
Koha

A Newbie's Guide

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Table of Contents

1. Audience	2
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2. Stuff you've got	3
2.1. Got Koha	3
2.2. Got stuff to catalogue	3
3. What Now?	3
4. Adding a New Branch	4
5. Book Funds	4
6. Currencies	4
7. Item Types	4
7.1. Adding Item Types	5
8. Borrower Categories	6
8.1. Add Category	7
9. Charges	8
10. Authorised Values	8
11. Thesaurus	9
12. MARC tag structure and Links Koha - MARC DB	10
13. Links Koha - MARC DB	10
13.1. Edit subfields page	12
14. MARC Check	12
15. Printers	13
16. Stop Words	13
17. Z39.50 Servers	13
18. System Preferences	13
19. Tools	16
19.1. MARC biblio export	16
19.2. Upload MARC records in Breeding Farm	16
20. Catalogue Search	17
20.1. Biblio Search Results	17
21. Adding a Patron	19
22. The Detailed Borrower Record Screen	20
22.1. Add Child	20
22.2. Modify	21
22.3. Delete	21
22.4. Change Password	21
22.5. Modify User Flags	21
23. How to place a reserve	22

1. Audience

This guide is meant for people brand new to Koha. This guide is for people that aren't on any automated library system whatsoever. That's right kiddies, it's for folks that covet stamper, card catalogue, and typewriter. We are old school. You might be a small rural public librarian like me, or you might be someone that has a big private collection that you want to keep tabs on.

Koha basically has three big parts – a mysterious Linux part, an Intranet, and an online catalogue. When you first get Koha, the Intranet part is lime green, and the online catalogue or OPAC is teal. You want to read this if you're going to be dealing with the Intranet part. The Intranet part is the part that lets you mess with the stuff that people see on the online catalogue. There's a lot to the Intranet, but it's not as mysterious to me as the Linux part of Koha.

Koha is friendly enough to deal with if you are not a techie. Honest. My fiance was kind enough to set me up on version 2.0.3r. After I selected all of my server's parts, I gave him a box of stuff which only ran me about \$700, and he turned it in to a server. After that, he stuck Debian Linux on it, Apache, and of course Koha. Since then, he's only needed to upgrade us to Koha 2.0, which went swimmingly, and took only about 5 minutes. So, you can convince the local tech guru to set this up for you in a couple of hours for the initial installation of Koha, Apache, and Debian Linux. Then you'll need to call on them every now and then to run a rebuild of your records (which is not scary or terribly time consuming) or an upgrade. If you can get them to volunteer here and there, you're set.

I'm at a small rural public library, so I can't afford to give money to the developers right now. Hopefully when I'm fully migrated, I'll be able to divert a little money to the project so that all may benefit. If you do have the money to spend, Koha is very valuable, and all of the developers are working hard. I can offer my thanks to all involved in my project, as well as a huge amount of gratitude. This manual is my way of helping, because I can't do much else. A hearty thanks to all of you developers. You are truly helping to make a difference in my small town of 1,872. A thanks in particular to Stephen Hedges who has put up with more than his fair share of pestering from me.

I've only been messing around with Koha for a couple of months. I've found in computer science there is generally more than one way to do things. My degree is in Library Science, though and not computer science. Also, I'm not yet circulating on Koha, so there are things I'm guessing at. I'll tell you when I don't know for sure.

Unfortunately for you, there's a good chance I might be doing things the slow and stupid way. I know that what I've been doing works, but if you know a better way, please share it. In my dreams, this is a wiki where everyone can edit as things progress.

2. Stuff you've got

2.1. Got Koha

I'm operating on the presumption that you have a computer with Koha installed on it. It doesn't matter whether you got someone else to do that for you, or whether you did it yourself. If you did do it yourself, give yourself a pat on the back.

2.2. Got stuff to catalogue

This is the stuff that physically comprises your library. It could be books, it could be records, it could be DVDs. Koha doesn't care what kind of materials you catalogue.

3. What Now?

If you're like me, you got all excited about having Koha, and you want to start adding stuff to the catalogue as soon as possible.

Luckily for us, Stephen Hedges of Nelsonville Public Library has written a migration guide. His guide is meant for people who have databases already. Since you don't, you're stuck with me. I would advise you to read his stuff, as well as the Koha manual. I know it's a lot of reading, and you might not understand a lot of it, but maybe some of it will stick.

From the lime green Intranet screen, pick *Parameters* by clicking once on it, which is the next to the last option on the screen. Put on your thinking cap, remember the good ole days of library school. If you didn't go to library school, don't despair. It's still possible to deal with Koha.

Important

A little time spent on this step will save A LOT of time later. So think first. Hard.

After picking parameters, you'll notice that Koha tells you

Fill these tables in the order they appear to get a working Koha

Let that sink in. Okay.

4. Adding a New Branch

Your first step is *Library Branches*. Click on it.

Now click on *Add New Branch*.

If you only have one branch like me, this is a cake walk. Just like if you are doing your collection at home, or just one collection of something, you'll only need one branch. If you expand later, I'm pretty sure Koha can deal with adding a new branch later on.

Enter a short branch code. I'm pretty sure Koha will only take 4 characters here. It doesn't really matter. I entered "MAIN" for my library.

Name is the name of your library. I entered "Hinsdale Public Library."

For *Address* I entered the street and mailing address for my library.

Fill in your *Phone*, *Fax*, and *Email* and you're all set.

If stuff changes, or you mess up, you can click *Edit* on this screen, and you'll be able to put your new information in.

5. Book Funds

As far as I can tell, you don't actually need to do anything for this. It is a neat feature if you want to keep track of your budget, but I'm not actually using it to its full capacity yet.

If you want to add your stuff, click on *Add Bookfund*. I entered "MAIN" for bookfund, and "Hinsdale Public Library" for Name.

