



User Manual



Southeast Education Service Center

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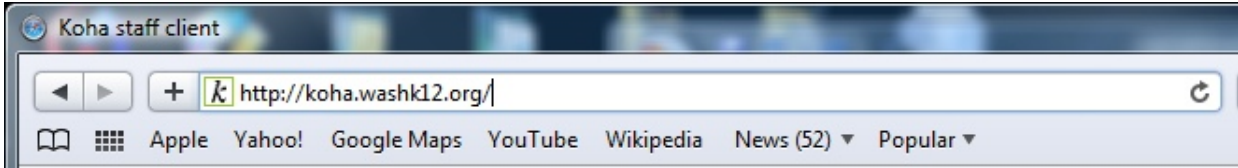
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The following is a quick overview of the Koha system. Koha is a web browser based system that will work with any browser, but performs best when used with the Safari web browser.

NOTE: All mouse clicks in Koha are single clicks on MAC and single left button clicks on PCs.

Login and Navigation:

1. Launch a web browser and type in the address to your Koha server in the address bar and press enter.

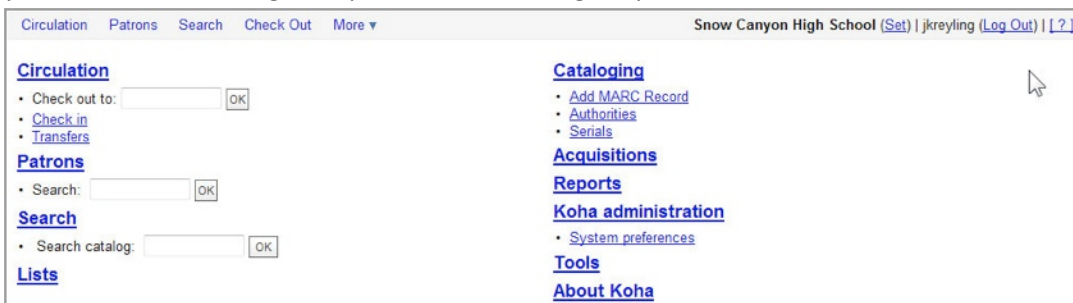



- Beaver's server address -> <http://bsd.sedck12.org:8080>
- Kane's server address -> <http://ksd.sedck12.org:8080>
- Garfield's server address -> <http://gsd.sedck12.org:8080>
- Iron's server address -> <http://isd.sedck12.org:8080>

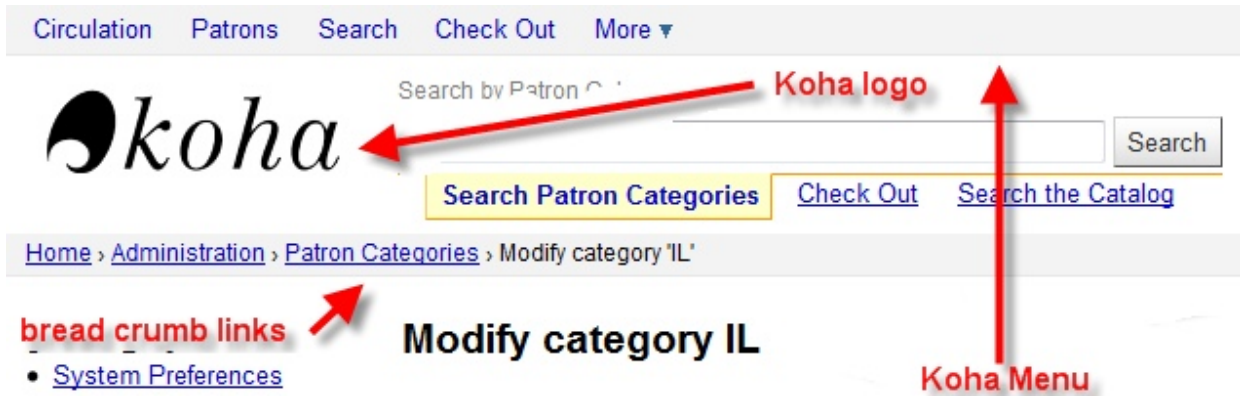
2. Type in your username and password then click the login button.

