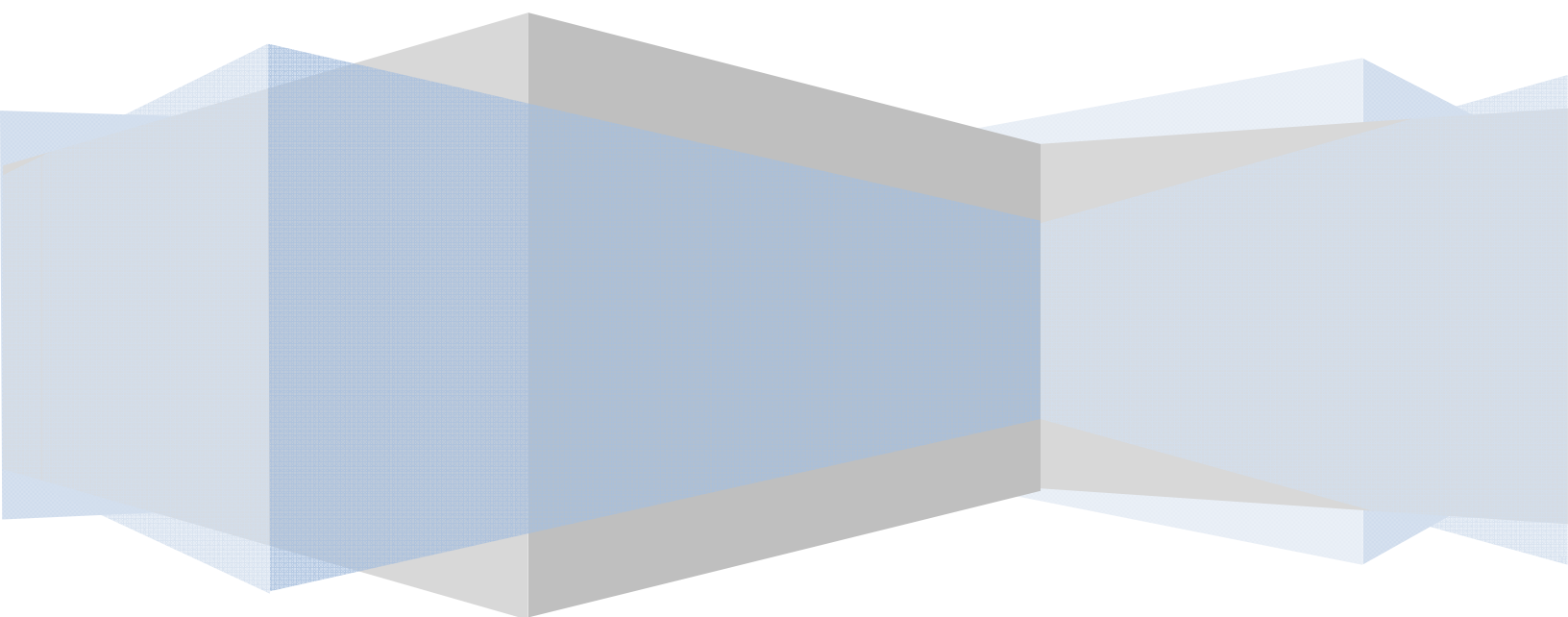


KOHA Manual

LIS 7435

Created by the Winter 2010 class



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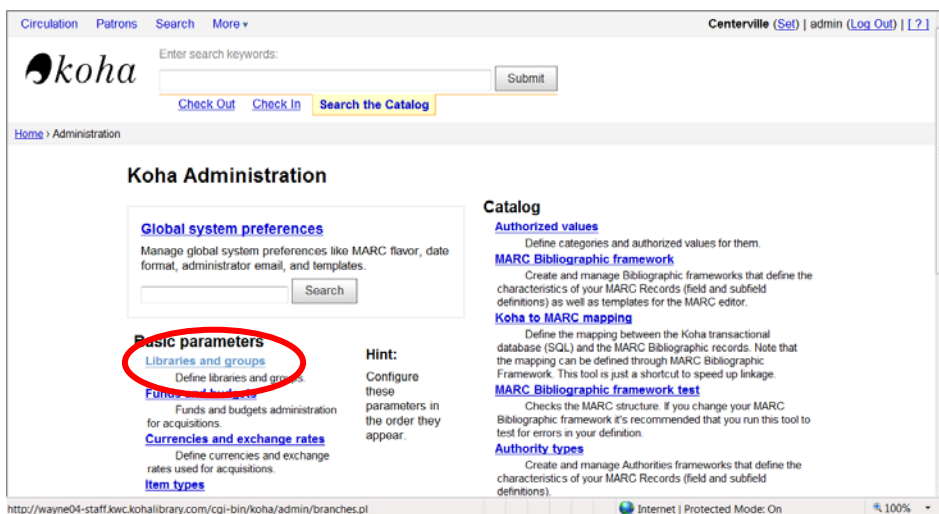
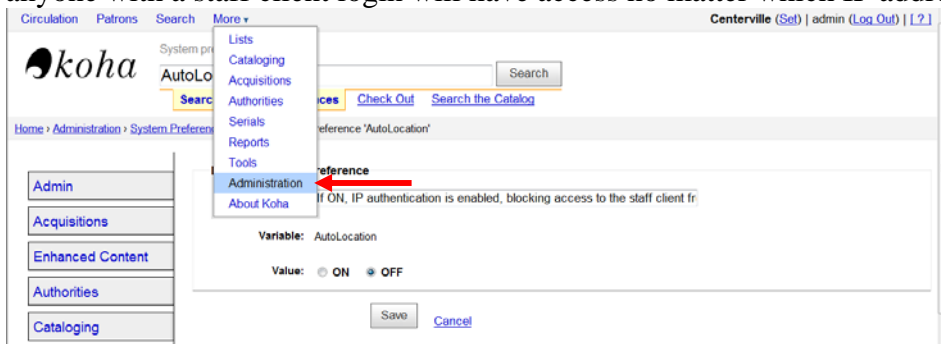
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ILS AREA: Admin

AutoLocation:

Description: This preference protects the system by blocking unauthorized users from accessing the staff client program and settings. Authorized and unauthorized users are determined by their computer's IP addresses. When the preference is "On", IP authorization is in effect and unauthorized IP addresses will be blocked. This means that staff cannot work from home unless their IP address has been authorized. The administration can enter the IP addresses which are allowed access; this is done by editing the preference in the administration module. To edit IP addresses, go to the administration module, click on "More" (upper center of screen), select "Administration", click on "Libraries, Branches, & Groups", then click on the word "Edit" located after the name of the library branch which you want to edit the changes for. When "Off", anyone with a staff client login will have access no matter which IP address they are using.



Recommendation: The recommendation is to accept the default, which is "Off". This way, staff can work from home since they have to use a login to access the staff/client anyway.

Author: DLB

DebugLevel:

Description: This preference determines how much information will be sent to the user's screen when the system encounters an error. The most detail will be sent when the value level is set at 2, some detail will be sent when the value is set at 1, and only a basic error message will display when the value is set at 0. This setting is especially important when a system is new and the administration is interested in working out the bugs (errors or problems) quickly. Having detailed error messages makes quick fixes more likely in problem areas.

Recommendation: The recommendation is to accept the default, which is 2. This will allow the most information to be gathered about errors in the system, which is especially helpful in working out bugs in an open source program.

Author: DLB

FrameworksLoaded:

Description: This setting contains a list of frameworks which are loaded during the web installation. They include MARC framework scripts, system preferences scripts, and sample data preferences:

auth_val.sql|authorities_normal_marc21.sql|class_sources.sql|marc21_default_matching_rules.sql|marc21_framework_DEFAULT.sql|marc21_simple_bib_frameworks.sql|message_transport_types.sql|parameters.sql|patron_categories.sql|sample_budgets.sql|sample_holidays.sql|sample_itemtypes.sql|sample_labels.sql|sample_libraries.sql|sample_news.sql|sample_notices.sql|sample_notices_message_attributes.sql|sample_notices_message_transports.sql|sample_patrons.sql|sample_z3950_servers.sql|stopwords.sql|subtag_registry.sql|sysprefs.sql|userflags.sql|userpermissions.sql

Recommendation: The recommendation is to accept the default as shown above since most library staff do not have the expertise to change programming code. **IMPORTANT:** It is recommended that this setting not be changed after the initial installation of Koha.

Author: DLB

GranularPermissions:

Description: Granular permissions are used to describe various types of access permissions given to selected people who use a site. They help an administrator maintain control over who is allowed to edit and/or publish on a site. If this preference is turned "On", more specific or granular permissions are provided. For example, access to one or two tools could be allowed instead of access to all of the tools. If "Off", the permissions are assigned by function instead allowing staff access to just parts of a function. **NOTE:** If this preference has been "On" and gets turned "Off", the system will revert to the original actions but with the retention of specific

permissions. For example, a staff member with previous granular permissions retains those permissions even if the preference is turned "Off".

Recommendation: The recommendation is to use the default value, which is "Off". This way, permissions can be assigned by function as needed.

Author: DLB

IndependentBranches:

Description: This preference should only be used by library branches which are sharing a single Koha installation but are considered independent organizations, meaning they do not share material or patrons with other branches and do not plan to change that in the future. It can prevent the catalog systems of library branches who share the same Koha installation from merging. It is important that this value be set before going live and that it NOT be changed. If "On", it increases the security between library branches by: prohibiting staff users from logging into another branch from within the staff client, filtering out patrons from patron searches who are not a part of the login branch conducting the search, limiting the location choices to the login branch when adding or modifying an item record, preventing users from other branch locations from placing holds or checking out materials from library branches other than their own, and preventing staff from editing item records which belong to other library branches. All of these security safeguards can be overridden only by the superlibrarian, the highest level of privileges. The superlibrarian is granted unlimited status and permissions in the system.

Recommendation: The recommendation is to use the default value, which is "Off". However, libraries which share a Koha installation may want to consider changing the preference to "On", especially if they share patrons and materials.

Author: DLB

Insecure:

Description: This preference controls whether or not authentication will be required to gain access to the staff client and OPAC. If "On", all authentication is bypassed. BEWARE! Having no authentication requirements leaves your system open to tampering. If "Off", authentication on the staff client and the OPAC are required.

Recommendation: The recommendation is to use the default setting, which is "Off". This will protect the system from tampering through unauthorized access. It is also recommended that this setting *not* be changed after the initial installation.

Author: DLB

Intranet_Includes:

Description: This preference would allow someone who has understanding of programming to make modifications to the appearance of the Koha system. Not much information about this

preference. Includes is the name of the directory which stores the code which renders a specific appearance to Koha.

Recommendation: The recommendation is to use the default value, which is “includes”. Without a high level of programming expertise, it is better to leave this preference alone.

Author: DLB

KohaAdminEmailAddress:

Description: This preference allows *one* email address to be specified to receive messages from patrons regarding modification requests, purchase suggestions, and questions or information regarding overdue notices. It is recommended that the e-mail address of the superlibrarian be used for this purpose since that position has the highest level of authority. This email address can be changed when needed.

Recommendation: The recommendation is to change the default value (currently set at root@localhost) to the email address of the superlibrarian or the staff person whose responsibility it will be to respond to patron requests, suggestions and questions sent via email. One student from each group should be designated as the superlibrarian for this function. That student can/should report on their findings in the final report.

Author: DLB

libraryAddress:

Description: This preference defines the library address to be used for printing overdue notices, receipts, etc. It should only be used if the mailing address is different from the physical address assigned to the library in “Libraries, Branches, & Groups”. For example, if the library uses a post office box to receive mail, this preference should be defined.

Recommendation: The recommendation is to leave the default value of “no value” UNLESS the library’s physical address is different from the mailing address.

Author: DLB

MIME:

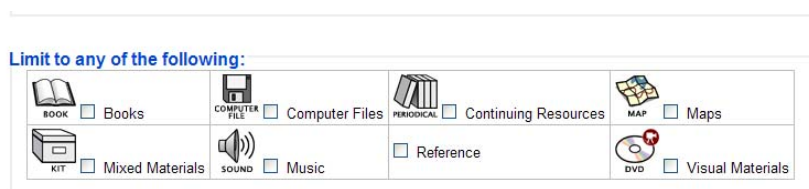
Description: This preference defines which application Koha will use when exporting reports: Excel or OpenOffice. It is important to specify which of the two programs the library’s computers have available in order for reports to function properly.

Recommendation: The recommendation is to select the application the library has available on the computers used for reports. If the library’s computers do not have Excel, OpenOffice is free software which can be downloaded and used in the creation of Koha reports.








Author: DLB

noItemTypeImages:

Description: This preference allows the system administrator to determine if users will be able to see an icon of the types of items they are searching for. The images will display in both the OPAC and the Staff/Client intranet. For example, if a user wants to search for a book but **not** a sound recording they are able to limit their results by clicking the box next to the item type. If images of item types are disabled, searches still may be limited by item types but the OPAC is not as visually appealing without the images.



Limit to any of the following:

 <input type="checkbox"/> Books	 <input type="checkbox"/> Computer Files	 <input type="checkbox"/> Continuing Resources	 <input type="checkbox"/> Maps
 <input type="checkbox"/> Mixed Materials	 <input type="checkbox"/> Music	<input type="checkbox"/> Reference	 <input type="checkbox"/> Visual Materials

Recommendation: This preference is confusing because setting it to “Off” enables the display of the item icons. It is recommended this preference be set to “Off” so patrons are able to see images of item types.

Author: FW

OPACBaseURL:

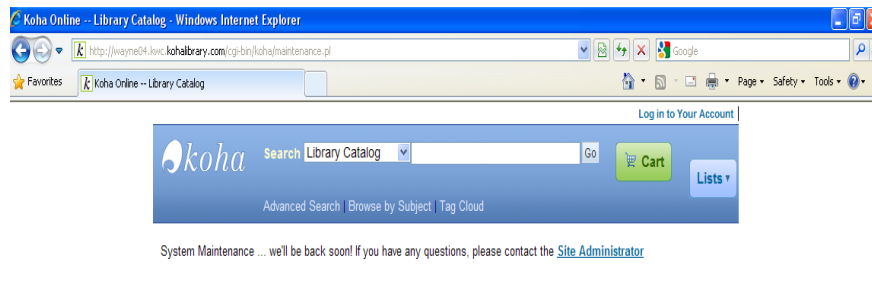
Description: This preference allows the system administrator to define where on the web the OPAC is to be located. An example of a web address may be opac.mylibrary.com. It is not necessary to include the ‘http://’ as Koha will do this automatically.

Recommendation: It is recommended that something simple and easy to remember be chosen for this preference such as, opac.[library’s web address].com or catalog.[library’s web address].com. It is strongly suggested that this preference not be changed after the initial installation of Koha.

Author: FW

OPACMaintenance:

Description: This preference allows the system administrator to turn off the OPAC during maintenance and display a message to users. When this preference is switched to “On” the OPAC is not usable. The text of the warning message reads “System Maintenance-we’ll be back soon! If you have any questions please contact the Site Administrator.” The text of this message is not editable at this time.



Recommendation: The default setting for this preference is “Off.” It is suggested that the default setting be kept in order to make the OPAC available to users. When there *must* be OPAC maintenance it is suggested the preference be set to “On.”

Author: FW

SessionStorage:

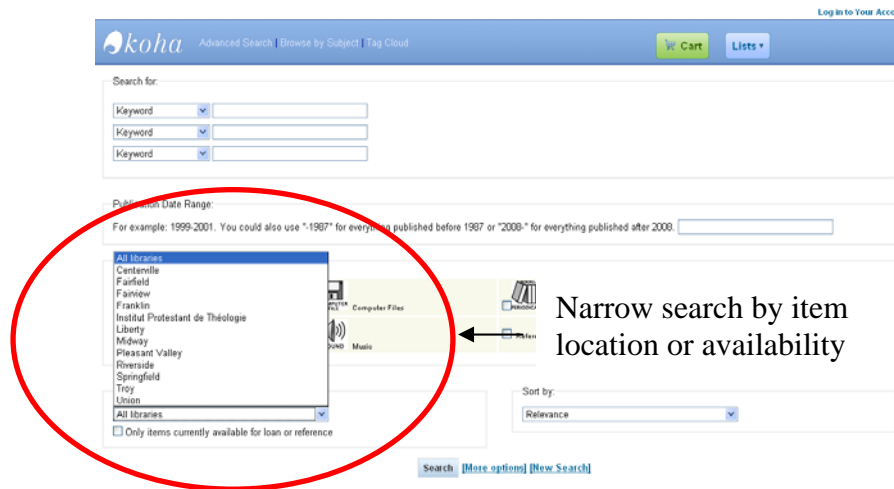
Description: This preference allows administrators to choose what format session data is stored in during web sessions. SessionStorage allows for data to be stored, “even if someone navigates away from the page that stored the data and then navigates back, the data saved to SessionStorage is still available” (<http://www.nczonline.net/blog/2009/07/21/introduction-to-sessionstorage/>). There are three values for this preference, “MySQL,” “tmp,” and “pg.”

Recommendation: SessionStorage is complex and should only be changed by someone who understands browser technology and developments. The default setting for this preference is “MySQL” it is recommended the default setting be kept for this preference.

Author: FW

SingleBranchMode:

Description: This preference is for libraries that have branches but do not want to share their items among other branches within their system. This preference can be set to “On” or “Off.” If the preference is set to “Off” then holdings will be shown for all branches within a system. On the “Home” screen of the OPAC users have the choice of narrowing down results by item location. Setting this preference to “On” will display only one branch’s holdings.



Recommendation: It is recommended this preference be left at its default setting of “Off.” This enables users to see all items within the library system as well as at which branch they are located. This setting also allows users the ability to narrow their searches by location and where the item is available.

Author: FW

StaffClientBaseURL:

Description: This preference allows administrators to set where the web address of the Staff/Client application is to be located. An example of this setting may be `staff.cpl.kohalibrary.com`. If arrangements have not been made to have a Koha service provider to host the staff client, it is necessary for the library to buy and register a domain name.

Recommendation: The value will depend on whether the library has opted for a hosted the solution. The name will depend of the registered domain name or the name requirements of the host server.

Author: FW

timeout:

Description: This preference sets the length of time the Staff/Client or OPAC accounts can be left inactive before re-logging in is necessary. The value of this preference is in seconds, the default value is 12,000,000 seconds that is approximately 139 days. At this time, the amount of time before a session times out must be the same for both the Staff/Client and the OPAC.



Message displayed after the session times out.

Recommendation: It is strongly recommended that this default be changed in order to protect patron privacy. It is suggested this preference be set at 900 seconds, which is 15 minutes.

Author: FW

Version:

Description: This preference displays the version of the Koha Installation you are using. DO NOT change this setting manually, it is automatically maintained by the webinstaller.

Recommendation: DO NOT ALTER OR CHANGE THIS SETTING.

Author: FW

ILS AREA: ACQUISITIONS

acquisitions:

Description: This preference defines the type of acquisitions the library plans to use. ‘Normal’ budget-based acquisitions will allow the library to update budgets and funds through the Acquisitions module. If the library elects to use ‘simple’ bibliographic-data acquisitions the budget will not be tracked with the Acquisitions module.

Recommendation: It is recommended to keep the ‘normal’ budget-based acquisitions default setting to easily keep track of the collection budget with the Acquisitions module.

Author: MB

emailPurchaseSuggestions:

Description: This preference defines how patron purchase suggestions made via the OPAC will be handled. If this preference is set to “Off” and the OPAC preference ‘suggestions’ is set to ON patrons can submit suggestions that can be managed using the Acquisitions module. If this preference is set to ON patron suggestions are emailed to an email address that the library can specify in the ‘KohaAdminEmailAddress’ preference.

