquer 'Approuver' en-dessous de la table.
- Pour rejeter un tag, vous pouvez soit cliquer le bouton 'Rejeter' au niveau du terme, soit cocher tous les termes que vous souhaitez rejeter et cliquer 'Rejeter' en-dessous de la table.

Une fois qu'un tag a Ã©tÃ© approuvÃ© ou rejetÃ©, il sera dÃ©placÃ© dans la liste de tags appropriÃ©e. Un rÃ©capitulatif de tous les tags est visible sur la droite de l'Ã©cran.

MÃªme une fois approuvÃ© ou rejetÃ©, un tag peut toujours Ãªtre dÃ©placÃ© vers une autre liste. En regardant la liste des tags approuvÃ©s, chaque tag a la possibilitÃ© d'Ãªtre rejetÃ© :

Pour vÃ©rifier si un terme est dans la liste 'approuvÃ©' ou 'rejetÃ©' (et Ã©ventuellement dans le dictionnaire que vous avez ajoutÃ© pour la modÃ©ration des tags), entrez simplement le terme dans le formulaire de recherche Ã droite de l'Ã©cran pour voir le statut du tag.

2.8. Profils CVS

Les profils CSV sont crÃ©Ã©s afin de dÃ©finir comment vous souhaitez exporter votre panier ou liste.

2.8.1. Ajouter des profils CSV

Pour ajouter un profil CVS

- Cliquez 'Profils CSV' Ã partir du menu Outils
  - Le 'Nom du profil' apparaÃ®tra dans le menu dÃ©roulant Format lorsque vous aurez choisi 'TÃ©lÃ©charger' Ã partir du panier ou d'une liste.
  - La 'Description du profil' est juste une information concernant le profil
  - Choisissez ensuite les sÃ©parateurs souhaitÃ©s pour le fichier CSV :
    - sÃ©parateur CSV : pour sÃ©parer les colonnes du fichier
    - sÃ©parateur de champ : sÃ©pare deux champs rÃ©pÃ©tÃ©s Ã l'intÃ©rieur d'une colonne
    - sÃ©parateur de sous-champ : sÃ©pare deux sous-champs rÃ©pÃ©tÃ©s Ã l'intÃ©rieur d'un champ
  - Enfin finalisez votre fichier CSV en utilisant le champ 'champs marc'
    - DÃ©finissez les champs et sous-champs que vous souhaitez exporter, sÃ©parÃ©s par des pipes. Vous pouvez indiquer le titre de la colonne Ã ce niveau en le saisissant avant le champ, suivi du signe Ã©gal. Exemple : Titre=200a|Editeur=210|Sujet=610a|300

2.8.2. Modifier les profils CSV

Une fois que vous avez crÃ©Ã© au moins un profil CSV une option 'Modifier ou supprimer un profil CSV' apparaÃ®t en-dessous du formulaire d'ajout.

Choisissez le profil Ã Ã©diter et modifiez les champs nÃ©cessaires.

Pour supprimer un profil, cochez l'option 'Supprimer le profil sÃ©lectionnÃ©' avant de cliquer 'Envoyer'

2.8.3. Utiliser les profils CSV

Vos profils CSV apparaÃ®tront dans la liste des formats Ã l'export du panier ou d'une liste aprÃ¨s avoir cliquÃ© le lien ou le bouton 'TÃ©lÃ©charger'.

2.9. Rotating Collections

2.10. PrÃ©paration des notices MARC Ã l'import

L'import de notices dans Koha nÃ©cessite en deux Ã©tapes. La premiÃ¨re est la prÃ©paration des notices pour l'import.

D'abord recherchez le fichier MARC sur votre ordinateur

Ensuite vous aurez accÃ¨s Ã des options pour la recherche de doublons et l'import des exemplaires.

Remplissez 'Notes Ã propos de ce fichier' pour repÃ©rer votre chargement lorsque vous irez dans l'outil 'GÃ©rer les notices MARC traitÃ©es'

Choisissez le format des donnÃ©es

Choisissez si vous souhaitez ou non rechercher des notices existantes

Vous pouvez dÃ©finir des rÃ¨gles de concordance dans le module Administration

Ensuite choisissez quoi faire avec les notices qui concordent s'il y en a

Enfin choisissez que faire avec les notices qui sont uniques

Ensuite vous pouvez choisir d'importer ou non les donnÃ©es d'exemplaires trouvÃ©es dans les notices MARC

Cliquez 'Traiter pour import'

Vous aurez accÃ¨s Ã une confirmation de votre import

Pour poursuivre le processus allez dans l'outil GÃ©rer les notices MARC traitÃ©es

---

2.11. Gestion des notices MARC traitÃ©es

Une fois que vous avez prÃ©parÃ© vos notices pour l'import vous pouvez finir l'import en utilisant cet outil.

A partir de la liste des notices traitÃ©es, cliquez sur le nom de fichier pour lequel vous voulez terminer l'import.

Remarquez que les notices qui ont dÃ©jÃ Ã©tÃ© importÃ©es ont un 'Etat' importÃ©

Un rÃ©capitulatif de votre import apparaÃ®t avec la possibilitÃ© de changer les rÃ¨gles de concordance.

En-dessous de ce rÃ©capitulatif se trouve la liste des notices qui seront importÃ©es

VÃ©rifiez le rÃ©capitulatif avant de terminer l'import afin de vous assurer que vos rÃ¨gles de concordance fonctionnent et que les notices apparaissent bien de la faÃ§on dont vous les attendez

Cliquez 'Importer dans le catalogue' pour terminer l'import

Une fois que votre import est terminÃ© un lien vers les nouvelles notices apparaÃ®t Ã droite de chaque titre importÃ©

Vous pouvez assui annuler votre import en cliquant le bouton 'Annuler l'import de notices dans le catalogue'

Les notices importÃ©es en utilisant cet outil restent dans le 'RÃ©servoir' jusqu'Ã ce qu'elles soient supprimÃ©es. Ces documents apparaissent lors d'une recherche dans le catalogue Ã partir du module Catalogage :

Pour supprimer les document du 'RÃ©servoir'

- Allez sur la page principale de l'outil Gestion des notices MARC traitÃ©es
- Pour supprimer un lot, cliquez le bouton "Clean" sur la droite
- Un message de confirmation s'affiche
  - Acceptez la suppression, les notices seront enlevÃ©es du rÃ©servoir et l'Ã©tat sera modifiÃ© en 'nettoyÃ©'

2.12. Exportation notices biblio et exemplaires

Koha possÃ¨de un outil qui vous permet d'exporter les donnÃ©es bibliographiques et/ou d'exemplaires par lot. Ceci peut Ãªtre utilisÃ© pour fournir vos notices Ã d'autres bibliothÃ¨ques, organisations ou services ; ou simplement dans un but de sauvegarde .

- Remplissez le formulaire de faÃ§on Ã limiter votre export Ã une certaine tranche (tous les champs sont optionnels)
  - Choisissez de limiter votre export selon une ou plusieurs des options suivantes
    - Limiter Ã une tranche de numÃ©ros de notices
    - Limiter Ã un type de document spÃ©cifique
    - Limiter Ã une bibliothÃ¨que particuliÃ¨re
    - Limiter Ã une tranche de cotes
    - Limiter Ã une pÃ©riode d'acquisition
  - Ensuite choisissez les informations Ã ignorer
    - Par dÃ©faut les exemplaires seront exportÃ©s, si vous souhaitezn'exporter que les donnÃ©es bibliographiques, cochez la case 'Ne pas exporter les exemplaires'
    - Pour limiter votre export aux exemplaires de la bibliothÃ¨que Ã laquelle vous Ãªtes connectÃ© (si vous avez laissÃ© le champ 'Site' sur 'Tout') ou Ã la bibliothÃ¨que sÃ©lectionnÃ©e plus haut, cochez la case 'Enlever les exemplaires non locaux'
    - Vous pouvez aussi choisir les champs que vous ne voulez pas exporter. Ceci peut Ãªtre pratique si vous partagez vos donnÃ©es, vous pouvez enlever tous les champs locaux avant de fournir vos donnÃ©es Ã une autre bibliothÃ¨que.
  - Enfin choisissez le format du fichier et le nom du fichier
    - Choisissez d'exporter vos donnÃ©es au format marc ou marcxml
    - Choisissez le nom de votre fichier
  - Cliquez 'Exportation'

2.13. Importation des donnÃ©es adhÃ©rents

L'outil d'import des lecteurs peut Ãªtre utilisÃ© n'importe quand pour ajouter des adhÃ©rents par lot. C'est communÃ©ment utilisÃ© dans les universitÃ©s et les Ã©coles lorsqu'un nouveau groupe d'Ã©tudiants s'inscrit.

2.13.1. CrÃ©er le fichier adhÃ©rents

L'installation de Koha comporte un fichier CSV blanc que vous pouvez utiliser comme modÃ¨le pour vos donnÃ©es adhÃ©rents. Si vous prÃ©fÃ©rez crÃ©er le fichier vous-mÃªme, assurez-vous que vos champs correspondent Ã l'ordre suivant :

borrowernumber, cardnumber, surname, firstname, title, othernames, initials, streetnumber, streettype, address, address2, city, zipcode, country, email, phone, mobile, fax, emailpro, phonepro, B_streetnumber, B_streettype, B_address, B_address2, B_city, B_zipcode, B_country, B_email, B_phone, dateofbirth, branchcode, categorycode, dateenrolled, dateexpiry, gonenoaddress, lost, debarred, contactname, contactfirstname, contacttitle, guarantorid, borrowernotes, relationship, ethnicity, ethnotes, sex, password, flags, userid, opacnote, contactnote, sort1, sort2, altcontactfirstname, altcontactsurname, altcontactaddress1, altcontactaddress2, altcontactaddress3, altcontactzipcode, altcontactcountry, altcontactphone, smsalertnumber, patron_attributes

La valeur du 'password' doit Ãªtre entrÃ©e en plein texte, et sera convertie en somme md5 (qui est une version cryptÃ©e du mot de passe).

Si vos mots de passe sont dÃ©jÃ cryptÃ©s, voyez avec votre administrateur systÃ¨me pour les solutions

Les formats de date doivent correspondre Ã votre prÃ©fÃ©rence systÃ¨me dateformat, et doivent Ãªtre complÃ©tÃ©s avec des zÃ©ros, i.e. '01/02/2008'.

Les champs 'branchcode' et 'categorycode' sont obligatoires et doivent correspondre Ã des entrÃ©es valides de votre base de donnÃ©es

Si vous chargez des attributs adhÃ©rents, le champ 'patron_attributes' doit contenir une liste des types d'attribut:valeurs sÃ©parÃ©s par des virgules

Le code du type d'attribut et un ':' doivent prÃ©cÃ©der chaque valeur

Par exemple: "INSTID:12345,LANG:fr"

Si vous entrez plus d'un attribut adhÃ©rent, veillez Ã mettre les informations entre guillemets (comme montrÃ© ci-dessus)

De faÃ§on optionnelle vous pouvez ajouter une ligne d'en-tÃªtes, permettant de voir quelles colonnes sont remplies dans le fichier d'import

---

2.13.2. Importer les adhÃ©rents

Une fois que vous avez crÃ©Ã© votre fichier, vous pouvez utiliser l'outil Importation des donnÃ©es adhÃ©rents pour charger les donnÃ©es dans Koha.

Choisissez votre fichier CSV et choisissez de tester la concordance sur le 'NumÃ©ro de carte' pour Ã©viter d'ajouter des numÃ©ros de carte en doublon dans le systÃ¨me

Ensuite vous pouvez choisir d'appliquer des valeurs par dÃ©faut Ã tous les adhÃ©rents que vous importez

ex. Si vous importez des adhÃ©rents spÃ©cifiquement dans une branche vous pouvez utiliser le champ du formulaire d'import pour appliquer le branchcode Ã tous les comptes que vous importez.

Enfin vous devez dÃ©cider que faire dans le cas de doublons.

Une notice doublon est dÃ©tectÃ©e en utilisant le champ que vous avez choisi comme concordance

Si vous incluez des attributs adhÃ©rent dans votre fichier vous pouvez dÃ©cider si vous ajoutez vos valeurs aux valeurs existantes ou si vous effacez les valeurs existantes pour ne garder que les nouvelles.

2.14. AdhÃ©rents (rendre anonyme et supprimer)

Cet outil vous permet de rendre anonyme de faÃ§on massive les historiques de circulation (ceci signifie que vous conservez les informations du nombre de fois oÃ¹ un exemplaire a Ã©tÃ© prÃªtÃ© - mais pas celles concernant les lecteurs qui ont empruntÃ© les documents) ou de supprimer les adhÃ©rents par lot (les supprimer dÃ©finitivement du systÃ¨me) .

Pour anonymiser ou supprimer des adhÃ©rents

Cochez l'action que vous souhaitez exÃ©cuter (Supprimer ou Rendre anonyme)

Saisissez une date avant laquelle vous souhaitez modifier les donnÃ©es

Cliquez 'Suivant'

Un message de confirmation apparaÃ®t vous demandant si vous Ãªtes sÃ»r que c'est bien ce que vous voulez faire

Cliquez 'Terminer' va supprimer ou rendre anonyme vos donnÃ©es

---

2.15. Chargement de photos d'adhÃ©rents

Des photos des adhÃ©rents peuvent Ãªtre chargÃ©es par lot si vous avez permis l'attachement de photographies d'adhÃ©rents aux fiches lecteurs.

CrÃ©er un fichier texte et appelez-le "DATALINK.TXT" ou "IDLINK.TXT"

Sur chaque ligne du fichier saisissez le numÃ©ro de carte adhÃ©rent suivi d'une virgule (ou d'une tabulation) et du nom du fichier image

Assurez-vous que votre fichier TXT est un document texte brut, pas RTF.

Compressez les fichier texte et les fichiers image

Allez dans l'outil Chargement de photos d'adhÃ©rents

Pour une seule photo, sÃ©lectionnez simplement le fichier image et saisissez le numÃ©ro de carte de l'adhÃ©rent

Pour plusieurs photos, choisissez de charger un fichier zip

AprÃ¨s le chargement vous aurez un message de confirmation

Il y a une limite Ã 100K pour la taille des images chargÃ©es, et il est recommandÃ© que les images aient une taille 120x200 pixels, mais de plus petites photos sont possibles Ã©galement.

2.16. Planificateur de tÃ¢ches

Le planificateur de tÃ¢ches permet de programmer l'exÃ©cution de rapports quand vous voulez

Pour programmer une tÃ¢che, allez dans le Planificateur de tÃ¢ches et remplissez le formulaire

L'heure du serveur montre l'heure sur votre serveur (programmez tous vos rapports por s'exÃ©cuter en fonction de cette heure - pas sur votre heure locale)

L'heure doit Ãªtre saisie sous la forme hh:mm (2 chiffres pour l'heure, 2 chiffres pour les minutes)

La date doit Ãªtre entrÃ©e Ã l'aide du popup calendrier

Choisissez le rapport Ã programmer dans la liste des rapports

Choisissez si vous souhaitez recevoir le texte ou un lien vers les rÃ©sultats

Dans le champ Email saisissez l'adresse mail de la personne qui recevra le rapport

En-dessous du formulaire de planification des tÃ¢ches, se trouve une liste des rapports programmÃ©s

Vous pouvez aussi programmer des rapports directement Ã partir de la liste des rapports sauvegardÃ©s en cliquant le lien 'Planifier'

2.16.1. RÃ©solution de problÃ¨mes

Le planificateur de tÃ¢ches ne fonctionnera pas si l'utilisateur avec lequel tourne le serveur web n'a pas la permission de l'utiliser. Pour voir si l'utilisateur en question a les permissions nÃ©cessaires, verifiez /etc/at.allow pour voir quels sont les utilisateurs prÃ©sents dedans. Si vous n'avez pas ce fichier, vÃ©rifiez /etc/at.deny. Si at.deny existe mais est vide, alors tout utilisateur peut l'utiliser. Voyez avec votre administrateur systÃ¨me pour ajouter l'utilisateur au bon endroit pour que le planificateur de tÃ¢ches fonctionne.

2.17. Messages

Tous les messages envoyÃ©s par Koha peuvent Ãªtre personnalisÃ©s en utilisant l'outil Messages. Plusieurs modÃ¨les prÃ©dÃ©finis sont installÃ©s dans Koha, qui sont visibles lorsque vous allez la premiÃ¨re fois dans l'outil Messages.

Chaque message peut Ãªtre modifiÃ©, mais seuls quelques uns peuvent Ãªtre supprimÃ©s, ceci afin d'Ã©viter les erreurs systÃ¨me si une notification devait Ãªtre envoyÃ©e sans modÃ¨le associÃ©.

2.17.1. Ajouter des messages

Pour ajouter un nouveau message

Cliquez 'Ajouter notification'

Choisissez le module auquel cette notification est rattachÃ©e

Le Code est limitÃ© Ã 20 caractÃ¨res

Utilisez le champ Nom pour prÃ©ciser plus d'information

Le Sujet du message est ce qui apparaÃ®tra dans le sujet du mail

Dans le Corps du message tapez le message qui vous convient, utilisez les champs sur la gauche pour entrer les donnÃ©es individuelles Ã partir de la base de donnÃ©es.

Pour les messages de retard (pour la circulation), assurez-vous d'utiliser <<items.content>> pour obtenir les donnÃ©es concernant tous les documents en retard, plutÃ´t que <<biblio.title>> et <<biblio.author>>.

2.17.2. Messages existants

Parmi les messages par dÃ©faut il y a des messages pour plusieurs actions frÃ©quentes dans Koha, voici un exemple de ce que ces messages font

ACQCLAIM (RÃ©clamation acquisistions)

Utilisé dans le module de rÃ©clamation des acquisitions

Allez dans : Plus > Acquisitions > Commandes en retard

HOLD (RÃ©servations mises de cÃ´tÃ©)

Ce message est utilisÃ© si deux conditions sont remplies :

La prÃ©fÃ©rence EnhancedMessagingPreferences est activÃ©e (ON)

*Allez dans :*Plus > Administration > PrÃ©fÃ©rences systÃ¨me > AdhÃ©rents > EnhancedMessagingPreferences

L'adhÃ©rent a demandÃ© Ã recevoir cette notification

*Aller dans :*OPAC > Login > Mes notifications

*Aller dans :*Interface professionnelle > Fiche adhÃ©rent > Notifications

ODUE (Message de retard)

Ce message est utilisÃ© pour envoyÃ© des notifications de retard aux adhÃ©rents

Voir un Exemple de message de retard

NÃ©cessite que vous paramÃ©triez le DÃ©clencheur de notification

RLIST (Liste de circulation)

UtilisÃ© dans le module PÃ©riodiques pour notifier les adhÃ©rents / les professionnels de la parution d'un nouveau numÃ©ro de pÃ©riodique

Allez dans : Plus > PÃ©riodiques > Nouvel abonnement

Vous avez la possibilitÃ© de choisir le message 'Liste de circulation' Ã la crÃ©ation d'un nouvel abonnement (Choix Ã partir du menu dÃ©roulant 'Notifications de l'adhÃ©rent').

Notez aussi que si vous souhaitez nitifier les lecteurs de la parution d'un nouveau numÃ©ro de pÃ©riodique, vous pouvez cliquer sur 'dÃ©finir un message', ce qui vous amÃ¨ne Ã l'outil 'Messages'

2.18. DÃ©clencheur de notification

Afin d'envoyer les messages de retard que vous avez dÃ©finis dans l'outil Messages, vous devez d'abord paramÃ©trer le dÃ©clencheur de notifications pour avoir ces messages.

Afin que des message de retard puissent Ãªtre envoyÃ©s Ã vos adhÃ©rents, vous devez paramÃ©trer les catÃ©gories adhÃ©rent pour qu'elles puissent recevoir des messages de retard.

L'outil DÃ©clencheur de notification donne la possibilitÃ© au bibliothÃ©caire d'envoyer jusqu'Ã trois messages pour chaque type d'adhÃ©rent les notifiant de documents en retard.

Le DÃ©lai est le nombre de jours de retard avant qu'une action soit programmÃ©e.