A screenshot of the Koha login page. At the top, there is the Koha logo and the text "OPEN-SOURCE INTEGRATED LIBRARY SYSTEM". Below this, there are two input fields: "Username:" and "Password:". To the right of the "Password:" field is a "Login »" button.

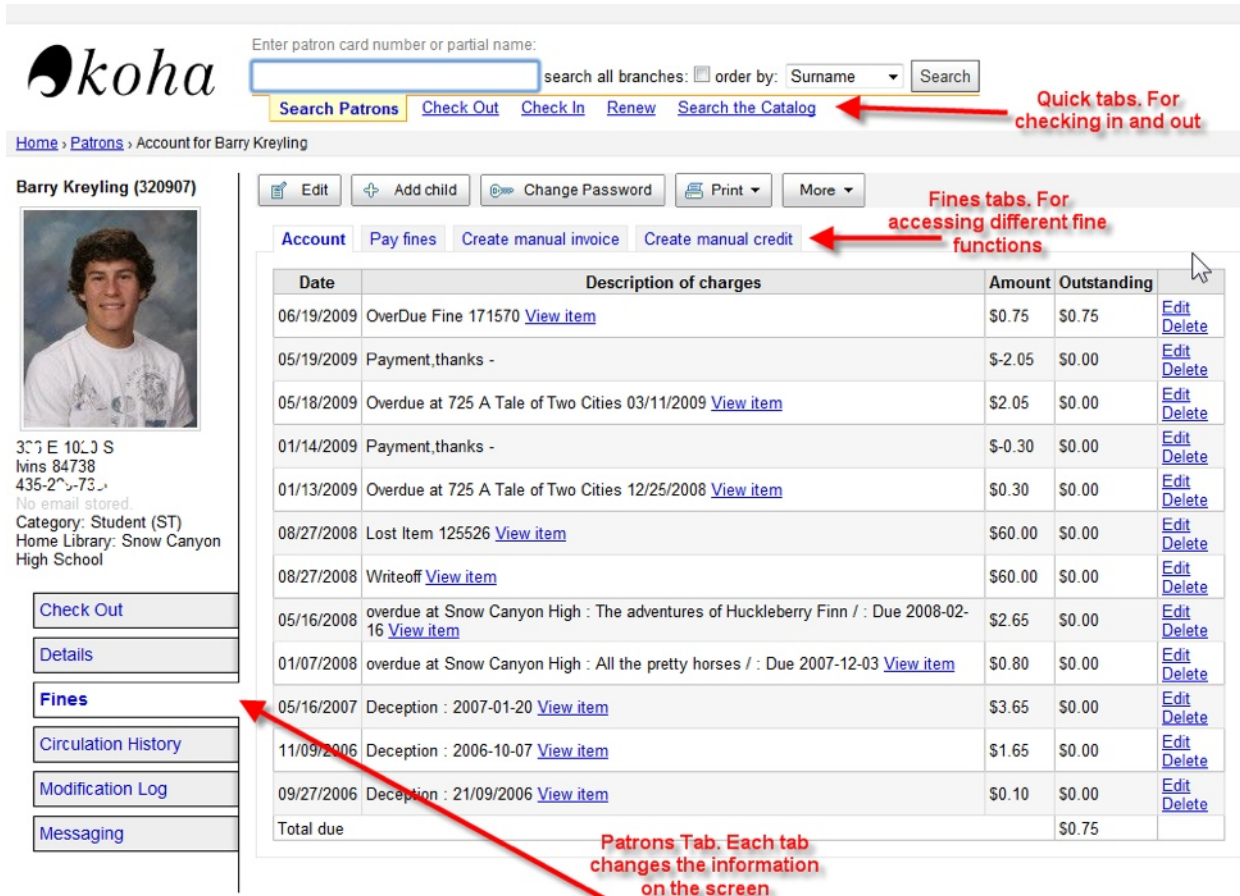
3. After you successfully login you will see Koha 's main page. This will be your main point of reference as you use Koha to manage the patrons and holdings in your media center.