Recommendation: It is recommended to keep the default value of “Off” which will allow the library to manage patron suggestions in the Acquisitions module. Ultimately, the setting here will depend on how the library plans to handle patron suggestions.

Author: MB

gist:

Description: This preference will allow the library to define a default Goods and Services Tax rate. All tax rates must be entered in numeric form, not as a percent. For example, 6% would be entered as 0.06, not as 6. The default of value of 0 will disable this preference.

Recommendation: It is recommended that a Goods and Services Tax that is applicable to the library be entered. If this preference is not disabled with the default value of 0, make sure the tax rate is entered in the correct numeric form.

Author: MB

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ILS AREA: CATALOGING

advancedMARCeditor:

Description: This preference determines whether or not MARC field names will be present when editing or creating MARC records. A setting of “Off” will enable the labeled display. Changing the setting to “On” will disable the display of the labels (see screenshots). *Note:* If “On” the creating and editing of records will require use of the ‡biblios application. ‡Biblios is an open-source program maintained by LibLime which can be integrated into the Koha ILS or used as a stand-alone application (available for free from <http://biblios.org/>). It gives access to MARC records and advanced editing capabilities. Integration into Koha does however require technical expertise and programming languages. Regarding ‡biblios, a free web-based client can be accessed from <http://biblios.net>, for the non-technical user.

Recommendation: Recommend using the default setting of “Off” unless using the ‡biblios application.

Author: GA

The screenshot displays the advancedMARCeditor interface with the 'Setting is On' configuration. The interface shows a list of MARC fields with their corresponding labels. The fields are listed as follows:

- 000 -
- 001 -
- 003 -
- 005 -
- 006 - + -
- 007 - + -
- 008 -
- 010 ☐ ☐ -
- 015 ☐ ☐ - + -
- 016 ☐ ☐ - + -
- 020 ☐ ☐ - + -
- 022 ☐ ☐ - + -
- 024 ☐ ☐ - + -
- 027 ☐ ☐ - + -
- 028 ☐ ☐ - + -
- 035 ☐ ☐ - + -

Below the list, the fields are grouped into sections:

- 000 - LEADER
- 001 - CONTROL NUMBER -
- 003 - CONTROL NUMBER IDENTIFIER
- 005 - DATE AND TIME OF LATEST TRANSACTION
- 006 - FIXED-LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL CHARACTERISTICS--GENERAL INFORMATION + -
- 007 - PHYSICAL DESCRIPTION FIXED FIELD--GENERAL INFORMATION + -
- 008 - FIXED-LENGTH DATA ELEMENTS--GENERAL INFORMATION
- 010 ☐ ☐ - LIBRARY OF CONGRESS CONTROL NUMBER -
- 015 ☐ ☐ - NATIONAL BIBLIOGRAPHY NUMBER + -
- 016 ☐ ☐ - NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBER + -
- 020 ☐ ☐ - INTERNATIONAL STANDARD BOOK NUMBER + -
- 022 ☐ ☐ - INTERNATIONAL STANDARD SERIAL NUMBER + -
- 024 ☐ ☐ - OTHER STANDARD IDENTIFIER + -
- 027 ☐ ☐ - STANDARD TECHNICAL REPORT NUMBER + -
- 028 ☐ ☐ - PUBLISHER NUMBER + -
- 035 ☐ ☐ - SYSTEM CONTROL NUMBER + -

Screenshot 1:
Setting is "On"

Screenshot 2:
Setting is "Off" (default)

autoBarcode:

Description: This setting is for libraries wishing to generate barcodes from within Koha (as opposed to scanning in pre-printed barcodes or manually assigning them). If desired, this setting can be changed to one of three formats:

- Incremental: generates barcodes in sequential number format (58978543, 58978544, etc.)
- Annual: the incremental (sequential) number is preceded by the year code (2010-58978543)
- hbyymmincr: the ILS generates a barcode according to the format library code (hb) year/month (yymm) incremental number (incr) (GL10038543, GL10038544, etc.)

Recommendation: Recommend leaving the default at “Off” unless local practice is to print barcodes from within Koha. Choice of format depends on the library's particular situation (for example, a library with multiple branches might want to use the “hb” style). *Note:* Javascript must be turned on in order to use the annual or hbyymmincr settings. Incremental will work with or without Javascript.

Author: GA

DefaultClassificationSource:

Description: This preference reflects how users find materials within the library (i.e., how materials are classified). Choice of settings is determined by local practice:

anscr = ANSCR classification for sound recordings
ddc = Dewey decimal classification
lcc = Library of Congress classification
sudocs = Government documents
udc = Universal decimal classification (not common in the U.S.)
z = Other classification (Accession numbers for example)

Recommendation: Recommendation is to set this preference to reflect local practice in assigning classification numbers (Dewey, LC, etc.). This setting should match with the itemcallnumber preference.

Author: GA

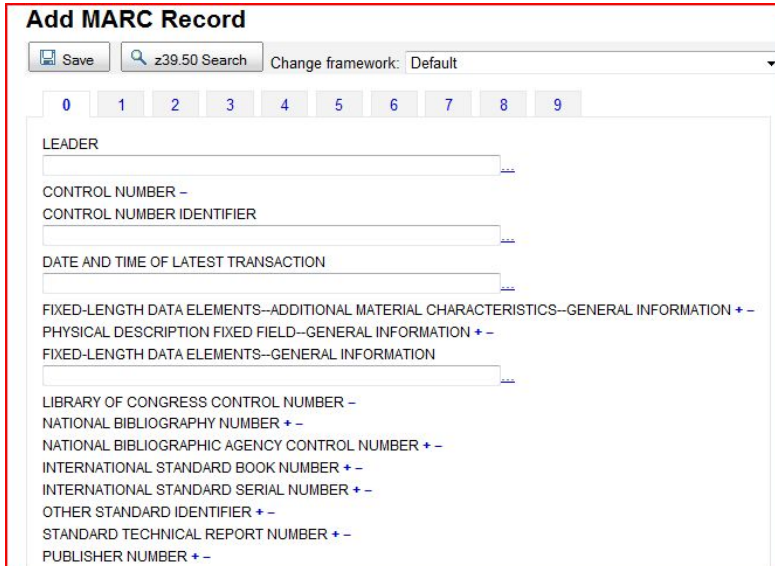
hide_marc

:

Description: This setting determines whether or not marc field codes, subfield codes, and indicators will display. Turning this setting to “On” will hide field codes, subfield codes, and indicators. With this setting on it is not possible to view or edit the subfields. Leaving the

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default setting at “Off” will enable display of the above items. [Screenshot 2](#) (above) shows the default view. [Screenshot 3](#) shows the “Off” setting.



Screenshot 3:
Setting is "On"

Recommendation: Recommendation is to leave the default setting “Off”. Many catalogers prefer the field codes to their labels when working with records. Either setting will display data.

Author: GA

IntranetBiblioDefaultView:

Description: This setting determines the bibliographic record display when searching the catalog on the staff client. This setting does not affect the display in the OPAC which is changed using the BiblioDefaultView preference under the OPAC preference tab. This is a free text field but one of three values is expected: normal, marc, or [isbd](#). This setting changes the look of the record when first displayed. The marc and isbd views can still be seen by clicking in the sidebar.

Recommendation: Recommend leaving the default setting of “normal” as the catalog offers both marc and isbd views by clicking on the sidebar. Leaving the setting at normal is the most useful as it offers a general view useful to the widest variety of library activities.

Author: GA

ISBD:

Description: This determines how the ISBD information will display. Elements in the list can be reordered to produce a different ISBD view. ISBD, the International Standard Bibliographic Description, was first introduced by IFLA ([International Federation of Library Associations](#)) in

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1969 in order to provide guidelines for descriptive cataloguing. The purpose of ISBD is to aid the international exchange of bibliographic records for a variety of materials. Do not delete values!

Recommendation: Recommendation is to leave the default.

Author: GA

item-level_itypes:

Description: This preference determines whether the item type Koha uses for issuing rules will be an attribute of the bibliographic record or the item record. Different item types may have different issuing circulation rules. This setting determines how Koha will access item type information. There are two possible settings, "On" or "Off". "On" enables item-level item type issuing rules; "Off" disables item-level item type issuing rules.

Recommendation: Recommend leaving the default setting "On" Many items in the collection may exist in various formats and greater control can be exercised with the setting "On".

Author: GA

itemcallnumber:

Description: This setting determines which marc field will be used to calculate the call number for items in the collection. The value is set by providing the Marc field code (050, 082, 090, 852 are all common) and the subfield codes without the delimiters (\$a, \$b would be ab). This setting determines the field Koha uses when creating the 952 field (local holdings information/location of item). *Note:* For a list of the field codes (050-09x) used by MARC, visit <http://www.loc.gov/marc/bibliographic/bd01x09x.html>

Dewey = 082ab or 092ab

LC = 050ab or 090ab

Local location information could be pulled also from 852hi.

Recommendation: Set this preference according to local practice so that it matches the classification system in use. This setting should match the DefaultClassificationScheme setting. For example, if DefaultClassificationScheme is set to "lcc" then the itemcallnumber setting should be 050ab or 090ab. If the DCS setting is "z" then set this preference to 852hi or to the appropriate marc field .

Author: GA

Greg Andrzejewski
Megan Buck
Andrew Drummer
Melissa Goins

LabelMarcView:

Description: This preference determines if the displayed MARC record will be standard (full) or economical. The economical view will only display the first field when fields repeat. For example, it will only show the first 500 note and the first 650 subject heading.

Recommendation: Recommendation is to leave the default standard view as repeatable fields such as 500 notes and 650 subject headings may be of importance.

Author: GA

marc:

Description: This is an outdated setting that enables a non-marc database. Most libraries use MARC records for authority and bibliographic records and therefore this setting should not be changed. Options are "On" (marc is supported) or "Off" (marc is not supported.)

Recommendation: Default setting is "On". Leave this setting at "On".

Author: GA

marcflavour:

Description: This preference defines global MARC style (MARC21 or UNIMARC) used for encoding. MARC21 is the standard style for the US, Canada and Britain. UNIMARC is a variation of MARC21 that is used in Italy, Russia, and many other countries.

Recommendation: It is recommended the default of MARC21 be kept for the US and that those outside the US use the style appropriate for their country. This preference cannot be changed after installation of the database.

Author: MB

MARCOrgCode:

Description: This preference defines the library's MARC Organization Code. Each organization has a unique code which can be found at <http://www.loc.gov/marc/organizations/org-search.php>. The MARC Organization Code is used to identify libraries with holdings of titles and more.

Recommendation: It is recommended that this preference be changed from the default to the code for the library. Search for the library's code at the web address provided. The default value only applies to the Stow Library in Ohio.

Author: MB

Greg Andrzejewski
Megan Buck
Andrew Drummer
Melissa Goins

NoZebra :

Description: Zebra is an open source index and retrieval engine which can be enabled to work with Koha. According to its website (<http://www.indexdata.com/zebra>), Zebra supports large databases and makes them searchable using a variety of tools. Zebra allows access to MARC records in Koha through Boolean search terms and relevance-ranked queries. It is more powerful than the Koha standard search capabilities; with the basic Koha set up, searches are slower than with Zebra. Zebra is highly recommended for collections of over 25,000 items, but can be used for smaller collections.

Recommendation: Setting this option can be confusing since the “Off” setting for this preference enables the Zebra search. “On” for NoZebra prevents access to the Zebra engine. The recommendation is to allow Zebra searching; therefore set this preference to “Off”.

NoZebraIndexes:

Description: This preference identifies the actual definitions used for Koha’s internal search engine. The internal search engine will be used if the [NoZebra](#) preference is set to “Off”. The default values should not be changed.

Recommendation: It is recommended, and important, to leave the default as provided.

Author: MB

OpacSuppression:

Description: This preference only applies to the 942\$n field, but if set to “On” at least one record must have a 942\$n field or all OPAC searches will fail. When this preference is set to “On”, the 942\$n field can be used to suppress records in the OPAC. If set to “Off”, it will not matter what is in the 942\$n field as even those coded to be suppressed will still appear in the OPAC. An authorized value for 942\$n field should be set in the Catalog module. The Koha Manual suggests setting the authorized value as SUPPRESS with a value of 0 for don’t suppress and 1 for suppress. Note: authorized values create dropdown list which limits the cataloger’s selection for a particular field. “Off”

Recommendation: It is recommended to keep the default of “Off”, unless the library is planning to code and suppress records using the 942\$n field.

Author: MB

Greg Andrzejewski
Megan Buck
Andrew Drummer
Melissa Goins

RoutingSerials:

Description: This preference determines if serials routing lists are enabled or disabled for the library. When set to “On”, serials routing is enabled and a serial can be directed through a list of people by identifying who should receive it next. The list of people can be established for each serial to be passed using the Serials module and the steps can be found in the Koha Manual (6.6). This preference can be used to ensure each person who needs to see a serial when it arrives at the library will get it.

Recommendation: It is recommended to keep the default of “On” if the library has any serials that are passed from one staff member or department to another. If using this preference, set up the routing list for each serial that is to be passed.

Author: MB

z3950AuthorAuthFields:

Description: This preference defines which MARC fields will be used for ‘Personal Name Authorities’ to replace authors as the bibliographic authorities. This preference only applies to those using UNIMARC encoding. The MARC fields selected here will only be used if ‘z3950NormalizeAuthor’ is set to “On”. The default field are 700, 701, and 702.

Recommendation: It is recommended that the MARC fields listed as the defaults be kept.

Author: MB

z3950NormalizeAuthor:

Description: This preference allows for ‘Personal Name Authorities’ to replace authors as the bibliographic authority. The MARC fields that will be used as ‘Personal Name Authorities’ are defined in the ‘z3950AuthorAuthFields’ preference. This preference should only be considered by libraries using UNIMARC.

Recommendation: It is recommended, and a must, that libraries using MARC21 keep the default of “Off”.

Author: MB

ILS AREA: Circulation

AllowHoldPolicyOverride:

Description: This preference is a binary setting which controls whether or not the library staff can override the circulation and fines rules as they pertain to the placement of holds. Setting this value to “Off” will prevent anyone from overriding, setting it to “On” will allow it. This setting is important because it determines how strict the libraries rules for placing holds are. If this is turned “On”, exceptions can be made for patrons who are otherwise normally in good standing with the library, but there is opportunity for the staff to abuse this function. If it is turned “Off”, no abuse of the system is possible, but it makes the system entirely inflexible in respect to holds.

Recommendation: The group’s recommendation for this setting is that it be turned “On”.

Library staff should be advised under what cases an exception might be made and be trusted to use their best judgment.

Author: A.D.

AllowHoldsOnDamagedItems:

Description: This parameter is a binary setting which controls whether or not hold requests can be placed on items that are marked as “damaged”. Setting this value to “Off” will prevent anyone from placing a hold on such items, setting it to “On” will allow it. This preference is important because it determines whether or not a patron can place a request for an item that might be in the process of being repaired or not in good condition. The library may wish to set this to “Off” if they were concerned about their patrons not receiving the item in a timely manner or at all (if it is determined that the item is beyond repair). Setting it to “On” would allow a patron to place a hold on an item and therefore receive it as soon as it becomes available.

Recommendation: The group’s recommendation is that this setting be turned “On” for the reason stated above.

Author: A.D.

AllowNotForLoanOverride:

Description: This parameter is a binary setting which controls the ability of staff to check out items that are marked as “not for loan”. Setting it to “Off” would allow such items to be checked out, setting it to “On” would prevent this. This setting determines whether items meant to stay in the library, such as reference materials, and other library resources can be checked out by patrons.

Recommendation: The group’s recommendation is that this setting be left “On”. There seems to be no reason to ever allow this setting to be turned “Off” as items marked “not for loan” should not be checked out under any circumstance.

Author: A.D.

AllowOnShelfHolds:

Description: This preference is a binary setting which controls the ability of patrons to place holds on items that are not checked out. Setting it to “Off” allows borrowers to place holds on items that are checked out but not on items that are on the shelf, setting it to “On” allows borrowers to place holds on any item that is available for loan whether it is checked out or not. This setting might be turned on if the library system is a multi branch system and patrons used the hold system to request items from other libraries, or if the library wanted to allow users to place holds on items from home through the OPAC. Setting it to “Off” would enforce a first come, first served standard.

Recommendation: The groups recommendation for this setting is that it be turned “On”, allowing patrons to place holds from other libraries in the system, or to place holds through the OPAC from home.

Author: A.D.

AllowRenewalLimitOverride:

Description: This preference is a binary setting which controls the ability of staff to override the limits placed on the number of times an item can be renewed. Setting it to “On” would allow such limits to be overridden, setting it to “Off” would prevent this. This is a preference in which if it is set to “no” it would allow the library staff to use their judgment for overriding the renew limit for special cases, setting it to “Off” prevents an opportunity for abuse by the library staff.

Recommendation: The group’s recommendation for this setting is that the value remains set to “Off”. While it is preferable that the library staff be allowed to generally use their judgment and common sense, in this case the benefit is small compared to the potential for abuse. Items that are at the renew limit can normally be checked in then checked out again by a patron, unless there is a hold on the item, or the patron does not have the item. In either of these cases the library should ensure that the item goes to the next patron who requested the item in the first case, or that the patron has not lost or damaged the item in the second.

Author: A.D.

AutomaticItemReturn:

Description: This preference is a binary setting which determines whether an item is returned to its home branch automatically or not. If set to “Off”, the staff member checking an item in at a location other than the item’s home branch will be asked whether the item will remain at the non-home branch (in which case the new location will be marked as a holding location) or returned. Setting it to “On” will ensure that items checked in at a branch other than their home branch will be sent to that home branch. This is important because it determines whether interesting items can be held at a branch by staff.

Recommendation: The group’s recommendation is that the default setting of “On” be maintained. Such items need to be returned to their home system, any long term loan of library material should be made via arrangement rather than on an ad hoc basis by the staff.

Author: A.D.

BranchTransferLimitsType:

Description: This parameter is a binary setting which determines whether items are transferred according to item type or collection code. Two values are allowed: “itemtype” (items are transferred by item type) and “ccode” (items are transferred by collection code). This value determines how the library manager is able to restrict what items can be transferred between the branches.

Recommendation: The group’s recommendation is that the default value “ccode” be maintained. Collection Code is a more flexible for selecting which items go out since collection categories are less rigidly defined.

Author: A.D.

canreservefromotherbranches:

Description: This preference is a binary setting which determines whether patrons can place holds on items from other branches. If the preference is set to “On” patrons can place such holds, if it is set to “Off” they cannot. This is an important setting because it determines if users can use Koha to request items from another branch. If the library is sharing an installation of Koha with other independent libraries which do not wish to allow interlibrary borrowing it is recommended that this parameter be set to “Off”.

Recommendation: The group’s recommendation is that this preference be set to “On”. As sharing collection materials between libraries is advantageous to small libraries like the one in the model.

Author: A.D.

ceilingDueDate:

Description: This preference limits the due date of all items to be before a selected date. This means that any items checked out will be due no later than the selected date. This preference is useful if the library is going to be closed for an extended period of time. This allows for the opportunity for all materials to be returned by a certain date (presumably the closure date). The value for this preference is either in the format of YYYY-MM-DD (“Y” being year, “M” being month, and “D” being day) when the “dateformat” parameter under the “I18N/L10N” (<http://koha.org/documentation/manual/3.0/administration/global-system-preferences/i18n-l10n#dateformat>) settings is set to “iso”, and in the format MM/DD/YYYY when it is set to “metric” or “US”

Recommendation: The group’s recommendation is that no data be entered for this parameter because the model library has no information on any upcoming extended closures.

Author: A.D.