Si vous souhaitez que Koha programme une action (envoyer un message ou suspendre un lecteur), une valeur pour le dÃ©lai est nÃ©cessaire .

Pour envoyer des messages additionnels, cliquez sur les onglets pour un 'DeuxiÃ¨me' et 'TroisiÃ¨me' message

Si vous souhaitez empÃªcher vos adhÃ©rents d'emprunter des documents en raison de leurs documents en retard, cochez la case 'Suspendu' ; ceci affichera un message sur la fiche adhÃ©rent lors du prÃªt informant le bibliothÃ©caire que le lecteur ne peut pas emprunter Ã cause de documents en retard.

Voir un Exemple de message de retard

2.19. Visualiseur des logs

Les actions dans Koha sont tracÃ©es dans des fichiers de log. Vos prÃ©fÃ©rences systÃ¨me peuvent Ãªtre modifiÃ©es pour empÃªcher les logs pour diffÃ©rentes actions. Les logs peuvent Ãªtre consultÃ©s grÃ¢ce Ã l'outil Visualiseur des logs.

Choisir diffÃ©rents critÃ¨res parmi les options fournira le fichier de log correspondant Ã cette requÃªte

Notez que les noms n'apparaissent pas dans le log, uniquement les numÃ©ros identifiants. De mÃªme, vous devez utiliser ces numÃ©ros identifiants lorsque vous recherchez dans les logs.

2.20. Inventaire / RÃ©colement

L'outil Inventaire de Koha peut Ãªtre utilisÃ© de deux faÃ§ons, l'une en sortant une liste Ã partir de laquelle vous pouvez marquer les exemplaires, l'autre en chargeant un fichier texte de codes barres collectÃ©s Ã l'aide d'un lecteur de codes barres portable.

Si vous n'avez pas la possibilitÃ© d'utiliser votre lecteur de codes barres partout dans la bibliothÃ¨que, la premiÃ¨re option disponible pour vous est de gÃ©nÃ©rer une liste basÃ©e sur des critÃ¨res que vous dÃ©finissez.

Choisissez quelle bibliothÃ¨que, quelle localisation, intervalle de cotes, statut d'exemplaire, et date Ã laquelle l'exemplaire a Ã©tÃ© vu pour la derniÃ¨re fois, pour gÃ©nÃ©rer une liste de documents que vous pouvez ensuite imprimer et utiliser dans les rayons de votre bibliothÃ¨que pour vÃ©rifier votre collection.

De faÃ§on alternative vous pouvez exporter la liste vers un fichier CSV pour modification dans une application sur votre poste de travail. Cochez simplement la case 'Exporter vers fichier csv' pour gÃ©nÃ©rer ce fichier.

Une fois que vous avez trouvÃ© les exemplaires sur les Ã©tagÃ¨res vous pouvez retourner sur la liste et cocher les exemplaires que vous avez trouvÃ©s, afin que le systÃ¨me mette Ã jour la date 'Pas vu depuis' Ã la date du jour.

Si vous avez un lecteur de codes barres (ou un ordinateur portable et une douchette USB) vous pouvez vous dÃ©placer dans la bibliothÃ¨que et scanner les codes barres au fur et Ã mesure. Lorsque vous avez terminÃ© vous pouvez charger dans Koha le fichier texte ainsi crÃ©Ã©.

Choisissez le fichier texte et la date avec laquelle vous souhaitez marquer les exemplaires comme 'vus', et cliquez 'Valider'.

2.21. Modifier un lot d'exemplaires

2.22. Supprimer un lot d'exemplaires

Cet outil vous permet de supprimer un lot d'exemplaires de Koha.

A partir de cet outil vous pouvez choisir de charger un fichier de codes barres ou d'id d'exemplaires, ou vous pouvez scanner les codes barres un par un dans la zone en-dessous de l'outil de chargement de fichier. Une fois que vous avez chargÃ© le fichier ou fait la liste de codes barres, vous pouvez cliquer 'Suivant'

Un Ã©cran de confirmation s'affiche. A partir de lÃ vous pouvez dÃ©cocher les exemplaires que vous ne souhaitez pas supprimer, avant de cliquer 'Valider'. Si les exemplaires sont en prÃªt un message d'erreur s'affiche aprÃ¨s avoir cliquÃ© 'Valider' et les exemplaires ne sont pas supprimÃ©s.

Si les exemplaires peuvent Ãªtre supprimÃ©s ils le seront, et une confirmation de la suppression s'affiche.

Chapter 3. AdhÃ©rents

Avant d'importer et/ou d'ajouter des adhÃ©rents, assurez-vous d'avoir configurÃ© vos catÃ©gories adhÃ©rents.

3.1. Ajouter un nouvel adhÃ©rent

Les adhÃ©rents sont ajoutÃ©s en allant dans le module 'AdhÃ©rents'.

Cliquer 'Ajouter'

Saisissez d'abord les informations d'identification concernant votre lecteur

Les champs obligatoires sont dÃ©finis dans la prÃ©fÃ©rence systÃ¨me BorrowerMandatoryField

Saisissez ensuite les informations de contact

Si ce lecteur est de type enfant, Koha vous propose de rattacher le lecteur enfant Ã un lecteur adulte

Cliquez 'AdhÃ©rent' pour rechercher un adhÃ©rent existant dans le systÃ¨me

Si le garant n'est pas dans le systÃ¨me, vous pouvez saisir le nom et le prÃ©nom dans les champs proposÃ©s

Les relations sont paramÃ©trÃ©es en utilisant la prÃ©fÃ©rence systÃ¨me borrowerRelationship

Si ce lecteur est de type Professionnel, Koha vous propose de rattacher le lecteur Ã un lecteur CollectivitÃ©

Cliquez 'AdhÃ©rent' pour rechercher un adhÃ©rent collectivitÃ© existant dans le systÃ¨me

Chaque adhÃ©rent peut avoir un autre contact

Un autre contact peut Ãªtre un parent ou un tuteur. Ceci peut Ã©galement Ãªtre utilisÃ© dans un contexte universitaire pour enregistrer l'adresse des parents des adhÃ©rents Ã©tudiants.

La section Elements de gestion inclue des informations utilisÃ©es en interne pr la bibliothÃ¨que

Le champ NumÃ©ro de carte est calculÃ© automatiquement si vous avez paramÃ©trÃ© la prÃ©fÃ©rence systÃ¨me autoMemberNum pour faire ainsi

Si vous avez choisi une mauvaise catÃ©gorie d'adhÃ©rent au dÃ©but vous pouvez la modifier ici

CritÃ¨re 1 et 2 sont utilisÃ©s pour obtenir des statistiques par la bibliothÃ¨que

Ensuite, la section Choix bibliothÃ¨que ajoute des informations additionnelles conernant la bibliothÃ¨que

La Date d'inscription est remplie automatiquement Ã la date du jour

Si votre carte lecteur expire (en fonction du paramÃ©trages des catÃ©gories adhÃ©rent) la Date d'expiration est calculÃ©e automatiquement

La Note OPAC est une note pour le lecteur - elle apparaÃ®t Ã l'OPAC sur la fiche lecteur

La Note de circulation est destinÃ©e Ã l'Ã©quipe de la bibliothÃ¨que et apparaÃ®t lorsque la bibliothÃ¨que va faire un prÃªt pour ce lecteur.

Les Identifiant OPAC et Mot de passe sont utilisÃ©s par les adhÃ©rents pour se connecter Ã leur compte Ã l'OPAC. Ils sont Ã©galement utilisÃ©s par les bibliothÃ©caires pour leur accÃ¨s Ã l'interface professionnelle.

Si vous avez activÃ© des attributs adhÃ©rents supplÃ©mentairess, ceuxi-ci apparaissent ensuite

Enfin vous pouvez choisir des prÃ©fÃ©rences de notification pour ce lecteur.

Ces prÃ©fÃ©rences vont Ã©craser celles que vous avez dÃ©finies au niveau des catÃ©gories adhÃ©rent

Ces prÃ©fÃ©rences peuvent Ãªtre modifiÃ©es par le lecteur via l'OPAC

3.2. Ajouter un adhÃ©rent professionnel de la bibliothÃ¨que

Tous les membres de l'Ã©quipe de la bibliothÃ¨que doivent Ãªtre entrÃ©s dans Koha comme adhÃ©rents du type 'BibliothÃ©caire'. Pour ajouter un adhÃ©rent professionnel, suivez les Ã©tapes dÃ©crites dans Ajouter un nouvel adhÃ©rent. Pour donner aux membres de l'Ã©quipe les permissions d'accÃ¨s Ã l'interface professionnelle, suivez les Ã©tapes dÃ©crites dans Permissions AdhÃ©rents

Pensez bien Ã attribuez Ã l'Ã©quipe des identifiants et mots de passe sÃ©curisÃ©s, puisqu'ils seront utilisÃ©s pour se connecter Ã l'interface professionnelle.

3.3. Ajouter un adhÃ©rent Statistiques

Pour comptabiliser les communications sur place des documents vous pouvez avoir besoin d'un adhÃ©rent de type de catÃ©gorie Statistiques. D'abord vous aurez besoin d'une catÃ©gorie adhÃ©rent dÃ©finie pour vos adhÃ©rents Statistiques.

Ensuite vous allez crÃ©er un nouveau lecteur de cette catÃ©gorie statistique.

Ensuite, suivez les Ã©tapes dÃ©crites prÃ©cÃ©demment dans la section 'Ajouter un nouvel adhÃ©rent' de ce manuel. Comme ce lecteur n'est pas une personne rÃ©elle, remplissez uniquement les champs obligatoires, les informations relatives Ã la bibliothÃ¨que, et rien d'autre.

3.4. Modifier les adhÃ©rents

Dans Koha les lecteurs peuvent Ãªtre modifiÃ©s Ã partir de l'un des boutons ou liens Modiifer existants.

- Pour Ã©diter la totalitÃ© de la fiche adhÃ©rent cliquez simplement le bouton 'Modifier' au-dessus de la fiche adhÃ©rent.
- Pour modifier uniquement le mot de passe adhÃ©rent, cliquez le bouton 'Changer mot de passe'.
  - Les mots de passe adhÃ©rents sont cryptÃ©s et ne peuvent pas Ãªtre retrouvÃ©s par l'Ã©quipe de la bibliothÃ¨que
  - Le formulaire gÃ©nÃ¨re automatiquement un mot de passe alÃ©atoire, ce mot de passe n'est pas le mot de passe actuel de l'adhÃ©rent, mais juste un nouveau mot de passe alÃ©atoire
- Pour modifier une section spÃ©cifique de la fiche adhÃ©rent (par exemple la section Utilisation de la bibliothÃ¨que) cliquez le lien 'Modifier' en-dessous de cette section
- Une photographie de l'adhÃ©rent peut Ãªtre ajoutÃ©e en recherchant l'image sur votre ordinateur Ã partir de la section 'TÃ©lÃ©charger les photos adhÃ©rents'
  - Ce formulaire n'apparaÃ®t pas si vous n'avez pas paramÃ©trÃ© la prÃ©fÃ©rence systÃ¨me patronimages pour autoriser les photos des adhÃ©rents
  - Pour ajouter les photos des adhÃ©rents par lot, utilisez l'outil Chargement photos adhÃ©rents
- Les lecteurs peuvent Ã©galement Ãªtre interdits de prÃªt en positionnant les PiÃ¨ges du compte adhÃ©rent
  - Si vous souhaitez que votre Ã©quipe confirme l'adresse d'un adhÃ©rent avant de lui faire des prÃªts, vous pouvez positionner le piÃ¨ge 'Parti sans laisser d'adresse'
  - Si vous voulez suspendre un adhÃ©rent vous pouvez activer le piÃ¨ge 'Suspendu', et Ã©ventuellement indiquer jusqu'Ã quelle date il est suspendu, et la raison de la suspension
    - Ce blocage peut Ãªtre positionnÃ© automatiquement par l'application des rÃ¨gles de retard (jours de suspension) ou par l'outil DÃ©clencheur de notification
  - Si un adhÃ©rent vous informe qu'il a perdu sa carte vous pouvez activer le blocage 'Carte perdue' pour Ã©viter que quelqu'un d'autre n'utilise cette carte pour emprunter

---

3.5. Permissions adhÃ©rent

Les permissions adhÃ©rents sont utilisÃ©es pour permettre aux professionnels d'avoir accÃ¨s Ã l'interface professionnelle.

> Pour que les membres de la bibliothÃ¨que puissent se connecter Ã l'interface professionnelle, ils doivent avoir (au moins) la permission 'catalogue' qui leur permet de voir l'interface professionnelle.

3.5.1. DÃ©finir les Permissions AdhÃ©rent

Pour dÃ©finir les permissions d'un adhÃ©rent, vous devez d'abord avoir un lecteur qui a la droit de le faire.

- Sur la fiche adhÃ©rent cliquez Plus et choisissez DÃ©finir permissions pour modifier les permissions adhÃ©rent.
- En fonction du paramÃ©trage de la prÃ©fÃ©rence systÃ¨me GranularPermissions vous pourrez voir l'un ou l'autre des menus ci-dessous :

Si GranularPermissions est positionnÃ© sur 'the general module' vous verrez les permissions basÃ©es sur les diffÃ©rentes modules de Koha, de faÃ§on globale

Si GranularPermissions est positionnÃ© sur 'the specific page' vous verrez des permissions plus granulaires, pour les fonctionnalitÃ©s Ã l'intÃ©rieur des modules

---

3.5.2. DÃ©tail des permissions adhÃ©rent

superlibrarian

Accès Ã toutes les fonctions de l'interface professionnelle, sans limite

circulate

PrÃªter et rendre des documents et avoir accÃ¨s au module Circulation de l'interface professionnelle

Avec la prÃ©fÃ©rence GranularPermissions posistionnÃ©e sur page spÃ©cifique cette section peut Ãªtre dÃ©taillÃ©e (En savoir plus)

catalogue

Allows staff members to search the catalog via the staff client

Must be given to all staff members to allow them to login to the staff client

parameters

Provides access to all areas of the Administration menu

borrowers

Allows staff members to add or modify patrons (with the exception of setting permissions)

permissions

Ability to set patron permissions

reserveforothers

Ability to place holds on books for patrons via the staff interface

borrow

Grants staff members the rights to borrow books from the library

editcatalogue

Ability to catalog items (add and edit bibliographic and holdings data)

With GranularPermissions is set to 'the individual modules' this section will be expanded (Learn more)

updatecharges

Manage patron accounts (including paying fines, adding credits, and creating invoices)

acquisition

Provides access to the acquisitions and patron purchase suggestion modules

With GranularPermissions is set to 'the individual modules' this section will be expanded (Learn more)

management

No longer in use

tools

Access to all items in the Tools section of the staff client

With GranularPermissions is set to 'the individual modules' this section will be expanded (Learn more)

editauthorities

Provides access to edit the authority record

serials

Allows access to the serials module

reports

Allow access to the Reports module (ability to create, edit and run all reports)

Reports found on the Circulation page are not controlled by this permission

With GranularPermissions is set to 'the individual modules' this section will be expanded (Learn more)

staffaccess

Provides the ability to modify login / permissions for staff users

---

3.5.2.1. Granular Circulate Permissions

If the staff member has 'circulate' permissions they have the ability to perform all of these actions. If you would like to control circulation permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

circulate_remaining_permissions

All circulation rights except override permissions

override_renewals

Override blocked renewals

3.5.2.2. Granular Cataloging Permissions

If the staff member has 'editcatalogue' permissions they have the ability to perform all of these actions. If you would like to control cataloging permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

edit_catalogue

Ability to access all cataloging functions via the Cataloging page

fast_cataloging

The ability to catalog using only the Fast Add Framework found on the Circulation page

---

3.5.2.3. Granular Acquisitions Permissions

If the staff member has 'acquisition' permissions they have the ability to perform all of these actions. If you would like to control acquisitions permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

budget_add_del

Ability to add and delete budgets (not modify()

budget_manage

Manage budgets

budget_modify

Ability to edit existing budgets (not to add or delete)

contracts_manage

Manage contracts

group_manage

Manage orders and basket groups

order_manage

Manage orders and baskets

order_receive

Manage orders and baskets

period_manage

Manage periods

planning_manage

Manage budget plannings

vendors_manage

Manage vendors

3.5.2.4. Granular Tools Permissions

If the staff member has 'tools' permissions they have the ability to access and use all items under the Tools menu. If you would like to control which tools staff members have access to on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

batch_upload_patron_images

Upload patron images in batch or one at a time (Access to the Image Upload Tool)

batchdel

Batch delete items from Koha (Access to the Modify a queryset of items Tool)

batchmod

Batch modify items in Koha (Access to the Delete a queryset of items Tool)

delete_anonymize_patrons

Delete old borrowers and anonymize circulation/reading history (Access to the Anonymize Patron Tool)

edit_calendar

Define days when the library is closed (Access to the Calendar/Holidays Tool)

edit_news

Write news for the OPAC and staff interfaces (Access to the News Tool)

edit_notice_status_triggers

Set notice/status triggers for overdue items (Access to the Overdue Notice Status/Triggers Tool)

edit_notices

Define notices (Access to the Notices Tool)

export_catalog

Export bibliographic and holdings data (Access to the Export Bibliographic & Holdings Data Tool)

import_patrons

Import patron data (Access to the Import Patrons Tool)

inventory

Perform inventory (stocktaking) of your catalog (Access to the Inventory Tool)

label_creator

Create printable labels and barcodes from catalog and patron data (Access to the Label Creator and Quick Label Creator Tools)

manage_csv_profiles

Create and edit CSV profiles (Access to the CSV Profiles Tool)

manage_staged_marc

Managed staged MARC records, including completing and reversing imports (Access to the Manage Staged MARC Records Tool)

moderate_comments

Moderate patron comments (Access to the Comments and Tags Tools)

schedule_tasks

Schedule tasks to run (Access to the Task Scheduler Tool)

stage_marc_import

Stage MARC records into the reservoir (Access to the Stage MARC Records Tool)

view_system_logs

Browse the system logs (Access to the Log Viewer Tool)

3.5.2.5. Granular Reports Permissions

If the staff member has 'reports' permissions they have the ability to perform all of these actions. If you would like to control reports permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

create_reports

The ability to create and edit but not run SQL reports

execute_reports

The ability to run but not create or edit SQL reports

3.6. Patron Information

When viewing a patron record you have the option to view information from one of many tabs found on the left hand side of the record.

3.6.1. Check Out

For instruction on checking items out, view the Checking Out section of this manual.

3.6.2. Details

All patron information will appear on the Details tab. This includes all the contact information, notes, messaging preferences, etc entered when adding the patron.

In the case of patrons who are marked as 'Child' or 'Professional' and their Guarantors additional information will appear on their record.

- A child patron will list their Guarantor
- On the Guarantor's record, all children and/or professionals will be listed

---

3.6.3. Fines

The patron's complete accounting history will appear on the Fines tab. Contrary to its name, the Fines tab does not just show fine data, it also shows membership fees, rental fees, reserve fees and any other charge you may have for patrons.

3.6.3.1. Charging Fines/Fees

Most fees and fines will be charged automatically if the fines cron job is running:

- FInes will be charged based on your Circulation & Fines Rules
- Hold fees will be charged based on the rules you set in the Patron Types & Categories administration area
- Rental fees will be charged based on the settings in your Item Types administration area
- Marking an item 'Lost' via the cataloging module will automatically charge the patron the replacement cost for that item

---

3.6.3.2. Pay/Reverse Fines

Each line item can be paid in full (or written off) using the 'Pay Fines' tab.

- Choose the payment type (Unpaid, Paid, Writeoff) from the pull down menu
- Click 'Make Payment'
- A line item will be added to the account information showing the fee paid in full (or written off)
- If you accidentally mark and item as paid, you can reverse that line item by clicking 'Reverse' to the right of the line
  - Once clicked a new line item will be added to the account, showing the payment as reversed

---

3.6.3.3. Creating Manual Invoices

For fees that are not automatically charged, librarians can create a manual invoice

- First choose the type of invoice you would like to create

To add additional values to the manual invoice type pull down menu, add them to the MANUAL_INV Authorized Value

If the fee is associated with an item you can enter its barcode so that the line item shows a link to that item

The description field is where you will enter the description of the charge

In the amount field, do not enter currency symbols, only numbers and decimals

---

3.6.3.4. Creating Manual Credits

Manual credits can be used to pay off parts of fines, or to forgive a fine amount.