Now your new fund will appear in the Book Funds screen, in the form of a light yellow bar and a lime green one. Click on the piece of paper with a plus sign to tell Koha a little more about your budget.

Koha wants a start date, end date, and a budget amount. Note that Koha wants the European date format of Day, Month, Year, so 15th August 2004 would be 15/08/2004.

6. Currencies

As far as I can tell, you don't actually need to do anything for this either, UNLESS you just did your book fund.

If you want click *Currencies*, then *Add currency*. Mine is set to US DOLLARS at a rate of 1. If you need more than 1 currency, enter the rate, calculated from your "main" currency.

Example 1. Currency rates:

EUR = 1 and USD = 1.20 (or USD = 1 and EUR = 1/1.20 if you're in USA)

7. Item Types

This is super dooper important. Really. But don't panic. I'm not sure how many item types that the database can handle, but I got all of mine in without busting anything. I've got 28 item types, but I can only see the first 20 on the Item Types screen. Don't worry, the other 8 are in there. If you go to the OPAC,

and click on the recent acquisitions drop down menu, you'll see all of your item types.

So, what the heck are item types, anyway?

Well, I like to have an item type for each sort of thing that has it's own shelving location in my library. You might need more or less than the 28 that I have. The first 20 of my item types are:

Adult Audio Book Fiction, Adult Audio Book Non Fiction, Adult Audio Book on CD Fiction, Adult Audio Book on CD Non Fiction, Adult Fiction, Adult Magazine, Adult Non Fiction, Board Book, Caldecott Award Book, Comic Book, Musical CD, DVD, Kid's Easy Reader, Graphic Novel, Kid's Audio Book Fiction, Kid's Audio Non Fiction, Kid's CD, Kid's Fiction, Kid's Magazine, Kid's Non Fiction (Interfiled with Adult).

7.1. Adding Item Types

From the Item Type Admin page, click on *Add Item Type*.

Make up to a 4 letter code for your item. For example, the code for "Adult Audio Book Fiction" in my library is "AAF". You won't really see this code anywhere else again, it's just there for the computer to mess with.

What you and patrons **will** see is the description. When I listed the first group of my item types, those were all descriptions. A good description gives the patron and the staff a general idea of where the item is found and what the item is. This is NOT where your Dewey goes or where the precise location goes. It's just general.

It's crucial that you get your item types straight, because if you decide that you really wanted things to be different later on, you're going to have to change the individual MARC records for all that junk.

If your library genrifies fiction, you need to create a new item type for each genre. I.E. an Adventure item type for adventure books, a mystery item type for mystery books.

I don't have a separate item type for paperback and hardcover, but you might want one if you store them in different places.

Don't panic if you accidentally forget something. I forgot my DVDs when I first set up the item types. Since we don't have an old database, it's not a big deal. All you have to do is add the new item type, and you're set. Just like if you decide to start collecting something new, like music, at your library you can go back and add an item type for music.

If this is not totally clear to you, keep struggling with it until it is. It is super dooper important. If you've got questions about it, feel free to email me at <mhelman (at) illinoisalumni.org>, and I'll try to make you understand it.

7.1.1. Not for loan

This is essentially your "building use only" box.

I don't use not for loan, because we don't have much that doesn't circulate at my library. The stuff at my library that doesn't circulate is local history, so I didn't want to ruin the old maps and books by barcoding them.

You would check or tick off this box if you had a collection, like reference, that you wanted to keep track of, but you didn't want to let leave your building.

7.1.2. Loan Length

This is how long your checks out. At my library, I have kept things very simple and all of our items check out for 2 weeks. So I put 14 for 14 days in this slot.

If you ticked the *Not for loan* box, the loan length box is useless to you, so don't put anything in it, because you don't want the item to check out. I think Koha will just ignore you if you put something in here and the item is non circulating.

7.1.3. Renewals

If you check or tick this box off, you let your lucky patrons renew whatever item type you are working on. For instance, to let my Adult Fiction have a renewal period, I ticked off the box. I think that Koha will renew your item for the amount of days that you put in the loan length box. If this is wrong, please let me know.

Because you're setting an item type up for each type of material you circulate, I believe that you can choose to let items be renewed or no for each item type. So, theoretically, you could disallow users from renewing their magazines, but allow them to renew their fiction. My library just does the same loan period on everything, so if this view of renewal in Koha is wrong, please let me know.

Note that this is just a box. In my dreams, I'd be able to fill in how many renewals I wanted. But alas, it is not to be in this version. Seeing as how I didn't pay for the software, I am not going to push my luck with the kind and generous developers.

You can actually set the renewals to however many you want. This involves a call to your local techie. I don't have a fig as to the specifics of this, and I'm just rehashing what I read in Stephen Hedges' *Migrating to Koha*. You need to tell your techie to change the `renewalsallowed` field in the Koha MySQL database to whatever number you need for a given item.

7.1.4. Rental charge

I believe that rental charge is where you would assign a fee if you want to rent your patrons stuff. Some libraries charge money to rent a video instead of just lending it out. If this is the case for materials in your library, I believe that you would put that fee in this box.

I DON'T believe that you mess around with this box if you want to charge an overdue fee on an item. I'm pretty sure that that gets assigned in the in the charges section. Again, I'm not sure because I haven't started actually circulating on Koha.

7.1.5. Click OK

After all that work, it would stink to not save it. So make sure you click *OK* to save the changes after you've puzzled it all out.

8. Borrower Categories

To the database, there are types of people as well as types of items. To have you better understand what impact the borrower types have, I'll go through what I put into borrower categories in Koha. Just as defining item types was super dooper important, so is defining your borrower categories.

For now, I've set up 5 borrower categories. They are: Adult, Youth, Trustee, Staff, and Non Resident Borrower.

I didn't want to lump in Non Residents with the rest of these fine folks because in Massachusetts, we get funding to offset non resident borrowing. You also might later want to know how many residents of your town use your library. You might want to charge an annual fee for non residents. Having a separate

category lets you do all of that.