4. While you navigate through Koha do not use the “Back Button”  in the web browser, instead use the “Koha menus” in the gray bar along the top of the page (this menu is always available while you are logged into Koha), the “bread crumb links” or to get back to the main page click the “Koha logo”.



5. Koha make use of the TAB’s concept to make access to information more accessible. These tabs will often be tabs along the side, and two sets of tabs at the top. See image below for an example of tabs in the patron fines view. The check in and out tabs are available at the top of all screens for quick access to circulation functions.



Quick Check Out:

1. From the main page you can type or scan the patron's ID into the "**Check out to:**" field or type in the first or last name of the patron. (If you typed in the information press the enter key or click the "**OK**" button).

Circulation Patrons Search Check

Circulation

- Check out to:
- [Check in](#)
- [Transfers](#)

2. If you typed in the patron name you will most likely see the "**Patron selection**" page. Click on the desired patron.

Patron selection

Select a patron:


Kreyling, Barry ... (320907 - ST) ... 33 · E 102 S

Kreyling (Room 228), Paul ... (92280 - T) ...

Kreyling (Room LIB), Jamie ... (12738 - T) ...

3. From the patron checkouts page scan or type in the barcode of the item into the "**Enter item barcode:**" field. (If you typed in the barcode press the enter key).

Circulation Patrons Search Check Out More ▾ Snow Canyon High School (Set) | jkreylin



Enter patron card number or partial name:

[Check Out](#) [Check In](#) [Renew](#) [Search the Catalog](#)

[Home](#) > [Circulation](#) > [Checkouts](#) > Barry Kreyling

Barry Kreyling (320907)

Checking out to Barry Kreyling (320907)

Enter item barcode:

Specify Due Date: Remember for Session:

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

Patron has nothing checked out.

[Check Out](#)

33 E 102 S
lvins 84738
4 75-2 9-7 J9
No email stored
Category: Student (ST)
Home Library: Snow Canyon High School

Note: When checking items out you may get a notice like the following:



This will happen for the following reasons and maybe overridden by clicking “Yes, Check Out (Y)” button:

1. Item is already checked out to a different patron
2. Patron has fines
3. Patron has a overdue item(s)
4. Item has a hold placed on it by another patron

Circulation:

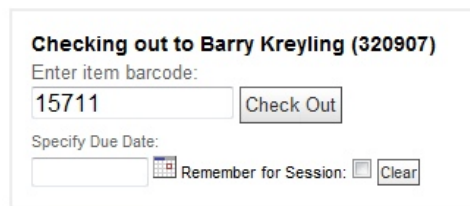
1. From the main page click the “**Circulation**” link to go to the main circulation page or click “**Circulation**” any time from the Koha menu. From this page you can check out, check in, renew, transfer items to another school and search for items in the catalog or run a circulation repo

2. To check items out from the circulation page:

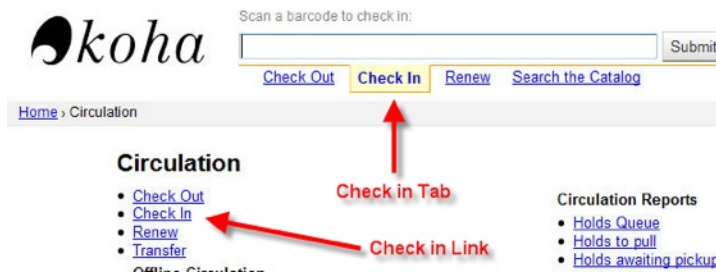
- i. Click the **“Check Out”** link or click in the **“Check Out”** Tab and scan or type in the patron ID or patron name (if ID or name is typed in you must press the enter key or click the Submit button). If you typed in the patron name you will most likely see the **“Patron selection”** page. Click on the desired patron.



- ii. Now the patron check out page is shown and ready to scan or type in the item barcode (if typed in press the **“Check Out”** button or press the enter key). To change the due date, type the desired due date in the **“Specify Due Date:”** or click the calendar icon and choose a due date before checking items out to patrons. If you click the box **“Remember for Session”** this new due will be apply to all checkouts until the user logs out or the **“Clear button”** is clicked.