CircAutocompl:

Description: This preference is a binary setting which determines whether auto-completion of fields is enabled or disabled for the circulation input field. Setting it to “On” would enable a staff member to begin typing a name or other value into the field and have a menu pop up with suggestions for completing it. Setting it to “Off” would disable this feature. This preference is important because it controls a useful feature that makes the staff’s job easier.

Recommendation: The group’s recommendation is that this preference remains “On” because auto-complete is useful and saves time.

Author: A.D.

CircControl:

Description: This preference establishes the length of time an item can be checked out as well as the amount of fines charged if the item is overdue—particularly in circumstances when the item has been loaned from a different library. The administrator may select from three options: PickupLibrary, PatronLibrary, or ItemHomeLibrary.

If the PickupLibrary is set as the preference then the circulation and fines policies will be controlled by the library that checked the item out to the patron. If PatronLibrary is selected, the policies will be determined by the patron’s home library. Koha automatically determines the home library based on the settings provided in the patron record. If ItemHomeLibrary is selected, the policies will be determined by the library that owns the item.

Recommendation: The default is set as ItemHomeLibrary. Libraries will have to discuss which setting will suit their service goals and best meet their patrons’ expectations. PatronLibrary may be ideal to maintain a consistent check-out policy for the public, however if the lending library loses money because of delinquencies then some negotiation may need to be arranged between the systems. The recommendation is to accept the default as ownership will usually determine authority in interlibrary interaction.

Author: CKG

emailLibrarianWhenHoldIsPlaced:

Description: The preference requires Koha to email the library staff whenever a patron requests an item to be held. While this function will immediately alert the librarian to the patron’s need, it is extremely impractical in most library settings. In most libraries the hold lists are monitored and maintained from a separate interface.

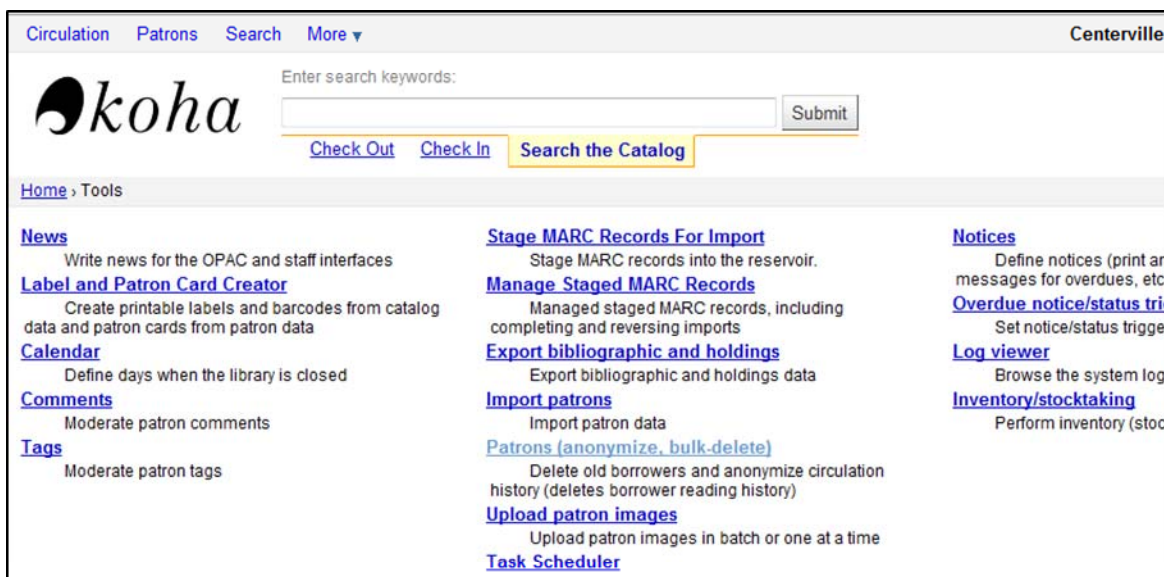
Recommendation: The recommendation is to accept the default preference which is “Off”. A librarian’s inbox will quickly be flooded with requests if the preference is set otherwise. Only extremely small libraries which rarely experience patron requests will want to consider this function.

Author: CKG

finesCalendar:

Description: This preference will determine whether or not fines will be accrued during instances when the library is closed. Examples include holidays, library in-service days, etc. The administrator may choose between two settings: noFinesWhenClosed, or ignoreCalendar. The noFinesWhenClosed setting will enable Koha to access its Calendar module

and be considerate of dates when the library is closed. To make use of this setting the administrator must first access Koha's calendar and mark certain days as "holidays" ahead of time. To find the Calendar module from the Home page, select the *Tools* link.

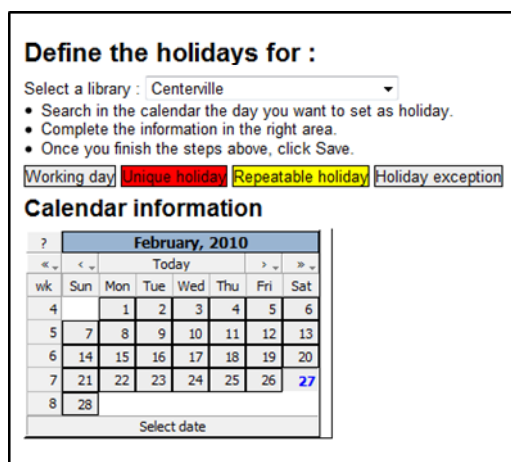


From the *Tools* page, select *Calendar*.

Dates can then be specified using the Calendar functions.

Repeatable holidays may be selected for reoccurring dates (such as January 1 or December 25).

If the ignoreCalendar preference is set, Koha will calculate fines regardless of holidays or library closings.



Recommendation: The default is set at noFinesWhenClosed and it is recommended that this setting remain selected. Most libraries will arrange to schedule due dates around closings and holidays out of fairness to their patrons.

Author: CKG

finesMode:

Description: This preference establishes how Koha will handle fines being accrued by patrons. There are three values to choose from: “Off”, Test, and Production.

If the “Off” value is put into effect no fines will be calculated.

The *Test* value prompts Koha to email fine notifications.

The *Production* value is selected to allow Koha to start calculating overdue fines.

It is important to know that extra programming will be involved to make this preference functional and a cronjob will need to be put into effect. A cronjob is a programming function that issues commands at specific dates and times. More basic information about cronjobs can be found at http://www.aota.net/Script_Installation_Tips/cronhelp.php3.

More discussion of finesMode can also be found at <http://www.mail-archive.com/koha-devel@lists.koha.org/msg01076.html>

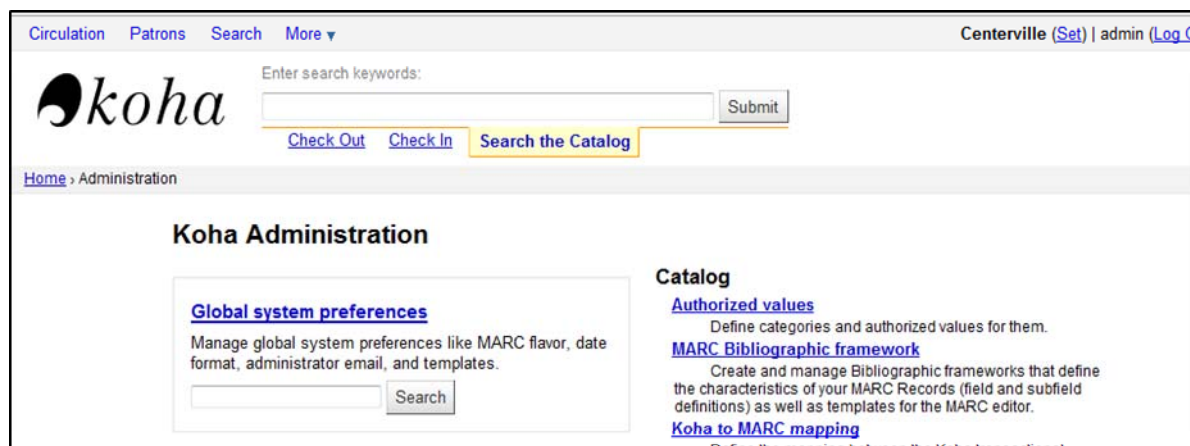
Recommendation: The default value is set at Test. Koha recommends this setting be kept until contacting the system administrator for support.

Author: CKG

globalDueDate:

Description: This preference sets a specific date upon which all library materials must be returned, regardless of whether or not this date interferes with the normal check-out duration. This feature is particularly useful for school libraries that close during the summer break and require the return of their materials before the end of the academic year. No default value is set and the parameter is left blank unless a date is entered.

If a date is entered, the date’s appearance may be formatted according to US (mm/dd/yyyy), metric (dd/mm/yyyy), or ISO (yyyy/mm/dd) standard. To select this formatting, the I18N/L10N



section of Koha must be accessed.

From *Administration*, select *Global System Preferences*.

Once in *Systems Preferences*, select I18N/L10N from the tabs. The *dateformat* preference will appear at the top of the I18N/L10N settings list. The date format can then be selected and saved.

The screenshot shows the Koha System Preferences Admin interface. The 'dateformat' preference is highlighted with a red circle. The 'language' preference is also visible. The interface includes a sidebar with navigation links and a main content area with a table of preferences.

Preference	Explanation	Value	Edit	Delete
dateformat	Define global date format (us mm/dd/yyyy, metric dd/mm/yyyy, ISO yyyy/mm/dd)	<div> <div>us</div> <div>metric</div> <div>us</div> <div>iso</div> <div>(zh_cn)</div> </div>	Edit	Delete
language	Set the default language in the staff client.	<div> <div>(zh_tw)</div> <div>Français(fr)</div> <div>Deutsch(de)</div> <div>Español(es)</div> <div>English(en)</div> <div>zh_cn</div> </div>	Edit	Delete

Recommendation: Public libraries will most likely not need to make use of this option and may leave the preference blank. Academic libraries, however, are recommended to take advantage of the global due date as necessary.

Author: CKG

holdCancelLength:

Description: This setting establishes how many days may pass before a patron hold will be canceled by Koha. This preference may easily be confused with Koha preference

ReservesMaxPickUpDelay, which sets the number of days a patron has to pick up an item once the item is placed on the Reserve Shelf. The wording for the two preferences is very similar in the Koha manual. More discussion may be found at <http://lists.koha.org/pipermail/koha-bugs/2009-October/012906.html>.

The holdCancelLength preference is designed to cancel old holds that never make it to the reserve shelf, such as a transfer from a different library that gets lost along the way, or items that are missing unbeknownst to the library staff. Any number entered will represent the number of days that may go by before a request is canceled, regardless of the circumstances. This means Koha may actually cancel a hold for a patron waiting on a hold queue because the time has exceeded the set number of days.

Recommendation: The Default is “no value.” Administrators should either keep the default setting or opt for a very high number, such as 365, to ensure patron requests are not canceled unfairly.

Author: CKG

HomeOrHoldingBranch:

Description: This preference establishes what may be done with a loaned item once the item has been returned. It deals with situations in which one library branch has borrowed materials from a different branch. Essentially it decides whether a library may check the borrowed item back out to its patron or if it must immediately send the item back to the owning location. Koha does not recommend altering this setting after installation.

The values to choose from are holdingbranch and homebranch. The holdingbranch setting gives the choice to the borrowing branch. When the item is checked in Koha will display a message reminding the staff member that the material belongs to another location and should be returned. This message may be overturned, however, and the item may still be reissued to another patron.

If homebranch is implemented then the item will not be able to check out again without first returning it to the owning location. For this setting to be functional the administrator must also make sure that the IndependentBranches preference is turned “On”. To find this setting the administrator should go to the *Global System Preferences* and click the *Admin* side tab.

The screenshot shows the Koha System Preferences Admin interface. The left sidebar contains a list of categories: Admin, Acquisitions, Enhanced Content, Authorities, Cataloging, Circulation, and ILS/ILM. The 'Admin' category is circled in red. The main content area is titled 'System preferences admin' and 'Admin preferences'. It contains a table with the following data:

Preference	Explanation	Value	Edit	Delete
AutoLocation	If ON, IP authentication is enabled, blocking access to the staff client from unauthorized IP addresses	<input type="radio"/> ON <input checked="" type="radio"/> OFF <input type="button" value="Save"/>	Edit	Delete
	Define the level of debugging			

Recommendation: The recommendation is to accept the default value, which is holdingbranch. Most libraries are unlikely limit inter-branch operations on a day to day basis.

Author: CKG

IssuingInProcess:

Description: This preference determines if a patron can check items out under the following conditions:

- There is an overdue fine on the account. And:
- Any of the materials the patron wishes to check out will potentially tip the account balance over the maximum fines policy the library has in place.

To give an example, picture a library with a fine policy that states a patron's account cannot exceed a \$5.00 fine. A patron comes to the desk to check out. The account already has a \$4.50 fine, and if returned late, one of the items (let's say, a CD) will have a \$0.50 fine. IssuingInProcess will dictate whether or not the patron may check the CD out. This preference can be turned "On" or "Off". If IssuingInProcess is "On" a patron WILL be allowed to check out. If the preference is "Off", the CD will not be allowed to check out and the patron will either have to pay the fine or wait until next time for the CD.

Recommendation: This setting is potentially tricky because the "On" setting will actually allow for check out but "Off" will stop it. The default setting is "Off". Recommendation is to keep the default setting unless some other method of fine management is in place.

Author: CKG

itemBarcodeInputFilter:

Description: This preference enables a filter for libraries using the Follett barcode scheme, specifically in instances when the system utilizes the T form to input cataloging and item

records. In this scheme, a barcode such as T0003452 uses the 0's as fillers to ensure the item number has a total of seven digits. This specific example was found at <http://lists.koha.org/pipermail/koha-bugs/2009-October/012944.html>.

To ensure all barcode schemes are compatible, Koha "Off"ers the following settings: Whitespace, T-prefix, and cuecat.

Whitespace is the Koha equivalent of turning the preference "Off".

T-prefix suits the needs of libraries using Follett barcodes.

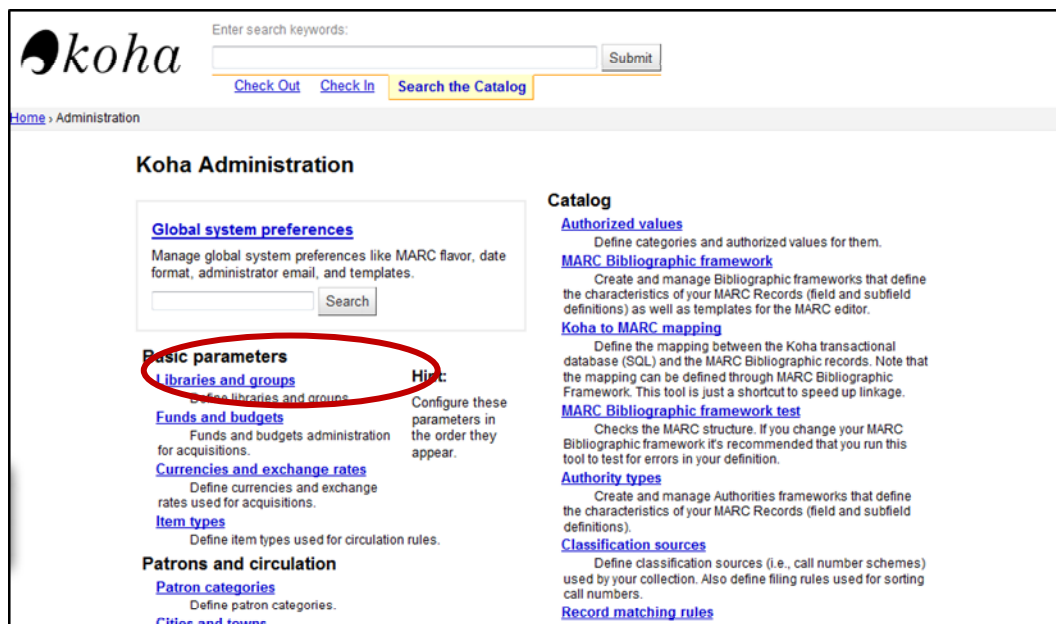
Cuecat is a specific barcode scanning technology that is not commonly implemented in most libraries today. More basic information on cuecat can be found at <http://en.wikipedia.org/wiki/CueCat>.

Recommendation: The default is set at Whitespace. Unless barcode incompatibility is a problem, the recommendation is to keep the default.

Author: CKG

maxoutstanding:

Description: This preference sets the monetary limit a patron can have fined to the account before Koha will no longer allow holds to be placed. The values are set in numbers, which represent the currency the administrator defines for the library system (i.e. dollars, Euros, etc.). To change the currency setting, from the *Administration* page select *Currencies and Exchange Rates*.



Recommendation: The default setting is 5. The recommendation is to accept the default unless the library system's fines policy requires otherwise.

Author: CKG

maxreserves:

Description: According to Johnson on the website (<http://www.kohadocs.org/newbieguide.html>) "This is the number of requests someone can make". The number is set to the default of fifty, but can be changed for higher limits like for use in academic library or lower limits for use in a public library. This preference will be subject to the libraries policy.

Recommendation: Since the library is a public library the recommendation of this setting the will be twenty-five because this number complies with the library policy.

Author: HS

noissuescharge:

Description: This preference is the maximum amount of money owed to the library before the user is banned from **borrowing** more items. This also coincides with maxoutstanding that limits patrons from placing **holds** when the maximum amount is owed to the library. The default for the US version of Koha is five dollars. The type of currency can be defined for other countries through the Koha system.

Recommendation: The recommendation is change this preference to two dollars because this set by library policy.

Author: HS

numReturnedItemsToShow:

Description: According to the support company for Koha called ByWater Solutions (http://stats.workbuffer.org/manual_en/ch01.html) this preference shows a set amount of last returned items on the checkin screen. The number is helpful because it can help staff remember what items they did or did not checkin. The default value is twenty, but limit can be set higher or lower.

Recommendation: The recommendation is fifty because this number can be of value to staff members during heavy checkin times that happen throughout the work day. If the number is set any higher it may be too overwhelming to staff members.

Author: HS

previousIssuesDefaultSortOrder:

Description: This preference sets the order of how the materials checked out to a patron will be displayed on the Circulation screen. The order is arranged according to the due date of the material. This preference may be set as ascending (earliest to latest) or descending (latest to earliest) view. The ascending view is the default setting. The following example shows an example of an ascending view and a descending view when a staff has checked out *Going Home* and then *Writing on-line* to a patron.

The default value of ascending ('asc'):

2 Checkout(s) 0 Holds

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
03/25/2010	Going home / by Mohr, Nicholasa.	SR	PZ7.M7276 Go 1986	502326000171		Too Many Renewals	Check In
03/25/2010	Writing on-line / by	CF	PE1404 .W728 1985	502326000224		<input type="checkbox"/>	Check In

Renew Checked Items Renew All

Descending ('desc') view:

2 Checkout(s) 0 Holds

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
03/25/2010	Writing on-line / by	CF	PE1404 .W728 1985	502326000224		<input type="checkbox"/>	Check In
03/25/2010	Going home / by Mohr, Nicholasa.	SR	PZ7.M7276 Go 1986	502326000171		Too Many Renewals	Check In

Renew Checked Items Renew All

Recommendation: The recommendation is to have this set to the descending (desc) view. Staff can navigate the checked out items with a bottom (latest)-up (earliest) convention.

Author: HS

printcirculationslips:

Description: This setting is for special printers that print receipts of checked out items on a patron's account. The "On" position will allow receipts to be automatically printed at the end of the checkout process. The "Off" position is used when a library does not have receipt printers or it is deemed that receipts of checkout lists are not needed at that library.

Recommendation: The library does have receipt printers and having this setting "On" will be one less step that staff does not have to remember during a hectic checkout process. So the recommendation is to have this preference to stay at the default "On" setting.