I didn't want to charge my trustees, my staff, or my library kids fines. I also wanted my staff to know when they were waiting on a trustee. So there's the rationale behind those categories.

Notice that I didn't set up male / female categories. You'll see that option when you go to actually add a borrower, which happens later.

Again, it's crucial to understand how this works, or you'll have a big headache later. You can always change things, but you have a choice between assigning a category now, or changing a bajillion patron records later. So if you still don't get it, feel free to email me at <mhelman (at) illinoisalumni.org>.

8.1. Add Category

Click on *Add category* on the Category admin page when you're ready to start.

8.1.1. Category code

This field will only take 2 characters. Don't panic. I don't think you really see this field much later. I believe it's primarily around so that the database can manipulate things. It's the description field that will show later on. I just used A,Y,T,S, and N for my borrower codes.

8.1.2. Enrollment period

This is the number of years that the person's record will last. Suppose you wanted to charge non residents an annual fee. When you set up a non resident record, you would set this slot to 1 and the enrollment fee to whatever you wanted to charge. I set mine stupidly high so that I wouldn't have to re-enter records annually.

8.1.3. Upperage limit

This is what tells Koha the maximum age someone can be for a given category. This is what you would mess with if you want a separate category for children. I set mine for my children's category to 18. I'm not sure what happens once a kid turns 18, I'm assuming Koha will produce an error, and that I will need switch them to the Adult Borrower code.

8.1.4. Age Required

This is what tells Koha the minimum age someone can be for a given category. For my Adults, I set this to 18.

8.1.5. Enrollment fee

This would be what you charge people to use your library patrons per annum. Originally, it was hard-coded at \$30 a year, which you can't change. However, if you set this to 0 to not charge your patrons, it will say \$30 a year / Paid in the Members screen, so don't worry.

8.1.6. Overdue notice required

This is a yes or no dropdown menu. I'm not precisely certain, but I suppose it helps keep track of overdues for a borrower category. It's used when creating overdue reports.

8.1.7. Issue limit

I believe this is the amount of stuff that a patron's allowed to check out. I set mine to 99, thankful that I don't have patrons that want more than that. I once had a patron who would sign out in excess of 300 items. All of them came back in great shape, on time, every time. So, I would suggest another digit on this box, especially if we want to draw in regional libraries that lend to other libraries.

8.1.8. Reserve fee

I'm jumping to the wild conclusion that this is the amount you wish to charge a patron for placing a hold. We don't charge, so I set it to 0.

9. Charges

Ka-ching! These are your fines.

Since you've been dutifully setting your database up in order, you already did your borrower types. If you've been naughty, you need to set your borrower categories before doing this table, or bad things will happen. Of course, if you decide to add a new category later, you need to come back here and edit your fines if applicable.

You also need to set up your item types before messing with this. Again, you can always change things later if you need to add something new.

You probably are looking at a whole bunch of

0,,

The tables look scary, but they really aren't. The numbers I have in the Non Resident and Adult columns are

0.1,1,1

Of course decimals are okay. For ppl using , as decimal separator (like in France), please use the "." here anyway. The , is to separate the 3 numbers.

If they are okay, what this does is charge 10 cents a day, after one day of grace, every day.

Suppose you don't want to charge fines on children's books. Since you're clever, you've made an item type (possibly several) for your children's books. Look at the item type you made for children's books on the left of the table. Going horizontally across the table, KEEP the default of 0,,. Suppose you want to charge a buck a day for late videos after one day of grace. No problem, go to the video item type and type

1, 1, 1

Got it? Having the fines linked to both borrower type and item type allows a library to charge a certain type of borrower for a certain type of item, but not necessarily a different type of borrower for the same type of item. Or one can charge for a certain item type regardless of the sort of borrower. There are lots of possibilities here.

Remember to hit the *OK* button at the bottom centre of the page or stuff won't save.

10. Authorised Values

When you define the MARC tag structure you can select how the subfield is managed. If you enter noth-

ing, then the subfield is free. If you choose a category of authorized_value, then a list will be shown and you can only choose a value in the list.

Sample : the language of the document. A table exists, defined by the LoC (and used even in french UNIMARC ;-)).

The table says :

ang	old english
eng	english
fre	french
fra	old french
ger	german

So, enter those values in a authorized values list (say : category LANG), and set langages subfield to "LANG".

The 3 digit being the "code" and the complete "text" being "english" or "french"...

Now, you have a list for the languages.

Better : If you set subfield to "mandatory", no empty value is possible.

If you set subfield to "non mandatory", an empty value is automatically added and is the default one.

Still better : The list is ordered by "text" in the MARC editor.

You want to have by default, say "eng" ?

Ok, you must know that the space is "lower" than any letter.

so, put " english" as text instead of "english" (notice the space at the beginning), and... eng / english is now the default value.

quite nice isn't it ?

11. Thesaurus

Thesaurus/ authority file is used in 2 ways :

- manage authorised & rejected forms for the same concept.
- manage hierarchy of the data.

Like in authorised values, thesaurus is used in MARC editor. If you choose a thesaurus category in for a subfield, then a popup will open when you click on the ... facing the subfield.

You can search in the thesaurus for a given value, go up & down, add a value if you don't find whatever you need.

You can also define rejected values. If you search & select a rejected value, the authorised value will be put instead.

Example 2. Thesaurus values :

“Writer -- French -- Emile Ajar” is a rejected form of

“Writer -- French -- Romain Gary”

If you search "Ajar", you will find it. If you select it, "Romain Gary" will appear magically.

Note that in 2.0, Koha doesn't handle MARC management of a thesaurus/authority. So no "see also" or "related values". It will be improved in 2.2.

12. MARC tag structure and Links Koha - MARC DB work together

This is super duper important. This jobby works with Links Koha - MARC DB. Stephen Hedges wrote exhaustively on both of these in his work *Migrating to Koha*.