3. There are three ways to check items in. Two from the **Circulation Page** using the **“Check In”** tab or the **“Check In”** Link. The third is from the **Patron Page:**



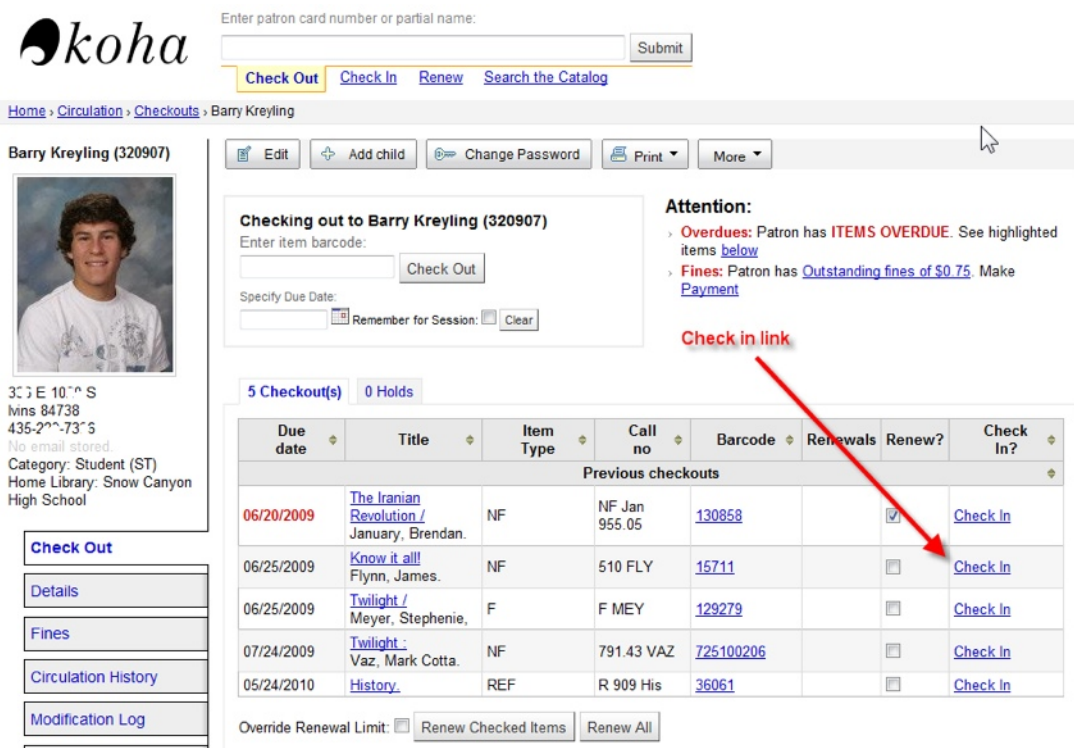
- i. Click the **“Check In”** tab, scan in the Barcode or type it in and click the **“Submit”** button or press the enter key.

- ii. Click the **“Check In”** Link. Now scan or type the barcode into the check in field. To check in more items continue to scan or type the barcode into the check in field (if typing in the number remember to click the **“Submit”** button or press the enter key).

NOTE: Do not scan or type the number in the field above the check in field that field will default back to the **“Check Out”** tab for you to type a patron ID.



- iii. Items can be checked in on the Patron Page. Click the **“Check Out”** tab, type or scan in the patron ID or name into the check out field and click the **“Submit”** button or the enter key. Click on the **“Check In”** link next to the item to be checked in.



4. There are three ways to renew items. Two are on the **Circulation Page**, the **“Renew”** tab and the **“Renew”** Link. The third way is on the **Patron Page**:

- i. Click the **“Renew”** tab, scan in the Barcode or type it in and click the **“Submit”** button or press the enter key.

- ii. Click the **“Renew”** Link. Now scan or type the barcode into the check in field. To renew more items continue to scan or type the barcode into the renew field (if typing in the number remember to click the **“Submit”** button or press the enter key). If the **“Override Renewal Limit”** box is checked it will renew the item regardless of how many times the item has already been renewed to the patron. If a different due date is desired type in the date wanted for this renewal or click the calendar icon and choose a date.