First choose the type of credit you'd like to apply

If this credit is associated with an item you can enter that item's barcode so that the line item links to the right item

The description field is where you will enter the description of the credit

In the amount field, do not enter currency symbols, only numbers and decimals

---

3.6.4. Circulation History

The circulation history tab will appear if you have set the intranetreadinghistory preference to allow it to appear.

3.6.5. Modification Log

If you have set your BorrowersLog to track changes to patron records, then this tab will appear. The Modification Log will show all changes made to the patron record.

The Librarian fiels shows the patron number for the librarian who made the changes

The Object field lists the patron that is being modified (in the example above, it was my changing my own record)

3.6.6. Messaging

The patron's messaging preferences are set when editing the patron. This tab will show the messages that have been sent and those that are queued to be sent:

3.6.7. Notices

3.7. Patron Search

Clicking on the link to the Patron module will bring you to a search/browse screen for patrons. From here you can search for a patron by entering any part of their name or barcode in the search box at the top.

You can also browse through the patron records by clicking on the linked letters across the top.

Once a list of patrons is on the screen you can filter your results using the filter options on the left of the results.

Entering a filter without first browsing or searching will return no results.

Chapter 4. Circulation

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

Before circulating your collectiion you will want to set your Global System Preferences, Basic Parameters and Patrons & Circulation Rules.

4.1. Check Out (Issuing)

To begin the checkout process you must enter the patron barcode or part of their name. The checkout option appears in three main places:

- Check out option on main staff client
- Check out option on the patron record
- Check out option on the quick search bar

4.1.1. Checking Items Out

To check an item out to a patron, first search for that patron using one of the many options listed above.

At the top of the Check Out screen is a box for you to type or scan the item's barcode into.

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

Below the box for the barcode there may be options for you to override the default due date for the item.

- This option will only appear if you have set the SpecifyDueDate system preference to allow staff to override the due date

At the bottom of the page there is a summary of the patron's current checked out items along with the due date and the list of items the patron has on hold

Once you have checked out all of the items for the patron you can print them a receipt by clicking the Print buton at the top of the screen and choosing 'Print Slip'

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

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

---

4.1.2. Check Out Messages

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

- Patron owes too much in fines
  - You can set the amount at which patron checkouts are blocked with the noissuescharge system preference
- Patron has been barred from the library
  - This can be set by the librarian editing a patron record and adding a flag or by the Overdue/Notice Status Triggers
- Patron needs to confirm their address
  - This can be set by the librarian editing a patron record and adding a flag
- Patrons has lost their library card
  - This can be set by the librarian editing a patron record and adding a flag

---

4.2. Check Out Warnings

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

- Patron has outstanding fines
- Item on hold for someone else
- Item should be on the hold shelf waiting for someone else

- Item already checked out to this patron
- Item checked out to another patron
- Item not for loan
- Patron has too many things checked out
- Item cannot be renewed
    - This can be overriden with the AllowRenewalLimitOverride system preference
- Barcode not found

4.3. Check In (Returning)

Checking in items can be performed from various different locations

- The check in link on main staff client
- The check in option on the quick search bar on the Circulation page
- The check in link on the patron's checkout summary (and on the checkout summary page)

4.3.1. Checking Items In

To check an item in scan the barcode for the item into the box provided. A summary of all items checked in will appear below the checkin box

If you are checking items in that were put in the dropbox while the library was closed you can check the 'Dropbox mode' box before scanning items. This will effectively roll back the returned date to the last date the library was open.

- This requires that you have your closings added to the Holidays & Calendar Tool

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

4.3.2. Check In Messages

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

- If you are checking an item in at a library other than the home branch, a message will appear asking you to transfer the book to the home library
    - After this item is checked in the status of the item will be changed in the catalog to 'in transit'
    - To mark an item as back at the home branch, check the item in at the home branch
        - A message will appear tell you that the item is not checked out, but the status will now say available in the catalog. This step is necessary to mark items as receieved by the home branch.
- If you're checking an item in that has a hold on it, you will be prompted to confirm the hold
    - Clicking the Confirm hold button will mark the item as waiting for pickup from the library
    - Clicking the Print Slip and Confirm button will mark the item as waiting for pickup at the library and present the library with a receipt to print and place on the book with the patron's information
    - Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)
- If you're checking in an item that has a hold on it at another branch you will be prompted to confirm and transfer the item
    - Clicking the Confirm hold and Transfer button will mark the item as in transit to the library where the hold was placed
    - Clicking the Print Slip, Transfer and Confirm button will mark the item as in transit to the library where the hold was placed and present the library with a receipt to print and place on the book with the patron's information

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

4.4. Circulation Messages

Circulation messages are short messages that librarians can leave for their patrons or their colleagues that will appear at the time of circulation.

4.4.1. Setting up Messages

Circulation messages are set up as Authorized Values. To add or edit Circulation Messages you want to work with the BOR_NOTES value.

4.4.2. Adding a Message

When on the patron's check out tab you will see a link to 'Add a new message' to the right of the check out box.

When you click 'Add a new message' you will be asked to choose if the message is for the librarians or the patron and the message you would like to leave.

4.4.3. Viewing Messages

Circulation messages meant for the staff will appear on the patron's checkout screen.

Circulation messages meant for the patron will appear when they log into the OPAC.

4.5. Holds

4.5.1. Placing Holds in Staff Client

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

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

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

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

- Enter any notes that might apply to this hold
- Choose the library where the patron will pick up the item
- If the patron wants the hold to start on a date other than today, enter that in the 'Hodl starts on date' field
- Next choose if you want to place a hold on the next available item or a specific item by clicking the radio button next to an individual item.

If you're placing a hold on multiple items you will be presented with the next available option for both titles.

4.5.2. Managing Holds

4.5.3. Receiving Holds

4.6. Transfers

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

- Click 'Transfer' on the Circulation page
  - Enter the library you would like to transfer the item to
  - Scan or type the barcode on the item you would like to transfer

Click 'Submit'

The item will now say that it is in transit

The item will not be permanently moved to the new library

The item shows the same 'Home Library' but has updated the 'Current Location'

4.7. Set Library

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

This is the library that all circulation transactions will take place at. If you are at another library (or on a bookmobile) you will want to set your library before you start circulating items. To do this you can click 'Set' at the top right or on the Circulation page.

Once you have saved your changes you new library will appear in the top right.

4.8. Fast Add Cataloging

Sometimes cicruclation librarians need to quickly add a record to the system for an item they are about to check out. This is called 'Fast Add.' To allow circulation librarians access to the Fast Add Cataloging tool, simply make sure they have the fast_cataloging permissions. To add a title with the fast add framework, click the Fast Cataloging option on the Circulation page

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

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

4.9. Circulation Reports

4.9.1. Holds Queue

This report will show you all of the holds at your library. To generate this report, you must have the Build Holds Queue cron job running.

4.9.2. Holds to pull

This report will show you all of the items that have holds on them that are available at the library for pulling.

This report will be generated based on a few system preferences:

StaticHoldsQueueWeight

Allows the library to specify a list of library location codes -- if used alone, it will rank the list statically, selecting the top-ranking available location to be added to the picklist.

RandomizeHoldsQueueWeight

If 'RandomizeHoldsQueueWeight' and 'StaticHoldsQueueWeight' are set, the list of library codes in the 'StaticHoldsQueueWeight' system preference are randomized rather than statically ranked. If RandomizeHoldsQueueWeight alone is set, the list of all available library codes is used to randomize the weight.

If neither 'RandomizeHoldsQueueWeight' or 'StaticHoldsQueueWeight' is set, the holds queue is statically ranked according to how they are pulled out of the system database.

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

4.9.3. Holds awaiting pickup

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

4.9.4. Hold ratios

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

4.9.5. Transfers to receive

This report will list all of the items that Koha thinks are in transit to your library.

4.9.6. Overdues

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

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

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

4.9.7. Overdues with fines

4.10. Tracking Inhouse Use

Many libraries track the use of items within the library. This is possible within Koha with the use of one or more Statistical Patrons. When collecting items that have been used within the library, you will want to check them out to your statistical patron:

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

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

4.11. In Processing / Book Cart Locations

Koha allows for handling temporary locations like the processing center and/or book carts throughout the library. For this feature to work you must first make sure you have authorized values set in the LOC category for PROC (Processing Center) and CART (Book Cart).

Next you need to set the NewItemsDefaultLocation system preference to PROC. This will set the new items to the Processing Center as their default location.

Create items with their desired final shelving location.

These newly cataloged items will be temporarily set to the PROC location and will display with whatever description PROC has. The original location code entered at item creation is stored in the new items column 'permanent_location', for future use. Items will stay in the PROC location until they are checked in. To have those items then move to the shelving cart:

Turn on the InProcessingToShelvingCart system preference

Check in those newly-created items and they will be moved to the location code of CART and display with whatever description CART has.

A cron job runs at specified intervals to age items from CART to the permanent shelving location. (For example, an hourly cron entry of cart_to_shelf.pl --hours 3 where --hours is the amount of time an item should spend on the cart before aging to its permanent location.)

If the syspref ReturnToShelvingCart system preference is turned on, any newly-checked-in item is also automatically put into the shelving cart, to be covered by the same script run.
Checkins with confirmed holds will not go into the shelving cart. If items on the shelving cart are checked out, the cart location will be cleared.

4.12. Self Checkout

Koha comes with a very basic self checkout module. To use this module you have to log in as a staff member with circulation permissions.

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

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

```
$(document).ready(function(){ $("#login
     #submit").parent().after("<p><a
     href=\"http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl\"
     target=\"_blank\">Self-Checkout</a></p>"); });
```

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

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

When on the self checkout page you will be asked to enter your patron card number:

Once your card number is entered you will be asked to scan the items you are checking out

As you scan items they will appear below the barcode box

When you are finished scanning items it is important to click the 'Click here if done' button to log the patron out and prepare for the next patron.

When attempting to check items out there are some instances where error messages will appear and the patron will be directed to the librarian.

4.13. Offline Circulation Utility

You can find koc file format specification on this page: http://wiki.koha.org/doku.php?id=koha_offline_circulation_file_format

4.13.1. Firefox Plugin

There is a plugin for Firefox that can be used for Offline Circulation: https://addons.mozilla.org/en-US/firefox/addon/14399

Once installed there will be an icon for the Offline Circulation Tool in the status bar at the bottom of you Firefox Window.

Additional instructions for using this Plugin can be found on the Koha Wiki: http://wiki.koha.org/doku.php?id=offline_circulation_firefox_plugin

4.13.2. Offline Circ Tool for Windows

The Offline Circulation Utility can be downloaded at: http://kylehall.info/index.php/projects/koha-tools/koha-offline-circulation/

4.13.3. Upload Offline Circ File

Chapter 5. Cataloging

5.1. Bibliographic Records

5.1.1. Adding Records

Records can be added to Koha via original or copy cataloging. If you would like to catalog a record using a blank template

- Click 'New Record'
  - Choose the framework you would like to base your record off of

If you want to catalog a record based on an existing record at another library

- Click 'z39.50 Search'
  - Search for the item you would like to catalog
    - If no results are found, try searching for fewer fields, not all Z39.50 targets can search all of the fields above.
  - Search targets can be altered by using the Z39.50 Admin area.
  - From the results you can view the MARC or Card view for the records or choose to Import them into Koha

Once you've opened a blank framework or imported a record via Z39.50 you will be presented with the form to continue cataloging

- To exapand a collapsed tag click on the tag number
- To duplicate a field click on the + (plus sign) to the right of the tag

To move subfields in to the right order, click the up arrow to the left of the field

To remove a subfield (if there is more than one of the same type), click the - (minus sign) to the right of the field

To use a plugin click on the ... (ellipse) to the right of the filed

Once you've finished, click the 'Save' button at the top

If you are about to add a duplicate record to the system you will be warned before saving

5.1.2. Editing Records

To edit a record you can click 'Edit Biblio' from the search results on the cataloging page

or by clicking the Edit button on the Bibliographic Record

The record will open in the MARC editor

Once you have made your edits you can click 'Save' at the top of the editor.

5.1.3. Duplicating Records

Sometimes a copy of the record you need to catalog can't be found via Z39.50. In these cases you can create a duplicate of similar record and edit the necessary pieces to create a new record. To duplicate an existing record click 'Edit as New (Duplicate)' from the Edit menu on the Bibliographic Record

This will open a new MARC record with the fields filled in with the values from the original BIbliographic Record.

5.2. Item Records

5.2.1. Adding Items

After saving a new bibliographic record, you will be redirected to a blank item record so that you can attach an item to the bibliographic record. You can also click 'Add Holdings' from the cataloging search results

or you can add new item at any time by clicking 'New' on the bibliographic record and choosing 'New Item'

The item edit form will appear:

At the very least, the following fields should be entered for new items:

8 - Collection code

a - Permanent location

b - Shelving location

o - Full call number

p - Barcode

v - Cost, replacement price

This value will be charged to patrons when you mark and item they have checked out as 'Lost'

y - Koha item type

Below the add form there are 3 buttons for adding the item

Add Item will add just the one item

Add & Duplicate will add the item and fill in a new form with the same values for your to alter

Add Multiple Copies will ask how many copies and will then add that number of copies adding +1 to the barcode so each barcode is unique

Your added items will appear above the add form once submitted

5.2.2. Editing Items

Items can be edited in several ways.

- Clicking 'Edit' and 'Edit Items' from the bibliographic record
- Clicking 'Edit Items' beside the item on the 'Items' tab

The edit menu is also where items can be deleted from:

5.2.3. Moving Items

Items can be moved from one bibliographic record to another using the Attach Item option

Visit the bibliographic record you want to attach the item to and choose 'Attach Item' from the 'Edit' menu.

Simply enter the barcode for the item you want to move and click 'Select'

5.3. Authorities

Chapter 6. Serials

6.1. Add a subscription

Subscriptions can be added by clicking the 'New' button on any bibliographic record

Or by visiting the Serials module and clicking 'New Subscription'

If you are entering a new subscription from the Serials module you will be presented with a blank form (if creating new from a bibliographic record the form will include the bib info).

- 'Librarian' field will show the logged in librarian's username
- 'Vendor' can be found by either searching vendors entered via the Acquisitions module or entering the vendor ID number
  - Vendor information is not required
  - In order to claim missing and late issues you need to enter vendor information
- 'Biblio' is the MARC record you'd like to link this subscription to
  - This can be done by searching for an existing record or by entering the bib number for a record
- Next you can choose whether a new item is created when receiving an issue
- 'Location' is for the shelving location
- 'Call Number' is for your item's call number prefix
- 'Library' is the branch that owns this subscription.
  - If more than one library subscribes to this serial you will need to create a subscription for each library
  - This can be done easily by using the 'Edit as New (Duplicate)' option found on the subscription information page and changing only the 'Library' field
- The 'Grace Period' is the number of days before an issue is automatically moved from 'expected' status to 'waiting' and how many days before an issue is automatically moved from 'waiting' status to 'late'
- Use the 'Public Note' for any notes you would like to appear in the OPAC for the patrons

'Nonpublic Note' should be used for notes that are only visible to the librarians via the staff client

To set up a routing list for serials, choose 'Routing List' from the 'Patron notification' field.

  For this option to appear you need to make sure that you have a Routing List notice set up in the Notices Tool

  Learn more about Routing Lists later in this manual

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

  If no values are entered in these fields, they will use the OPACSerialIssueDisplayCount and StaffSerialIssueDisplayCount system preference values

In 'First issue publication' you want to enter the the date of the issue you have in your hand, the date from which the prediction pattern will start

There are several pre-defined options for the 'Frequency' of publication

  Without periodicy: some very specific (usually high level science journals) don't have a true periodicity. When you subscribe to the title, you subscribe for 6 issues, which can arrive in 1 year... or 2... There is no regularity or known schedule.

  Unknown select this if none of the other choices are relevant

  Irregular: The journal is not "regular" but has a periodicity. You know that it comes out on January, then in October and December, it is irregular, but you know when it's going to arrive.

  2/day: Twice daily

  1/day: Daily

  3/week: Three times a week

  1/week: Weekly

  1/ 2 weeks: Twice monthly (fortnightly)

  1/ 3 weeks: Tri-weekly

  1/month: Monthly

  1/ 2 months (6/year): Bi-monthly

  1/ 3 months (1/quarter): Quarterly

  1/quarter (seasonal) : Quarterly related to seasons (ie. Summer, Autumn, Winter, Spring)

  2/year: Half yearly

  1/year: Annual

  1/ 2 years: Bi-annual

Checking the 'Manual history' box will allow you to enter serials outside the prediction pattern.

'Numbering pattern' will help you determine how the numbers are printed for each issue

  Start with the numbering on the issue you have in hand, the numbering that matches the date you entered in the 'First issue publication' field

  In the 'Rollover at' field, enter the last issue number before the volume number changes

  You can choose to create your own numbering pattern by choosing 'None of the above' and clicking the 'Show/Hide Advanced Pattern' button at the bottom of the form

'Subscription start date' is the date at which the subscription begins. This is used for setting up renewal alerts

'Subscription length' is the number of issues or months in the subscription. This is also used for setting up renewal alerts

'Subscription end date' should only be entered for subscriptions that have ended (if you're entering in a backlog of serials)

The 'Numbering formula' is editable to match the way you'd like your numbering to print on the item record and subscription information pages

Click 'Save Subscription' to save the information you have entered.

6.2. Receive Issues

Issues can be marked as received from several locations. To find a subscription, use the search box at the top of the Serials page to search for the serial you'd like to receive issues for:

From the search results you can click the 'Serial Receive' link or you can click on the subscription title and then click the 'Receive' button.

The final way to receive serials is from the 'Serial Collection' page. To the left of the Subscription summary page there is a menu with a link to 'Serial Collection'

From the page that opens up you can click 'Edit Serial' with the issue you want to receive checked.

All three of these options will open up the issue receive form:

- Choose 'Arrived' from the status pull down to mark a serial as received.
- If you have decided to have an item record created for each issue an item add form will appear
- If your issue has a supplemental issue with it, fill in the Supplemental Issue information.
- If you have decided to have an item record created for each issue an item add form will appear for your supplement and for the issue itself
- Once you have entered your info you can click 'Save'

6.3. Create a Routing List

If RoutingListAddReserves is set to on then patrons listed in the routing list will automatically be added to the holds list for the issue.

6.4. Subscriptions in Staff Client

Subscription information will appear on bibliographic records under the 'Subscriptions' tab

Clicking the 'Subscription Details' link will take you to the Subscription summary page in the staff client.

6.5. Subscriptions in OPAC

When viewing the subscription in the OPAC there will be several options.

Like in the staff client, there will be a Subscriptions tab on the bibliographic record.

Under this tab will appear the number of issues you chose when setting up the subscription or in your OPACSerialIssueDisplayCount system preference. Clicking the 'More details' link will provide you with additional information about the serial history. You can set the default view of a serial in the OPAC with the SubscriptionHistory system preference.

There are two views, compact and full. The compact serial subscription will show basic information regarding the subscrption

Whereas the full view shows extensive details, broken out by year, regarding the subscription

Chapter 7. Acquisitions

7.1. Setup

Before using the Acquisitions Module you will want to make sure that you have completed all of the set up.

First, set your Acquisitions System Preferences and Acquisitions Administration to match your library's workflow.

7.2. Vendors

Before any orders can be places you must first enter at least one vendor.