Read this section and his until you understand what is going on here, it's just that important. If you don't quite get it email me at <mhelman (at) illinoisalumni.org> and I will try to walk you through it.

I would highly advise talking to a librarian who is a cataloguer if you are not one prior to editing this part of the database. You need to really think back to library school and try and understand all of these tags.

When you get Koha, it comes with all of the MARC tags. That's a heap. Chances are you will not be using ALL of the MARC tags. However, I would advise against deleting any of these tags. You might not use them now, but you might want to use them later. Also, they do not take up that much space. Compared with the hassle you would face through accidentally deleting something important, I would opt to keep them all. There are panels of evil geniuses that decide which MARC tags to include in the LIS field, they are the uber cataloguers. Try not to defy them and ruin standards by adding whacky fields or deleting necessary ones.

You will not *see* all of the MARC tags on the first screen. You will only see the tags beginning with 0. It is possible to wade through the MARC waters by typing the number of the tag you wish to edit. For instance, if I type just 1 into the box and hit enter, the screen will bring up results for the hundred fields. Since there aren't that many, it also brings up some 2xxs and 3xxs.

Your 1xx field is where the Author goes. Needless to say, this is an important field so it ought to be linked to something. For right now, Koha cheats and kind of looks over at the MARC record, but doesn't really use it to its full potential. What this means to you is that you need to go back to the parameters screen and pick --

13. Links Koha - MARC DB

The first screen will bring up the links to the biblio table. Notice that the second heading is for author. My screen shows a link between author and Tag 100a. This means that when someone searches using the OPAC and tries an author search, Koha will send the search over to the 100a tag. If there is nothing in that tag, nothing will be found under an author search.

This could be a very big deal indeed if you are predominantly a music or video library. You might even wish to change this link to 700a. I'm not certain that Koha can handle more than one entry in the 700a

field, which happens often.

Now, there is an `additionalauthors` table in Koha under the Links Koha - MARC DB screen. You get there by pulling down the menu underneath the MARC links heading. You will see another author heading on the left, but this time, you can edit it so that it is linked to 700a.

You can do this by clicking on the folder icon on the right.

You will now see a page with a bunch of pull down menus. Don't panic. These more or less correspond to each major MARC field. The 7xxs live in the 8th pull down menu. Selecting 700 a - Personal name from the 8th menu and then clicking on the OK button next to that pull down menu will link the additional author table to that field of the MARC record.

Don't be scared to explore the pull downs in order to figure out wher tags are kept. Nothing will change until you hit ok at the right of the pull down.

You can only pick one tag at a time.

To clear your selections, click the *HERE* button.

Now, since you changed things, you need to run `misc/rebuildnonmarc.pl` script. This is located in the mysterious Linux part of Koha. If you don't know how to do this, ask your administrator or friendly volunteer. The actual command takes two seconds to type in, but it goes through all of the bibliographic records you have and converts them to the new set up, so if you are changing something after you inputed thousands of records, it could take a little while. With my server, I have had to run this a few times when I've changed my mind. It took my server just a couple of minutes, but if you have different hardware, it could take longer.

You also need to be sure to run the MARC check after changing things. Luckily for us, the MARC check is so easy even I can use it. You just click on MARC check from the parameters screen and it will check for errors. If it doesn't find anything, it tells you that you're OK and that's that.

I have yet to have it find an error for me, so I can't yet give you advice on what to do then.

Now you need to revisit the MARC tag structure link so you can set things up the way you want. Continuing on our quest to mess around with the author tag, type **1** into the text box under MARC tag structure admin and hit enter on your keyboard.

Pick the first heading for

100 MAIN ENTRY -- PERSONAL NAME

by clicking on the blue *subfields* link. This will take you deeper into the dark underbelly of the cataloguer's world. This is the stuff that Library School nightmares are made of. After looking at these tables, I would advise you not to swim or eat for at least a half hour.

In the very first column we've got the corresponding MARC subfield. When you make a MARC record from scratch as a cataloguer, this column is the subfield delimiter, or the stuff you put after the \$ signs (or whatever special character) in the MARC record. So for cataloguing this page we'd have a heading of

100 1_ \$a Helman, M. Brooke.

In our table we see that subfield a is in fact the Personal name field. The Koha field shows a link to `biblio.author`, which means that Koha is filing this subfield data under author, which is good. Then you have the standard cataloguing rules that tell us that it's non repeatable and non mandatory.

Next is the mysterious tab field. You'll note that a lot of these are set to -1. It's time to ponder which tags

you will never really use in cataloguing. The tags you decide to neglect at your library should remain set to -1, that way you don't see them when you add a record to the catalogue.

Obviously, you will want to see the author tag. So we will click on the little folder at the lower left of the subfields page. Which will bring up the --

13.1. Edit subfields page

Holy drop down menus, Batman! Hang in there, you will not need to see any of these pages with a great degree of frequency after the first couple of days. Again we see that the first column on the left corresponds to the piece of the MARC record we are working on. Which is still 100a if you haven't been paying attention. It says "Personal name" next to it. It has Koha field `biblio.author` assigned to it. We're doing great!

Then once again, there is the appearance of the mysterious tag field. Remember all of those -1s on the previous page? When you get to the edit subfields page, the drop down menus for all of those -1s read "ignore". My drop down menu tab for 100a is set to 2.

What this corresponds to is when I:

- go all the way back to the very first lime green Intranet page
- select *Catalogue search* from the top
- select *Add biblio* from the navigation bar at the top middle of the page
- and then find a title for a record that is in the breeding farm
- and click *okay* a lime green bar will appear that reads "MARC biblio: "

Underneath that bar there is a bunch of numbers. If I

- select 2 by clicking on the blue 2

Viola! I will see our friendly neighbourhood 100a field.