Author: HS

RandomizeHoldsQueueWeight:

Description: This preference randomizes the libraries to which hold requests are sent. All available libraries may be randomized or only those libraries listed in the StaticHoldsQueueWeight preference. This preference can work with StaticHoldsQueueWeight preference to determine which libraries (branch or consortium library) will be targets for items on holds list. This hold list is produced when patron's requests for items are generated on a

regular basis. The StaticHoldsQueueWeight preference lists library codes for specific associated libraries to which holds are sent. See [StaticHoldsQueueWeight](#) for more details on how to enter the Library codes. RandomizeHoldsQueueWeight will or will not randomize the list of libraries that in the StaticHoldsQueueWeight list. “Off” If the RandomizeHoldsQueueWeight is set as “On” the hold requests will be sent randomly to the libraries on the StaticHoldsQueueWeight list or if the StaticHoldQueueWeight is not used then the hold requests will be sent randomly to all available libraries. If this preference is set as ““Off””, hold requests will be sent to the libraries according to their order as designated in the StaticHoldsQueueWeight or according to their static ranking in the database.

Recommendation: The recommendation is for this setting to be ““On”” in order to randomize the list so that one library on the list will not automatically get hit harder for holds because they are at the top of the hold list.

Author: HS

RenewalPeriodBase:

Description: This preference sets a new due date for an item that a patron wants beyond the current due date. According to ByWater Solutions (http://stats.workbuffer.org/manual_en/ch01.html) this setting asks “When renewing checkouts, base the new due date on”. This setting can add time to the old due date (date_due) or have time added to the current date (now) on which the patron requests the renewal. The default setting is time added to the current date (now) on which the patron requests the renewal.

Recommendation: The recommendation is to have this preference set to “now” because as Ferraro (<http://www.mail-archive.com/koha-patches@lists.koha.org/msg01683.html>) says “For many US libraries now+loanlength is the correct renewal procedure”.

Author: HS

ReservesMaxPickUpDelay:

Description: This preference puts an expiration date on an item a patron has on hold. After this expiration date the staff will release an unclaimed hold item which then may be returned to the library shelf or issued to the next patron on the item’s hold list. The default is seven days but the library can lower or raise this default.

Recommendation: The recommendation for this setting is the default of seven days. This will allow ample time for patron to come to the library to pick up their items on hold.

Author: HS

ReservesNeedReturn:

Description: This preference refers to 'item specific' holds where the item is currently on the library shelf. This preference allows a library to decide whether an 'item specific' hold is marked as "Waiting" at the time the hold is placed or if the item will be marked as "Waiting" after the item is checked in. This preference will tell the patron that their item is 'Waiting' for them at their library and ready for check out. The default for this setting is "On" and the item will not be marked to as "Waiting" until the staff physically checks the item into the system. The "Off" setting means that the item requested will be automatically marked as 'Waiting' in the system and does not require physical verification from staff. "Off" would mean that the patron would be notified that the item is "Waiting" but indeed the item might not yet have been moved from the library shelf to the hold shelf.

Recommendation: This preference can be very confusing because the "Off" setting means the system notifies the patron automatically if their item is "waiting" without verification. The recommendation is that item possession be verified before patrons are notified that their hold is "Waiting", and therefore, this preference should be set to "On". "On" will ensure that the item has been moved from the library shelf to the hold shelf and the material is definitely "Waiting" for the patron.

Author: HS

ReturnBeforeExpiry:

Description: This is preference may prevent a patron from having items checked out after their library card has expired. This preference may be set as "On" or the default "Off". If this is set to "On", then a due date of any checked out item can not be set for a date which falls after the patron's card expiration. If the setting is left "Off" then item check out dates may exceed the expiration date for the patron's library card.

Recommendation: The "Off" setting will give too much leeway to a patron who card has not been verified and renewed. The recommendation is to have this preference set to the "On" setting. This setting will ensure that items that are checked out by the patron will be returned before their card expires.

Author: HS

SpecifyDueDate:

Description: The SpecifyDueDate preference allows for circulation staff to change a due date from the automatic due date to another calendar date. This option would be used for circumstances in which the due date may need to be decreased or extended in a specific

circumstance. The “On” setting would allow for this option to be utilized by staff, the “Off” setting would bar staff from changing the due date on materials.

Recommendation: This option should be left “On” allowing for the staff to have more control over material due dates.

Author: JW

StaticHoldsQueueWeight:

Description: The StaticHoldsQueueWeight works in conjunction with the RandomHoldsQueueWeight preference. The Static Holds Queue Weight preference allows for certain libraries or branches to have a higher weight for holds fulfillment, allowing these libraries to receive holds before other branch libraries. Previously set library codes are entered into the preference box, separated by commas, and these libraries would receive holds before libraries not listed.

Recommendation: The Static Holds Queue Weight should not be utilized as this would cause an unfair bias toward other libraries. The [RandomizeHoldsQueueWeight](#) preference should be used instead.

Author: JW

TransferMaxDaysWarning:

Description: The TransferMaxDaysWarning preference is set at a default number of days. This preference allows for a warning to appear after a set amount of time if an item being transferred between library branches has not been received. The warning will appear in the Circulation report called ‘transfers to receive’.

Recommendation: This recommendation would largely depend on the interlibrary loan and delivery standards of the library. A basic default setting of 7 would allow for one week to pass before being alerted to possible problems. This is a reasonable amount of time for materials being transferred between two libraries to have arrived.

Author: JW

useDaysMode:

Description: This preference controls how scheduled library closures affect the due date of a material. The useDaysMode has three options: calendar, days, and Datedue. The calendar setting allows for a scheduled closure not to count as a day in the loan period, the days setting would not consider the scheduled closure at all, and Datedue would only effect the due date if the day the item is due would fall specifically on the day of closure. Therefore if the library is scheduled to be closed on the December 24th and December 25th, and if these dates had been previously entered into the calendar, the calendar mode would shift the due date to a non-scheduled closure

two days after the library re-opened, in this case December 27th, to compensate for the holiday in the loan period. The days option would move the due date to December 26th, the first open day after the closure, but only if the item was to be due on the holiday itself. The Datedue feature would ignore the closure entirely, and allow the due date to remain at the 24th or 25th.

Recommendation: The recommendation for this preference is days. This allows for the items to be due back the first day that the library is re-opened. This would allow for the full standard loan period to pass, without providing extensive additional time.

Author: JW

WebBasedSelfCheck:

Description: The WebBasedSelfCheck is for use in libraries that have an internet based self checkout system in use. If these libraries have this system, the preference should be set to “On.”

Recommendation: According to Koha (<http://koha.org/documentation/manual/3.2.com>) “This system preference has not been inserted into the code yet”. Therefore the preference should be set to “Off” as the capability does not yet exist within the system. If the library has a web based shelf check out system, the preference should be switched to “On” once it is available.

Author: JW

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ILS Area: Enhanced Content

AmazonAssocTag

Description: An Amazon Associates Tag allows a library to earn a percentage of all purchases made on Amazon when a patron accesses Amazon's site via links on the library's website. More information about the Amazon Associates program is available at Amazon's Affiliate Program's website, <https://affiliate-program.amazon.com/>. An Amazon Associates tag is necessary if a library wishes to use Amazon content in the system. Before a tag can be obtained, however, the library must first apply for an Amazon Web Services (AWS) account. Applications are free of charge and can be made at <http://aws.amazon.com>. Once an AWS account has been established, the library can then obtain the Amazon Associates Tag.

Recommendation: This item is left blank as a default. If the library wishes to participate in this service, it should first apply for an Amazon Associates Tag and then enter the tag number here. If the library will not be using this service, the field should be left blank.

Author: SH

AmazonCoverImages:

Description: This preference makes it possible to either allow or prevent Amazon cover images from being displayed in the Staff Client. Cover images are retrieved by Amazon, which pulls the content based on the first ISBN number in the item's MARC record. Amazon offers this service free of charge, but interested libraries must first establish an Amazon Web Services (AWS) account (for details on how to set up an AWS account, see [AmazonAssocTag](#) above). If the value for this preference is set to "On", the cover images will appear in the Staff Client, and if it is set to "Off", the images will not appear. If activating this feature, the library must *first* set [AWSAccessKeyID](#) and [AmazonAssocTag](#). Furthermore, [AmazonEnabled](#) must be turned "On" in order for this feature to function. Finally, if AmazonCoverImages is turned "On", both [GoogleJackets](#) and [BakerTaylorEnabled](#) must be turned "Off". If they are not turned "Off", they will prevent AmazonCoverImages from functioning properly.

Recommendation: The recommendation is leave the default in the "Off" position in order to omit Amazon cover images from the Staff Client, thus allowing for a more streamlined search and display.

Author: SH

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AmazonEnabled:

Description: This preference does not display any content but instead enables other Amazon-related preferences ([AmazonCoverImages](#), [AmazonSimilarItems](#), [AmazonReviews](#)). Before turning this feature "On", the library must *first* set [AWSAccessKeyID](#) and [AmazonAssocTag](#). Furthermore, if Amazon content is enabled, [GoogleJackets](#) and [BakerTaylorEnabled](#) should be turned "Off" to avoid interference. The default value for AmazonEnabled is "Off", which means that no Amazon content will be displayed in the Staff Client. If this preference is turned "On", Amazon content will then be enabled. Note: This preference applies only to the Staff Client. In order to display Amazon content on the OPAC, please turn the [OPACAmazonEnabled](#) feature "On".

Recommendation: This feature should be turned "On" if the library has decided to employ Amazon content within the system. Otherwise, the preference should be left in the default "Off" position.

Author: SH

AmazonLocale:

Description: This preference sets the country locale of the library's Amazon Web Services. Once the country has been selected from the pull-down menu, click Save. The values listed in the pull-down menu are as follows:

- US
- CA
- DE
- FR
- JP
- UK

Recommendation: If the library has decided to allow Amazon content in the system, the recommendation is to choose the correct country locale from the pull-down menu. If the library is located in the United States, leave the preference set at the default, which is US. If a library has chosen *not* to use Amazon services, the locale should still be left in the default (US) position.

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AmazonReviews:

Description: This preference makes it possible to either allow or prevent Amazon reviews from being displayed in the Staff Client. Amazon offers this service free of charge, but interested libraries must first establish an Amazon Web Services (AWS) account (for details on how to set up an AWS account, see [AmazonAssocTag](#) above). If the value is set to "On", the reviews will appear in the Staff Client, and if it is set to "Off", the reviews will not appear. Before turning this feature "On", the library must *first* set [AWSAccessKeyID](#) and [AmazonAssocTag](#). Furthermore, [AmazonEnabled](#) must be turned on in order for this feature to function. Finally, if AmazonReviews is enabled, [GoogleJackets](#) and [BakerTaylorEnabled](#) should be turned "Off" to avoid interference.

Recommendation: The recommendation is leave the default in the "Off" position in order to omit Amazon reviews from the Staff Client, thus allowing for a more streamlined search and display.

Author: SH

AmazonSimilarItems:

Description: This preference makes it possible to either allow or prevent Amazon's suggestions for Similar Items from being displayed in the Staff Client. Amazon offers this service free of charge, but interested libraries must first establish an Amazon Web Services (AWS) account (for details on how to set up an AWS account, see [AmazonAssocTag](#) above). If the value is set to "On", the Similar Items suggestions will appear in the Staff Client, and if it is set to "Off", the suggestions will not appear. Before turning this feature "On", the library must *first* set [AWSAccessKeyID](#) and [AmazonAssocTag](#). Furthermore, [AmazonEnabled](#) must be turned on in order for this feature to function. Finally, if AmazonSimilarItems is enabled, [GoogleJackets](#) and [BakerTaylorEnabled](#) should be turned "Off" to avoid interference.

Recommendation: The recommendation is leave the default in the "Off" position in order to omit Amazon Similar Items from the Staff Client, thus allowing for a more streamlined search and display.

Author: SH

AWSAccessKeyID:

Description: If the library has signed up for an Amazon Web Services (AWS) account, it will be assigned an Access Key ID. In order to enable Amazon content, cover images, reviews, and similar item suggestions, the library's Access Key ID must be entered here. If the library has not previously signed up for an Amazon Web Services account, it may do so by visiting <http://aws.amazon.com>. If the library already has an AWS account but

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cannot locate the Access Key ID, the number can be obtained by first going to <http://aws.amazon.com>, then clicking on Your Web Services Account, and finally clicking View Access Key Identifiers. If the library signed up for an Amazon Web Services account when it was known as an Amazon E-Commerce Service account (ECS 3.0), it may be necessary to re-register for the AWS account.

Recommendation: If the library wishes to allow Amazon content in the system, it should obtain the Access Key ID and enter it in the field provided. If the library has chosen not to allow Amazon content, this field should be left in the blank default position.

Author: SH

Babeltheque:

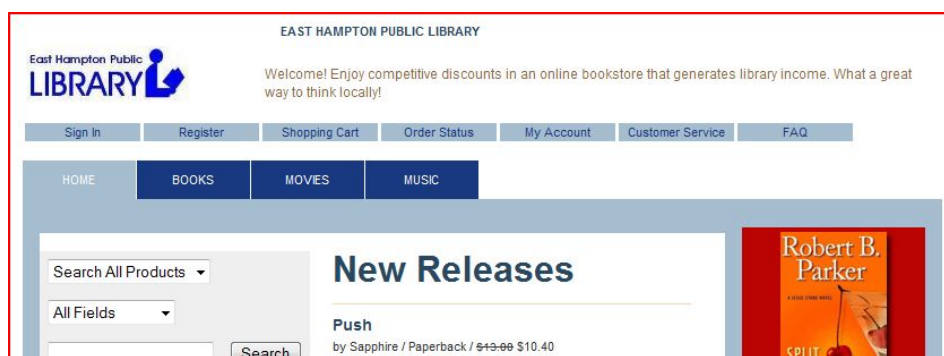
Description: This preference makes it possible to display a Babeltheque tab in the OPAC, allowing patrons to access tags, reviews, and additional title information provided by Babeltheque. The information which Babeltheque supplies is drawn from the French language-based Babelio.com (<http://www.babelio.com/>), a French service similar to LibraryThing for Libraries. More information about Babeltheque is available through its website, <http://www.babeltheque.com/>. Libraries that wish to allow access to this information must first register for the service at <http://www.babeltheque.com>. Please note that this information is only provided in French.

Recommendation: If the library has a significant number of French-speaking patrons, the recommendation is to set the value to "On", thus allowing the Babeltheque tab to appear in the OPAC. If the library does not have a significant number of French-speaking patrons, the recommendation is to leave the default value set to "Off", thus preventing the Babeltheque tab from appearing in the OPAC.

Author: SH

BakerTaylorBookstoreURL:

Description: Some libraries generate additional funding for the library by selling books and other materials that are purchased from or have been previously leased from Baker & Taylor. These materials can be accessed via a link on the library's website. This service is often referred to as "My Library Bookstore." In order to participate in this program, the library must first register and pay for the service with Baker & Taylor. Additional information about this and other services provided by Baker & Taylor is available at the Baker & Taylor website, <http://www.btol.com/>. An example of East Hampton (CT) Public Library's site (<https://ehplct.mylibrarybookstore.com/MLB/screens/index.jsp>) is included below:



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The BakerTaylorBookstoreURL preference establishes the URL in order to link to the library's Baker & Taylor-backed online bookstore, if such a bookstore has been established. The default for this field is left blank; if no value is entered, the links to My Library Bookstore will remain inactive. If enabling this preference, enter the library's Hostname and Parent Number in the appropriate location within the URL. The "key" value (key=) should be appended to the URL, and <https://> should be prepended.

An example of the Orange County Library's URL for My Library Bookstore is listed below. In this example, "ocls.mylibrarybookstore.com" is the Hostname; the Parent Number is 10923.

ocls.mylibrarybookstore.com/MLB/actions/searchHandler.do?nextPage=bookDetails&parentNum=10923&key=

Recommendation: The default for this preference is blank. If the library has established an online library bookstore backed by Baker & Taylor, the URL should be entered in this field. If the library has not made arrangements for an online library bookstore, this option should be disabled by leaving the field blank.

Author: SH

BakerTaylorEnabled:

Description: This preference makes it possible to display Baker & Taylor content (book reviews, descriptions, cover images, etc.) in both the Staff Client and the OPAC. Libraries that wish to display Baker & Taylor content must first register and pay for this service with Baker & Taylor (<http://www.btol.com/>). If Baker & Taylor content is enabled, all [Amazon](#) preferences and [GoogleJackets](#) should be turned "Off".

Recommendation: If the library has registered for Baker & Taylor services, the recommendation is to turn this preference "On" so that Baker & Taylor content can be displayed in the Staff Client and OPAC. If the library has not registered with Baker & Taylor, disable this preference by leaving it in the default "Off" position.

Author: SH

BakerTaylorPassword:

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Description: This setting is only applicable if the library has a paid subscription to the external Content Café service from Baker & Taylor. Use the box provided to enter in the library's Content Café password. Also, ensure that the [BakerTaylorBookstoreURL](#), [BakerTaylorEnabled](#), and [BakerTaylorUsername](#) settings are properly set. The Content Café service is a feed of enhanced content such as cover art, professional reviews, and summaries that is displayed along with Staff Client/OPAC search results. For more information on this service please see the Baker & Taylor website: <http://www.btol.com/>

Recommendation: If the library is utilizing the Baker & Taylor services, then enter the library's BakerTaylor password in the box provided. Otherwise, leave this box blank.

Author: DJB

BakerTaylorUsername:

Description: This setting is only applicable if the library has a paid subscription to the external Content Café service from Baker & Taylor. Use the box provided to enter in the library's Content Café user name. Also, ensure that the [BakerTaylorBookstoreURL](#), [BakerTaylorEnabled](#), and [BakerTaylorPassword](#) settings are properly set. The Content Café service is a feed of enhanced content such as cover art, professional reviews, and summaries, that is displayed along with Staff Client/OPAC search results. For more information on this service please see the Baker & Taylor website: <http://www.btol.com/>

Recommendation: If the library is utilizing the Baker & Taylor services, then enter the library's BakerTaylor username in the box provided. Otherwise, leave this box blank.

Author: DJB

FRBRizeEditions:

Description: This setting enables or disables the Staff Client capability to query remote ISBN databases for applicable ISBNs only. To enable this feature in the OPAC, see the [OPACFRBRizeEditions](#) setting. When enabled, associated editions of a resource will display in separate "Editions" tab on the item's detail page. This allows patrons to see all related editions and forms of a resource. Set to "On" to enable this capability, or set to "Off" to disable it. Please note that if this feature is used, then all [Amazon](#) features and [BakerTaylorEnabled](#) should be set to "Off".

Recommendation: If the library is using the free Amazon service or the BakerTaylor service, then this setting should be "Off". Otherwise, set this to "On" to enable this service.

Author: DJB

GoogleJackets:

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Description: This setting controls the display of applicable cover art from the free Google Books database, via the Google Books API. Please note that to use this feature, all [Amazon](#) preferences are set to “Off” and [BakerTaylorEnabled](#) is set to “Off”. To allow Google cover art to appear to users, set this to “On”; otherwise set this to “Off” to prevent this content from appearing.

Recommendation: If the library chooses to use this service from Google, then set this to “On”. Otherwise, set this to “Off”.

Author: DJB

LibraryThingForLibrariesEnabled:

Description: This setting is only applicable if the library has a paid subscription to the external LibraryThing for Libraries service. This service can provide patrons with the display of expanded information on catalog items such as book recommendations and cover art. It also can offer advanced features like tagged browsing, patron written reviews, and a virtual library display accessed from the details tab. For more information on this service please see the LibraryThing for Libraries website:

<http://www.librarything.com/forlibraries>. The setting is either “On” or “Off”. Setting this to “On” enables the [LibraryThingForLibrariesID](#) and

[LibraryThingForLibrariesTabbedView](#) settings. Please ensure that these other settings are properly set. Setting this to “Off” disables all LibraryThing features and settings.