7.2.1. Add a Vendor

To add a vendor click the 'New Vendor' button on the Acquisitions page

The vendor add form is broken into three pieces

- The first section is for basic information about the Vendor
  - Of these fields, only the Vendor name is required, the rest of the information should be added to help with generating claim letters and invoices
- The second section is for information regarding your contact at the Vendor's office
  - None of these fields are required, they should only be entered if you want to keep track of your contact's information within Koha
- The final section is for billing information
  - To be able to order from a vendor you must make them 'Active'
  - For List Prices and Invoice Prices choose the currency
    - Currencies are assigned in the Currencies & Exchange Rates admin area
  - If the vendor offers a consistent blank discount, enter that in the 'Discount' field
    - You can enter item specific discounts when placing an order
  - GST rate is for any tax the vendor may charge
  - Notes are for internal use

7.2.2. View/Edit a Vendor

To view a vendor's information page you must search for the vendor from the Acquisitions home page. Your search can be for any part of the Vendor's name:

From the results, click on the name of the vendor you want to view or edit

To make changes to the vendor, simply click the 'Edit' button.

7.2.3. Vendor Contracts

You can define contracts (with a start and enddate) and attach it to a vendor. This is used so that at the end of the year you can see how much you spent on a specific contract with a vnedor. In some places, contracts are set up with a minimum and maximum yearly amount.

7.3. Managing Suggestions

Depending on your settings in the suggestion system preference, patrons may be able to make purchase suggestions via the OPAC.

7.4. Placing Orders

To place an order you must first search for the vendor or bookseller you want to send the order to.

7.4.1. Create a basket

To create a basket you have several options from the vendor search results page:

From here you can choose to create a new basket by clicking 'New basket' under 'Manage orders' or by clicking 'Add basket'

When adding a basket you want to give it a name that will help you identify it later. The notes fields are optional and can contain any type of information. When finished, click 'Save'

Once your basket is created you are presented with several options for adding items to the order.

- If you are ordering another copy of an existing item, you can simply search for the record in your system
    - From the results, simply click 'Order' to be brought to the order form
        - All of the details associated with the item will already be listed under 'Catalog details'
- If you allow patrons to make purchase suggestions (learn more in the Managing Suggestions section of this manual) then you can place orders from those suggestions
    - From the results, click 'Order' next to the item you want to order and you will be presented with the order form
        - From this form you can make changes to the Catalog Details if necessary
- To order from a record that can't be found anywhere else, choose the 'From a new (empty) record'
    - You will be presented with an empty form to fill in all of the necessary details about the item you are ordering
- If you want to search other libraries for an item to purchase you can use the 'From an external source' option which will allow you to order from a MARC record found via a Z39.50 search
    - From the results click the Order link next to the item you want to purchase
    - In the order form that pops up you will not be able to edit the catalog details
- The final option for ordering is to order from a staged record (learn more about staging records)
    - From the list of files you are presented with, choose the 'Add orders' link
        - From the list of records, click 'Add order' next to the item you want to add to your order
            - From the order form you will not be able to edit the catalog details.

Once an item is added to the basket you will be presented with a basket summary

From here you can edit the items you have added or remove them. Once you're sure your basket is complete you can click 'Close this basket' button

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7.4.2. Create a basket group

A basket group is simply a group of baskets. In some libraries, you have several staff members that create baskets, and, at the end of a period of time, someone then groups them together to send to the vendor in bulk. That said, it is possible to have one basket in a basket group if that's the workflow used in your library.

7.4.3. Printing baskets

7.5. Receiving Orders

7.6. Claims & Late Orders

7.7. Acquisition Searches

At the top of the various Acquisition pages there is a quick search box where you can perform either a Vendor Search or an Order Search.

In the Vendor Search you can enter any part of the vendor name to get results.

Using the Order Search you can search for items that have been ordered with or without the vendor.

You can enter info in one or both fields and and you can enter any part of the title and/or vendor name.

Chapter 8. Lists & Cart

Lists are a way to save a collection of content on a specific topic or for a specific purpose. The Cart is a session specific storage space.

8.1. Lists

8.1.1. Create a List

A list can be created by visiting the Lists page and clicking 'New List'

The new list form offers several options for creating your list:

- The name is what will appear on the list of Lists
- You can also choose how to sort the list
- Finally there are three types of lists you can choose from
  - A Private List is managed by you and can be seen only by you
  - A Public List can be seen by everybody, but managed only by you
  - A Open List can be seen and managed by everybody

A list can also be created from the catalog search results

- Check the box to the left of the items you want to add to the new list
- Choose [New List] from the 'Add to:' pull down menu
  - Name the list and choose what type of list this is
    - A Private List is managed by you and can be seen only by you
    - A Public List can be seen by everybody, but managed only by you
    - A Open List can be seen and managed by everybody

Once the list is saved it will accessible from the Lists page and from the 'Add to' menu at the top of the search results.

8.1.2. Add to a List

To add items to an existing list click on the list name from the page of lists

From the List page you can add items by scanning barcodes into the box at the bottom of the page

An item can also be added to a list by selecting items on the search results page and choosing the list from the 'Add to' menu

8.1.3. Viewing Lists

To see the contents of a list, visit the Lists page on the staff client

Clicking on the 'List Name' will show the contents of the list

8.2. Cart

To add things to the cart, search the catalog and select the items you would like added to your cart and choose 'Cart' from the 'Add to' menu

A confirmation will appear below the cart button at the top of the staff client

Clicking on the Cart icon will provide you with the contents of the cart

- From this list of items you can perform several actions

'Send' will send the list to the email address you enter

'Download' will allow you to download the cart using one of 3 default formats or your [CSV Profiles]

'Print' will present you with a printable version of the cart

'Empty and Close' will empty the list and close the window

'Hide Window' will close the window

Chapter 9. Reports

9.1. Custom Reports

Koha's data is stored in a MySQL database which means that librarians can generate nearly any report they would like by either using the Guided Reports Wizard or writing their own SQL query.

9.1.1. Add Custom Report

9.1.1.1. Guided Report Wizard

The guided report wizard will walk you through a six step process to generate a report.

Step 1: Choose the module you want to report on. This will determine what tables and fields are available for you to query.

Step 2: Choose a report type. For now, Tabular is the only option available.

Step 3: Choose the fields you want in your report. You can select multiple fields and add them all at once by using CTRL+Click on each item you want to add before clicking the Add button.

Step 4: Choose any limits you might want to apply to your report (such as item types or branches). If you don't want to apply any limits, simply click Next instead of making an option.

Step 5: Perform math functions. If you don't want to do any calculations, simply click Next instead of making an option.

Step 6: Choose data order. If you want the data to print out in the order it's found in the database, simply click Finish.

When you are finished you will be presented with the SQL generated by the report wizard. From here you can choose to save the report by clicking 'Save' or copy the SQL and make edits to it by hand.

If you choose to save the report you will be asked to name your report and enter any notes regarding it.

Once your report is saved it will appear on the 'Use Saved' page with all other saved reports.

From here you can make edits, run the report, or schedule a time to have the report run.

9.1.1.2. Report from SQL

In addition to the report wizard, you have the option to write your own queries using SQL. To find reports written by other Koha users, visit the Koha Wiki: http://wiki.koha.org/doku.php?id=sql_library. You can also find your database structure in /installer/data/mysql/kohastructure.sql or online at: http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD.

To add your query, simply fill in the form presented

9.1.2. Edit Custom Reports

Every report can be edited from the reports lists. To see the list of reports already stored in Koha, click 'Use Saved.'

From this list you can edit any custom report by clicking 'Edit SQL'

9.2. Statistics Reports

Statistic reports will show you counts and sums. These reports are all about numbers and statistics, for reports that return more detailed data, use the Guided Report Wizard.

9.2.1. Acquisitions Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

When generating your report, note that you get to choose between counting or summing the values.

Choosing amount will change your results to appear as the sum of the amounts spent.

9.2.2. Patron Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

Based on your selections, you may see some query information above your results table. You can also choose to export to a file that you can manipulate to your needs.

9.2.3. Catalog Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.2.4. Circulation Statistics

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

> To get a complete picture of your monthly or daily circulation, you can run the report twice, once for 'Type' of 'Checkout' and again for 'Renewal.'
>
> This report uses 'Period,' or date, filtering that allows you to limit to a month by simply selecting the first day of the first month through the first day of the next month. Â For example, 10/1 to 11/1 to find statistics for the month of October.
>
> > To find daily statistics, set your date range.</br> Example: "I want circulation data starting with date XXX up to, but not including, date XXX."
> >
> > For a whole month, an example range would be: 11/01/2009 to 12/01/2009
> >
> > For a whole year, an example range would be: 01/01/2009 to 01/01/2010
> >
> > For a single day, an example would be: 11/15/2009 to 11/16/2009 to find what circulated on the 15th

---

9.2.5. Serials Statistics

Using the form provided, choose how you would like to list the serials in your system.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.2.6. Patrons with the most checkouts

This report will simply list the patrons who have the most checkouts.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.2.7. Most Circulated Items

This report will simply list the items that have the been checked out the most.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.2.8. Patrons with no checkouts

9.2.9. Items with no checkouts

This report will list items in your collection that have never been checked out.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.2.10. Catalog by Item Type

This report will list the total number of items of each item type per branch.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.2.11. Lost Items

This report will allow you to generate a list of items that have been marked as Lost within the system

---

9.2.12. Average Loan Time

This report will list the average time items are out on loan based on the criteria you enter:

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

9.3. Report Dictionary

The report dictionary is a way to pre-define common filters you'd like to apply to your reports. This is a good way to add in filters that the report wizard doesn't include by default. To add a new definition, or filter, click 'New Definition' on the Reports Dictionary page and follow the 4 step process.

Step 1: Name the definition and provide a description if necessary

Step 2: Choose the module that the will be queried.

Step 3: Choose columns to query from the tables presented.

Step 4: Choose the value(s) from the field(s). These will be automatically populated with options available in your database.

Confirm your selections to save the definition.

Your defintions will all appear on the Reports Dictionary page

Then when generating reports on the module you created the value for you will see an option to limit by the definition at the bottom of the usual filters.

Chapter 10. OPAC

This chapter assumes that you have the following preferences set as follows:

OPACXSLTResultsDisplay = using XSLT stylesheets

OPACXSLTDetailsDisplay = using XSLT stylesheets

DisplayOPACiconsXSLT = show

If your system preferences are set differently your displays may differ.

10.1. Search Results

To search the OPAC you can either choose to enter your search words in the box at the top of the OPAC or click on the 'Advanced Search' link to perform a more detailed search.

For more on searching check the 'Searching' chapter in this manual.

10.1.1. Results Overview

After performing a search the number of results found for your search will appear above the results

By default your search results will be sorted based on your OPACdefaultSortField and OPACdefaultSortOrder system preference values. To change this you can choose another sorting method from the pull down on the right.

Under each title on your results list a series of values from your leader will appear. It is important to note that this has nothing to do with the item types or collection codes you have applied to your records, this data is all pulled from your leader.

Below each title you will see the availability for the items attached to the record. Note that even if you filtered on one library location all locations that hold the item will appear on the search results.

If you have turned on Enhanced Content preferences you may have book jackets on your search results.

10.1.2. Filters

To filter your results click on the links below the 'Refine Your Search' menu on the left of your screen

10.1.3. Search RSS Feeds

You will be able to subscribe to your search results as an RSS feed by clicking the RSS icon in your address bar or next to the number of results. To learn more about what RSS feeds are check out this tutorial video.

Subscribing to search results as RSS feeds will allow you to see when a new item is added to the catalog in your area of interest.

10.2. Bibliographic Record

10.3. Lists & Cart

A cart is a temporary holding place for records you're interested in finding during this session. That means that once you log out of the OPAC or close the browser you lose the items in your cart. A list is a more permanent location for saving items. To learn more about lists, check the Lists in the Staff Client chapter of this manual.

10.3.1. Lists

10.3.1.1. Adding titles to Lists

Titles can be added to lists from the search results and/or from the bibliographic record. On the search results options to add items to the list appear below each result and across the top of the results page

To add a single title to a list, click the 'Save to Lists' option and then choose the list you'd like to add the title to. To add multiple titles to a list check the boxes on the left of the titles you want to add and then choose the list you want to add the titles to from the 'Add too' pull down at the top of the screen.

10.3.1.2. Managing Lists

10.3.2. Cart

10.3.2.1. Adding titles to the Cart

Titles can be added to the cart from the search results and/or from the bibliographic record. On the search results options to add items to the cart appear below each result and across the top of the results page

Clicking the 'Add to Cart' button will add the one title to your cart. To add multiple titles at once, check the box to the left of each result and the choose 'Cart' from the 'Add to' pull down at the top of the screen. Once titles are added to the cart you will be presented with a confirmation

10.3.2.2. Managing the Cart

Once you have titles in your cart you can manage the contents by clicking on the 'Cart' button usually found at the top of the screen to the right of the search box. Your cart will open in a new window.

From this window you are presented with several options. Across the top of the cart are several buttons.

First is the 'More details' button. Clicking this will show you additional information about the titles in your card (ISBNs, Subjects, Publisher Info, Notes and more).

Next is the option to send the contents of your cart to an email address. This is handy if you want to send the resources you found at the library to your home email account to refer to later or to send to a patron researching a specific topic. Clicking this link will open up a new window that asks for the email address and message to send.

In addition to sending your cart you can download the contents of your cart in several pre-defined formats or using a CSV Profile that you defined in the Tools module.

Finally you can print out the contents of your cart by choosing the 'Print' link.

In addition to the various different ways to save the contents of your cart, there are ways to add value to the data in your cart. By selecting one or more titles from the cart you can add them to a list (click 'Add to a List'), place hold(s) (click 'Place hold'), or tag them (click 'Tag'). All of these operations follow the same procedure as they do when performing them in the OPAC.

10.4. Enhanced Content

10.4.1. Tagging

Depending on your settings for the TagsEnabled, TagsInputOnList and TagsInputOnDetail preferences you may be able to add tags to bibliographic records from the search results and/or bibliographic records. If you are allowing patrons to add tags from the search results screen you will see an input box below each result and a 'Tag' option at the top of the screen.

To add a tag to one item, type the tabs (seperated by commas) in the 'New tag' box and click 'Add'. You will be presented with a confirmation of your tags being added.

From the results you can also tag items in bulk by clicking the checkboxes on the left and then clicking the 'Tag' button at the top. After clicking the button it will change into an input box for you to add tags to all of the items you have selected.

10.4.2. Comments

Patrons can leave comments in the OPAC if you have the reviewson preference set to allow this. Each bibliographic record has a comments tab below the bibliographic information.

If the patron is logged in they will see a link to add a comment to the item. Clicking this link will open a pop up window with a box for their comments.

Once the comment has been typed and the 'Submit' button clicked, the patron will see their comment as pending and other patrons will simply see that there are no comments on the item.

Once the comment is approved the patron will see the comment highlighted in yellow as their comment.

Other patrons will see the comment with the name of the patron who left the comment.

10.4.3. Zotero

Zotero is a Firefox add on that allows for the saving and generating of a bibliography. Learn more about and download Zotero at http://zotero.org.

When on the search results in the Koha OPAC, if you have Zotero installed, you will see a folder icon in the address bar to the right of the URL. Clicking that folder will open up a list of titles on the page for you to pick from to add to Zotero.

Select the titles you want to add to Zotero and then click the 'OK' button. This will add the title to Zotero. You can see the title by opening your Zotero library.

10.4.4. Custom RSS Feeds

Using misc/cronjobs/rss/rss.pl you can generate an RSS feed for any SQL query (for example a new acquisitions RSS feed). rss.pl is run on the command line to produce an RSS XML document.

The output should be placed in a directory accessible to the OPAC (or staff) web interface so that users can download the RSS feed.

An example of usage can be found at: misc/cronjobs/rss.pl lastAcquired.conf

Normally rss.pl should be run periodically (e.g., daily) to keep the feed up-to-date.

The configuration file (e.g., lastAcquired.conf) lists

name of the template file to use

path of output file

SQL query

rss.pl runs the SQL query, then feeds the output of the query through the template to produce the output file.

To use custom RSS feeds you need to turn on the cron job.

10.5. My Account

From the OPAC patrons can log in and access their account if you have set the opacuserlogin preference to 'Allow'. Once logged in patrons are brought to their account summary. If you would like to get from any other apge your account in the OPAC, click on your name in the top right of the OPAC.

From the 'my summary' tab, patrons will see all of the items they have checked out with the overdue items highlighted in red. If you have OpacRenewalAllowed set to 'Allow' then your patrons will be able to renew their books right from the OPAC. Clicking on the 'Overdue' tab will show only the items that are overdue.

The 'Fines' tab will show just a total of what the patron owes. Clicking on the total will take them to the 'my fines' tab where they will see a complete breakdown of their fines and bills. If you don't charge fines at your library you can turn the display of these tabs off by setting the OPACFinesTab preference to 'Don't Allow.'

Finally, clicking on the 'Holds' tab will show the patron the status of all of the items they have on hold. Items that are ready for pickup will be highlighted in yellow.

If your library charges fines the next tab on the left is 'my fines.' Opening this tab will show the patron an entire history of their accounting at the library.

If you have your OPACPatronDetails preference set to 'Allow', your patrons will see a form filled in with their contacting information by clicking on the 'my personal details' tab.

Patrons can edit their details in this form and click 'Submit Changes' to have their edits sent to the library for review before their record is updated. If the OPACPatronDetails preference is set to 'Don't allow' then patrons will simply see their details in plain text.

If your library has TagsEnabled set to 'Allowed' then the next tab on the left will be 'my tags.' This tab will show patrons all of the tags in the system as a cloud and then all of the tags they have applied in a list format. From here patrons have the ability to remove tags that they added if they want.

Next, if you have OpacPasswordChange set to 'Allow' the next tab will be 'change my password,' where patrons can change their password for logging into the OPAC. Patrons will be presented with a standard form asking them to enter their old password and then their new password twice.

Depending on your library's setting for OpacPrivacy and opacreadinghistory you patrons may see the 'my reading history' tab next. This will show the patron their entire reading history.

If your library allows patrons to make purchase suggestions the next tab will show all suggestions that the patron made to the library and their statuses. To disable this tab and the suggestion functionality set the suggestion preference to 'Don't allow.'

If your library as the EnhancedMessagingPreferences preference set to 'Allow' then your patrons will be able to choose which messages they receive from the library (with the exception of overdue notices which the library controls).

Finally, if your library has the virtualshelves set to 'Allow' then the last tab will by 'my lists.' From here your patrons can review public lists and create or edit their own private lists.

Chapter 11. Searching

11.1. Advanced Search Prefixes

The following prefixes can be added to search terms in the keyword search box to limit items returned

ti: title search

ex. ti:hamlet

su: subject search

ex. su:cookery

pb: publisher search

ex. pb:penguin

au: author search

ex. au:rowling

su-geo: geographic subjects

ex. su-geo:wales and kw:description and kw:travel

bc: barcode

ex. bc:502326000912

lex: lexile

levels lex:510

11.2. Guide to Searching

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This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

11.2.1. Indexing and Searching Description

Koha's databases are indexed by the Zebra open-source software. The overview to the documentation describes Zebra as:

> "...Zebra is a high-performance, general-purpose structured text indexing and retrieval engine. It reads records in a variety of input formats (eg. email, XML, MARC) and provides access to them through a powerful combination of Boolean search expressions and relevance-ranked free-text queries.
>
> Zebra supports large databases (tens of millions of records, tens of gigabytes of data). It allows safe, incremental database updates on live systems. Because Zebra supports the industry-standard information retrieval protocol, Z39.50, you can search Zebra databases using an enormous variety of programs and toolkits, both commercial and free, which understands this protocol..." Zebra - User's Guide and Reference, p. 1, http://www.indexdata.dk/zebra/doc/zebra.pdf

This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

The indexing described in this document is the set used by SouthEastern University. Your local indexing may vary.

11.2.2. Indexing Configuration

There are three configuration files that Koha uses while indexing.

The first configuration file (etc/zebradb/biblios/etc/bib1.att) contains the Z39.50 bib-1 attribute list, plus the Koha local use attributes for Biblio Indexes, Items Index, and Fixed Fields and other special indexes. The Z39.50 Bib-1 profile is made up of several different types of attributes: Use, Relation, Position, Structure, Truncation, and Completeness. The bib-1 'Use' attribute is represented on the chart; the other attributes are used primarily when doing searches. While there are over 150+ use attributes that could be used to define your indexing set, it's unlikely that you will choose to use them all. The attributes you elect to use are those that become the indexing rules for your database. The other five attribute sets define the various ways that a search can be further defined, and will not specifically be addressed in this document. For a complete list of the standard Bib-1 attributes, go to http://www.loc.gov/z3950/agency/bib1.html.