Now that was a lot of steps to go through. However, you practically only need to do this the first few days you have Koha as you decide which fields you want to see first when you edit or add a bibliographic record.

You need to repeat this process for every subfield you wish to be able to edit. It is tedious, but worth it. This lets you pick exactly what fields you would like and in what order you wish them to appear. You can always go back later and change these tabs if you decide you want to edit a field. However, if you think things through first, you will save yourself from a lot of retroactive cataloguing.

I strongly suggest you review your cataloguing, because there are a lot of new neat features to MARC, such as the 856u field. I am a big fan of using this field in Koha. It shows up in the Koha OPAC as a link to a URL which your patrons can click on right from a book's catalogue record. Quite often it's a link to a summary of the book.

This is the hardest thing to figure out after you install Koha. So, if you get used to this part, it's all down hill. :)

14. MARC Check

Run this check after messing around with your MARC tag structure and your Database Links. I've never gotten an error, so I wouldn't know how to reverse one if I had one.

All you have to do to run this check is click on the *MARC Check* link on the Parameters screen.

If it does find an error, I would stop whatever you're doing and ask for help on the Mailing List.

15. Printers

This is where you set up printers. I'm not going to do that, so I'd appreciate someone filling information in about how to do that.

16. Stop Words

Stop words are ignored during searches. I'm still a novice, so I haven't messed around with adding stop words yet. So currently, if I click on *Stop words* it takes me to the "Stop words admin" page. Out of the box, Koha has "THE" as a stop word. You might want to add "A" "AN" or other stop words to clean up your searches, but I didn't mess with this yet.

17. Z39.50 Servers

Edit me, please.

This part is going to be important for people that are migrating. There are also a lot of tricks to getting it to work correctly. Check the mailing list for this topic, as there's information about the daemon and more about getting this part running.

Right now, if I click this link, it shows me the Library of Congress server. If I click on the folder for that server at the right, I can edit it.

- The first part is its name.
- The second field is the hostname, or place in the internet that you can find it. In this case, it's "z3950.loc.gov"
- The port is "7090"
- The database is "voyager"
- Nothing is set in Userid or Password

I believe that checked and rank relate to the order in which Koha will handle them, so if you like the results from a given server, make this number low like 1 or 2.

The syntax is your MARC syntax. What flavour are the rest of your records? Are they MARC21 or UNIMARC? Pick whichever they are from this drop down menu.

18. System Preferences

This is a lot of miscellaneous stuff that you'll want to take a look at. After clicking on *System preferences* you'll get the "System preferences admin" page.

You'll see three columns : Variable, Value and Explanation. Here are what the first two are set to in my

system.

Variable	Value	[author's comments]
acquisitions	normal	
authority sep	--	
autoBarcode	0	I didn't want Koha to come up with a Barcode - I already had barcodes, so I obviously wanted the database to match what was on my books
autoMemberNum	0	Again, I didn't want Koha to generate stuff for me. I work in a small town where everyone was assigned a number, which they remember and use to check out materials. They also use their numbers to check the cards in the books to see if they've read a given book. When I first got to the Library, I started to scratch these out because of privacy concerns, but my patrons yelled at me, because they couldn't figure out what they read anymore. So this was a big plus to having Koha - they wouldn't need a new long barcode number.
checkdigit	none	
dateformat	metric	This means my date is day month year instead of month day year or even ISO which is year month day.
gist	0.125	
insecure	no	This one's important. I'm pretty sure if you set this to "Yes" other folks can mess with your administrative stuff without needing a password. That means nice people like Paul can fix stuff, but it means evil folks can do bad stuff. You might as well just have a password. It's not hard. To have the secure no value, click on this, and make sure the value is set to 0.
kohaadminemailaddress	mhelman@illinoisalumni.org	Go ahead and write me ;)
Library Name	Hinsdale Public Library Koha Free Software Koha : a gift, a contribution in Maori	This one's neat. If you mess with this value, it will show up on the first OPAC screen right above the little wave. It obeys HTML, so if I click on the edit folder to the right of this field, I actually have " Hinsdale Public Library

		<i>Koha Free Software Koha : a gift, a contribution in Maori</i>” as the value. As always, click OK to save your changes.
marc	yes	I would set this to yes even if you aren't terribly sure how to catalogue with MARC. Later, I'll go through how someone would add a basic record in MARC.
marcflavour	MARC21	This is the MARC that serves me best in the States.
maxoutstanding	99	If you don't want your patrons to be able to place reserves if they already have 5 books out, you would set this to 5. I don't care how many books my patrons have out, so I set this to 99. I wish there were one more digit to this number. It's not common to have more than 100 items out, but it does happen. What hasn't happened to me is a situation that would warrant more than 999 books out to one person or agency.
maxreserves	5	This is the number of requests someone can make. I arbitrarily set it to 5, because I think that it's fair.
noissuescharge	99	I believe that this is what you would change to limit patrons to a certain number of materials at a time. I'm open with my policies, but it would be very useful to other people to have this tied to the item type and borrowers tables. That way, a library could limit a patron to as many books as a patron wanted, but have a limit to DVDs. Alternatively, adults would be able to check out as much as they wanted, but kids could be limited to 10 items at a time. I wouldn't limit kids, but there are some people out there that would want that.
opaclanguages	en	This sets my OPAC to English.
opacthemes	default	You can change your OPAC theme. There is information on how to do that on the mailing list archive, but since that deals predominantly with the mysterious Linux part, I don't know how to mess with mine.

template	default	I just left this alone, too.
timeout	1200	This is the time in seconds until you get that annoying "Your session expired, log back in" type of message. You don't want to set this so high that someone else can mess with the database while you're off doing something else BUT you don't want it so short that you have to relogin every time something distracts you.

Give yourself a big pat on the back! You're done all of the setup stuff you need to do in order to do actual work with Koha. :) On to tools!