NOTE: Do not scan or type the barcode in the field above the renew field. It will be defaulted back to the “**Check Out**” tab for you to type a patron ID.

The screenshot shows the Koha website interface. At the top left is the Koha logo. To its right is a search bar labeled "Enter patron card number or partial name:". Below this are navigation tabs: "Check Out" (highlighted in yellow), "Check In", "Renew", and "Search the Catalog". A breadcrumb trail reads "Home > Circulation > Renew". The main content area is titled "Renew" and contains a form with the following elements: "Enter item barcode:" with a text input field and a "Submit" button; "Override Renewal Limit:" with a checkbox; "Renewal due date:" with a date picker; and "Remember for Session:" with a checkbox. Three red arrows point to these elements with labels: "Renew field" points to the "Renew" tab, "Override box" points to the "Override Renewal Limit" checkbox, and "Set due date box" points to the "Remember for Session" checkbox.

5. To do a quick search of items in the catalog click the “Search the Catalog” tab and type in a title, keyword or barcode (advanced searching will be covered later in this manual). Click the “Submit” button or press the enter key.

The screenshot shows the Koha search page. At the top left is the Koha logo. To its right is a search bar labeled "Enter search keywords:". Below this are navigation tabs: "Check Out", "Check In", "Renew", and "Search the Catalog" (highlighted in yellow). A breadcrumb trail reads "Home > Circulation". The search bar contains the text "Math and Mars" and has a "Submit" button.

Patron Page overview:

The Patron page contains the following information (accessed through the Patron tabs located under the patron picture):

- Items checked out
- Details (name, address, phone number, email, graduations date, home room teacher, birthday, login information, can change patron’s picture, different view of check outs with item cost, etc...)
- Fines (a view of fine and payment history)
- Circulation History (show history of all items checked out)
- Modification log (Used to track what changes are made to an account and who has made the changes)
- Messaging (used to send e-mails to patron about holds, due items, etc...)

By accessing the patron page through circulation or check out the default tab is the “**Check Out**” tab. If you access through the “**Patrons**” menu link the default tab will be “**Details**”.

Patron "Check Out" Tab:

Below is a screen shot of the patron "Check Out" tab:

Enter patron card number or partial name:

Check Out | [Check In](#) | [Renew](#) | [Search the Catalog](#)

Home > [Circulation](#) > [Checkouts](#) > Barry Kreyling

Barry Kreyling (320907)

Checking out to Barry Kreyling (320907)

Enter item barcode:

Specify Due Date: Remember for Session:

Attention:

- > **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- > **Fines:** Patron has **Outstanding fines of \$0.75**. Make [Payment](#)

5 Checkout(s) 0 Holds

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
07/06/2009	Twilight , by Vaz, Mark Cotta.	NF	791.43 VAZ	725100206	1	<input type="checkbox"/>	Check In
Previous checkouts							
06/20/2009	The Iranian Revolution / January, Brendan.	NF	NF Jan 955.05	130858		<input checked="" type="checkbox"/>	Check In
06/25/2009	Know it all! Flynn, James.	NF	510 FLY	15711		<input type="checkbox"/>	Check In
06/25/2009	Twilight / Meyer, Stephenie.	F	F MEY	129279		<input type="checkbox"/>	Check In
05/24/2010	History .	REF	R 909 His	36061		<input type="checkbox"/>	Check In

Override Renewal Limit:

Check Out | [Details](#) | [Fines](#) | [Circulation History](#) | [Modification Log](#) | [Messaging](#)

The following can be done on the patron "Check Out" tab:

- Check items in and out
- Renew items
- Pay fines
- Sort columns
- Edit patron information
- Change patron password and/or username for OPAC
- Print check out slip (shows all items checked out with due dates)
- Print page (shows all items with replacement cost and total cost of all checked out items)

- Check Holds (Placing holds for patrons will be covered in the **“Catalog Search”** section below).
- Go to item’s MARC record in catalog
- Go to items information (can set lost and damaged status and set public note on item)

NOTE: Whenever you navigate away from a patron page to perform another task like a catalog search you can return to the last patron’s page by clicking the Koha **“Check Out”** menu at the top of the page.