The second file (etc/zebradb/marc_defs/[marc21|unimarc]/biblios/record.abs) contains the abstract syntax which maps the MARC21 tags to the set of Use Attributes you choose to use. The rules established in this file provides a passable Bath level 0 and 1 service, which includes author, title, subject, keyword and exact services such as standard identifiers (LCCN, ISBN, ISSN, etc.)

The third file (etc/zebradb/ccl.properties) is the Common Command Language (CCL) field mappings. This file combines the bib-1 attribute set file and the abstract file and adds the qualifiers, usually known as index names. The qualifiers, or indexes, for this database are: pn, cpn, cfn, ti, se, ut, nb, ns, sn, lcn, callnum, su, su-to, su-geo, su-ut, yr,pubdate, acqdate, ln, pl, ab, nt, rtype, mc-rtype, mus, au, su-na, kw, pb, ctype, and an.

The Koha Indexing Chart summarizes the contents of all three of these files in a more readable format. The first two columns labeled Z39.50 attribute and Z39.50 name matches the Z39.50 bib-1 attributes file. The third column labeled MARC tags indexed is where you find which MARC tags are mapped to an attribute. The fourth column labeled Qualifiers identifies the search abbreviations used in the internal CCL query. The following description provides a definition for the word 'qualifiers'.

Qualifiers are used to direct the search to a particular searchable index, such as title (ti) and author indexes (au). The CCL standard itself doesn't specify a particular set of qualifiers, but it does suggest a few shorthand notations. You can customize the CCL parser to support a particular set of qualifiers to reflect the current target profile. Traditionally, a qualifier would map to a particular use-attribute within the BIB-1attribute set. It is also possible to set other attributes, such as the structure attribute.

In the MARC tags indexed column, there are some conventions used that have specific meanings. They are:

A three digit tag (100) means that all subfields in the tag can be used in a search query. So, if you enter a search for 'Jackson' as an author, you will retrieve records where Jackson could be the last name or the first name.

A three digit tag that has a '$' followed by a letter (600$a) means that a search query will only search the 'a' subfield.

A three digit tag that is followed by a ':' and a letter (240:w) means that a search query can be further qualified. The letter following the ':' identifies how to conduct the search. The most common values you'll see are 'w' (word), 'p' (phrase), 's' (sort), and 'n' (numeric).

The contents of the MARC tags, subfields, and/or fixed field elements that are listed in this chart are all indexed. You'll see that every attribute line is not mapped to a specific qualifier (index)-LC card number, line 9 is one example. However, every indexed word (a string of characters preceded and succeeded by a space) can be searched using a keyword (kw) search. So, although an LC card number specific index doesn't exist, you can still search by the LCCN since tag 010 is assigned to the LC-card-number attribute. To verify this, enter 72180055 in the persistent search box. You should retrieve The gods themselves, by Isaac Asimov.

Examples of fixed field elements indexing can be seen on the chart between Attribute 8822 and Attribute 8703. These attributes are most commonly used for limiting. The fixed field attributes currently represent the BK codes. Other format codes, if needed, could be defined.

11.2.3. Basic Searching

The search box that library staff and library patrons will see most often is the persistent search box at the top of the page. Koha interprets the searches as keyword searches.

To start a search, you enter a word or multiple words in the search box. When a single word is entered, a keyword search is performed. You can check this out by typing one word into the form and note the number of results located. Then, repeat the search with a minor change. In front of the search word, type 'kw=' followed by the same search term. The results will be identical.

When you have more than one word in the search box, Koha will still do a keyword search, but a bit differently. Each word will be searched on its own, then the Boolean connector 'and' will narrow your search to those items with all words contained in matching records.

Suppose you want to find material about how libraries are using mashups. You'll select the major words and enter them into the persistent search box.

The response to this search is:

The order of the words does not affect the retrieval results, so you could also enter the search as "mashups library". The response to this search is results

Too many words in the search box will find very few matches, as the following example illustrates:

11.2.4. Advanced Searching

When you can't find the most appropriate material with a general search, you can move to the Advanced Search page by clicking on the Search option on the persistent toolbar.

The Advanced Search page offers many ways to limit the results of your search. You can search using the Boolean operators AND, OR, and NOT; limit by item type; limit by year and language; limit by subtypes audience, content, format, or additional content types; by location and by availability.

The first limiting section on the Advanced Search page provides a quick and simple way to use the Boolean operators in your search. Note that this display depends on a system preference setting. This option can be found on the Administration > System Preferences > Searching page. The option called expandedSearchOption must be set to 'show' to see the following display.

In this section you can choose among the many indexes by clicking on the arrow in the first box. The blank box that follows is where you enter your first search term or terms. On the second line, you can choose the Boolean operator you want to use in your search. The options are 'and', 'or', and 'not'. Then, you would again choose the index to search, followed by the second term or terms. If you have more concepts you want to include in your search, you can click the [+] to add another line for your search.

A sample search is shown next, followed by its results:

When you use the Boolean operators to broaden or narrow a search, remember the action of each operator. The 'and' operator narrows the results you'll retrieve because the search will retrieve the records that include all your search terms. The 'or' operator expands the results because the search will look for occurrences of all of your search terms. The 'not' operator excludes records with the term that follows the operator.

Note: If you leave this expandedSearchOption set to 'don't show', this is the display you will see:

The Advanced Search page then shows the multiple kinds of limits that can be applied to your search results. Either check a box or select from the drop down menus to narrow your search. You will type the year, year range, or a 'greater than (>)' or 'less than (<)' year.

Finally, you can choose how the results will be sorted. The pre-defined sort options are in the final area of the Advanced Search screen. search limits

The default sort is by relevance, although you can choose to sort by author, by title, by call number, by dates, or by popularity. If you would prefer a different default sort, you can set defaultSortField to one of the other choices in Administration > System Preferences > Searching.

11.2.5. Common Command Language Searching

Koha uses the Common Command Language (CCL) (ISO 8777) as its internal search protocol. Searches initiated in the graphical interface use this protocol as well, although the searcher doesn't know which indexes, operators and limiters are available and being used to conduct their search. The searcher can use the Advanced Search when more precise results set are desired and where the search indexes are somewhat known. However, some library users and many library staff prefer using a command based structure. This part of the document will present and explain the use of the Koha command based structure. The indexes, operators, and limiters used are identical to those used in the graphical interface.

11.2.5.1. Indexes

The CCL standard itself doesn't specify a particular set of qualifiers (indexes), but it does suggest a few short-hand notations such as 'ti', 'au', and 'su'. Koha has a default set of indexes; it's possible to customize that set by adding needed indexes based on local requirements. A qualifier (index) maps to a particular use-attribute within the Z39.50 BIB-1 attribute set. The complete Z39.50 Bib-1 Attribute can be viewed at http://www.loc.gov/z3950/agency/bib1.html.

The standard Koha set of indexes is a fairly common example of MARC21 indexing rules. The indexes that are defined in Koha are indexes typically used by other integrated library systems. The defined Z39.50 Bib-1 Attribute mapped to the indexes are:

Table 11-1. Attributes

Bib-1 Attribute	Qualifier (index)
Personal-name	pn
Corporate-name	cpn
Conference-name	cfn
Title	ti
Title-series	se
Title-uniform	ut
ISBN	nb
ISSN	ns
Local number	sn
Local-classification	lcn and callnum
Subject	su, su-to, su-geo, su-ut

Pubdate	yr,pubdate
Date-of-Acquisition	acqdate
Language	ln
Place-of-publication	pl
Abstract	ab
Notes	nt
Record-type	rtype, mc-rtype, mus
Author	au, aut
Subject-person-name	su-na
Any (keyword)	kw
Publisher	pb
Content-type	ctype
Koha-Auth-Number	an
Author-personal-bibliography	aub
Author-in-order	auo

The three lines above with green type are used primarily as limiters. Refer to the Koha Indexing Chart for the MARC21 tags mapped to each Bib-1 Attribute and index combination.

11.2.5.1.1. Audience Examples

aud:a Easy

aud:cc Juvenile

aud:d Young adult

aud:e Adult

11.2.5.1.2. Contents Examples

fic:1 Fiction

fic:0 Non Fiction

bio:b Biography

mus:j Musical recording

mus:I Non musical record

11.2.5.2. Search Syntax

In the persistent search box, single words generally retrieve large sets. To narrow a search, you can use multiple words. Koha automatically uses the 'and' Boolean operator to create a set of records matching your input. When you want to narrow the search to an author or a title or a subject or some other specific field or use a Boolean operator, there isn't an obvious way to accomplish that specificity. The library user can, of course, go to the Advanced Search page; however, if you know how to construct a CCL search, you can achieve more specificity while using the persistent search box on any page.

There is a specific order to the CCL search syntax. Although it can be used for simple searches, it is an especially effective way to perform complex searches, as it affords you a great deal of control over your search results. To construct a CCL search, first enter a desired index code, then an equal sign, followed by your search word(s). Following are examples of simple CCL searches.

ti=principles of accounting

au=brown joseph

su=poetry

su-na=Shakespeare

kw=marlin

You can refine your search by combining search terms with Boolean operators 'and', 'or', or 'not'. Following are examples of searches using Boolean operators.

ti=principles of accounting and au=brown joseph su=poetry not su-na=Shakespeare

kw=communication and su=debate

Using specific indexes and Boolean operators are not the only way a search can be refined. You can also refine your search as a phrase when looking for a title, author, or subject. The syntax for this search is *index,phr=search words*.

To illustrate the results of various search types, a search was done for the words 'supreme court'. The results illustrate that the search index and the word order make a difference in search results. Only the results count and the search itself is in these examples. The search executed will always be between the single quotes.

You can also choose to use limiters in your search query. Some common limiters include dates, languages, record types, and item types. In the Advance Search, you can either click a box or key in data to limit your search. You can also apply the same limits with CCL by using the syntax in the following examples. In all

By Date: su=supreme court and yr,st-numeric=>2000

When you limit by date, you can use the '>' (greater than), '<' (less than), '=' (equal), or 'yyyy-yyyy' (range) symbols.

By Item Type: su=nursing and itype:BK

Each library will have a different set of item types defined in their circulation configuration. When you set up item types, you define a code and a name for each one. The name will appear on the Advance Search page. The code you assigned is used as a CCL search limit, formatted as 'itype:x', where 'x' is the assigned code. The initial set of item types in Koha will usually be edited to reflect your collections, so your item type limiters may be different than the initial ones. The initial item type limiters follow.

itype:BKS Books, Booklets, Workbooks

itype:SR Audio Cassettes, CDs

itype:IR Binders

itype:CF CD-ROMs, DVD-ROMs, General Online Resources

itype:VR DVDs, VHS

itype:KT Kit

itype:AR Models

itype:SER Serials

By format: su=supreme court not l-format:sr

The format limiters are derived from a combination of LDR, 006 and 007 positions. The formats that are currently defined are the following.

l-format:ta Regular print

l-format:tb Large print

l-format:fk Braille

l-format:sd CD audio

l-format:ss Cassette recording

l-format:vf VHS tape

l-format:vd DVD video

l-format:co CD software

l-format:cr Website

By content type: su=supreme court not ctype:l

The content types are taken from the 008 MARC tag, positions 24-27.

There are two other limiter types that are not described in this document. They are: Audience and Content. The only difference in the syntax of the CCL is the actual limiter. They are reproduced here just in case you would like to use these limiters.

11.3. Koha Search Indexes

By default, not all fields are indexed in the Zebra search engine, but most are. Below are the fields that are indexed in Zebra.

Table 11-2. Indexes

Field	Description
001	Control-number
005	Date/time-last-modified
007	Microform-generation:n:range(data,11,1), Material-type,ff7-00:w:range(data,0,1), ff7-01:w:range(data,1,1), ff7-02:w:range(data,2,1), ff7-01-02:w:range(data,0,2)
008	date-entered-on-file:n:range(data,0,5), date-entered-on-file:s:range(data,0,5), pubdate:w:range(data,7,4), pubdate:n:range(data,7,4), pubdate:y:range(data,7,4), pubdate:s:range(data,7,4), pl:w:range(data,15,3), ta:w:range(data,22,1), ff8-23:w:range(data,23,1), ff8-29:w:range(data,29,1), lf:w:range(data,33,1), bio:w:range(data,34,1), ln:n:range(data,35,3), ctype:w:range(data,24,4), Record-source:w:range(data,39,0)
010	LC-card-number, Identifier-standard
011	LC-card-number, Identifier-standard
015	BNB-card-number, BGF-number, Number-db, Number-natl-biblio, Identifier-standard
017	Number-legal-deposit, Identifier-standard
018	Identifier-standard
020$a	ISBN:w, Identifier-standard:w
020	Identifier-standard
022$a	ISSN:w, Identifier-standard:w
022	Identifier-standard
023	Identifier-standard
024$a	Identifier-other
024	Identifier-standard
025	Identifier-standard
027	Report-number, Identifier-standard
028	Number-music-publisher, Identifier-standard
030	CODEN, Identifier-standard
034	Map-scale
037	Identifier-standard, Stock-number
040	Code-institution, Record-source
041	ln
043	Code-geographic
050$b	LC-call-number:w, LC-call-number:p, LC-call-number:s
050	LC-call-number:w, LC-call-number:p, LC-call-number:s
052	Geographic-class
060	NLM-call-number
070	NAL-call-number
080	UDC-classification
082	Dewey-classification:w, Dewey-classification:s
086	Number-govt-pub
100$9	Cross-Reference:w, Koha-Auth-Number
100$a	Author,Author:p, Author:s, Editor, Author-personal-bibliography, Author-personal-bibliography:p, Author-personal-bibliography:s
100	Author, Author-title, Author-name-personal, Name, Name-and-title, Personal-name
110$9	Koha-Auth-Number
110	Author, Author-title, Author-name-corporate, Name, Name-and-title, Corporate-name
111$9	Koha-Auth-Number
111	Author, Author-title, Author-name-corporate, Name, Name-and-title, Conference-name
130$n	Thematic-number
130$r	Music-key
130$9	Koha-Auth-Number
130	Title, Title-uniform

210	Title, Title-abbreviated
211	Title, Title-abbreviated
212	Title, Title-other-variant
214	Title, Title-expanded
222	Title, Title-key
240$r	Music-key
240$n	Thematic-number
240	Title:w, Title:p, Title-uniform
243$n	Thematic-number
243$r	Music-key
243	Title:w, Title:p, Title-collective
245$a	Title-cover:w, Title-cover:p, Title-cover:s, Title:w, Title:p, Title:s
245$c	Author, Author-in-order:w, Author-in-order:p, Author-in-order:s
245$9	Cross-Reference:w, Koha-Auth-Number
245	Title:w, Title:p
246	Title, Title:p, Title-abbreviated, Title-expanded, Title-former
247	Title, Title:p, Title-former, Title-other-variant, Related-periodical
260$a	pl:w, pl:p
260$b	Publisher:w, Publisher:p
260$c	copydate, copydate:s
260	pl
300	Extent:w, Extent:p
400$a	Name-and-title
400$t	Author-title, Name-and-title, Title, Title-series
400$9	Koha-Auth-Number
400	Author, Author-name-personal, Name, Personal-name
410	Author, Corporate-name
410$a	Name-and-title
410$t	Author-title, Title, Title-series
410$9	Koha-Auth-Number
410	Author-name-corporate, Name
411	Author, Conference-name
411$a	Name-and-title
411$t	Author-title, Title-series
411	Author-name-corporate, Name
440$a	Title-series:w, Title-series:p
440$9	Koha-Auth-Number
440	Title-series:w, Title-series:p, Title, Title-series
490$a	Title-series:w, Title-series:p
490	Title, Title-series
490$9	Koha-Auth-Number
500	Note:w, Note:p
502	Material-type
505$r	Author
505$t	Title
505	Note:w, Note:p
510	Indexed-by
520	Abstract:w, Abstract:p
521$a	lex:n
526$c	arl, arl:n
526$d	arp, arp:n
590	Note:w, Note:p
600$a	Name-and-title, Name, Personal-name, Subject-name-personal, Subject
600$t	Name-and-title, Title, Subject
600$9	Koha-Auth-Number
600	Name, Personal-name, Subject-name-personal, Subject
610$a	Name-and-title
610$t	Name-and-title, Title
610$9	Koha-Auth-Number
610	Name, Subject, Corporate-name
611	Conference-name
611$a	Name-and-title
611$t	Name-and-title, Title
611$9	Koha-Auth-Number
611	Name, Subject
630$n	Thematic-number

630$r	Music-key
630$9	Koha-Auth-Number
630	Subject
650$9	Koha-Auth-Number
650	Subject, Subject:p
651$9	Koha-Auth-Number
651	Name-geographic, Subject,Subject:p
652$9	Koha-Auth-Number
653$9	Koha-Auth-Number
653	Subject, Subject:p
654$9	Koha-Auth-Number
654	Subject
655$9	Koha-Auth-Number
655	Subject
656$9	Koha-Auth-Number
656	Subject
657$9	Koha-Auth-Number
657	Subject
690$9	Koha-Auth-Number
690	Subject, Subject:p
700$9	Cross-Reference, Koha-Auth-Number
700$a	Author, Author:p
700$n	Thematic-number
700$r	Music-key
700$t	Author-title, Name-and-title, Title, Title-uniform
700	Author, Author-name-corporate, Author-name-personal, Name, Editor, Personal-name
710	Author, Corporate-name
710$t	Author-title, Name-and-title, Title, Title-uniform
710$a	Name-and-title
710$9	Koha-Auth-Number
710	Author, Name
711$a	Name-and-title
711$t	Author-title, Title, Title-uniform
711$9	Koha-Auth-Number
711	Author-name-corporate, Name, Conference-name
730$n	Thematic-number
730$r	Music-key
730$9	Koha-Auth-Number
730	Title, Title-uniform
740	Title, Title-other-variant
773$t	Host-item
780$t	Title
780	Title, Title-former, Related-periodical
785	Related-periodical
800$a	Name-and-title
800$t	Author-title, Name-and-title, Title, Title-series
800$9	Koha-Auth-Number
800	Author, Author-name-personal, Name, Personal-name
810$a	Name-and-title
810$t	Author-title, Name-and-title, Title, Title-series
810$9	Koha-Auth-Number
810	Author, Corporate-name, Author-name-corporate, Name
811$a	Name-and-title
811$9	Koha-Auth-Number
811$t	Author-title, Name-and-title, Title, Title-series
811	Author, Author-name-corporate, Name, Conference-name
830$9	Koha-Auth-Number
830	Title, Title-series
840	Title, Title-series
999$c	Local-Number:n, Local-Number:w, Local-Number:s
999$d	biblioitemnumber:n, biblioitemnumber:w, biblioitemnumber:s
942$0	totalissues:n, totalissues:s
942$2	cn-bib-source
942$6	cn-bib-sort:n, cn-bib-sort:s
942$c	itemtype:w

942$n	Suppress:w, Suppress:n
942$h	cn-class
942$i	cn-item
942$k	cn-prefix
942$m	cn-suffix
952$0	withdrawn:n, withdrawn:w
952$1	lost, lost:n
952$2	classification-source
952$3	materials-specified
952$4	damaged:n, damaged:w
952$5	restricted:n, restricted:w
952$6	cn-sort:n, cn-sort:s
952$7	notforloan:n, notforloan:w
952$8	ccode
952$9	itemnumber:n, itemnumber:s
952$a	homebranch
952$b	holdingbranch
952$c	location
952$d	Date-of-acquisition, Date-of-acquisition:d, Date-of-acquisition:s
952$e	acqsource
952$f	coded-location-qualifier
952$g	price
952$j	stack:n, stack:w
952$l	issues:n, issues:w, issues:s
952$m	renewals:n, renewals:w
952$n	reserves:n, reserves:w
952$o	Local-classification:w, Local-classification:p, Local-classification:s
952$p	barcode, barcode:n
952$q	onloan:n, onloan:w
952$r	datelastseen
952$s	datelastborrowed
952$t	copynumber
952$u	uri:u
952$v	replacementprice
952$w	replacementpricedate
952$y	itype:w
952$z	Note:w, Note:p

Chapter 12. About Koha

The 'About Koha' area will give you important server information as well as general information about Koha.