19. Tools

19.1. MARC biblio export

Click on this to get a rough backup of your bibliographic records OR get an export you can send to a friend. I use it to backup my records by clicking on *MARC biblio export* and then NOT filling anything in, so that ALL of my records are saved to a file. Clicking export will download all of your records to whatever path you have as a download default if you're using a Mac. If you're on a Windows machine, a download window will pop up. You then select a folder you want, and Koha will put a file called `marc.pl` there. I believe that the location ends up showing in these records, so they aren't precisely clean.

If you want to send just a record or two, you need to adjust the range to reflect what records you want to export.

Exporting copies information OUT of the database and assigns it to a file - Importing puts information FROM a file INTO the database.

19.2. Upload MARC records in Breeding Farm

You will see this option a lot, so get used to it. After you've found your wily MARC record, click on *Upload MARC records in Breeding Farm* to actually get it into the Koha breeding farm. The breeding farm is a pool of records that you've uploaded into Koha in order to link those records to materials that you own. There are two big steps to adding a record to your catalogue. This is step one. I'll go into this more in the next section Adding an Actual Item to Koha.

You need to remember where you've stored your MARC record on your computer. Then hit *Choose File* to browse for your file. Click on it when you find it, and that will take you back to this screen, and there will be a path to the file displayed.

You can name your record. This is useful if you have a paperback ISBN and a hardcover, or two files for the same item, or if you want to be anal retentive. I don't name my files most of the time, so feel free to leave this blank.

Next, select your flavour of MARC. Make sure this is consistent with the other times Koha asked this.

Finally, there are 2 radio buttons. These relate to what will happen if Koha finds an item with the same ISBN in the breeding farm. Usually, I keep this set to "Ignore this one, keep the existing one." That way, if I try to import the same record, Koha doesn't add another breeding record to the pool. Sometimes, I set the radio button to "Overwrite the existing one with this."

Sometimes when I go to link the actual MARC record, I notice that it is missing fields, or an Audiobook record that I fetched is digital instead of analogue, et cetera. So I go back, find a new MARC record that is better suited to the item I have in my Library, and then select this option to overwrite the old record.

Koha can only import one file at a time. It is possible to save multiple MARC records in a single file.

When you click *Import*, you will see a screen that confirms that a certain number of records were imported into the breeding farm. This is where it will tell you if something is already in Koha.

I've noticed that when you use III Innopac records, you get an extra record for your breeding farm. So if you saved 6 records in your search, Koha will think that there are 7. I believe that this is because III adds a proprietary junk record to your saved search. Otherwise, it's nothing to worry about.

20. Catalogue Search

Now that you've got a MARC record or two in your breeding pool, it's time to link them to the actual book so that your barcode will be attached to the book, and the computer will know which branch it's at, et cetera.

To start the linking process start at the lime green Intranet page, and choose *Catalogue Search* by clicking on the top purple option. This will take you to a scary looking MARC search page. I almost never use that search. Instead, click on the *Add Biblio* option at the top of the page under Reports. This will sneakily highlight the Acquisitions bar at the top of the screen, but don't sweat it.

In order to find your record, you either need to know the Title or the ISBN. I hope that in future there will be an author option.

There are a few things to keep in mind:

- If your title starts with A, An, The or any other little word, you NEED to type that part in. This is NOT true once the record is fully linked, but it is so for this search. So, if you want to link *_The Firm_* by John Grisham, you need to type "The Firm" -- plain old "Firm" won't cut it.
- If you have a barcode scanner, you can cut out a lot of typing by using the ISBN text box. Keep in mind that oftentimes the ISBN barcode is NOT the ISBN. This is not a Koha issue, it's a barcode thing. There's generally a 978 before the ISBN, and the last digit is often different from the last digit of the ISBN. On DVDs, sometimes the barcode is **nothing** like the ISBN. Even with all of this stuff, it is faster to do things this way than it is to do all the number typing.

Continuing with our Grisham theme, I will type "The Firm" into the title text box, and click on *Go*.

20.1. Biblio Search Results

You now get a new screen that shows the results you get. There are two different flavours of result:

- Biblios in Koha

Biblios in Koha are things that are already fully linked and in your database. For now, we aren't bothering with those, and you shouldn't have any in your database yet. The other flavour is

- Biblios in breeding farm

These are all of your wily MARC records that you've been slaving over. There might be just one to select, or in the case that you've gotten an audiobook, a video, and a regular book all of the same

title, there will be multiple records. I am automating my collection in an order of sorts. I started with all of fiction. I moved to audiobooks. So I know that an audiobook breeding record came AFTER a regular book breeding record. So, if there are multiple records in the breeding farm for `_The Firm_` I can move my mouse arrow over the *Add Biblio* link and hold it there. A URL will appear in the lower left gray bar of my browser that ends in a number. That number is the number of the record in the breeding farm. One of my breeding ids for `_The Firm_` is 1117 and the other is 2745. 2745 is listed on the biblios in breeding farm list BEFORE 1117. I know that 2745 is my audiobook and 1117 is my regular book.

Even if I didn't know all of this stuff, it doesn't matter. I could always click on *Add Biblio* which will bring up the **MARC biblio** screen.

There's stuff in the MARC record that will give me a clue as to whether it is a book or not. Remember all of those tabs that you dealt with in the Edit Subfields section of the MARC tag structure admin page? Well, this is payoff time. I select the tab that I assigned to 300a the Physical Description, by clicking on the 6 at the top of my MARC biblio screen. (Your 300a field might be on tab 3 like a normal person would have it. You can always click through until you see where you kept it. If you don't find it, go back to MARC tage structure and make sure you don't have it set to "ignore". You didn't delete it, did you?)

300a tells me the extent, which in the case of this audio is 2 sound cassettes. This field will be a giveaway as to what sort of item type the record belongs to.