Also, for further configuration instructions please see the LibraryThing Wiki:

<http://www.librarything.com/wiki/index.php/Koha>

Recommendation: If the library will be utilizing the LibraryThing for Libraries service, then set this setting to “On”. Otherwise, set this to “Off”.

Author: DJB

LibraryThingForLibrariesID:

Description: This setting is only applicable if the library has a paid subscription to the external LibraryThing for Libraries service. Use the box provided to enter in the library’s LibraryThing for Libraries ID as provided to the library by LibraryThing. The ID number is a series of numbers in the form ###-#####, and can be found on the library’s account page at LibraryThing for Libraries. This service can provide patrons with the display of expanded information on catalog items such as book recommendations and cover art. It also can offer advanced features like tagged browsing, patron written reviews, and a virtual library display accessed from the details tab. For more information on this service please see the LibraryThing for Libraries website:

<http://www.librarything.com/forlibraries>.

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Recommendation: If the library will be utilizing the LibraryThing for Libraries service, then enter the library's LibraryThing for Libraries ID in the box provided. Otherwise, leave the box blank.

Author: DJB

LibraryThingForLibrariesTabbedView:

Description: This setting is only applicable if the library has a paid subscription to the external LibraryThing for Libraries service. This service can provide patrons with the display of expanded information on catalog items such as book recommendations and cover art. It also can offer advanced features like tagged browsing, patron written reviews, and a virtual library display accessed from the details tab. For more information on this service please see the LibraryThing for Libraries website:

<http://www.librarything.com/forlibraries>.

Recommendation: If the library wishes to have all LibraryThing content displayed on a separate tab, then set this to "On". If not, then set this to "Off".

Author: DJB

OCLCAffiliateID:

Description: This setting is only applicable if the library has an OCLC Affiliate ID. This allows WorldCat searching in the OPAC via the XISBN programming interface. Simply enter the library's OCLC Affiliate ID in the box provided. Please note that using this feature requires that the [FRBRizeEditions](#) and/or [OPACFRBRizeEditions](#) and [XISBN](#) settings are all "On". For more information on this service please visit the OCLC website: <http://www.worldcat.org/affiliate/default.jsp>. To sign up for an ID, visit the OCLC self-register site:

<http://www.worldcat.org/wcpa/do/AffiliateUserServices?method=initSelfRegister>

Recommendation: If the library wishes to use this service, simply enter the library's OCLC Affiliate ID in the box provided. Otherwise, leave it blank.

Author: DJB

OPACAmazonCoverImages:

Description: This setting controls whether cover art from Amazon is displayed in OPAC search results. To enable this feature set this to "On". To disable this feature set this to "Off". The OPACAmazonEnabled must be "On" for this setting to work. Also note that the AWSAccessKeyID and AmazonAssocTag settings must be properly set before

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enabling this feature. For more information on this service please see the Amazon web site: <https://affiliate-program.amazon.com/gp/advertising/api/detail/main.html>

Recommendation: If the library is using the Amazon enhanced information service and would like this extra Amazon content to be displayed in the OPAC, then set this to "On". Otherwise, set this to "Off".

Author: DJB

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OPACAmazonEnabled:

Description: This setting enables or disables the [OPACAmazonCoverImages](#), [OPACAmazonSimilarItems](#), and [OPACAmazonReviews](#) settings. To display Amazon content in the OPAC, these other settings must also be properly set. Also note that the [AWSAccessKeyID](#) and [AmazonAssocTag](#) settings must be properly set before enabling this feature. Furthermore, to use Amazon's content, [GoogleJackets](#) and [BakerTaylorEnabled](#) must be set OFF. To enable the Amazon content settings set this to "On", or conversely to disable them set this to "Off". For more information on this service please see the Amazon web site: <https://affiliate-program.amazon.com/gp/advertising/api/detail/main.html>

Recommendation: If the library is using the Amazon enhanced information service and wishes to enable the other OPACAmazon settings, then set this to "On". Otherwise, set this to "Off".

Author: DJB

OPACAmazonSimilarItems:

Description: If this preference is turned "On", the Amazon Similar Items will be displayed in the OPAC for readers, enabling readers to see similar items offered by Amazon. If it is turned "Off", it will not appear. If this feature is to be enabled, the library must first set the [AWSAccessKeyID](#) and [AmazonAssocTag](#). The library must also activate [OPACAmazonEnabled](#) for the [OPACAmazonSimilarItems](#) to function. [GoogleJackets](#) and [BakerTaylorEnabled](#) must be turned off before using this function.

Recommendation: Amazon is a free service. The recommendation is to activate this option if the library opts to use the Amazon services.

Author: PT

OPACFRBRizeEditions:

Description: Using the rules set forth in the Functional Requirements for Bibliographic records, this option, when it is turned "On", displays all editions of the same title in the library's collection regardless of the type. Turning it off disables this feature. According to Libraries Unlimited's *Online Dictionary for Library and Information Science* (<http://lu.com/odlis/>), FRBRizing the catalog involves collating MARC records of similar materials. FRBRization brings together entities (sets of Works, Expressions, or Manifestations), rather than just sets of Items. It can aid patrons in selecting related items, expressions, and manifestations that will serve their needs. When it is turned "On", the

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OPAC will query one or more ISBN web services for associated ISBNs and display an Editions tab on the details pages. Once OPACFRBRizeEditions is turned "On", the library must select one of the ISBN options ([PINESISBN](#), ThingISBN, or [XISBN](#)). This option is only for the OPAC; the '[FRBRizeEditions](#)' option must be turned "On" to have the Editions tab appear on the Staff Client.

Recommendation: The recommendation is to turn this option "On" and use one of the three services mentioned above that best meets the library's needs and budget.

Author: PT

PINESISBN:

Description: When this option is turned "On", it enables use of the ISBN service of Georgia's PINES (Public Information Network for Electronic Services) Consortium (<http://www.georgialibraries.org/public/pines.php>). Turning it "Off" disables this feature. This service is used with the [FRBRizeEditions](#) option to search for related editions using the FRBR rules listed in the [OPACFRBRizeEditions](#) preference. If "On", Koha will use PINES ISBN web service in the Editions tab on the detail pages. The [OPACFRBRizeEditions](#) option must be activated to use this service. If this selection is used, the ThingISBN and [XISBN](#) options must be deactivated. Also, be sure to turn the PINESISBN option "Off" if one of these other ISBN services is used. The default setting is "Off".

Recommendation: Since PINES is used only by libraries in the state of Georgia, the recommendation is to leave this option deactivated.

Author: PT

SyndeticsAuthorNotes:

Description: When this option is turned "On", Syndetics provides notes and short author biographies for more than 300,000 authors, in both fiction and nonfiction. Turning it off disables the option. With this option turned "On", the library can display Syndetics Author Notes on the OPAC. According to the Syndetics Solutions website (<http://www.bowker.com/syndetics/>), Author Notes include lists of contributors for many multi-author texts and compilations. This option is a paid subscription service and the [SyndeticsEnabled](#) option must be activated before this service can be used. The default setting is "Off".

Recommendation: As this is a subscription service, the recommendation is that this option not be enabled unless the library decides to purchase Syndetics services.

Author: PT

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SyndeticsAwards:

Description: When this option is turned "On", Syndetics provides its clients with a list of awards that any title has won. Turning it "Off" disables the option. With this service turned "On", the library can display those awards for each book on its website. For each book or item that comes up during a user search, the list of awards for that title will be displayed. When a user clicks on a given award, information about that award is presented along with a list of the other titles that have won that award. If the user clicks on any title in the list, they will see holdings information about that title in their region. This option is a paid subscription service. The [SyndeticsClientCode](#) must be entered and the [SyndeticsEnabled](#) option must be activated before this service can be used. The default setting is "Off".

Recommendation: As this is a subscription service, the recommendation is that this option not be enabled unless the library decides to purchase Syndetics services.

Author: PT

SyndeticsClientCode:

Description: Once the library signs up for Syndetics' services, Syndetics will provide the library with an access code. (Visit the Syndetics homepage at <http://www.bowker.com/syndetics/> for more information.) This is the code that must be entered to access Syndetics' subscription services. Syndetics is a paid subscription service. It must be entered before [SyndeticsEditions](#) can be enabled. If the code is lost, corrupted, or forgotten, a new one can be obtained from <http://www.bowker.com/syndetics/>.

Recommendation: As this is a subscription service, the recommendation is that this option not be enabled unless the library decides to purchase Syndetics services.

Author: PT

SyndeticsCoverImages:

Description: When turned "On", this option allows libraries to display Syndetics' collection of full-color cover images for books, videos, DVDs and CDs on their OPAC. Turning it "Off" disables the option. For each book or item that comes up during a user search, the cover image for that title will be displayed. Since these cover images come in three sizes, the optimum size must be selected using the [SyndeticsCoverImageSize](#) preference after SyndeticsCoverImages are enabled. This option is a paid subscription service. The [SyndeticsClientCode](#) must be entered and the [SyndeticsEnabled](#) option must be activated before this service can be used. Other cover image preferences

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([AmazonCoverImages](#), [GoogleJackets](#), and [OPACAmazonCoverImages](#) should also be turned “Off” to avoid interference. The default setting is “Off”.

Recommendation: As this is a subscription service, the recommendation is that this option not be enabled unless the library decides to purchase Syndetics services.

Author: PT

SyndeticsCoverImageSize:

Description: According to the Syndetics website (<http://www.bowker.com/syndetics/>), Syndetics cover images come in three sizes: thumbnail (94 x 94 pixels), mid-size (187 x 187 pixels), and large (400 x 400 pixels). Koha allows its client libraries to pick between the *latter two*. This setting allows libraries to choose the size that is best for their website. Before making this selection, the [SyndeticsCoverImages](#) option must be enabled. Additionally, this option is a paid subscription service. The [SyndeticsClientCode](#) must be entered and the [SyndeticsEnabled](#) option must be activated before this service can be used.

Recommendation: As this is a subscription service, the recommendation is that this option not be enabled unless the library decides to purchase Syndetics services.

Author: PT

SyndeticsEditions:

Description: When turned “On”, this option shows information on other editions of a title from Syndetics on the item detail pages of the OPAC. Turning it “Off” disables the option. This option is a paid subscription service. The [SyndeticsClientCode](#) must be entered and the [SyndeticsEnabled](#) option must be activated before this service can be used. The default setting is “Off”.

Recommendation: As this is a subscription service, the recommendation is this option not be enabled unless the library decides to purchase Syndetics services.

Author: PT

SyndeticsEnabled:

Description: When this option is turned “On”, all of the Syndetics options can be used. Turning it “Off” disables the option. The [SyndeticsClientCode](#) (provided by Syndetics) must be entered *before* the SyndeticsEnabled option is turned “On”. Syndetics is a paid subscription service.

Recommendation: As this is a subscription service, the recommendation is that this option not be enabled unless the library decides to purchase Syndetics services.

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Wanda Greene
Trevor Zuidema

Author: PT

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SyndeticsExcerpt:

Description: This preference allows Syndetics to display excerpts given to them from selected publishers. The excerpts are available from prominently reviewed new titles, both fiction and non-fiction. The excerpts include poems, essays, recipes, forwards and prefaces. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (<http://www.bowker.com/syndetics/>).

Recommendation: If the library has selected the SyndeticsExcerpt option, a subscription fee is required along with a Syndetics assigned ID number ([SyndeticsClientCode](#)). In addition to paying the subscription fee, the preference [SyndeticsEnable](#) must be turned “On”. Otherwise the default “No” should be selected.

Author: WG

SyndeticsReviews:

Description: Syndetics Reviews is an accumulation of book reviews available from a variety of journals and serials. The reviews page displays colored images of reviewed books dust jackets, partnered with the names of the journal or serial providing the review. Clicking on an icon opens a window revealing the book title, author’s name, book cover icon and the critic’s opinion of the book. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (<http://www.bowker.com/syndetics/>).

Recommendation: If the library has selected the SyndeticsReviews option, a subscription fee is required along with a Syndetics assigned ID number ([SyndeticsClientCode](#)). In addition to paying the subscription fee, the preference [SyndeticsEnable](#) must be turned “On”. Otherwise the default “No” should be selected.

Author: WG

SyndeticsSeries:

Description: Each fiction title within a series is linked to the complete series record. The record displays each title in reading order and also displays the publication order, if different. Alternate series titles are also displayed. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (<http://www.bowker.com/syndetics/>).

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Recommendation: If the library has selected the SyndeticsExcerpt option, a subscription fee is required along with a Syndetics assigned ID number ([SyndeticsClientCode](#)). In addition to paying the subscription fee, the preference [SyndeticsEnable](#) must be turned “On”. Otherwise the default “No” should be selected.
Author: WG

SyndeticsSummary:

Description: Providing more than 5.6 million summaries and annotations derived from book jackets, edited publisher copy, or independently written annotations from Book News, Inc. Covering fiction and non-fiction, this summaries option provides annotations on both trade and scholarly titles. For more information see (<http://www.bowker.com/syndetics/>).

Recommendation: If the library has selected the SyndeticsExcerpt option, a subscription fee is required along with a Syndetics assigned ID number ([SyndeticsClientCode](#)). In addition to paying the subscription fee, the preference [SyndeticsEnable](#) must be turned “On”. Otherwise the default “No” should be selected.
Author: WG

SyndeticTOC:

Description: This preference allows staff and patrons to review the Table of Contents from a wide variety of publications from popular self-help books to conference proceedings. Specific Information access is the main purpose for this option, allowing patrons guidance to their preferred section of the book. Special arrangements with selected book services is used to obtain the table of contents for new publications each year. Automatic links provided by the ISBNs within local MARC records are required to integrate Syndetics secured, high-speed Internet servers to the library OPACs. For more information see (<http://www.bowker.com/syndetics/>).

Recommendation: If the library has selected the SyndeticsExcerpt option, a subscription fee is required along with a Syndetics assigned ID number ([SyndeticsClientCode](#)). In addition to paying the subscription fee, the preference [SyndeticsEnable](#) must be turned “On”. Otherwise the default “No” should be selected.
Author: WG

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TagsEnabled:

Description: Turn “On” to enable tagging. A tag is metadata, a word added to identify an item. Tags allow patrons to classify materials on their own. TagsEnabled is the main switch that permits the tagging features. TagsEnabled must be “On” to allow for other tagging features.

Recommendation: The recommendation is to set this preference to “On”. Tags are useful tools. This Web 2.0 feature invites patrons to be active participants with the catalog.

Author: TZ

TagsExternalDictionary:

Description: The dictionary includes a “whitelist” and a “blacklist” of tags. The whitelist includes all the tags that have been pre-allowed. The blacklist includes tags that are not allowed. This default value is “no value” which means the dictionary is empty. This preference identifies the “whitelist” dictionary used. Ispell is an open source dictionary which can be used as the “whitelist”. Since the dictionary allows for accurately spelled obscenities, the libraries policy may dictate that modifications are made to the Ispell dictionary if this preference is use. For more information about Ispell <http://www.gnu.org/software/ispell/ispell.html> For more information about setting up a “whitelist” or “blacklist” see <http://vtwireless.com/nytprof/C4-Tags-pm-sub.html>

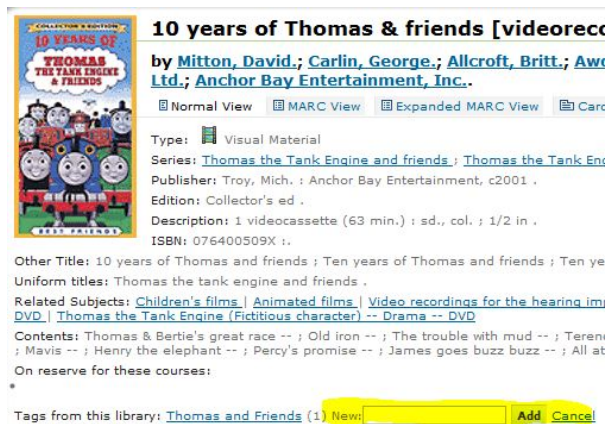
Recommendation: The recommendation is to set this preference to no value. Tagging is by and for the patrons. The use of this preference would depend on library policy.

Author: TZ

TagsInputOnDetail:

Description: Turn “On” to allow patrons to add tags to a title from the detail page. (First, turn [TagsEnabled](#) “On”.) Patrons click the hyperlink “Add” which opens an entry box to add or cancel adding a tag.

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The screenshot shows a library catalog record for a video cassette. On the left is a small image of the video cover, which features the characters from Thomas the Tank Engine. To the right of the image, the title '10 years of Thomas & friends' is displayed in a large, bold font, followed by '[videorec]'. Below the title, the authors are listed: 'by Mitton, David.; Carlin, George.; Allcroft, Britt.; Anchor Bay Entertainment, Inc.'. There are four tabs: 'Normal View', 'MARC View', 'Expanded MARC View', and 'Cart'. The 'Normal View' tab is selected. Below the tabs, the record details are listed: 'Type: Visual Material', 'Series: Thomas the Tank Engine and friends; Thomas the Tank Engine', 'Publisher: Troy, Mich. : Anchor Bay Entertainment, c2001.', 'Edition: Collector's ed.', and 'Description: 1 videocassette (63 min.) : sd., col. ; 1/2 in. ; ISBN: 076400509X'. Below the description, there is a section for 'Other Title' and 'Uniform titles', followed by 'Related Subjects' which includes links to 'Children's films', 'Animated films', 'Video recordings for the hearing impaired', 'DVD', and 'Thomas the Tank Engine (Fictitious character) -- Drama -- DVD'. The 'Contents' section lists several episodes: 'Thomas & Bertie's great race --', 'Old iron --', 'The trouble with mud --', 'Tereni & Mavis --', 'Henry the elephant --', 'Percy's promise --', 'James goes buzz buzz --', and 'All at On reserve for these courses:'. At the bottom, there is a 'Tags from this library' section with a dropdown menu showing 'Thomas and Friends (1)', a 'New' button, and 'Add' and 'Cancel' buttons.

Recommendation: The recommendation is to set this preference to "On". Tagging is a valuable feature and the detail display is a natural place for patrons to add tags.

Author: TZ

TagsInputOnList:

Description: This is another option for patrons to create tags. Turn "On" to allow patrons to add tags from the search results list. (First, turn [TagsEnabled](#) "On".) This preference may be turned "On" along with the [TagsInputOnDetail](#) preference; patrons then can add tags on the result page and the item details page.

Recommendation: The recommendation is to set this preference to "Off". Tag input is important, but the search results list is not the right place to do it. The detail page is a more natural place to add tags. Adding tag input here would unnecessarily clutter the display.

Author: TZ

TagsModeration:

Description: Turn "On" to require all tags to be first filtered by the tag moderator. Only approved tags will be visible to patrons. Turn "Off" to bypass the tag moderator and allow patrons' tags to be immediately visible. When this preference is turned on the moderator, a staff member, would approve the tag in the Staff-Client. The tags pending approval may be found in the More menu under Tools—Tags. The moderator will have the option to approve or reject each pending tag suggestion.

Recommendation: The setting for this preference would depend on library policy. A library which may not have a "whitelist" dictionary identified in the [TagsExternalDictionary](#) preference and be concerned with obscenities appearing in their OPAC may want to turn this preference "On". However, turning this preference "On"

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may discourage social participation by the patrons and will place an added responsibility on the staff member who is asked to act as the tags moderator.

Author: TZ

TagsShowOnDetail:

Description: Sets the number of tags to display on the details page. (First, turn [TagsEnabled](#) "On".) Set default to 0 to turn off.