12.1. Server Information

Under the 'Server Information' tab you will find information about the Koha version and the machine you have installed Koha on. This information is very important for debugging problems. When reporting issues to your support provider or to the various other support avenues (mailing lists, chat room, etc), it's always good to give the information from this screen.

12.2. Perl Modules

In order to take advantage of all of the functionalities of Koha, you will need to keep your Perl modules up to date. The 'Perl Modules' tab will show you all of the modules required by Koha, the version you have installed and whether you need to upgrade certain modules.

Items listed in bold are required by Koha, items highlighed in red are missing completely and items highlighted in yellow simply need to be upgraded.

Chapter 13. SOPAC2 Installation

The following documentation was translated using Google Translate from French to English and may have some language errors.

13.1. Introduction

This is an installation guide and the connector SOPAC2 Koha. It has been tested on Debian Lenny and Ubuntu Jaunty, with 6.12 and Koha Drupal 3.0.x It does not cover the installation of Koha and Drupal, but SOPAC, its dependencies and the connector.

13.2. Installation of Locum and Insurge

Locum and Insurge are the two libraries used primarily by SOPAC. They serve as a layer of abstraction to the data. Insurge manages the social aspect (tags, reviews, ratings), while Locum manages the connection to the ILS via the connector. Both libraries use a different database from that of Drupal.

13.2.1. Dependencies

There are no packages for Debian MDB2 yet, you can install it via pear:

```
# apt-get install php-pear
# pear install MDB2
# pear install MDB2#mysql
```

13.2.2. Download

Download the Locum and Insurge libraries from SVN:

```
# cd /usr/local/lib
# svn co http://dobby.darienlibrary.org/svn/locum/trunk/ locum
# svn co http://dobby.darienlibrary.org/svn/insurge/trunk/ insurge
```

13.2.3. Creation of the Database

```
$ mysql -u root
mysql> create database scas;
mysql> grant all privileges on scas.* to scas_user@'localhost' identified by 'scas_pass';
mysql> flush privileges;
mysql> exit
```

13.2.4. Sync DSN

This file will provide the connection information to a DB libraries:

```
# nano /usr/local/etc/locum_insurge_dsn.php
```

It should contain:

```
<?php
$dsn = 'mysql://scas_user:scas_pass@localhost/scas';
```

13.2.5. Installation of Insurge

If you customize the name of the database, consider editing the sql file:

```
# nano /usr/local/lib/insurge/sql/scas_insurge.sql
```

Import Insurge:

```
$ mysql -u root -p < /usr/local/lib/insurge/sql/scas_insurge.sql
```

Configure Insurge:

```
# nano /usr/local/lib/insurge/config/insurge.ini
```

The variables in insurge.ini are empty. The default values are too long and cause MySQL errors.

Here is a sample of insurge.ini

```
; This is the Locum configuration file
; General configuration options for your installation of Insurge.
```

```
[insurge_config]
dsn_file = "/usr/local/etc/locum_insurge_dsn.php"
; This is where you configure your repository membership information.
;
; parent_server is the server name of the repository parent server you have been
; told to use.
; group_id = The group ID you have been given by your repository admin.
; These configuration points are OPTIONAL and are only necessary if you are
; participating in a repository relationship.
[repository_info]
parent_server = ""
group_id = ""
group_key = ""
```

13.2.6. Installation of Locum

The same procedure applies to Locum

```
# nano /usr/local/lib/locum/sql/scas_locum.sql
# mysql < /usr/local/lib/locum/sql/scas_locum.sql
# nano /usr/local/lib/locum/sql/locum_init.sql
# mysql < /usr/local/lib/locum/sql/locum_init.sql
# nano /usr/local/lib/locum/config/locum.ini
# mkdir /usr/local/var
# mkdir /usr/local/var/log
```

Configure the DSN:

```
[locum_config]
dsn_file = "/usr/local/etc/locum_insurge_dsn.php"
```

And the coordinates of your Koha installation:

```
[ils_config]
ils = "koha";
ils_version = "30x"
ils_server = "localhost"
ils_harvest_port = "80"
```

The rest depends on your configuration of Koha.

13.3. Installation of Koha Connector

Enter the connector Koha from SVN:

```
# cd /usr/local/lib/locum/connectors/
# svn co http://dobby.darienlibrary.org/svn/connectors/koha/ locum_koha_30x
```

13.4. Harvest Records

Now that the connector is in place, we will be able to launch harvest.php, a tool that will reap Locum DB Koha and fill the locum.

Start by configuring harvest.php:

```
# nano /usr/local/lib/locum/tools/harvest.php
```

Here are the variables you must change:

```
$first_record = 1;
$last_record = 30;
```

These are the minimum and maximum biblionumbers from your Koha install.

Then start the harvest:

```
# chmod +x /usr/local/lib/locum/tools/harvest.php
$ /usr/local/lib/locum/tools/harvest.php
```

13.5. Installation of Sphinx

Sphinx is the indexer for the database used by Locum and Insurge.

13.5.1. Dependencies

There is no Debian package for Sphinx so you'll have to compile the source directly:

```
# apt-get install g++ make libmysql++-dev
```

13.5.2. Download and Compile

```
$ wget http://sphinxsearch.com/downloads/sphinx-0.9.8.tar.gz
$ tar zxvf sphinx-0.9.8.tar.gz
$ cd sphinx-0.9.8
$ ./configure --prefix=/usr/local/sphinx
$ make
# make install
# mkdir /usr/local/sphinx
# mkdir /usr/local/sphinx/lib
# cp api/sphinxapi.php /usr/local/sphinx/lib/
$ rm -R sphinx-0.9.8*
```

13.5.3. Creation of User and Group

Creating a Sphinx user and change the owner:

```
# adduser sphinx
# addgroup sphinx
# usermod -G sphinx sphinx
# mkdir /usr/local/sphinx/var/run
# chown -R sphinx.sphinx /usr/local/sphinx/var
```

13.5.4. The demon Sphinx

Download:

```
# cd /etc/init.d
# wget http://www.thesocialopac.net/sites/thesocialopac.net/files/sphinx
# chmod +x /etc/init.d/sphinx
```

Add Sphinx in the service at boot:

```
# update-rc.d sphinx defaults
```

13.5.5. Configuration

Copy the configuration file supplied with the source of Sphinx before the change:

```
# cp /usr/local/lib/locum/sphinx/sphinx.conf /usr/local/sphinx/etc/
# sed 's/locum_db_user/scas_user/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile;
mv tmpfile /usr/local/sphinx/etc/sphinx.conf
# sed 's/locum_db_pass/scas_pass/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile; mv tmpfile /usr/local/sphinx/etc/sphinx.conf
```

And if you personalize the name of the BDD:

```
# sed 's/scas/Ma_BDD/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile; mv tmpfile /usr/local/sphinx/etc/sphinx.conf
```

13.5.6. Indexing documents

Indexing is necessary if you want to use the search features of SOPAC.

You must first complete the Insurge table index

```
# chmod +x /usr/local/lib/insurge/tools/update-index.php
$ /usr/local/lib/insurge/tools/update-index.php
```

Then start indexing Sphinx

```
$ /usr/local/sphinx/bin/indexer --all
```

Finally, we must start the demon:

```
# /etc/init.d/sphinx start
```

When the demon is already en route, you can update the index with:

```
$ /usr/local/sphinx/bin/indexer --all --rotate
```

13.6. Installation of SOPAC2

Now to the SOPAC software itself:

13.6.1. Download

Download from SVN:

```
$ cd /chemin/vers/drupal/sites/all/
$ mkdir modules
$ cd modules/
$ svn co http://dobby.darienlibrary.org/svn/sopac/trunk/ sopac
```

13.6.2. Installation

Going in the administration of Drupal to activate the module. Enable also the dependencies:

- Profile
- PHP Filter
- Path

The Drupal menu should now list these entries.

13.6.3. Configuration

Then go into the settings of SOPAC.

- Configure the paths to the Locum and Insurge libraries
- Choose a URL prefix SOPAC, in my "catalog". Create a node with content like:

```
<?php
print sopac_search_form('both');
print theme('pages_catalog');
```

- Check the Input Format "PHP Code"
- Check Move to front page
- In URL path settings, set the SOPAC URL prefix you have chosen.

Go to the root of Drupal, a search form will appear.

Thinking to empty the cache of Drupal when something does not work.

Drupal offers a few blocks, not configured by default. Must specify on which page they should appear.

Appendix A. System Preference Defaults

A.1. ISBD Defaults

A.1.1. MARC Default

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#656|

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#657|

<label>Index Terms--Function: </label>|{\n6573 }{\n657a}{--657x}{--657z}{--657y}{--657v}|

#658|

<label>Index Terms--Curriculum Objective: </label>|{\n658a}{--658b}{--658c}{--658d}{--658v}|

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A.1.2. UNIMARC Default

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A.2. NoZebraIndexes Default

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Appendix B. Implementation Checklist

The following guide will walk you through the areas of Koha you need to look at in order to prepare to start using the system.

B.1. Data Migration

Before you can start using Koha you'll need to have some data. This can be done by entering it all by hand, but most people already have their data in electronic format of some sort and just need to reformat it a bit for importing into Koha.

- Create a list of libraries and enter their info and codes into Libraries & Groups
- Define your list of Item Types
- Define you patron categories and enter the categories and their codes into Patron Categories
- Enter any additional patron information fields you use in your library in the Patron Attributes
    - Requires that you first set the ExtendedPatronAttributes system preference if you have custom fields
- Define all of your Authorized Values
    - Collection codes
    - Shelving locations
    - Item statuses (lost, not for loan, use restrictions)
    - Plus any others that are needed in your library
- Optionally define City/Postal Code combos and Road Types for patron entry
- Map your bibliographic data from your legacy system to Koha fields and migrate (remembering to use the collection, shelving, item type and library codes you entered in the above setting areas)
- Map your patron data from your legacy system to the Koha fileds and migrate (remembering to use the patron and library codes you defined above)

B.2. Admin Configuration

Most of these preferences won't need to be changed to use your Koha system, but there are a few that you might want to customize.

- If your library uses CAS Authentication, you'll want to set the various CAS system preferences
- Administration System Preferences
    - KohaAdminEmailAddress : This is the email address that will be used by the system in 'from' lines and to send errors to if there is no email set for the branch
    - noItemTypeImages : Decide if you want to show item type icons in the staff client and opac
    - delimiter : This value will be put in between fields when exporting data from Koha
    - virtualshelves : Decide if you want the staff and/or patrons to use lists in Koha
    - insecure : If your system is behind a local firewall, you can set it to no require log in for the staff client
    - AutoLocation : Require staff to log in to the staff client from a specific IP range
    - IndependantBranches : Prevent librarians from editing content that belongs to other branches
- Go through the Log System Preferences and decide which actions you want to keep track of in the logs

B.3. Localization Configuration

Koha is used worldwide and so you need to make sure you set your localization preferences so that options throughout Koha appear properly for your location/language.

- Localization/Internationalization System Preferences
  - dateformat : Decide how dates are displayed throughout Koha
  - opaclanguagesdisplay : Decide if patrons can choose what language the OPAC appears in
    - opaclanguages : Decide which languages the patrons can choose from
  - language : Decide which langauges appear in the staff client

---

B.4. Circulation Configuration

Before you start circulating your collection you'll need to set up your rules and preferences for circulation.

- Define you Circulation/Fine rules
- Enter the days your library is closed for fines and due date calculations
- Circulation System Preferences
  - CircControl : Define whether circ rules are based on itemâ€™s location, patronâ€™s location or transaction location
  - useDaysMode : Define how due dates are calculated
  - finesCalendar : Define how fines are calculated (for every late date or only for days the library is open)
  - SpecifyDueDate : Decide if staff are allowed to override due dates on checkout
  - AutomaticItemReturn : Decide if items are sent back to the owning branch when checked in
  - todaysIssuesDefaultSortOrder : Decide how items checked out today display on the patron record
  - previousIssuesDefaultSortOrder : Decide how items checked out prior to today display on the patron record
  - noissuescharge : Define the maximum amount a patron can owe before checkouts are blocked
  - ReturnBeforeExpiry : Decide if patrons need to return items before their accounts expire
  - AllowOnShelfHolds : Decide if patrons can place holds on items that are marked as being available
    - AllowHoldPolicyOverride : Decide if you want the staff to be able to override the setting for the above at checkout
  - AllowHoldsOnDamagedItems : Decide if patrons can place holds on items that are marked as damaged
    - AllowHoldPolicyOverride : Decide if you want the staff to be able to override the setting for the above at checkout
  - maxreserves : Decide how many items a patron can have on hold at once
    - AllowHoldPolicyOverride : Decide if you want the staff to be able to override the setting for the above at checkout
  - maxoutstanding : Define the maximum amount a patron can owe before holds are blocked
    - AllowHoldPolicyOverride : Decide if you want the staff to be able to override the setting for the above at checkout
  - ReservesMaxPickUpDelay : Define the number of days before a hold expires
  - WebBasedSelfCheck : Decide if you want to use the built in web-based self-checkout system
    - AutoSelfCheckAllowed : Decide if the self-checkout system requires login

ShowPatronImageInWebBasedSelfCheck : Decide if you want patron images to show on the self checkout screen

AllowNotForLoanOverride : Decide if you want the staff to be able to checkout items marked as â€˜not for loanâ€™

AllowRenewalLimitOverride : Decide if you want staff to override the limit put on renewals

RenewalPeriodBase : Decide what date renewals are based on

finesMode : Switch to â€˜Calculate and Chargeâ€™ before go live if you charge fines

OverdueNoticeBcc : If you want to receive a copy of every overdue notice sent out, enter your email address here

emailLibrarianWhenHoldIsPlaced : Decide if you want an email every time a hold is placed

ReservesControlBranch : Decide which branch's hold rules are considered first

soundon : Decide if you want to have sounds on for circulation actions

AllowNotForLoanOverride : Decide if you want staff to be able to override 'not for loan' statuses

globalDueDate : If you want all your books due on the same date, enter that here

ceilingDueDate : If you want all books due no later than a specific date (like the end of a semester) enter a date here

OverdueNoticeBcc : If you want to receive a copy of all overdue emails, enter your address here

FilterBeforeOverdueReport : If you have a large amount of overdues, you might want to turn this preference on so as to allow you to filter before results appear

DisplayClearScreenButton : If you have a lot of staff members sharing one circ computer you might want to enable this so that staff can clear the screen in between checkouts to protect patron's privacy

Customize your Notices

Define your Overdue Notice Triggers

Set up your cron jobs

Populate your holds queue (every 1-4 hours)

Decide when holds expire (daily)

Calculate fines due (daily)

Mark long overdue items as lost (daily)

Decide when the system sends out messages (1-4 hours)

Decide when the system queues overdue notices (daily)

Set up hold notices that didn't send for printing (daily after overdues and message queue)

Decide when the system queues the advanced notice of items due (daily)

B.5. Patron Configuration

You have already imported patron data from your old system, but there are plenty of options available to you regarding patrons and their accounts.

Enter your staff members as patrons

Define staff members access permissions

Patron System Preferences

AddPatronLists : Decide how patron categories appear when creating a new patron

- autoMemberNum : Decide if the patrons barcodes are auto-generated or if you enter them yourself
- MaxFine : Determine the maximum amount that people can owe in fines
- NotifyBorrowerDeparture : Decide when to warn staff that the patron account is about to expire
- intranetreadinghistory : Decide if the staff can see the patron's reading/checkout history
- BorrowerMandatoryField : List fields that you want to appear as mandatory on the patron add/edit form
- BorrowersTitles : Add or change the titles for your patrons
- borrowerRelationship : Add or change borrower relationships (child to adult and professional to organization)
- AutoEmailPrimaryAddress : Determine if the patrons get an email confirming the creation of their account
- EnhancedMessagingPreferences : Decide if patrons can choose from a series of notices (other than overdues)
- patronimages : Decide if you want to save patron images in your system
- ExtendedPatronAttributes : Decide if you want to enable custom patron fields
- minPasswordLength : Enter the minimum number of characters you want passwords to have

---

B.6. Cataloging Configuration

Before you start cataloging in Koha you'll want to set up your preferences and other rules.

- Define your cataloging templates aka MARC Bibliographic Frameworks
  - Run the MARC Bibliographic Framework Test to be sure your changes are valid
- Define any authorized values you might want to use in cataloging
- Set up custom classification sources (if you use something other than the defaults)
- Set up MARC matching rules for importing records from mrc files or z39.50
- Set up Koha to Keyword mapping for deciding how to display marc fields to the screen (still in beta - only one field)
- Set up the z39.50 targets you want to search for cataloging (and acquisitions)
- Cataloging System Preferences
  - URLLinkText : Enter text to display when 856 fields do not have pre-defined labels
  - hide_marc : If you are unfamiliar with MARC you can have the MARC fields number hidden
  - LabelMARCView : Choose how you want duplicate fields to appear on the editor
  - DefaultClassificationSource : Choose which classification source is the default in your library
  - advancedMARCeditor : Decide if you need labels to appear on your MARC editor
  - marcflavour : Choose your MARC format
  - itemcallnumber : Enter which field and subfields to look into for the call number
  - MARCOrgCode : Enter your MARC Organizational Code (not the same as your OCLC number)
  - autoBarcode : Decide if Koha generates item barcodes for you
  - OpacSuppression : Decide if you want to hide items marked as suppressed from the OPAC search results
- Set up your cron jobs
  - Decide when the system checks URLs in catalog records to see if they are still valid

B.7. Authorities Configuration

Koha has the ability to keep track of your authority records and how they're linked to your bibliographic records. Before using authorities you should configure several preferences.

- Set Authority Frameworks aka templates
- Authority System Preferences
  - BiblioAddsAuthorities : Decide if Koha creates authorities when cataloging
  - dontmerge : Decide if updates to authorities trigger updates to the bibliographic records that link to them
- Set up your cron jobs
  - Choose when the system looks for authorities updates to merge changes into bibliographic records

B.8. Searchng Configuration

There are several system preferences related to searching, it is not always recommended to make too many changes to these preferences since they are set to get you the most relevant results. If you would like to change the default way that Koha handles searching, view the Searching system preferences tab.

- Set up your cron jobs
  - Decide how often your system rebuilds the search index (4-10 min)

B.9. OPAC Configuration

There are a lot of ways you can customize your OPAC in Koha.