Speaking of item type, there are a couple of important fields involved so that Koha will display the right type in the OPAC. The field that will change the listing for Item Type in my OPAC is 300f. So I definitely want to use the drop down menu on this field so that I select the Item Type so that my staff and my patrons will find the item.

After you've gone through all of the tabs at the top, which are numbered 0-9, and you've changed all of the stuff you want to change, hit *Save* to save the record. If you don't click on *Save*, it won't save, and you'll go bald tearing out your hair. We don't want that.

Hitting save on a Mac running Safari seems to take a ridiculous amount of time. So, when I'm on the Mac, I use Internet Explorer. For some reason, this seems to run faster than Safari.

After you hit *Save*, you get a new screen. There's a section called **New Item** with a few drop down menus. If you have branches, you need to select the appropriate ownership for the book from the first two drop down menus. I don't have branches, so I make sure I select Hinsdale Public Library from both dropdowns. It would be sweet to have these already filled in for me. If you acquire a new branch (Hooray!) you can go back to the first option on the Parameters screen and type the information in.

See why it was important to do everything on the Parameters screen first?

The p field is where your barcode goes. You know what? You can use a barcode scanner in this field which will make your life a whole bunch easier! I got a Cue Cat barcode scanner on Ebay for about \$15, and it works fine with this field. When I'm at home, I cut and paste the first part of my barcodes. They begin 304540000 which I highlight, and then I hold down the Control button and C at the same time to copy it. Later, as long as I haven't copied something else, I can hold down Control and V to paste it. If you have a happy techy, they should be able to easily assign this to an unused function key like F7.

There is also a price field that you can fill in with a replacement cost. Theoretically, this information should be part of the MARC record.

The date accessioned can be filled out to include the date that you got the item. That could be useful to you for weeding materials.

I don't use the Not For Loan field because all of the stuff that will be in my catalogue will be for loan.

When you are all done editing these fields, click on *Add Item*. You'll see that the drop downs reset them-

selves, and you'll see your item under Existing Items now.

Suppose you were to enter a redundant barcode. Koha would catch this and yell at you for it. There would be a red error message at the bottom of the page that tells you the barcode exists. To change a barcode, you need to click on the little folder to the right of the barcode field under existing items. BUT you want your new item to have a barcode so that everything saves okay. You can always change the new fake barcode later. Generally, this problem won't happen at all with a barcode scanner and pre-fabbed barcodes.

Congratulations! You've got a new record in Koha. You'll need a record for everything in your library. This is like to take a long time. Just stick with it, and you'll get done.

21. Adding a Patron

Now that you know how to add a bibliographic record into Koha, we turn to living breathing people.

From the lime green intranet screen, mouse over *Members*. Select the *Add Member* option. This will cause the add member screen to appear.

The first text box to fill in is the Member number, Card Number box at the upper left. If your patron cards are barcoded, this is where you would scan in the barcode from the back of the patron's card. It is a very good idea to give all of your patrons unique numbers. My library is very simple and we just assign numbers in order of registration.

Notice that this field had a * next to it, meaning that it was mandatory to fill it out.

Now fill in the patron's personal information using the

- Given Names (First Name)
- Surname (Last Name)
- and perhaps the preferred name (Nickname) box.

The preferred name will not show up in the search listings or the issues screen for a patron. It will show up when one looks at the detailed member information screen, however.

Make sure that you use the male/female radio button.

The category pulldown menu is incredibly important! After working so hard at determining your patron types, be sure to use this pull down to make sure your borrowers are sorted by the computer into the categories that you want. For instance, in Massachusetts, I need to turn in statistics at the end of the year on Resident and Non Resident use as well as Adult and Youth tallies. If I didn't use the options on the pull down, my data would be flawed.

Continue filling out the Patron's address. The only two fields mandatory are:

- Postal Address; and
- Town.

BUT this is where you would add the patron's phone number and email address, both of which are very useful for reserves.

Alternate Contact Details is the section I use to add a spouse. You could also add a spouse under Given

names. If you want to add a child, there's a special button just for that, but you need to wait until the parent is fully added to use it.

Under *Library Use* there are two note fields, and it's critical to know the difference between them.

The Borrower message is what you use if there's something you want the borrower to see if they happen to log on to the Koha OPAC. Comments like "You accidentally left your glasses, please pick them up at circulation." would go here.

The Circulation message is something that you want your staff to see. For instance "Please request that patron return their extra late copy of Great Expectations" would be the type of thing that went here.

The sorting fields are new to me, and I think that they might help achieve some of the statistics I referred to earlier.

When you're all through this form, click the *Save* button at the bottom. This will take you to the detailed borrower record screen.

22. The Detailed Borrower Record Screen

This screen is very useful for a number of different reasons. Let's first discuss what it contains, and what its contents mean to you.

In the membership record box, you'll note the patron's name and address. Note that the Patron's Preferred name or Nickname is listed FIRST. This is great to know so that you don't accidentally call someone by the wrong name if they are at the desk. Their full name will be in parentheses.

The card number is the number that you, the Library, assign to a patron. This number is different from the number that Koha assigns a patron, which is listed under Membership number.

Phone, fax, email and all that good stuff are here, too.

Whether a patron is current on paying their annual fee is listed here, as well. My library does not charge any fees, so the default \$30/year paid is shown. Don't worry if you don't charge, you'll see this anyway.

The expiration of the card is next and the branch they signed up for a card at. This is followed by some more personal information.

Next come a number of important green buttons. They are labeled:

- Add Child;
- Modify;
- Delete;
- Change Password; and
- Modify User Flags.

These are all very, very useful and important.

22.1. Add Child

You would select this option by clicking on it if a patron wanted their child to use the same card, provided that your library allows that.

The window that results from this selection is much shorter than the average Add Member screen, but all of the options that are in the Add Child screen have previously been covered under Add Member. So nothing should be scary or new to you.