Circulation Patrons Search Check Out More ▾

Checking items in and out:

1. To check items in on the Patron **“Check Out”** tab click the **“Check In”** Link in the row of the item that needs to be checked in.

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
07/06/2009	Twilight . by Vaz, Mark Cotta.	NF	791.43 VAZ	725100206	1	<input type="checkbox"/>	Check In

2. To check items out on the Patron **“Check Out”** tab click on the Check out field and scan or type in the barcode.

Checking out to Barry Kreyling (320907)

Enter item barcode:

Specify Due Date:



Renewing items:

1. To renew items on the Patron **“Check Out”** tab check the renew box in all the rows of the items to be renewed. Now click the **“Renew Checked Items”** button at the bottom of the checkout(s) table.

NOTE: Overdue items will have a Due Date in red.

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
07/06/2009	Twilight . by Vaz, Mark Cotta.	NF	791.43 VAZ	725100206	1	<input type="checkbox"/>	Check In
Previous checkouts							
06/20/2009	The Iranian Revolution / January, Brendan.	NF	NF Jan 955.05	130858		<input checked="" type="checkbox"/>	Check In

- a. To override all renewal limits check the **“Override Renewal Limit”** box.
- b. To renew all items for the chosen patron click the **“Renew All”** button.

Override Renewal Limit:

Paying fines:

- To pay fines from the Patron **“Check Out”** tab Click on the **“Payment”** link in the **“Attention”** area.

Attention:

- > **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- > **Fines:** Patron has [Outstanding fines of \\$0.75](#). Make [Payment](#)

NOTE: In the **“Attention”** area if the below link is clicked and the patron has more items that show on the page the screen will jump to the overdue item. If the **“Outstanding fines of ...”** link is clicked the tab will change to the **“Fines”** tab, click the **“Pay fines”** tab (disused in more detail later in this manual).




- Now click the **“Unpaid”** Drop down box and chose Paid, Write Off or leave set to Unpaid. After setting each fine as desired click the **“Make Payment”** button.

Account
Pay fines
Create Manual Invoice
Create Manual Credit

Fines & Charges	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Sub Total						0.00
Unpaid ▾	OverDue Fine 171570	F	1	0	0.75	0.75
Sub Total						0.75
Total Due						0.75

[Cancel](#)

Sorting columns:

Columns can be sorted by clicking any column title that has a  next to the title name. Each time you click a column title it will rotate from descending or ascending order. The column that the **“Checkout(s)”** is sorted by is denoted by a  or  depending if it is descending or ascending order. The example below is sorted by the **“Barcode”** column in descending order.


5 Checkout(s)
0 Holds

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
07/06/2009	Twilight , by Vaz, Mark Cotta.	NF	791.43 VAZ	725100206	1	<input type="checkbox"/>	Check In
06/20/2009	The Iranian Revolution / January, Brendan.	NF	NF Jan 955.05	130858		<input checked="" type="checkbox"/>	Check In
06/25/2009	Twilight / Meyer, Stephenie,	F	F MEY	129279		<input type="checkbox"/>	Check In
05/24/2010	History .	REF	R 909 His	36061		<input type="checkbox"/>	Check In
06/25/2009	Know it all! Flynn, James.	NF	510 FLY	15711		<input type="checkbox"/>	Check In

Override Renewal Limit:


Edit patron information:



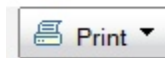
To edit or update patron information click the  button in the patron menu. Update the desired information and click the save button at the bottom of the page.

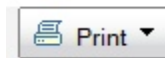
Change Password and/or username for OPAC:



To change the patrons OPAC login password and/or username click the  button in the patron menu. Make desired changes and click the save button. **Note:** The password is encrypted and will appear as random letters and number.

Print out page or check out slip:



To print out a check out slip or the page click the  button on the patron menu and chose which you would like to print. A new page or browser tab opens. To print go to the browsers print menu and print the page. Below is a sample of both pages that can be printed.