Recommendation: The recommendation is to keep the default setting of this preference at 10. Tags are very useful and the detail page is a good place to display them. 10 tags would be enough to provide the patron with additional search options. Instead of the detail page being the end of a patron's search it can continue simply by clicking on a tag. More than 10 tags may be too many, which would clutter the display.

Author: TZ

TagsShowOnList:

Description: Sets the number of tags to show in the search results list. (First, turn [TagsEnabled](#) "On".) The default value is 6.

Recommendation: The recommendation is to keep the default preference at 6. Including tags on the search results list allows patrons to redirect their search without having to create an entirely new search. It increases functionality of the search with minimal complication to the display. The search results list contains a lot of information. More than 6 tags may needlessly clutter the display.

Author: TZ

ThingISBN:

Description: Turn "On" to display an "Editions" tab on the item's detail page. (The [FRBRizeEditions](#) preference must be turned "On" to have the Editions tab appear on the Staff Client and the [OPACFRBRizeEditions](#) preference must be turned "On" to have the Editions tab appear in the OPAC.) Editions are listed, complete with cover art and bibliographic information. The feed comes from LibraryThing's ThingISBN web service. This is a free service to non-commercial sites with fewer than 1,000 requests per day.

Recommendation: Unless the library prefers to use ThingISBN over [PINESISBN](#) or [XISBN](#), the recommendation is to turn this preference "Off".

Author: TZ

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XISBN:

Description: Turn “On” to display an “Editions” tab on the item’s detail page. (The [FRBRizeEditions](#) preference must be turned “On” to have the Editions tab appear on the Staff Client and the [OPACFRBRizeEditions](#) preference must be turned “On” to have the Editions tab appear in the OPAC. This preference also requires an OCLC Affiliate ID entered in the [OCLCAffiliateID](#) preference.) Editions are listed, complete with cover art and bibliographic information. The feed comes from OCLC’s xISBN web service. The feed limit for non-commercial sites is 500 requests per day.

Recommendation: The recommendation is to set this preference to “On” if the library has registered with OCLC and has an ID. The “Editions” tab adds functionality for the patron at no cost. The xISBN feed is free for non-commercial use under 500 hits per day.

Author: TZ

XISBNDailyLimit:

Description: This preference limits the number of daily requests to OCLC’s xISBN service. Enter in a value only if XISBN is turned “On”. ([FRBRizeEditions](#) and/or [OPACFRBRizeEditions](#) must also be turned “On”. XISBN also requires an OCLC Affiliate ID entered in the [OCLCAffiliateID](#) preference.). The default value is 499 requests per daily because xISBN is a free service if used non-commercially and limited to 500 requests per day.

Recommendation: The recommendation is to set this preference to enter a limit of 499 if XISBN is also turned “On”. The “Editions” tab adds functionality for the patron at no cost, as the xISBN feed is free for non-commercial use under 500 hits per day. The daily limit preference ensures the library will not exceed the number for hits for free service.

Author: TZ

ILS Area: I18N/L10N

dateformat:

Description: This preference controls how the date is displayed. The options are the United States method, mm/dd/yyyy (04/24/2010), the metric method, dd/mm/yyyy (24/04/2010) or ISO, which is the International Standard of Organization, yyyy/mm/dd (2010/04/24). The International Standard of Organization would primarily be used by libraries with locations in multiple nations that may use different date formats, to have a single display type, or if the library would be in a region that does not use the United States or metric method. More information regarding the ISO date format can be found at http://www.iso.org/iso/iso_catalogue.htm.

Recommendation: The recommended preference is the United States method, mm/dd/yyyy, as this is the method that staff and patrons would be able to read most easily.

Author: JW

language:

Description: This preference is the language that the Koha system will appear in. The options are English, zh_cn (simplified Chinese characters), zh_tw (Taiwanese Mandarin), French, German and Spanish.

Recommendation: The recommendation for this preference is English, as this is the primary language of most libraries in the United States.

Author: JW

opaclanguages:

Description: A selected box in this preference sets the default language for the OPAC interface. This preference alone does not seem to change the OPAC language but works in conjunction with the *opaclanguagesdisplay* preference. With the *opaclanguagesdisplay* set to “On” and more than one language in the *opaclanguages* selected, then a language other than English can be selected from the main OPAC page. To keep the selected language and not offer other choices, the *opaclanguagesdisplay* must be then turned to “Off” again. There are six Koha generated languages to choose from: English, simplified Chinese, traditional Chinese, French, German, and Spanish. The default language is set to English (en). These options cannot be expanded to include other languages.

Recommendation: Since the primary language of the local user is English, the recommendation is to use the Koha default selection which is English

Author: PJ

ILS Area: Logs

BorrowersLog:

Description: Each patron has a main record consisting of borrower information, such as contact and affiliation, in the Details view. The Details view gives the patron information in three editable areas: personal information, library use, and alternate information. With the *BorrowersLog* preference "On", the Koha system generates a list of records whenever the information in a patron's Details record is added, deleted, or modified. This information appears in the Members module log. The log record shows information regarding the time and date, the action such as MODIFY or ADD, and links to the detailed view of the librarian who took the action and to the patron. If the action was MODIFY, the log record includes information listing all of the fields in the area where the action took place, not the specific information that changed. If the Preference is set to OFF the system will not create a log record when patron data is edited.

Recommendation: The recommendation is to keep the Koha default position of ON for this preference. It is important to have records of users who are taking any action with patron data and keeping this preference ON monitors that activity while keeping patron data private which is not shown in the log record.

Author: PJ

CataloguingLog:

Description: The *CataloguingLog* shows a list of records created when the bibliographic information for an item is added, modified or deleted in the Cataloging Module. With this preference "On", any changes in the MARC record will be recorded and viewable in the Catalog log. The log shows information regarding the time and date, the action such as MODIFY or ADD, links to the detailed view of the librarian who took the action, the item, and information for how the record looked prior to the action so that a comparison may be made to the current record. If the preference is "Off", the system will not create a record for the log when MARC records are added, changed, or deleted.

Recommendation: MARC records can change quickly and often in a busy library and in large numbers where records are updated on a regular schedule. However, the recommendation is to keep the default position of "On" for this log and to monitor the volume of activity.

Author: PJ

ReturnLog:

Description: When the *ReturnLog* preference is set to "On", the Koha system will record each returned item transaction and make that information available in a log. The log information includes six fields: Date, Librarian, Module, Action, Object and Item. The date shows the specific time and date of the transaction, that it happened in the Circulation Module and the

action was a Return. For Librarian, Object and Item, the log gives links to the detailed records for the staff member who checked-in the item, the patron who returned the item, and the item itself. If the preference is set to “On” the system will not create a record of the returned item transaction in the circulation log.

Recommendation: The default value is set to “On” and it is a good practice to record this type of circulation activity, the recommendation is to leave the preference in the default position.

Author: PJ

SubscriptionLog:

Description: With the *SubscriptionLog* preference “On”, a log record will be created when a serial subscription is added, modified or deleted. The record includes the time and date of the action, the action itself, that the action took place in the Serials module, and any optional additional information from the subscription record. The log record includes links to the detailed view of the librarian who took the action and a link to the detailed view of the object. The log only appears if the user is browsing the Serials Module log, not when browsing ALL modules. If the preference is turned “Off”, this record will not be created and will not appear in the Serial Module log, though records created while the preference was “On”, will still appear in the log.

Recommendation: The default position of the SubscriptionLog preference is set to “On”. It is important to have a history of subscription additions and changes and the recommendation is to keep the preference “On”.

Author:PJ

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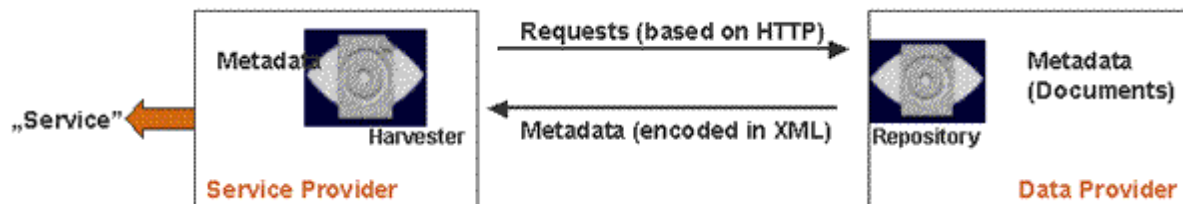
ILS Area: OAI-PMH

OAI-PMH:

Description: For the Open Archives Initiative-Protocol for Metadata Harvesting (OAI-PMH) there are two groups of ‘participants’: Data Providers and Service Providers. **Data Providers** (open archives, repositories) provide free access to metadata, and may, but do not necessarily, offer free access to full texts or other resources. OAI-PMH provides an easy to implement, low barrier solution for Data Providers. **Service Providers** use the OAI interfaces of the Data Providers to harvest and store metadata. Note that this means that there are no live search requests to the Data Providers; rather, services are based on the harvested data via OAI-PMH. Koha at present can only act as a Data Provider. It can not harvest from other repositories. The biggest stumbling block to having Koha harvest from other repositories is that MARC is the only metadata format that Koha indexes natively. <http://www.openarchives.org/OAI/openarchivesprotocol.htm#Identify> Image from <http://www.oaforum.org/tutorial/english/page3.htm>.

Recommendation: Due to the experimental status of this preference, the recommendation is to leave this preference in the “Off” position.

Author: WG



OAI-PMH:MaxCount:

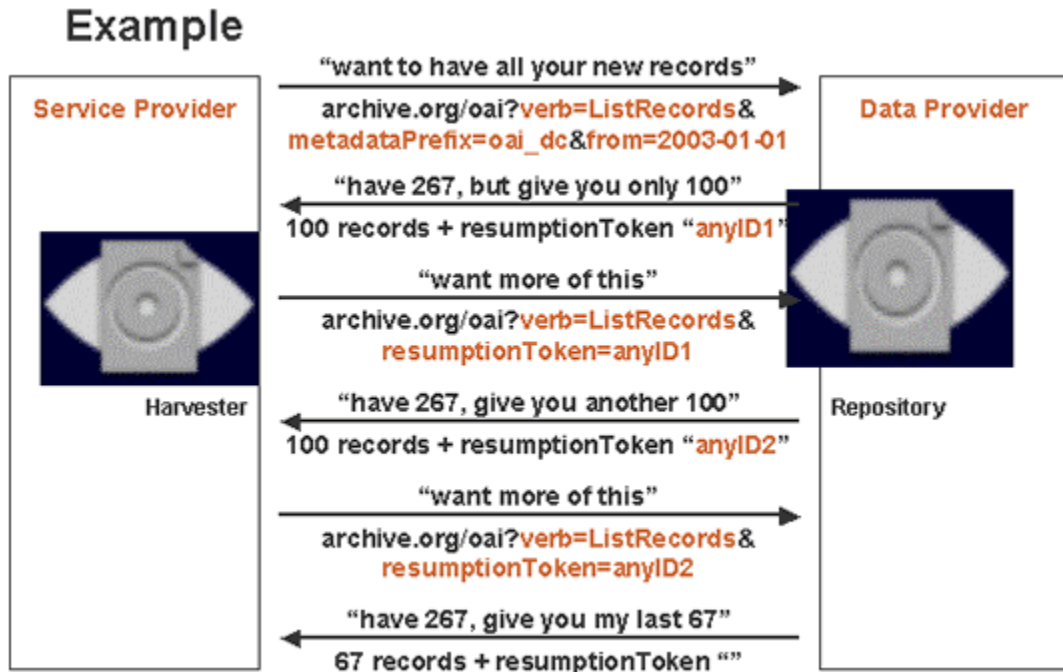
Description: This is the maximum number of records that would be returned based on ListRecord or ListIdentifier queries from harvesters. ListRecords harvest the entire records while the ListIdentifier is an abbreviated form of ListRecords, retrieving only headers rather than records. <http://www.openarchives.org/OAI/openarchivesprotocol.htm#Identify> Image from <http://www.oaforum.org/tutorial/english/page3.htm>

Recommendation: Due to the experimental status of this preference, the recommendation is to avoid installation.

Author: WG

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Four of the request types return a list of entries. Three of them may reply with 'large' lists.



OAI- PMH:Set:

Description: Sets enable a logical partitioning of repositories. They are optional archives that do not have to define Sets. There are no recommendations for the implementation of Sets. Sets are not necessarily exhaustive of the content of a repository. They are not necessarily strictly hierarchical. It is important and necessary to have negotiated agreements within communities defining useful sets for the communities.

<http://www.oaforum.org/tutorial/english/page3.htm>

-examples

- *publication types (thesis, article)

- *document types (text, audio, image)

- *content sets, according to DNB (medicine, biology)

Recommendation: Due to the experimental status of this preference, the recommendation is to avoid installation.

Author: WG

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ILS Area: OPAC

AnonSuggestions:

Description: Patrons, without logging into their own account, can make purchase suggestions anonymously when they cannot find items in the catalog. In order to use this preference, the library must create an anonymous patron identity in the Patron Module for by completing the required fields (with example): “surname” (anonymous), “zip code” (55555), and “borrower number” (55).

Recommendation: Patrons should be able to make anonymous purchase suggestions in the interest of privacy rights. To allow for anonymous suggestions, create an anonymous borrower for patrons to log into and set the value of this preference to the the borrow number (in this example, “55”). Keep the default setting at 0 and do not create an anonymous patron to not allow for anonymous purchase suggestions.

Author: as

BiblioDefaultView:

Description: This preference determines the level of bibliographic detail that the patron will see on the OPAC item detail. Choose one of three values: “normal,” “marc,” or “isbd.” Normal displays the graphical interface; marc displays the MARC21 cataloging view; isbd displays the ISBD (International Standard Bibliographic Description, AACR2) view. The default value is normal.

Recommendation: Use the default value “normal.” This view is the most user friendly and gives the patron enough information without any library jargon. The MARC21 and ISBD views are for the librarian use.

Author: as

hidelostitems:

Description: Items that are marked lost by the library can either be shown or not shown on the OPAC. This preference is set as either “On” or “Off.” By setting the value “On,” the lost item is not shown on the OPAC. By setting the value “Off,” the lost item is shown on the OPAC for patrons to view, as a lost item.

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Recommendation: Set the value “On” and do not show the lost item on the OPAC. The information is irrelevant to the user since the item cannot be obtained, and may only be confusing to the patron.

Author: as

kohaspsuggest:

Description: This preference allows staff to keep track of search inquiries made by patrons. A database and a user password must be established and maintained by the system administrator in order to use this preference.

Recommendation: This preference requires a database to be established to keep track of search queries. Use the default value (no value) unless a database has been established, in which case the preferences is turned on by defining “host:ddname” (database name) and “user:pass” (password).

Author: as

LibraryName:

Description: This preference sets the display of the library name on the browser title bar. (Use [opacheader](#) to display the library name above the OPAC search box.)

Recommendation: Provide “the name of the library” as the value. This will help users know they have located the URL for the library.

Author: as

OpacAuthorites:

Description: This preference displays the link on the OPAC for the authority search and gives users the ability to “Browse by Subject.” By setting the preference “On” (default) patrons can use this search link of the OPAC. Setting the preference “Off” prohibits use of this search link.

Recommendation: Set the value “On” and provide the link to the authority search in the OPAC so that patrons have a greater ability to search the catalog. Essentially the patron will be able to browse by the catalog.

Author: as

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opacbookbag:

Description: This preference allows the user to temporarily save a list of items found on the catalog. By using the Book Bag, or Cart, the user can print out (or e-mail) a list of items found. The user does not need to be logged in. This list is temporary and will be emptied, or cleared, at the end of the session. The value set as “On” provides the user with the cart, set “Off” prohibits use of the cart.

Recommendation: Set the value “On” to allow display of the cart for the user. The ability to create a list of items from the catalog enables the user to more easily obtain bibliographic information and search the library shelves.

Author: as

OpacBrowser:

Description: This is an experimental feature. “On” value allows the system administrator to runs scripts of the subject authorities’ browser on the OPAC. “Off,” the default value prohibits the subject authorities’ browser on the OPAC. This features functions similarly to facets. It will take a search term and break it down to smaller, more specific subjects in the catalog. Example: 2545 items found relating to “Religion”—545 about “Protestant”, 500 about “Islam”, 500 about “Hindu”, 500 about “Catholic”, 500 about “Judaism”. Then click on “Catholic” to further break down the search—200 about “Orthodox Catholic”, 300 about “Roman Catholic”.

Recommendation: Use the default “Off” setting since this is an experimental feature and KOHA recommends the feature to be left “Off” unless the system administrator wants to run scripts.

Author: as

OpacCloud:

Description: This is an experimental feature. This browser only works for the french Dewey catalog and is not modified to work with other structures. “On” value allows the system administrator to runs scripts of the subject authorities’ browser on the OPAC. “Off,” the default value prohibits the subject authorities’ browser on the OPAC. (In order to use this preference, buildopaccloud must be launched.)

Recommendation: Use the default “Off” setting since this is an experimental feature and KOHA recommends the feature to be left “Off” unless the system administrator wants to run scripts.

Author: as

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opaccolorstylesheet:

Description: Changing this preference will alter the appearance of the OPAC by customizing the CSS (Cascading Style Sheets). This preference is no longer used unless the library chooses to use a secondary stylesheet that replaces the default CSS. To change from the default CSS, a new style sheets (CSS) must be created and uploaded to the Koha server in the same directory as the default CSS.

Recommendation: Use the default value and leave the preference as “color.css.” Overriding the default settings requires knowledge of html and css. To change the default setting, create a pointer to the new style sheet by entering the name of the new CSS.

Author: as

opaccredits:

Description: This setting is for credits that will appear at the bottom of your OPAC pages. Credits encompass copyright information, last date updated, hyperlinks or other information represented in an HTML format. This is static information and any updates must be entered manually.

Recommendation: The default value is “no value”. The recommendation is to minimally include Organization name and logo, copyright information and date of last update, name of updating authority

Author: kml

OPACDisplayRequestPriority:

Description: When a patron has material on hold this preference will display the patron’s priority on the holds queue in the OPAC if set to “On”, or will not show the patron’s priority on the holds queue in the OPAC is set to “Off”.

Recommendation: The default value is “Off” and the recommendation is to retain the default value.

Author: kml

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OPACHighlightedWords:

Description: Defines whether the entered search terms are highlighted in the displayed search results in the OPAC. When the value is set to “On” search terms are highlighted in the OPAC display and when the value is set to “Off” search terms are not highlighted in the OPAC display

Recommendation: The default value is “On” and the recommendation is to retain the default value. Highlighted terms provides the user with a visual indication of the relevancy of the results.

Author: kml

OPACItemHolds:

Description: This allows for the decision of whether patrons can place a hold on a specific item or only on the next available copy in the OPAC. The patron can place a hold on a specific item if the value is set to “On” or the patron can only request the next available copy if the system is set to “Off”.

Recommendation: The default value is “On” and the recommendation is to retain the default value and allow patrons to place holds on specific items if they desire.

Author: kml

opacstylesheet:

Description: This setting’s function is to point to the *.css file used to define the OPAC layout. A *.css file is a cascading style sheet which is used in conjunction with HTML to set how the HTML page is formatted and will look on the OPAC. There are two style sheets that come with the system; opac.css and opac2.css. A custom style sheet may also be used. A style sheet designated in the [opacstylesheet](#) preference will override the style sheet listed here.

Opacstylesheet allows for style sheets from other locations to be accessed. The style sheets listed in the opacstylesheet preference are held on the Koha server.

Recommendation: The default value is opac.css and the recommendation is to retain the default value.

Author: kml

OpacNav:

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Peggy Cookson

Description: Use this preference to enter HTML that will appear on the left hand navigation column for the OPAC. The HTML entered serves as the heading for the menu on the left side of the OPAC screen.