- Decide how you want your OPAC to look & what content you want on the main page
- Create a library branded stylesheet using CSS
  - Do not edit the default CSS files, instead create a new one, that way the system can always fall back on the original CSS.
- Create a custom XSLT stylesheet to change the way search results and bib records appear in the OPAC
- OPAC System preferences
  - opacuserlogin : Decide if you want to allow patrons to login to the OPAC to access customized functionality (searching will be allowed without logging in)
    - RequestOnOpac : Decide if patrons can place holds via the OPAC
    - OPACItemHolds : Decide if patrons can place holds on specific items (instead of just the next available item)
    - OpacPasswordChange : Decide if patrons can change their password (don't allow this if you're using LDAP)
    - OpacRenewalAllowed : Decide if patrons can renew their checked out items via the OPAC
    - opacreadinghistory : Decide if patrons can view their reading/checkout history via the OPAC
    - reviewson : Decide if you want to allow patrons to comment on bib records via the OPAC
    - virtualshelves : Decide if you want patrons to be able to create Lists
    - suggestion : Decide if you want patrons to be able to submit purchase suggestions
    - OPACViewOthersSuggestions : Decide if you want patrons to be able to see purchase suggestions made by other patrons
  - opacbookbag : Decide if patrons can save items into their cart
  - AnonSuggestions : Decide if you want non logged in users to be able to make purchase suggestions

OPACXSLTResultsDisplay : Decide if you want to use the XSLT stylesheets on the OPAC search results

OPACXSLTDetailsDisplay : Decide if you want to use the XSLT stylesheets on the bib records in the OPAC

LibraryName : Enter your library name for display in the <title> tag and on the top of the OPAC

opacsmallimage : Choose a logo to replace the Koha logo

opaccredits : Enter HTML to appear at the bottom of every page in the OPAC

OpacMainUserBlock : Enter HTML that will appear in the center of the main OPAC page

OpacNav : Enter HTML that will apper to the left on the main OPAC page

opacheader : Enter the HTML that will appear above the search box on the OPAC

Customize your stylesheets:

- OPACUserCSS : Enter any additional fields you want to define styles for
- opaclayoutstylesheet : Point to a CSS file on your Koha server
- opacstylesheet : If you have a custom CSS enter the link to that file
- opaccolorstylesheet : Point to a CSS file on your Koha server

OpacHighlightedWords : Decide if you want search terms to be highlighted on the search results

hidelostitems : Decide if you want to show patrons items you have marked as lost

BiblioDefaultView : Decide what view is the default for bib records on the OPAC

OPACShelfBrowser : Decide if you want to enable the shelf browse functionality

OPACURLOpenInNewWindow : Decide if URLs clicked in the OPAC are opened in a new window

SearchMyLibraryFirst : If you have a multi-branch system decide if you want patrons to search their library first

OpacAuthorities : Decide if you want patrons to be able to search your authority file

OpacBrowser : Decide if you want patrons to browse your authority file

OPACSearchForTitleIn : Choose which libraries you want patrons to be able to re-run their search in

OpacAddMastheadLibraryPulldown : If you're a multi-branch system you can add a pull down to the search bar for patrons to search which library to search

EnableOpacSearchHistory : Decide if you want the system to keep a search history

Set up your cron jobs

- If you have the OpacBrowser preference set decide when you want the contents to rebuild
- If you have custom RSS feeds, decide when you want the feed to be populated

---

B.10. Enhanded Content Configuration

Koha allows you to pull in content from outside sources to enhance your bib records. All of this content can be toggled on and off using the enhanced content system preferences.

FRBR/Editions

If you would like to have your OPAC and/or staff client show an 'Editions' tab on the bib record, you want to enable one or the other FRBR preferences and then either one or both of the ISBN services (XISBN and ThingISBN).

Amazon : This service is free and just requires that you visit http://aws.amazon.com to sign up

Using the Amazon preferences you can choose to show different types of content from Amazon. Before choosing which types of content you would like to display you will need to enable Amazon content for the staff client and/or the OPAC.

BabelthÃ¨que

This is a pay service. Contact BabelthÃ¨que to learn how to enable this content in the OPAC.

Baker and Taylor

This is a pay service from Baker & Taylor. Contact Baker & Taylor for the information to enter into these preferences.

Google

This service is free and does not require registration, simply enable GoogleJackets and you're set to go.

LibraryThing

With the exception of ThingISBN, you will need to contact LibraryThing for the information to enter into these preferences

Enabling ThingISBN will help to populate the editions tab on the bib record display if you have enabled FRBR.

OCLC

XISBN is used to populate the editions tab on the bib record display if you have enabled FRBR. This service is free for up to 999 queries a day.

Syndetics

This is a pay service from Syndetics to add content for your bib records. Contact Syndetics for the information to enter into these preferences.

Tagging

Choose whether or not you want to allow patrons to add tags to records in Koha.

B.11. Acquisitions Configuration

When using acquisitions in Koha you first need to define some defaults.

Set up your funds & budgets

Choose your default currency and enter others if you order from multiple countries

Enter in your vendor information

Create an Framework with the code ACQ (if you're going to enter item records at the time of ordering or receiving)

Acquisitions System preferences

AcqCreateItem : Decide if an item record is created during acquisition

CurrencyFormat : Decide how you want monetary amounts to display

gist : Enter your sales tax (if you are billed for tax)

OrderPdfFormat : Decide what format you want your print orders to use

---

B.12. Serials Configuration

When you use serials there are a few options you can set before hand.

Serials System Preferences

RenewSerialAddsSuggestion : Decide if you want renewing serials to add a suggestion for easy purchasing

RoutingSerials : Decide if you want to route serials around your library

RoutingListAddReserves : Decide if holds are placed on serials when there is a routing list in place

Cataloging System Preferences

StaffSerialIssueDisplayCount : Decide how many of the most recent issues to display in the staff client

OPACSerialIssueDisplayCount : Decide how many of the most recent issues to display in the OPAC

SubscriptionHistory : Decide how you want the subscription information to display in the OPAC

B.13. Planning for Go-Live

Once you have all of your settings ready, you need to prepare for making your system live:

Decide if you need training by an outside service or if your staff can do the trianing themselves.

Make sure that there is time for your staff to play with your test system and get comfortable with it

If this is a migration, work with your previous company to extract data right before you go live

Come up with URLs for your new Koha OPAC & Staff Client

Make sure that if you're hosting your own system you have a backup plan

---

Appendix C. Handling On Order items and holds

If you tend to import your MARC records when you have ordered the book (as opposed to when you receive the books), and allow patrons to place holds on those books, you may need to add item records to the *.mrc file before importing.

The easiest way to import your latest order is to first run your records through MARCEdit. Download your MARC records, saving them to your desktop or some other location you use/will remember. If you have MARCEdit already installed you should simply have to double click on your MARC records, and they will automatically open in MARCEdit.

> This tutorial was written with MARCEdit version 5.2.3769.41641 on Windows XP, instructions may be different if your version or operating system is different.

Your original file will automatically be in the input; ensure MarcBreaker is chosen, and then click "Execute"

You will be presented with a summary of the records processed at the bottom of the screen

Click 'Edit Records' to continue on to adding item records

Your screen will be replaced with a larger screen containing the MARC records

Click on Tools > Add/Edit Field

Enter in the Koha specific item info

In the Field box, type 942

In the Field Data box, type \\$c and the item type code (\\$cBOOK in this example)

Check the 'Insert last' option

Click 'Add Field'

Enter in the item record data

In the Field box, type 952

In the Field Data box, type $7ORDERED_STATUS$aPERM_LOC$bCURR_LOC$cSHELVING_LOCATION$eSOURCE_OF_ACQ$yITEM_TYPE ex. $7-1$aCPL$bCPL$cNEW$eBrodart$yBOOK

In a default install of Koha -1 is the value for the Ordered status

You may want to look at other subfields you would like data in -- for example, changing the collection code to put all the items in the same collection (8), automatically fill in the acquisition date (d), or put in a public note (z).

Be sure you use the $ to separate subfields; adding each subfield on a separate line will cause that many items to be imported with your MARC record (in the example above, four items, each with one of those subfields corrected)

Make sure you look at the Administration > Authorized Values in Koha to put the correct code into the field

Check the 'Insert last' option

Click 'Add Field'

Close the field editor window

Click on File > Compile into MARC

Choose where to save your file

Now you want to go into your Koha system and follow the instructions for importing MARC records.

Once the item has come in, you will need to go to the item record and individually change the item to have the correct barcode, and manually change the status from Ordered to the blank line in the Not for Loan field.

If you purchase your cataloged item records, you may want to request your vendor put in the information you need into the MARC records for you; that way, you could import the edited-by-the-vendor file, overwriting the current record, automatically replacing the data with what you need.

Appendix D. Configuring Receipt Printers

The following instructions are for specific receipt printers, but can probably be used to help with setup of other brands as well.

D.1. For Epson TM-T88III (3) & TM-T88IV (4) Printers

D.1.1. In the Print Driver

For these instructions, we are using version 5,0,3,0 of the Epson TM-T88III print driver; the EPSON TM-T88IV version is ReceiptE4. Register at the EpsonExpert Technical Resource Center website to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

Click Start Â» Printers and Faxes Â» Right click the receipt printer Â» Properties:

Advanced Tab, click Printing Defaults button

Layout Tab: Paper size: Roll Paper 80 x 297mm

TM-T88III: Layout Tab: Check Reduce Printing and Fit to Printable Width

TM-T88IV: Check Reduced Size Print; Click OK on the popup window that appears. Fit to Printable Width should be automatically selected.

OK your way out of there.

D.1.2. In Firefox

Under File Â» Page Setup:

Shrink to fit page on Format & Options tab

0,0,0,0 for Margins on Margins & Header/Footer Tab. This makes the receipts use all available space on the paper roll.

Set all Headers/Footers to -blank-. This removes all of the gunk you might normally find on a print from firefox, such as the URL, number of pages, etc.

Click OK

Set the default printer settings in Firefox so you don't see a "Print" dialog:

Go to File -> Print

Set the Printer to the receipt printer.

Click the Advanced (or Properties) button

Layout Tab: Paper size: Roll Paper 80 x 297mm

TM-T88III: Layout Tab: Check Reduce Printing and Fit to Printable Width

TM-T88IV: Check Reduced Size Print; click OK on the popup window that appears. Fit to Printable Width should be automatically selected.

OK your way out, go ahead and print whatever page you are on.

Type about:config, in the address bar. Click "I'll be careful, I promise!" on the warning message.

Type, print.always in Filter.

Look for print.always_print_silent.

If the preference is there then set the value to true.

If the preference is not there (and it shouldn't be in most browsers) you have to add the preference.

Right click the preference area and select New -> Boolean

Type print.always_print_silent in the dialog box and set the value to True. This sets the print settings in Firefox to always use the same settings and print without showing a dialog box.

Setting the print.always_print_silent setting in about:config DISABLES the ability to choose a printer in Firefox.

D.2. For Epson TM-T88II (2) Printers

Register at the EpsonExpert Technical Resource Center website to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

D.2.1. In Firefox

Under File Â» Page Setup:

Shrink to fit page on Format & Options tab

0,0,0,0 for Margins on Margins & Header/Footer Tab. This makes the receipts use all available space on the paper roll.

Set all Headers/Footers to -blank-. This removes all of the gunk you might normally find on a print from firefox, such as the URL, number of pages, etc.

Click OK

Set the default printer settings in Firefox so you don't see a "Print" dialog:

Go to File -> Print

Set the Printer to the receipt printer.

Print whatever page you are on.

Type about:config, in the address bar. Click "I'll be careful, I promise!" on the warning message.

Type, print.always in Filter.

Look for, print.always_print_silent.

If the preference is there then set the value to true.

If the preference is not there (and it shouldn't be in most browsers) you have to add the preference.

Right click the preference area and select New -> Boolean

Type, print.always_print_silent in the dialog box and set the value to True. This sets the print settings in Firefox to always use the same settings and print without showing a dialog box.

Setting the print.always_print_silent setting in about:config DISABLES the ability to choose a printer in Firefox.

Appendix E. Sample Notice

Nicole Engard

410 Library Rd.

Philadelphia, PA 19107

Dear Nicole Engard (23529000035726),

According to our records, at the time of this notice, you have items that are overdue. Please return or renew them as soon as possible to avoid increasing late fines.

If you have registered a password with the library, you may use it with your library card number to renew online.

If you believe you have returned the items below please call at and library staff will be happy to help resolve the issue.

The following item(s) are currently overdue:

07/08/2008 Creating drug-free schools and communities : 502326000054 Fox, C. Lynn.

06/27/2008 Eating fractions / 502326000022 McMillan, Bruce.

Sincerely, Library Staff

Appendix F. Using Koha as a Content Management System (CMS)

F.1. Setup

These are instructions for taking a default install of Koha 3.0 and allowing it to function as a little content management system. This will allow a library to publish an arbitrary number of pages based on a template. This example uses the template for the main opac page, but you could just as well use any template you wish with a bit more editing. This may be appropriate if you have a small library, want to allow librarians to easily add pages, and do not want to support a complete CMS.

Copy /usr/share/koha/opac/cgi-bin/opac/opac-main.pl to /usr/share/koha/opac/cgi-bin/opac/pages.pl (in the same directory)

Edit pages.pl in an editor

At approximately line 32 add:

```
my $cgi = new CGI;
```

At approximately line 36 change this code:

```
template_name =>
         "opac-main.tmpl",
```

To this code:

```
template_name => "pages.tmpl",
```

At approximately line 54 change this code:

```
$template->param(
         koha_news => $all_koha_news,
         koha_news_count => $koha_news_count
         );
```

To this:

```
my $page = "page_" . $cgi->param("p");
         $template->param(
         koha_news => $all_koha_news,
         koha_news_count => $koha_news_count,
         local_page => "" .
         C4::Context->preference($page)
         );
```

Copy /usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/opac-main.tmpl to /usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/pages.tmpl

At approximately line 38, change this:

```
<!-- TMPL_IF NAME="OpacMainUserBlock"
         --><div id="opacmainuserblock" class="container"><!--
         TMPL_VAR NAME="OpacMainUserBlock" --></div><!-- /TMPL_IF
         -->
```

To this:

```
<!-- TMPL_IF NAME="local_page" --><div
         id="opacmainuserblock" class="container"><!-- TMPL_VAR
         NAME="local_page" --></div><!-- /TMPL_IF
         -->
```

In system preferences in the staff client, click the button for "New Preference" under "Local Use"

Fill it out as so

Explanation: test page for pages tiny cms

Variable: page_test

Value: Lorem ipsum

Click the TextArea link (or enter "TextArea" into the input field below it)

variable options (last field): 80|50

In a browser go to http://youraddress/cgi-bin/koha/pages.pl?p=test The page should come up with the words "Lorem ipsum" in the main content area of the page. (replace "youraddress" with localhost, 127.0.0.1, or your domain name depending on how you have Apache set up.)

To add more pages simply create a system preference where the title begins with "page_" followed by any arbitrary letters. You can add any markup you want as the value of the field. Reference the new page by changing the value of the "p" parameter in the URL.

F.1.1. Troubleshooting

If you have problems check file permissions on pages.pl and pages.tmpl. They should have the same user and group as other Koha files like opac-main.pl.

F.1.2. Bonus Points

Instead of using the address http://youraddress/cgi-bin/koha/pages.pl?p=test you can shorten it to http://youraddress/pages.pl?p=test Just open up /etc/koha/koha-httpd.conf and add the follow at about line 13:

```
ScriptAlias /pages.pl "/usr/share/koha/opac/cgi-bin/opac/pages.pl"
```

Then restart Apache.

F.2. Usage

After setting up Koha as a CMS you can create new pages following these instructions:

F.2.1. Adding Pages

To add a new page you need to add a system preference under Local Use.

- Get there: More > Administration > Global System Preferences > Local Use
- Click 'New Preference'
- Enter in a description in the Explanation field
- Enter a value that starts with 'page_' in the Variable field
- Enter starting HTML in the Value field
- Set the Variable Type to Textarea
- Set the Variable options to something like 20|20 for 20 rows and 20 columns

F.2.2. Viewing your page

You can view your new page at http://YOUR-OPAC/cgi-bin/koha/pages.pl?p=PAGENAME where PAGENAME is the part you entered after 'page_' in the Variable field.

F.2.3. Example

This process can be used to create recommended reading lists within Koha. So once the code changes have been made per the instructions on 'Koha as a CMS' you go through the 'Adding a New Page' instructions above to great a page for 'Recommended Reading Lists'

Next we need to create pages for our various classes (or categories). To do this, return to the 'Adding a New Page' section and create a preference for the first class.

Next you'll want to link your first page to your new second page, go to the page_recommend preference and click 'Edit.' Now you want to edit the HTML to include a link to your newest page:

F.2.4. Live Examples

- The Crawford Library at Dallas Christian College is using this method for their recommended reading lists: http://opac.dallas.edu/

Appendix G. Resetting the Koha Database

These notes on how to reset the database for Koha 3 were derived from the following email thread: http://lists.koha.org/pipermail/koha-devel/2009-January/008939.html

Resetting the database may be useful if you install Koha with the sample data, and then wish to use real data without reinstalling the software.

G.1. Truncate Tables

Use your preferred MySQL client to truncate the following tables:

- bibio
- biblioitems
- items
- auth_header
- sessions
- zebraqueue

G.2. Reset the Zebra Index

Run the following commands to reset the authorities and biblios Zebra indices.

```
$ zebraidx -c /etc/koha/zebradb/zebra-authorities-dom.cfg -g iso2709 -d authorities init
$ zebraidx -c /etc/koha/zebradb/zebra-biblios.cfg -g iso2709 -d biblios init
```

Appendix H. Important Links

H.1. Koha Related

Report Koha Bugs - http://bugs.koha.org

Koha Versioning Control - http://git.koha-community.org/

Database Structure - http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD

Koha as a CMS - http://wiki.koha.org/doku.php?id=en:documentation:tutorials:kohaascms

SIP2 Support - http://wiki.koha.org/doku.php?id=en:development:sip2

Kyles's Koha Tools - http://kylehall.info/index.php/projects/koha-tools/

H.2. Cataloging Related

Koha MARC Tutorials - http://www.pakban.net/brooke/

Z39.50 Server Search - http://targettest.indexdata.com/

Z39.50 Server List - http://staff.library.mun.ca/staff/toolbox/z3950hosts.htm

Library of Congress Authorities - http://authorities.loc.gov/

MARC Country Codes - http://www.loc.gov/marc/countries/

Search the MARC Code List for Organizations - http://www.loc.gov/marc/organizations/org-search.php

H.3. Enhanced Content Related

Amazon Associates - http://associates.amazon.com

Amazon Web Services - http://aws.amazon.com

WorldCat Affiliate Tools - http://www.worldcat.org/wcpa/do/AffiliateUserServices?method=initSelfRegister

XISBN - http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp

LibraryThing for Libraries - http://www.librarything.com/forlibraries

H.4. Reports Related

SQL Reports Library - http://wiki.koha.org/doku.php?id=sql_library

Sample reports from NEKLS - http://www.nexpresslibrary.org/training/reports-training/

H.5. Installation Guides

Installing Koha 3 on Ubuntu - http://www.blazingmoon.org/guides/k3-on-u810-1.html

Koha on Debian installation documentation - http://openlib.org/home/krichel/courses/lis508/doc/koha_installation_overview.html

H.6. Misc

Zotero - http://zotero.org

Appendix I. Koha Embedded Holdings Data

This table represents the default embedded holdings data in Koha 3.0. This information can be used for migration or importing data purposes

Table I-1. Koha Embedded Holdings Data

MARC21 Tag/subfield	Data Element	Description	Notes
952Â‡0	Withdrawn status	Default values: 0 = Not withdrawn 1 = Withdrawn	Coded value, matching Authorized Value category ('WITHDRAWN' in default installation)
952Â‡1	Lost status	Default values: 0 = Available 1 = Lost 2 = Long Overdue (Lost) 3 = Lost and Paid For 4 = Missing in Inventory 5 = Missing in Hold Queue	It's possible to configure OPAC so that lost items don't display with the hidelostitems system preference. Coded value, matching Authorized Value category ('LOST' in default installation)
952Â‡2	Classification	Classification scheme that defines filing rules used for sorting call numbers.	If no classification scheme is entered, the system will use the value entered in the DefaultClassificationSource preference.
952Â‡3	Materials specified	Specific issues of serials or multi-part items.	Copy/volume data is stored in 952Â‡h and Â‡t for display in Normal views. Â‡3 isn't displayed anywhere except the MARC view.
952Â‡4	Damaged status	Default values: 0 = Not damaged 1 = Damaged	Coded value, matching Authorized Value category ('DAMAGE' in default installation)
952Â‡5	Use restrictions	Default values: 0 = No use restrictions 1 = Restricted Access	Coded value, matching Authorized Value category ('RESTRICT' in default installation)
952Â‡7	Not for loan	Default values: -1 = Ordered 0 = Available for loans 1 = Not for Loan 2 = Staff Collection	Coded value, matching Authorized Value category ('NOT_LOAN' in default installation)
952Â‡8	Collection code	Coded value	Coded value, matching Authorized Value category ('CCODE' in default installation)
952Â‡9	Item number	System-generated item number.	Does not display in the item record.
952Â‡a	Owning Library	Branch code	Code must be defined in Libraries, Branches and Groups
952Â‡b	Holding library (usually the same as 952$a)	Branch code	Code must be defined in Libraries, Branches and Groups

952Â‡c	Shelving location code		Coded value, matching Authorized Value category ('LOC' in default installation)
952Â‡d	Date acquired	YYYY-MM-DD	Date formats in the 952 subfields are required to be in the system internal format for data loading and subsequent item editing: YYYY-MM-DD
952Â‡e	Source of acquisition	Coded value or vendor string	
952Â‡g	Purchase price	Decimal number, no currency symbol	
952Â‡h	Serial enumeration caption		
952Â‡o	Koha full call number		
952Â‡p	Barcode *	Max 20 characters	
952Â‡v	Replacement price	Decimal number, no currency symbol	
952Â‡w	Price effective from	YYYY-MM-DD	Date formats in the 952 subfields are required to be in the system internal format for data loading and subsequent item editing: YYYY-MM-DD
952Â‡y	Koha item type *	Coded value, required field for circulation	Coded value, must be defined in Item types
952Â‡z	Public note		

* - required for circulation

Appendix J. FAQs

J.1. Display

J.1.1. Custom Item Type/Authorized Value Icons

Question: Can I have my own set of item type images (or authorized value icons)?