22.2. Modify

Modify is what you select if you accidentally spell someone's name wrong, or you need to change a person's phone number, email, et cetera. Modify allows you to change whatever personal data you want about a given patron. If you need to add or remove a note, modify is also what you need.

22.3. Delete

Suppose a member gets added twice, moves on, et cetera and you just don't need his or her data cluttering up your database anymore. You'd delete his or her record. Don't worry about hitting this selection by accident, because Koha will ask for confirmation before you really delete the record. However, ONCE YOU DELETE A RECORD, YOU CANNOT GET IT BACK AGAIN.

22.4. Change Password

Use this if a member forgets his or her password. Koha will generate a password for you, but you can feel free to change the gobbledygook that Koha generates. You can also change a member's username login from this screen. Both of these things are great features because you can let a user select something that they will remember but is unique to them.

22.5. Modify User Flags

It is critical that you understand how these permissions work so that users only have access to the parts of the database that you want them to have access to. Most of the time, you won't need to modify a patron's flags. This is especially true if they don't wish to use the catalogue at home to request books. The flags you can set are:

superlibrarian -- Access to all librarian functions

This is fine to give to your systems administrator. However, you probably don't want your patrons to have this much access. You might not even want to give this level of access to all of your staff. Think carefully before you let anyone have total access like this.

circulate -- Circulate books

This is the permission you give to your staff to let you circulate or issue books. If your staff are going to work the circulation desk, they will need permission to circulate books, and you should be sure to check the check box next to this option. Patrons shouldn't have this access level.

catalogue -- View Catalogue (Librarian Interface)

This lets you view the purple Catalogue screens. If you *don't* want someone cataloguing that oughtn't be, then make sure that this option is NOT checked. Obviously, people in technical services SHOULD have this option. Remember, this doesn't only let someone see the books in the catalogue, it lets them modify the records. If someone just wants to search the catalogue, the regular OPAC should suffice. This is not something that patrons should have access to.

parameters -- Set Koha system paramters

This is an option that I would think would only be suitable for your systems administrator. There's really no reason to have too many people on staff have this access. However, you will need to let a cataloguer have access to this as the Import in Reservoir option is part of parameters. This is definitely not a permission you want to allow to your patrons.

<i>borrowers</i> -- Add or modify borrowers	All staff who man your desks should have access to this option so that they can issue cards and edit borrower records. This is once again a patron no no.
<i>permissions</i> -- Set user permissions	This is the option that allows a user to allow other users access to parts of the database. Only systems administrators or people you really trust should have this level of access.
<i>reserveforothers</i> -- Reserve books for patrons	This is an option that your staff should have access to so that they may place holds for patrons. Suppose a patron is helping another patron who is home-bound. That would be a case where I could see granting this permission to a patron. A teacher could reserve books for kids that they teach. In general, though, it is an option I would reserve for staff.
<i>borrow</i> -- Borrow books	Everyone in good standing ought to have access to this feature. If you wanted to make it so that someone COULDN'T borrow, then you would revoke privileges by unchecking this box.
<i>reserveforself</i> -- Reserve books for self	Everyone in good standing again ought to enjoy this feature. I could see having it off if someone is abusive of holds or you reserve books on a fee system or perhaps you disallow reserves entirely.
<i>editcatalogue</i> -- Edit Catalogue (Modify bibliographic/holdings)	This is a permission your cataloguer should enjoy. You don't want your patrons to have this one, or you won't have your sanity too long.
<i>updatecharges</i> -- Update borrower charges	This allows a user to change how much money someone owes. I think that it might even allow them to mark an item returned, but I'm not certain.
<i>acquisition</i> -- Acquisition and/or suggestion management	Only your head of Acquisitions should have permission to do this.

23. How to place a reserve

From the Lime Green Intranet screen, select the Green *Member Search* option by clicking on it.

Use the text box OR the letters to pull up the borrower who would like to make a request.

Once you've arrived at that borrower, thier name will be in big bold text at the top of the page.

Scroll down the page using the scroll bar at the right of your browser.

Near the bottom on the left, there is a box that reads *Modify User Flags*. Select it by clicking on it.

A new screen will appear with all sorts of options. If you want patrons to be able to reserve books for themselves, check the box that has *Reserve books for self*. Note that right now, protections are such that things are all or nothing. What this means is that someone is given administrator rights to EVERYTHING even though they should only be able to do certain things. This is very crummy indeed, and a fix is in the works. So seriously think about whether your patrons will set their own holds, or you will do it for them. Of course, if it gets fixed, then this won't be the case any more.

You should not have to do that procedure more than once for each borrower.

Return to the Member page that has the big bold type name at the top of the screen. Scroll to the bottom. This time, select *Change Password* by clicking on it. This will bring up a screen with a username and password. Set the username to something the kid will remember, then set the password to something else the kid will remember. The password box will be filled with an automatically generated password. You can simply type over that, or hand it to the kid. HOWEVER, remember that UNIX is case sensitive, so if you use caps or the computer generates capitals, they have to be there.

Now, when you see the book that they want in the OPAC, you can reserve it, but you need to logon with the username and password you just created.

Well, you might not want to do things that way at all. You might want to make the patrons ask you for a reserve themselves. If you want to request things for the patron, you need to make sure that you are logged on as the admin. If not, remember how you got to the Modify User Flags screen, and modify the login to be able to make holds for other patrons. So make sure there's a check next to *Reserve for others*.

Go to the lime green intranet screen, and select the first purple option *Catalogue Search* by clicking on it. Select *Quick search*. Type in the title of the book you want. There will be a link labeled *Request* to the right of the title. Select it by clicking on it.

You will now see a screen that reads "Requesting" and the title.

Put the patron's number in the text box under Member Number and click *Request*.

Now suppose you had an audio book and a hardcover. You can request the hardcover by clicking the checkbox to the left of the item that corresponds to the hardcover and that would make Koha get only the hardcover.

Remember, feel free to nag me. :)