Recommendation: The default value is “Important links here” and can be changed to fit the purpose of the column for a particular OPAC.

Author: kml

Preference: OpacPasswordChange

Description: This preference determines whether a patron can change their passwords through the OPAC. If the value is set to “On” the patron is allowed to initiate a password change and if the setting is “Off” the patron cannot initiate a password change.

Recommendation: The default value is “On” and the recommendation is to retain the default value unless authentication takes place at the network level (Directory Service running over TCP/IP) and not within the OPAC.

Author: kml

Preference: opacreadinghistory

Description: Set this preference to determine whether to display patron circulation history on the My Account screen. If set to “On” circulation history is displayed on the My Account screen, and if set to “Off” circulation history is not displayed on the My Account screen. When set to “Off” the patron circulation history is still stored in the database. By using the Anonymize Patron Data tool patron circulation history can be made anonymous or deleted in bulk mode.

Recommendation: The default value is “On” and the recommendation is to retain the default value.

Author: kml

OpacRenewalAllowed:

Description: This preference allows the administration to choose if patrons can renew their checked out materials via their checked out history in the OPAC. It allows patrons to renew their materials without having to contact the library or having to return to the library. Setting this preference to “On”, allows patrons to renew their materials through the OPAC, setting this preference to “Off”, will not allow patrons to renew their materials via the OPAC and would instead have to call or visit the library.

Recommendation: The recommendation for this setting is “On” to give patrons easy renewal options. This setting does depend on your circulation policy.

Author: JG

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Peggy Cookson

OPACShelfBrowser:

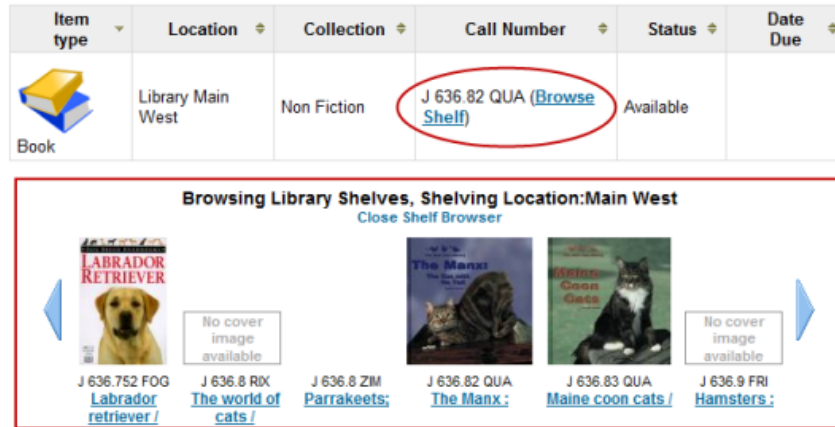


Illustration courtesy of Sanbornton Public Library (http://splnh.kohalibrary.com/cgi-bin/koha/opac-detail.pl?biblionumber=5372&shelfbrowse_itemnumber=5372#shelfbrowser)

Description: This preference allows patrons to view what is located on the shelf near the item they looked up. The shelf browser option appears on the item details page. It allows for a shelf browsing library experience via the OPAC and lets patrons see other books that may relate to their search and items that sit on the shelf near the item they are looking at. Setting this preference to “On” will enable the shelf browser, setting this preference to “Off”, disables the shelf browser view.

Recommendation: This preference should be set to “On”. Only on busy Koha installations should it be set to “Off” because of resource load.

Author: JG

OPACShowCheckoutName:

Description: This preference allows all users to see who has the item checked out if it is checked out. In small corporate libraries this can be helpful so coworkers can just contact the patron with the book themselves. Setting the preference to “Off” will not show who checked out them item to other users, “On” will show the name of the patron that has the item checked out to all users of the OPAC.

Recommendation: Use the default preference of “Off” for patron privacy.

Author: JG

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opacsmallimage:



Description: This preference allows the administrator to replace the Koha logo with their own custom logo. With a custom logo, users of the OPAC will know whose catalog they are searching and will help brand the library or corporation. The default value is no value, which will display the Koha logo.

The logo size defaults to 120px x 40px. If using an image this size or smaller, it will display correctly. Simply, upload the image to your hosting server and then enter the complete URL to the image, including http://, in the field to replace the Koha logo with the custom logo.

If the custom logo is larger than 120px x 40px, there are two options.

Option 1: Upload the image to your hosting server then enter the complete URL to the image including the http:// to the opacsmallimage setting. Next, edit the code below then copy and paste all of it to the OPACUserCSS setting.

```
h1#libraryname {  
width: 200px; /*change the number to the width of your logo */  
}  
h1#libraryname a{  
padding: 80px 0 0; /*change the first value to the height of your logo */  
width: 220px; /*change the number to the width of your logo */  
}  
#fluid {  
Margin-left: 224px;  
}
```

Option 2: For advanced users only. If using a custom stylesheet to format the look of the OPAC, the logo settings may be changed there.

Recommendation: Change the logo to your custom logo, preferably using a logo 120px x 40px. If a larger logo is required, add the code to the [OPACUserCSS](#) setting.

Author: JG

opacstylesheet:

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Description: This preference allows the administrator to completely replace the default stylesheet with their own alternate stylesheet. This allows the administrator to completely customize the look of the OPAC. The default setting is no value. To change the stylesheet, enter a complete URL, including the http:// to the custom stylesheet. Content in the custom/alternate stylesheet will overwrite any data in the default stylesheet defined in the opaclayoutstylesheet setting.

The default stylesheet will likely be found at `http://your_koha_address/opac-tmpl/prog/en/css/opac.css`

Recommendation: Leave the default setting of no value. Only advanced users with CSS knowledge should change this setting.

Author: JG

opacthemes:

Description: This preference allows the administrator to choose to use a different template if one is available. This preference identifies the template to be used. The templates are stored on the Koha server in the systempreferences table for the 'opacthemes' settings. If working with the default installation, there is only one template to choose. Templates contain HTML markup that includes items that will be displayed on the pages. Talk to your system administrator about creating new templates.

This preference should only be used rarely, with every upgrade to Koha custom templates will have to be updated. The default template includes options to customize the appearance without having to modify the template.

Recommendation: Leave the default setting. Only advanced users should change the templates and customization can be done through CSS instead.

Author: JG

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OPACTopissue:

The screenshot shows the OPAC interface. At the top, there is a search bar with the text 'Search Library Catalog' and a 'Go' button. Below the search bar, there are navigation links: 'Advanced Search', 'Browse by Subject', 'Tag Cloud', and 'Most Popular'. The 'Most Popular' link is highlighted with a red box. Below the navigation bar, there is a section titled 'The 10 most checked-out item types at all locations in the past 3 months'. To the left of this section is a 'Refine your search' sidebar with various filters. The main content area displays a table of the top 10 checked-out items.

Title	Itemtype	Checkouts	
Vampire game / Judal. - Tokyopop,		48	Place Hold
Arthur's reading trick / Brown, Marc Tolon. - Random House,		29	Place Hold
From far away / Hikawa, Kyōko. - Viz Media,		25	Place Hold
U is for undertow / Grafton, Sue. - G.P. Putnam's Sons,		23	Place Hold
Tales from the crypt. - Papercutz ; Melia [distributor],		20	Place Hold
La's orchestra saves the world / McCall Smith, Alexander. - Pantheon Books,		20	Place Hold
Harry Potter and the half-blood prince - Warner Home Video,		18	Place Hold
Singing sensation / - Scholastic Paperbacks,		15	Place Hold
Trial by fire / Jance, Judith A. - Simon & Schuster,		15	Place Hold
Shark attack! / Dubowski, Cathy East. - DK,		14	Place Hold

Illustration courtesy of Salinas Public Library (<http://salinas.kohalibrary.com/cgi-bin/koha/opac-topissues.pl>)

Description: This preference allows the administrator to choose to show the “Most Popular” link at the top of the OPAC. The “Most Popular” page shows the top circulated items in the library, as determined by the number of times a title has been circulated. This allows users to see what titles are popular in their community. Setting this preference to “On” displays the “Most Popular” link, “Off” hides the link.

Recommendation: Use the default setting of “Off”. This is still an experimental feature. Turning this feature “On” may overload the system.

Author: JG

OPACURLOpenInNewWindow:

Description: This preference determines if URLs in the OPAC will open in a new window or not. When clicking on a link in the OPAC, a patron does not need to worry about navigating

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away from their search results. Setting this preference to 'On', opens the URL in a new window, 'Off' opens URLs in the existing window the patron is using.

Recommendation: Set this preference to "On" to open URLs in new windows; patrons will not have to worry about losing their search results.

Author: JG

OPACUserCSS:

Description: CSS stands for Cascading Style Sheets, which are styles that define how to display HTML elements and data. (http://w3schools.com/css/css_intro.asp) OPACUserCSS allows the administrator to enter styles that will overwrite the OPAC's default CSS as defined in 'opaclayoutstylesheet' or 'opacstylesheet'.

For example, entering:

```
body{  
background:black;  
}
```

will change the OPAC's background to black. The default is no value.

Styles may be entered for any of the selectors found in the default style sheet. The default stylesheet will likely be found at http://your_koha_address/opac-tmpl/prog/en/css/opac.css

Recommendation: Leave the default of no value, unless adding content specified in another preference, for instance the content in [opacsmallimage](#) if needed.

Author: JG

opacuserjs:

Description: This preference allows the administrator to enter JavaScript that will be embedded across all pages of the OPAC. JavaScript is a scripting language that is used to make web pages interactive. (http://w3schools.com/js/js_intro.asp) Administrators may use this preference to customize some of the interactive sections of Koha, customizing the text for the login prompts, for example. The default setting is no value. JavaScript coding may be entered in the field.

Recommendation: Leave the default of no value. This is for advanced users with knowledge of JavaScript.

Author: JG

opacuserlogin:

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Description: The user login lets the patrons either login to manage their accounts or not. If the value is “On” the users can manage their account. If the value is “Off” they cannot manage their account.

Recommendation: The recommendation is that the value is to be “On” because the user will need to be able to login and manage his/her account. This one is detrimental due to the patron needs to be able to access the account and do activities on the system.

Author: PC

OPACViewOthersSuggestions:

Description: If the value is “On” the patrons will be able to see others purchase suggestions as well as the name of the person making the suggestion. If the value is “Off” they can see only theirs.

Recommendation: The recommendation is that the value is to be “Off”. All libraries should keep their patron’s purchases and any other patron information private. To have the value on goes against the privacy act and should be kept off.

Author: PC

RequestOnOpac:

Description: If this value is “On” the patrons can place holds through the OPAC. If the value is “Off” the patrons cannot place holds through the OPAC. If set to “Off” all holds would have to be placed by the library staff via the staff-client.

Recommendation: The recommendation is that the value is “On” to enable the patron to place the holds on the OPAC. If the patron has to go another route to place the hold it will take longer and the patron will not place the hold.

Author: PC

reviewson:

Description: This button allows the patrons to submit comments on books they have read via the OPAC. The patron may enter a comment on the item details page. If this preference is set to “On” reviews are first sent to the staff-client for staff approval before the review is displayed in the OPAC. The staff member who reviews and approves comments may find the pending comments in the More menu under Tools—Comments. The staff member can then choose to approve or delete the comments.

Recommendation: The recommendation is this value is to be “On”. It will be convenient for other patrons to read comments on books to be able to see if they will like the book or if the book is a book they can use.

Author: PC

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SearchMyLibraryFirst:

Description: When the patron is logged into their account, this preference limits the search to the user's library only. If it is "Off" the user can search all the library branches. If the patron is not logged into their account then all available libraries are searched. If this option is "On" and a patron is logged into their account, the patron will have to use the Advance Search option to force the system to search all available libraries.

Recommendation: The recommendation is that the value be "Off." The users will want to be able to find all available copies. This option gives them a better chance of finding the material they need.

Author: PC

suggestion:

Description: When "On", this preference allows the patrons to make purchase suggestions via the OPAC. Patrons must be logged into the OPAC in order to make suggestions. The suggestions are sent to the Acquisitions Module which is viewed in the staff-client.

Recommendation: The recommendation is that this value be "On" so the patrons will be able to make the purchase suggestions. The OPAC needs the input from the patrons and the patrons need to be able to make the suggestions.

Author: PC

URLLinkText:

Description: A URL is entered in 856 subfield u and is usually accompanied by subfield 3; subfield 3 specifies materials (a related topic like the publisher's information) while subfield u contains the related source link. The URLLinkText specifies the text when there is not subfield 3.

Recommendation: The recommendation is that the value is left blank so only the text of subfield 3, when available, will be shown..

Author: PC

XSLTDetailsDisplay:

Description: XSLT and CSS are both style sheets. However, XSLT transforms one document into another while CSS formats a document. See <http://webdesign.about.com/library/weekly/aa101901a.htm> for more information. XSLT allows for more complex formatting and for the information to be seen in other media like cell phones. The XSLDetailsDisplay will enable the cataloger to be able to control the details page. In Koha, the XSLT documents provide greater detail on the details page of the OPAC. The XSL style

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sheets are stored on the Koha server and must be edited directly. They require advanced knowledge of XSL construction. Consult the Koha administrator to make changes to the XSL. This feature is only available when using MARC21.

Recommendation: The recommendation is that the value be “Off”. **Author:** PC

XSLTResultsDisplay:

Description: See XSLTDetailsDisplay. In Koha, the XSLT documents provide greater detail on the results page of the OPAC. The XSL style sheets are stored on the Koha server and must be edited directly. They require advanced knowledge of XSL construction. Consult the Koha administrator to make changes to the XSL. This feature is only available when using MARC21

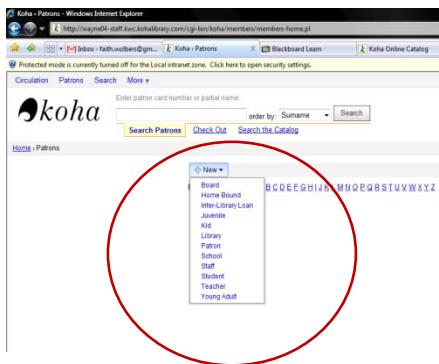
Recommendation: The recommendation is that the value be “Off”.

Author: PC

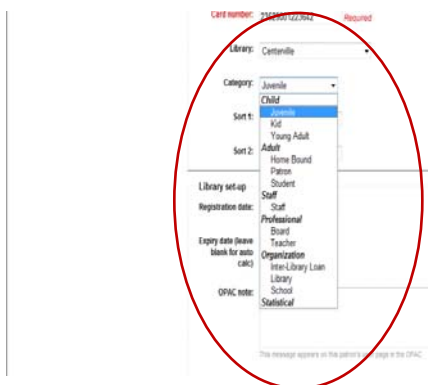
ILS Area: Patrons

AddPatronLists:

Description: This preference allows the administrator to set how the patron type is determined when entering new patron information. There are two settings for this preference, “categorytype” or “category_code.” Category type gives the defined list of categories when you click to add a new patron. ”Category_code” gives you a patron type when you initiate a new patron, but an additional menu must be used when choosing the patron category in the new patron form. See below.



This displays the “categorytype” value. Notice all patron categories are displayed when “+New” is clicked.



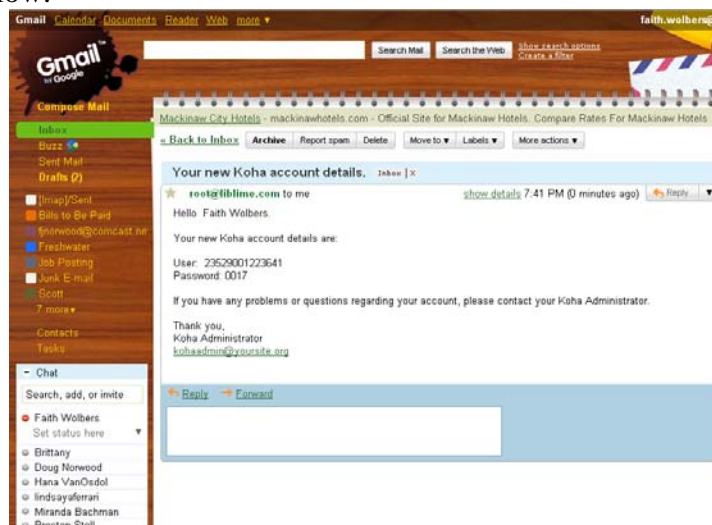
This displays the “category_code” value. After clicking “+New” the patron category may be selected at the bottom of the page. This setting requires an additional step that is eliminated by using the “categorytype” setting.

Recommendation: The default value for this preference is “categorytype.” It is suggested to keep the default setting. This makes entering patron data into the computer much easier and efficient for staff. Turning the preference to “category_code” allows for more mistakes to be made because choosing the type at the end is less intuitive for the person entering data.

Author: FW

AutoEmailOPACUser:

Description: This preference allows library users to be notified by email of their account details when a new account is opened. When this feature is “On” an email is sent automatically to new users who provided an email address when they activated their online account. The email contains the username and password given to or chosen by the patron when signing up for their account. See Below.



Recommendation: The default setting for this preference is “Off.” The recommendation for this preference is to keep the default setting in order to protect patron privacy. Library users should be encouraged to remember their pin number and to keep it in a safe place. The email (see above) that is sent to the user gives both the username and the password together. At this time if a user forgets their username there is not a way for them to retrieve it without calling or stopping into the library. In future versions of Koha hopefully there will be a way for this information to be retrieved by using secure password reminders.

Author: FW

AutoEmailPrimaryAddress:

Description: This preference determines which email field to pull as the primary patron email address from the patron form. The preferences have the following meaning: email = Patron email address; emailpro = Business email address; B_email = Alternate email address; cardnumber = Patron card number (some libraries use email addresses for this field); “Off” = Checks email, emailpro, and B_email (in that order) and uses the first one that has what looks like a valid email address.

Recommendation: It is recommended that this preference be set to "Off". If it is set to "Off," the system automatically checks all of the above mentioned fields and ensures that a valid email address is selected.

Author: NU

autoMemberNum:

Description: This preference determines if the patron's barcode is automatically calculated. This prevents the person setting up the library card account from having to assign a number to the new card. This field directly related to the '[checkdigit](#)' preference; when this preference is "On," set the "checkdigit" to 'none' which will then calculate a new patron barcode by adding 1 to the maximum barcode already present in the database.

Recommendation: It is recommended to accept the default value of "On," so that the number is automatically calculated. (Note: For our project this setting is fine but for libraries that purchase barcodes and they may get out of order—so scanning each barcode into the system might be the better option.)

Author: NU

BorrowerMandatoryField:

Description: This preference enables the system administrator to choose which fields your library would like required for patron accounts. Enter field names separated by | (bar) or, (comma). This ensures that basic information is included in each patron record. If a patron leaves one of the required fields blank an error message will issue and the account will not be created.

Recommendation: It recommended that the setting be email|surname|zipcode. This will ensure that the library can contact the patron thru email.

Author: NU

borrowRelationship:

Description: This preference enables the system administrator to define valid relationships between a guarantor (sponsor, usually a parent) & a guarantee (sponsored individual, usually a child). Defining values for this field does not make the Guarantor field required when adding a guarantee type patron. This preference creates a dropdown list identifying the relationship of the guarantor to the guarantee. The choices are separated by | (bar) or, (comma).

Recommendation: It is recommended that the setting be set to father|mother|guardian to take into account various family relations.

Author: NU

BorrowersTitles:

Description: This preference allows the staff to choose the titles that can be assigned to patrons. The choices present as a dropdown list when creating a patron record. Choices are separated by | (bar) or, (comma).

Recommendation: It is recommended that the setting include Dr|Mr|Mrs|Miss|Ms because it captures the most common titles in the United States.