Answer: Absoltuley. To add additional icons to your system you simply add a new directory to koha-tmpl/intranet-tmpl/prog/img/itemtypeimg/ and to koha-tmpl/opac-tmpl/prog/itemtypeimg and put your icons in the new directory. Your icons will show up in a new tab as soon as they are in the folders.

> Remember to put the icons in both places (on the OPAC and the intranet).

J.2. Circulation

J.2.1. Dropbox Date

Question: How is the dropbox date is determined? Is it the last open date for the checkout branch? Is it today's date minus one? Can the dropbox checkin date be set?

Answer: If the library is cHow is the dropbox date is determined?losed for four days for renovations, for example, there would be more than one day needed for the dropbox date. You will only have one dropbox date and that will be the last day that the library open (determined by the holiday calendar) because there is no real way to know what day the books were dropped into the box during the 4 closed days. The only way to change the effective checkin date in dropbox mode is to modify the calendar.

J.2.2. Duplicate Overdue Notices

Question: Why are patrons getting two overdue notices?

Answer: This tool takes all branches in the overdue rules and sent notifications to them. So, if you have a default rule & a branch rule, the notification will be generated twice. A quick fix is to discard "default rule" for instance.

J.3. Cataloging

J.3.1. Authority Fields

Question: Why can't I edit 1xx, 6xx, or 7xx fields in my catalog record?

Answer: These fields are authority controlled and you probably have the BiblioAddsAuthorities set to 'allow'. When it is set to 'don't allow' these fields will be locked and require you to search for an exisiting authority record.

J.4. Reports

J.4.1. Define Codes Stored in DB

J.4.1.1. Fines Table

Question: What do the codes in the accounttype field in the accountlines table stand for?

Answer:

A = acc't management fee

C = credit

F = overdue fine

FOR =forgiven

FU = overdue, still acccruing

L = Lost Item

M = Sundry

N = New Card

PAY = payment

W = writeoff

J.4.1.2. Statistics Table

Question: What are the possible codes for the type field in the statistics table?

Answer:

localuse

Registers if an item that had been checked out to a statistics patron (category type = 'X') is returned

issue

return

renew

writeoff

payment

CreditXXX

stores different types of fee credits, so a query to catch them all would include a clause like "type LIKE 'Credit%'"

J.5. Enhanced Content

J.5.1. FRBRizing Content

Question: At our public library we are running a Koha installation and we've tried to turn on all the nice functionalities in Koha such as the frbrising tool, but do not get the same result as Nelsonville public library.

Answer: In fact, this feature is quite tricky to make that right. First it looks at xisbn service. And then search in your database for that isbn. So both xisbn and your internal isbn (in biblio table) have to be normalized. You could therefore use the script misc/batchupdateISBNs.pl (it removes all the - in your local ISBNs)

J.6. System Administration

J.6.1. Errors in Zebra Cron

Question: I am noticing some errors in the koha-zebradaemon-output.log file. When new records are added it takes a bit longer to index than we think they should. Running rebuild zebra is often faster. Zebra ends up indexing and search works, but I am concerned about the errors. Any ideas?

Answer: Rebuild_zebra.pl -r deletes all of the files in the Zebra db directories (such as reci-0.mf) and then recreates them. Thus, permissions will be lost, and the files will be owned by the user who ran rebuild_zebra.pl. If one rebuilds the zebra indexes as root, the daemons, which typically run under the user koha, will not be able to update the indexes. Thus, it's important then that the zebra rebuilds are put in the cronjob file of the user koha, and not root. Also important is that other users, such as root, don't manually execute rebuilds.

If one desires that another user be able to execute rebuild_zebra.pl, he should be given the permission to execute 'sudo -u Koha .../rebuild_zebra.pl,' (if you want to do this, you also have to edit the sudoers file to pass the PERL5LIB variable with the env_keep option as by default sudo strips away almost all environment variables). Or, as root user, one can use a simple 'su koha' and then the rebuild_zebra.pl command.

I've also tried to set the sticky bit on rebuild_zebra.pl, but for whatever reason it didn't seem to work due to some problem with the PERL5LIB variable that I wasn't able to figure. That seems to me the easiest thing to do, if anybody has any idea how to make it work. If it worked and were the default, I think it would help folks to avoid a great deal of the problems that come up with zebra.

J.6.2. Making Z39.50 Target Public

Question: Could someone tell me the exact steps I need to take to configure Zebra to expose my Koha 3 db as a public Z39.50 service?

Answer: Edit the KOHA_CONF file that your Koha is using. Uncomment the publicserver line like:

<!-- <listen id="publicserver" >tcp:@:9999</listen> -->

to be:

<listen id="publicserver" >tcp:@:9999</listen>

Then restart zebasrv and connect on the port specified (9999).

J.6.3. Shelving Location Authorized Values

Question: When editing an item, the new shelving location I created is not showing up by default in the items where I assigned it to.

Answer: This is because you created the new shelving location with a code value of 0 (zero) Just FYI the system interprets authorized values of 0 as equaling a null so when you edit a record in cataloging where the authorized value in a field was assigned where the code was 0, the value displays as null in the item editor (or MARC editor) instead of the value the library meant it to be.

J.6.4. Why do I need Authorized Values?

Question: Why would I want to define authorized values for MARC tags?

Answer: Authorized Values create a 'controlled vocabulary' for your staff. As an example, let us assume that your Koha installation is used by several libraries, and you use MARC 21. You might want to restrict the 850a MARC subfield to the institution codes for just those libraries. In that case, you could define an authorized values category (perhaps called "INST") and enter the institution codes as the authorized values for that category.

> Koha automatically sets up authorized value categories for your item types and branch codes, and you can link these authorized values to MARC subfields when you set up your MARC tag structure.

J.7. Hardware

J.7.1. Barcode Scanners

Question: What barcode scanners have been known to work with Koha?

Answer: The simple rule of thumb is, does it act like a keyboard device?, if so, it will work. (i.e. can you take the scanner, scan a barcode and have it show up in a text editor, if so, it will work.)

The main points to check are that it connects to your PC conveniently (can be USB or "keyboard wedge" which means it connects in line with the keyboard, which is useful with older computers), and that it scans the barcode type that you are using.

It is a good idea to test some 'used' barcodes if you have any, to see whether the scanner can read scuffed or slightly wrinkled ones successfully. Most scanners are capable of reading several barcode types - there are many, and the specification should list the ones it can read. You may need to adjust settings slightly, such as prefix and suffix characters, or whether you want to send an 'enter' character or not.

One more tip - some can be set 'always on' and may come with a stand, some have triggers under the handle, some have buttons on top, some are held like a pen. Think about the staff working with the hardware before choosing, as a button in the wrong place can be very awkward to use.

J.7.1.1. Scanners used by Koha libraries

MS9590 VoyagerGS (more here: http://wiki.koha.org/doku.php?id=en:documentation:barcode_scanners:ms9590_voyagergs&s[]=barcode&s[]=scanner)

J.7.2. Printers

J.7.2.1. Printers used by Koha libraries

POS-X receipt printer

Star Micronics printer (exact model unknown) with a generic/plain text driver.

Star SP2000 (Nelsonville)

Star TSP-100 futurePRINT (Geauga)

> "I know there have been a lot of questions on receipt printers so I thought I'd pass on my findings. We have been testing the Star TSP-100 futurePRINT. I found this print to be VERY easy to configure for Koha. I was even able to customize the print job by adding our system logo (a .gif) to the top of every receipt. Also with a bitmap created in Paint was able to add a message at the bottom of each receipt with the contact information, hours and website for the library that the materials were checked out at."

Epson TM 88 IIIP thermal receipt printers

Epson TM-T88IV

1x1 labels using a Dymolabelwriter printer

J.7.2.2. Braille Support

Question: Are there any braille embosser or printer which has inbuilt braille converter and it is accessible with UNIX environment?

Answer: You may want to look into BRLTTY (http://www.emptech.info/product_details.php?ID=1232).

J.7.2.3. Additional Support

http://wiki.koha.org/doku.php?id=receipt_printing&s=printer

http://www.nexpresslibrary.org/go-live/configure-your-receipt-printers/

Appendix K. Cron Jobs

K.1. Cron Jobs

The locations below assume a dev install which puts the crons in misc/, if you have a standard install you may want to look in bin/ for these files if you cannot find them in misc/

K.1.1. Search

Script path: misc/migration_tools/rebuild_zebra.pl

Does: Updates Zebra indexes with recently changed data.

Required by: Zebra

Frequency suggestion: every x minutes, (between 5-15 minutes) depending on performance needs

K.1.2. Fines

Script path: misc/cronjobs/fines.pl

Required by: finesMode system preference

Frequency suggestion: nightly

K.1.3. Circulation

K.1.3.1. Holds Queue

Script path: misc/cronjobs/holds/build_holds_queue.pl

Does: Updates holds queue report

Required by: Holds Queue Report

Frequency suggestion: every 1-4 hours

K.1.3.2. Long Overdues

Script path: misc/cronjobs/longoverdue.pl

Does: allows one to specify delays for changing items to different lost statuses, and optionally charge for them.

Required by: Frequency suggestion: nightly

K.1.4. Notices

K.1.4.1. Message Queue

Script path: misc/cronjobs/process_message_queue.pl

Does: processes the message queue to send emails and SMS messages to users. sends outgoing emails to patrons.

Frequency suggestion: nightly

K.1.4.2. Advanced Notice

Script path: misc/cronjobs/advance_notices.pl

Does: prepares "pre-due" notices and "item due" notices for patrons who request them prepares notices for patrons for items just due or coming due soon. requires EnhancedMessagingPreferences to be on

Frequency suggestion: nightly

> This script does not actually send the notices. It queues them in the message queue for later

K.1.4.3. Overdue Notice

Script path: misc/cronjobs/overdue_notices.pl

Does: prepares messages to alert patrons of overdue messages

Frequency suggestion: nightly

This script does not actually send the notices. It queues them in the message queue for later

---

K.1.5. In Processing/Book Cart

Script path: misc/cronjobs/cart_to_shelf.pl

Does: Updates all items with a location of CART to the item's permanent location.

Required by: NewItemsDefaultLocation, InProcessingToShelvingCart, & ReturnToShelvingCart system preferences

Frequency suggestion: hourly

K.1.6. Catalog

K.1.6.1. Check URLs

Script path: misc/cronjobs/check-url.pl

Does: checks URLs in 856$u field. Script output can now be formatted in CSV or HTML. The HTML version links directly to MARC biblio record editor.

Frequency suggestion: monthly

K.1.6.2. Merge Authorities

Script path: misc/migration_tools/merge_authorities.pl

Does: Updates biblio data with changes to authorities records

Required by: dontmerge system preference

Frequency suggestion: nightly

K.1.6.3. Serials Update

Script path: misc/cronjobs/serialsUpdate.pl

Does: checks if there is a "late" issue on active subscriptions, and if there is, the script will set it as late, and add the next one as expected.

Frequency suggestion: nightly

K.1.7. OPAC

K.1.7.1. RSS Feeds

Script path: misc/cronjobs/rss/rss.pl

Does: Produces an RSS XML document for any SQL query (not used for search results RSS feed)

Frequency suggestion: hourly

K.1.7.2. Authorities Browser

Script path: misc/cronjobs/build_browser_and_cloud.pl

Does: Generate content for authories browse in OPAC

Required by: OpacBrowser system preference

K.1.8. Deprecated scripts

These should not be run without modification:

Script path: misc/cronjobs/update_items.pl

Script path:misc/cronjobs/smsoverdues.pl

Script path:misc/cronjobs/notifyMailsOp.pl

Script path:misc/cronjobs/reservefix.pl

Script path:misc/cronjobs/zebraqueue_start.pl

Script path:misc/cronjobs/j2a.pl

K.2. Additional Information

http://wiki.koha.org/doku.php?id=en:development:cronjobs

Appendix L. Using the SRU server

L.1. Using the SRU server

Koha implements the Search/Retrieve via URL (SRU) protocol. More information about the protocol itself can be found at http://www.loc.gov/standards/sru/. The version implemented is version 1.1.

L.1.1. Explain

If you want to have informations about the implementation of SRU on a given server, you should have access to the Explain file using a request to the server without any parameter. Like http://myserver.com:9999/biblios/The response from the server is an xml file that should look like the following and will give you information about the default settings of the SRU server.

```
<zs:explainResponse>
     <zs:version>1.1</zs:version>
     <zs:record>
          <zs:recordSchema>http://explain.z3950.org/dtd/2.0/</zs:recordSchema>
          <zs:recordPacking>xml</zs:recordPacking>
          <zs:recordData>
          <explain xml:base="zebradb/explain-biblios.xml">
          <!--
          try stylesheet url: http://./?stylesheet=docpath/sru2.xsl
          -->
     <serverInfo protocol="SRW/SRU/Z39.50">
          <host>biblibre</host>
          <port>9999</port>
          <database>biblios</database>
     </serverInfo>
     <databaseInfo>
          <title lang="en" primary="true">Koha 3 Bibliographic SRU/SRW/Z39.50 server</title>
          <description lang="en" primary="true">Koha 3 Bibliographic Server</description>
          <links>
               <sru>http://biblibre:9999</sru>
          </links>
     </databaseInfo>
     <indexInfo>
          <set name="cql" identifier="info:srw/cql-context-set/1/cql-v1.1">
               <title>CQL Standard Set</title>
          </set>
          <index search="true" scan="true" sort="false">
          <title lang="en">CQL Server Choice</title>
          <map>
               <name set="cql">serverChoice</name>
          </map>
```

```
                <map>
                   <attr type="1" set="bib1">text</attr>
                   </map>
              </index>
          <index search="true" scan="true" sort="false">
             <title lang="en">CQL All</title>
                 <map>
    <name set="cql">all</name>
    </map>
    <map>
    <attr type="1" set="bib1">text</attr>
    </map>
    </index>
    <!-- Record ID index -->
    <index search="true" scan="true" sort="false">
    <title lang="en">Record ID</title>
    <map>
    <name set="rec">id</name>
    </map>
    <map>
    <attr type="1" set="bib1">rec:id</attr>
    <attr type="4" set="bib1">3</attr>
    </map>
    </index>
```

L.1.2. Search

This url : http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=reefs is composed of the following elements:

base url of the SRU server : http://myserver.com:9999/biblios?

search part with the 3 required parameters : version, operation and query. The parameters within the search part should be of the key=value form, and can be combined with the & character.

One can add optional parameters to the query, for instance maximumRecords indicating the maximum number of records to be returned by the server. So http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=reefs&maximumRecords=5 will only get the first 5 results results from the server.

http://www.loc.gov/standards/sru/sru1-1archive/search-retrieve-operation.html gives more details about the search operations and in particular the list of optional parameters for searching.

L.1.2.1. More details about Search

The "operation" key can take two values: scan or searchRetrieve.

If operation=searchRetrieve, then the search key should be query. As in : operation=searchRetrieve&query=reefs

If operation=scan, then the search key should be scanClause. As in : operation=scan&scanClause=reefs

etc/zebradb/biblios/etc/bib1.att defines Zebra/3950 indexes that exist on your system. For instance you'll see that we have indexes for Subject and for Title: att 21 Subject and att 4 Title respectively.

In the pqf.properties file located under etc/zebradb/pqf.properties I see that an access point already uses my Subject index (index.dc.subject = 1=21) while another uses my Title index (index.dc.title = 1=4) I know this is my Subject index because as I've seen just before in my bib1.att file, it's called with =1=21 in Z3950: so index.dc.subject = 1=21 correctly points to my Subject index. And Title was called with 1=4 so index.dc.title = 1=4 correctly points to my Title index. I can now construct my query just like I would in a search box, just preceding it with the "query" key: query=Subject=reefs and Title=coral searches "reefs" in the subject and "coral" in the title. The full url would be http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Subject=reefs and Title=coral If I want to limit the result set to just 5 records, I can do http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Subject=reefs and Title=coral&maximumRecords=5

I can also play with truncate, relations, etc. Those are also defined in my pqf.properties file. I can see for instance the position properties defined as:

```
position.first              = 3=1 6=1
```

```
# "first in field"
 position.any                = 3=3 6=1
   # "any position in field"
```

So as an example if I want "coral" to be at the beginning of the title, I can do this query :
http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Title=coral first

---

L.1.3. Retrieve

My search for http://univ_lyon3.biblibre.com:9999/biblios?version=1.1&operation=searchRetrieve&query=coral reefs&maximumRecords=1 retrieves just on record. The response looks like this:


```
         <zs:searchRetrieveResponse>
<zs:version>1.1</zs:version>
<zs:numberOfRecords>1</zs:numberOfRecords>
<zs:records>
<zs:record>
<zs:recordPacking>xml</zs:recordPacking>
<zs:recordData>
<record xsi:schemaLocation="http://www.loc.gov/MARC21/slim http://www.loc.gov/ standards/marcxml/schema/MARC21slim.xsd">
<leader> cam a22 4500</leader>
<datafield tag="010" ind1=" " ind2=" ">
<subfield code="a">2-603-01193-6</subfield>
<subfield code="b">rel.</subfield>
<subfield code="d">159 F</subfield>
</datafield>
<datafield tag="020" ind1=" " ind2=" ">
<subfield code="a">FR</subfield>
<subfield code="b">00065351</subfield>
</datafield>
<datafield tag="101" ind1="1" ind2=" ">
<subfield code="c">ita</subfield>
</datafield>
<datafield tag="105" ind1=" " ind2=" ">
<subfield code="a">a z 00|y|</subfield>
</datafield>
<datafield tag="106" ind1=" " ind2=" ">
<subfield code="a">r</subfield>
</datafield>
<datafield tag="100" ind1=" " ind2=" ">
<subfield code="a">20091130 frey50 </subfield>
</datafield>
<datafield tag="200" ind1="1" ind2=" ">
<subfield code="a">Guide des rÃ©cifs coralliens / A Guide to Coral Reefs</subfield>
<subfield code="b">Texte imprimÃ©</subfield>
<subfield code="e">la faune sous-marine des coraux</subfield>
<subfield code="f">A. et A. Ferrari</subfield>
</datafield>
<datafield tag="210" ind1=" " ind2=" ">
<subfield code="a">Lausanne</subfield>
<subfield code="a">Paris</subfield>
<subfield code="c">Delachaux et NiestlÃ©</subfield>
<subfield code="d">cop. 2000</subfield>
<subfield code="e">impr. en Espagne</subfield>
</datafield>
<datafield tag="215" ind1=" " ind2=" ">
<subfield code="a">287 p.</subfield>
<subfield code="c">ill. en coul., couv. ill. en coul.</subfield>
<subfield code="d">20 cm</subfield>
</datafield>
......
<idzebra>
<size>4725</size>
```

```
<localnumber>2</localnumber>
<filename>/tmp/nw10BJv9Pk/upd_biblio/exported_records</filename>
</idzebra>
</record>
</zs:recordData>
<zs:recordPosition>1</zs:recordPosition>
</zs:record>
</zs:records>
</zs:searchRetrieveResponse>
```

Appendix M. GNU General Public License version 3

Version 3, 29 June 2007

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