Author: NU

checkdigit:

Description: This preference is related to the autoMemberNum preference. This preference enables checks on 'Katipo' style patron barcode. Koha was created by a group of programmers at the consulting firm, Katipo, for the Horowhenua Library Trust in New Zealand. Katipo has its own digit check style. The check digit is generally the digit at the end of the barcode that is checked for consistency. Libraries only have to be concerned with using the

Recommendation: As mentioned in the 'autoMemberNum' it is recommended to accept the default of 'none.'

Author: NU

EnhancedMessagingPreferences:

Description: It is important to note that this feature is still experimental. If enabled, this preference allows for patrons to select additional account messages to mobile phone devices. If this feature is not enabled the librarian determines which messages are sent to the patron. SMSDriver is required for this function to work. The SMS Driver is specified in the [SMSSendDriver](#) preference. Note: SMS, short message service, allows for text messages on mobile devices. MMS, multimedia messaging service, allows for images, video, and ringtones, as well as text messages; and EMS, enhance messaging service, is somewhere between SMS and MMS.

Recommendation: It is recommended that this feature be set to "Off" because it is still in the experimental phase and it requires an SMS which has an additional cost.

Author: NU

ExtendPatronAttributes:

Description: This preference refers to added patron attributes set via the 'Patron attribute type' found in the Patrons and Circulation section of the Staff-Client Koha Administration. The patron

attributes are displayed and edited in a new section of the patron details page. Each attribute is identified by its type (including type code and type description) and value (a value may be selected from a list if an authorized value has been established.). If this is enabled any extended patron attributes whose type is marked as displayable in the OPAC are now displayed in the 'my details' page in the OPAC (assuming that the patron is logged in). And patron attributes can be displayed and edited by staff members. Currently, it is not possible for a patron to suggest changes to any of their extended attributes from the OPAC.

Recommendation: It is recommended that this preference should remain at the default of "Off" because the patron records contain enough information to meet the needs of the library. If the library decides that an additional attribute is required this preference may be turned "On" to allow for additional information to be added to the patron record.

Author: NU

intranetreadinghistory:

Description: This preference allows the patron's circulation history to be displayed on the staff client site. If this feature is enabled, a patron's reading history will display on their account in the staff interface. If this feature is not enabled, a patron's reading history will not display on their account in the staff interface. Even with this preference set to "Off", the patron's reading history will be stored in the database. The stored patron reading history must be destroyed using the the Anonymize Patron Data tool found in the More (Tools) dropdown menu in the Staff-Client.

Recommendation: It is recommended that this preference be set to "Off" to maintain a patron's privacy. Since 9/11 and the Patriot Act, libraries in the US have been very guarded about a patron's right to privacy. A patron's reading taste is personal. A patron should decide with whom they share his/her preferences.

Author: NU

maxFine:

Description: This preference allows the system administrator to determine the maximum fine a patron can have for a single late return.

Recommendation: It is recommended that this preference accept the default of '9999'. This takes into account the cost of replacement if rare or expensive books are not returned to the library.

Author: NU

minPasswordLength:

Description: This preference allows the system administrator to set the minimum length of passwords for patron or staff access. The default value is set to 3.

Recommendation: It is highly recommended that the value be changed to 8, so as to ensure the security of a password.

Author: PQ

NotifyBorrowerDeparture:

Description: Setting this preference allows the system administrator to set the interval (number of days) between the time the staff is notified of any given patron's account expiration, and the actual expiration date. The default value is set to 30 days. When the patron attempts to check out materials, a warning will appear in the check out window of the Staff-Client.

Recommendation: It is recommended that the default value should not be changed.

Author: PQ

PatronsPerPage:

Description: Setting this preference allows the system administrator to determine how many patron records appear on the results page when a search is performed in Staff Client. The default value is 20.

Recommendation: It is recommended that the default value not be changed.

Author: PQ

SMSSendDriver:

Description: This preference is related to the EnhancedMessagingPreferences preference. The SMS::SendDriver is the mechanism by which an enhanced message is sent to a patron. An enhanced message is a message delivered to a patron's cell phone (text message). SMS stands for Short Messaging Service. The value needs to be set according to cell phone standards, for example Verizon. The system administrator should determine the appropriate values. The default value is a blank field. For more information on SMS, see

http://en.wikipedia.org/wiki/SMS_message

Recommendation: Needs to be set if EnhancedMessagingPreferences is turned "On". The value depends on the system the library wishes to use. A list of values can be found at

<http://search.cpan.org/~adamk/SMS-Send-0.05/lib/SMS/Send.pm>

Author: PQ

uppercasesurnames:

Description: This preference, when set to "On", converts a patron's last name to all uppercase letters on the patron entry form. The default value is "Off".

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July 1, 2010

Recommendation: It is recommended that the default value not be changed.

Author: PQ

ILS AREA: SEARCHING

Advanced Search Screen with default settings

The screenshot shows the 'Advanced Search' interface of a library system. At the top, there are navigation links: 'Circulation', 'Patrons', 'Search', and 'More'. The user is logged in as 'Centerville (Set)' with an 'admin' role, and there are links for 'Log Out' and a help icon. The breadcrumb trail shows 'Home > Advanced Search'.

The main section is titled 'Advanced Search' and contains several filter groups:

- Search For:** Three dropdown menus, all set to 'Keyword', each followed by a text input field.
- Limit to any of the following:** A grid of checkboxes with icons for different material types: Books, Computer Files, Continuing Resources, Maps, Mixed Materials, Music, Reference, and Visual Materials. All checkboxes are currently unchecked.
- Subtype limits:** Four dropdown menus: 'Any audience', 'Any content', 'Any format', and 'Additional content types'.
- Location and availability:** A checkbox for 'Only items currently available' (unchecked) and a dropdown for 'Individual Libraries' set to 'All Libraries'.
- Sort by:** A dropdown menu set to 'Relevance'.

At the bottom, there is a 'Search' button and two links: '[More options]' and '[New search]'. The browser's status bar at the very bottom shows 'Internet' and a zoom level of '100%'.

AdvancedSearchTypes:

Description: This preference sets the “type” field that will appear in the advanced search options. The search type field can be limited by itemtypes such as books, computer files, music, etc. or by ccode, which uses collection codes such as fiction, mystery, etc. The following screen shots show the difference between itemtypes and cccodes (see [Figure 1](#) and [Figure 2](#)).

Recommendation: Itemtypes is the default and recommended setting as it is more common to limit advanced searches by format.

Author: MG

Figure 1 itemtypes

Advanced Search


Search For:


Keyword


Keyword


Keyword


Limit to any of the following:


 ☐ Books

 ☐ Computer Files

 ☐ Continuing Resources

 ☐ Maps

 ☐ Mixed Materials

 ☐ Music

☐ Reference


 ☐ Visual Materials

Figure 2 ccodes

Advanced Search

Search For:

Keyword

Keyword

Keyword

Limit to any of the following:

☐ Fiction

☐ Reference

☐ Non Fiction

defaultSortField:

Description: This preference sets the default sort field for advanced searches on the staff side. This field is displayed in the advanced search screen as “Sort by” with the following options: relevance, popularity, call number, dates, and title. Selecting relevance here simply means that relevance ranking is automatically selected in the “Sort By” drop down list. However, the other options are still available in the drop down list for selection at any time (see [Figure 3](#) for the drop down menu options).

Recommendation: Relevance is the default and recommended setting for this preference.

Author: MG

Relevance

Popularity

Popularity (Most to Least)

Popularity (Least to Most)

Author

Author (A-Z)

Author (Z-A)

Call Number

Call Number (Non-fiction 0-9 to Fiction A-Z)

Call Number (Fiction Z-A to Non-fiction 9-0)

Dates

Publication/Copyright Date: Newest to Oldest

Publication/Copyright Date: Oldest to Newest

Acquisition Date: Newest to Oldest

Acquisition Date: Oldest to Newest

Figure 3 “Sort by” drop down menu in advanced search

defaultSortOrder:

Description: This sets the default sort order for advanced searches on the staff side. The choices are ascending, descending, a-z, or z-a. This preference only sets the order that is automatically selected (the default) on the advanced search screen, but the other options are still available to select in the drop down list at any time (see figure 3 for drop down menu options). This preference is directly related to the defaultSortField option. Note that not all SortOrder options are applicable to all SortFields. For instance, relevance is the default and recommended setting for defaultSortField, but none of these sort order options applies to relevance ranking. However, setting the default to ascending will sort results in ascending order when applicable.

Recommendation: Ascending (asc) is the default and recommended setting.

Author: MG

expandedSearchOption:

Description: The advanced search page on the staff side can display all search options or some select search options. When the expanded search option is set to “On”, all of the search options are displayed by default. When the expanded search option is set to “Off” only some of the search options are displayed by default. However, the additional search options are available by clicking on the “more options” button at the bottom of the screen (see image of advanced search screen with default settings). The additional search options displayed include Boolean search, scan index, and the ability to limit searches by date or language.

Recommendation: “Off” is the default and recommended setting.

Author: MG

numSearchResults:

Description: This is a staff side setting and specifies the maximum number of search results to display on a results page.

Recommendation: The default and recommended setting is 20.

Author: MG

OPACdefaultSortField:

Description: This preference sets the default sort field for advanced searches in the OPAC. This field is displayed in the advanced search screen as “Sort by” with the following options: relevance, popularity, call number, dates, and title. Selecting relevance here simply means that relevance ranking is automatically selected in the “Sort By” drop down list. However, the other options are still available in the drop down list for selection at any time (see [Figure 3](#) for drop down menu options).

Recommendation: Relevance is the default and recommended setting for this preference.

Author: MG

OPACdefaultSortOrder:

Description: This sets the default sort order for searches in the OPAC. The choices are ascending, descending, a-z, or z-a. This preference only sets the order that is automatically selected (the default) on the search screen, but the other options are still available to select in the drop down list at any time (see figure 3 for drop down menu options). This preference is directly related to the OPACdefaultSortField preference. Note that not all SortOrder choices are applicable to all SortFields. For instance, relevance is the default and recommended setting for OPACdefaultSortField, but none of these sort order options applies to relevance ranking. However, setting the default to ascending will sort results in ascending order when applicable.

Recommendation: Ascending (asc) is the default and recommended setting.

Author: MG

OPACItemsResultsDisplay:

Description: This setting selects the information about an item that will display in the search results page of the OPAC. The results can display the status of an item or full details including branch, location, and call number. While the itemdetails option allows for more information to be displayed on the search results page, the information can be overwhelming for large collections with multiple branches.

Recommendation: The statuses option is the default setting and best for large collections that may retrieve a large number of search results. However, the itemdetails option may work best for smaller collections as it bypasses unnecessary steps in locating materials.

Author: MG

OPACNumSearchResults:

Description: This setting specifies the maximum number of search results to display on an OPAC results page.

Recommendation: The default and recommended setting is 20.

Author: MG

QueryAutoTruncate:

Description: This setting allows for searches to be automatically truncated or for additional characters to be added to the end of a search string. When set to "On" the search string automatically ends with a wildcard function. For example, a search for the word "invent" with

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auto truncation "On" will also retrieve results for inventor, invention, inventory, etc. Although auto truncation is set to "Off", a truncation search can still be performed by manually typing in the wildcard character, an asterisk (*). Typing "invent*" even with auto truncation turned "Off" will retrieve the same inventor, invention, inventory results. Auto truncation bypasses the necessity to type long search strings in their entirety.

Recommendation: The default and recommended setting is "On".

Author: MG

QueryFuzzy :

Description: If set to "On", this preference enables "fuzzy" searching, in which the search engine returns results that are similar to, but not exactly matching, the word or words entered by the user. This preference enables the search function to compensate for slightly misspelled names or phrases.

Recommendation: This preference should be set to "On", as it will increase the rate of recall of items, especially for authors with names which are difficult to spell. However, this will lead to a decrease in precision. For example, a search for the novel "The Stand" misspelled as "The Staind" returned the correct item, but also returned results for the rock band Staind. Libraries for which precision is an issue may wish to disable this preference.

Author: AD

QueryRemoveStopwords :

Description: If set to "On", this preference causes the search function to ignore any of the words listed in the Stop Words preference on the Administration page. These words include many articles and verbs by default, but the list can be modified to remove words or include other words at the user's preference.

Recommendation: This preference should be set to "On", but the list of stopped words should be tailored to the individual collection by the administrators, as the default list includes many more words than is necessary. For example, a search for the novel "About a Boy" with the default list would exclude everything but the word "boy."

Author: AD

QueryStemming :

Description: If set to "On", this preference enables word stemming. Stemming allows the search function to return multiple versions of the same word, as well as related terms (i.e., both fish and fishing would be returned).

Recommendation: This preference should be set to "On", as it will enable users to find many related items that would otherwise be ignored by the search function. However, precision has a

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possibility to decrease sharply with some searches, so libraries for which precision is an issue may wish to test this preference beforehand, or else disable it.

Author: AD

QueryWeightFields :

Description: If set to ON”On”, this preference enables certain fields in a record, such as title, to be given more weight than others when searching for items in the catalog. For example, a search for “Henry V” with this preference set to ”On” would return the Shakespeare play before it would return a book about the historic king. Specific field weighting is currently not available in Koha, but will be available in a later version through an Excel spreadsheet.

Recommendation: This preference should be set to ”On”. While the option to specify custom weighting is not yet implemented, this feature is still useful, and should result in more accurate returns on searches.

Author: AD

Sortbynonfiling:

Description: This preference formerly allowed the search function to ignore non-filing characters in MARC records. For example, the novel “The Great Gatsby” would be under the letter G instead of the letter T. This preference is now deprecated.

Recommendation: As this preference is deprecated, and is therefore obsolete, it should remain “Off” at all times.

Author: AD

ILS AREA: SERIALS

OPACSerialIssueDisplayCount :

Description: This preference allows the administrator to select the number of issues for each serial which appear in the OPAC when the serial is accessed. The default value is three, but this can be changed to any number greater than zero.

Recommendation: This preference should be set to the number of issues which are available as loose issues in the serials section of the library. For example, if only the most recent issue is kept in the open stacks, and the rest are either bound or stored in closed stacks, this preference should be set to 1.

Author: AD

OPACSubscriptionDisplay:

Description: This preference allowed the administrator to select the format for display of serial subscription information when accessed via the OPAC. The administrator could choose between 'economical' and 'full' displays, or turn subscription information off. This preference has now been deprecated.

Recommendation: As this preference is deprecated, and is therefore obsolete, it should not be changed from its default value (currently 'economical').

Author: AD

RenewSerialAddsSuggestion :

Description: If set to "On", this preference will automatically add a serial to the Acquisitions Suggestion menu when it is time for it to be renewed. With this preference set to "Off", each renewal will have to be entered as if it were a new order. It is set to "Off" by default.

Recommendation: This preference should be set to "On". When set, it allows the purchaser to select the serial from a suggestions menu when it is time to renew the subscription. This selection automatically fills in all of the purchasing data for the serial into the order form, speeding up the renewal process. This preference should only be set to "Off" if the library's subscriptions are expected to change price and format frequently. Good examples of the purchasing process with this option set to ON and "Off" can be found at <http://koha.org/documentation/manual/3.0/acquisitions/ordering-from-a-suggestion> and <http://koha.org/documentation/manual/3.0/acquisitions/placing-orders>, respectively.

Author: AD

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StaffSerialIssueDisplayCount :

Description: This preference allows the administrator to select the number of issues for each serial which appear in the Staff Client when the serial is accessed. The default value is three, but this can be changed to any number greater than zero.

Recommendation: This preference should be set to the same value as the preference for the OPAC (OPACSerialIssueDisplayCount). This will ensure that the staff sees the same thing as the patrons for reference and troubleshooting purposes.

Author: AD

SubscriptionHistory :

Description: This preference determines what information appears in the OPAC when the user clicks "On" the More Details option. This preference has two options. The 'Simplified' option displays a one-line summary of the volume and issue numbers of all issues of that serial held by the library. The 'Full' option displays a more detailed breakdown of issues per year, including information such as the issue date and the status of each issue.

Recommendation: This preference should be set to 'Full'. The 'Simplified' option presents the volume and issue numbers, but no issue dates or years, and does so in a single confusing line of text. The 'Full' option provides all of this information in a tabled format that is easier to use and understand.

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ILS Area: Staff Client

intranetcolorstylesheet:

Description: This preference is used to set the background color and style of the Staff Client. The value is a .css file. The system administrator should determine which file is appropriate. The default value is a blank field. For more information on Cascading Style Sheets (.css) consult <http://www.w3.org/Style/> In order to link to the css, the availability and file paths would have to be known.

Recommendation: Since LibLime does not provide information about the css file paths or the availability of color style sheets, leave this preference blank.

Author: PQ

IntranetmainUserblock :

Description: This preference is used as a space to enter HTML code that will display the Staff Client Home Page. The system administrator should obtain the appropriate HTML code file. The default value is a blank field.

Recommendation: Set this value according to staff color and style preference.

Author: PQ

Intranetstylesheet:

Description: The *Intranetstylesheet* preference is a layout and design feature for the intranet, a staff-side private network. A style sheet is a document of programming code which defines the presentation or how a page will look on the computer screen. To change the style sheet from the original, place in this preference the file path to the style sheet—include the entire url starting with http://. This preference allows a library to customize the appearance of the Staff-Client. Knowledge of css is needed to create a functional style sheet.

Recommendation: Using validated css would ensure that the appearance would be rendered correctly across various browsers. Knowledge of style sheet code would be essential to change the default. The default value is blank and the recommendation is to keep the value blank. Blank will give the Staff-Client the default appearance.

Author: PJ

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intranetuserjs:

Description: The *intranetuserjs* field is where the intranet designers could enter Javascript that is not included in the original page code. JavaScript is a scripting language which would allow the intranet to display more dynamic behavior such as 3-D or interactive graphics. JavaScript is the language that determines the function and design of the additional content.

Recommendation: JavaScript is an advanced feature which requires the understanding of programming code. An incorrect code could make the page display incorrectly for some users. The recommendation is to keep the default value of a blank field.

Author: PJ

template:

Description: Templates are files containing programming language which customizes the design and functions for the staff-side interface of the Koha application. The *template* preference searches the server where Koha is installed and produces a drop down menu of the template interfaces found. The default installation of the Koha only has a single interface template. System administrators may be able to create new templates. For more information about templates see:

http://www.ossrc.org.in/downloads/koha-resources-cd/koha2.2_user_guide/pdf/ch01s05.pdf

Recommendation: The default installation of Koha includes one template and creating new templates requires the deep technical skills of the system administrator, the recommendation is to use the default template setting.

Author: PJ

TemplateEncoding:

Description: The *TemplateEncoding* preference is used in consideration for the languages that the application may need to display. According to the World Wide Web Consortium (<http://www.w3.org/International/getting-started/characters>) character are the letters and symbols used in any given writing system. Characters are represented as bytes in a computer systems and encoding the characters requires a key so that the bytes are represented as the correct letters or symbols in the display. The preference provides the option of two character encoding schemes which can be used for the Koha interface template. UTF-8 is a common encoding key which can be used for most of the world's

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writing systems and ISO-8859-1 is a scheme used for predominantly latin-based writing systems.

Recommendation: The recommendation is to use the default setting of UTF-8. This encoding scheme is the current standard for character encoding and should correctly display more languages than ISO-8859-1.

Author: PJ

yuipath:

Description: The *yuipath* preference allows for the user to define a local path or web URL to the Yahoo User Interface Library (<http://developer.yahoo.com/yui/2/>). This library is a resource of developer tools including JavaScript and style sheets. Changing this preference made no noticeable change to Koha or the interface. The Koha default value is set to “local” but also includes a web URL in the drop down menu.

Recommendation: This preference is a developer or system administrator tool and should be set only by that user. The recommendation is to keep the default value.

Author: PJ