1. Print Page:

Account Summary: Barry Kreyling (320907)

- 2009
- Ward, Rob

Items Checked Out

Date Checked Out	Title	Author	Format	Call Number	Barcode	Price	Date Due	Charge	Price	Status
06/19/2009	Know it all!	Flynn, James.	NF	510 FLY	15711	12.70	06/25/2009	0.00	12.70	
06/19/2009	History.		REF	R 909 His	36061		05/24/2010	0.00		
06/19/2009	Twilight :	Vaz, Mark Cotta.	NF	791.43 VAZ	725100206	14.44	07/06/2009	0.00	14.44	
06/19/2009	Twilight /	Meyer, Stephenie,	F	F MEY	129279	22.00	06/25/2009	0.00	22.00	
06/19/2009	The Iranian Revolution /	January, Brendan.	NF	NF Jan 955.05	130858	20.00	06/20/2009	0.00	20.00	Overdue!
				Totals:	0.75	69.14				

2. Print Slip:

Snow Canyon High School
Checked out to 320907

Checked Out

[Know it all!](#)

Barcode: 15711

Date due: 06/25/2009

[History.](#)

Barcode: 36061

Date due: 05/24/2010

[Twilight :](#)

Barcode: 725100206

Date due: 07/06/2009

[Twilight /](#)

Barcode: 129279

Date due: 06/25/2009

Overdues

[The Iranian Revolution /](#)

Barcode: 130858

Date due: 06/20/2009

Check holds:

To check what items a patron has on hold click the "**Holds(s)**" tab (located by the checkout(s) table. To go to the items hold tab in the catalog click on the title of the item on hold. Placing holds for patrons will be covered in the "**Catalog Search**" sections below.

Barry Kreyling (320907)



337 E 1027 S
Ivins 84738
435-279-7311
No email stored.
Category: Student (ST)
Home Library: Snow Canyon
High School

[Check Out](#)

EditAdd childChange PasswordPrintMore

Checking out to Barry Kreyling (320907)

Enter item barcode:

Specify Due Date:

 Remember for Session:

Attention:

- > **Overdues:** Patron has **ITEMS OVERDUE**. See high items [below](#)
- > **Fines:** Patron has [Outstanding fines of \\$0.75](#). Make [Payment](#)

5 Checkout(s)2 Holds(s)

Hold date	Title	Item Type	Call Number	Barcode	Priority
06/22/2009	Art	Non-Fiction			Hold priority 1
06/22/2009	Careers in focus	Non-Fiction			Hold priority 1

Go to item's MARC record in catalog:

Click on the title of the item to go to the MARC for that item.

Go to items information to set lost, damaged status and set a public note:

Click on the barcode number of the item to leave the patron page and go to the items information page. (This page will be fully covered later in this document)

Barcode 725100206

Item Information [\[Edit Items\]](#)

Home Library:	Snow Canyon High School
Item type:	Non-Fiction
Item Callnumber:	791.43 VAZ
Replacement Price:	14.44

Statuses

Current Location:	Snow Canyon High School
Checkout Status:	Checked out to 320907 , Due back on 07/06/2009
Lost Status:	<input type="text"/> <input type="button" value="Set Status"/>
Damaged Status:	<input type="text"/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

History

Accession Date:	04/25/2009
Total Renewals:	1
Total Checkouts:	2 (View item's checkout history)
Last seen:	06/19/2009
Last borrowed:	06/19/2009
Last Borrower:	12738
Paid for?:	
Public Note:	<input type="text"/> <input type="button" value="Update"/>

If this item has been Lost or Damaged set that information here. Make sure to click the **“Set Status”** button. If the Status is set to Lost it will post a fine, in the amount of the replacement cost of the item, on the account of the current patron it is checkout to.

Public notes can also be added to the item and will show up in the checkout(s) table in red. After adding a **“Public Note:”** make sure to click the **“Update”** button when finished for it to appear. In the example below the Public Note: This book has no cover was added so when the book is returned it can be quickly seen that the item had no cover when it was checked out to the current patron.

5 Checkout(s) 2 Holds(s)

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
07/06/2009	Twilight ; by Vaz, Mark Cotta - This book has no cover.	NF	791.43 VAZ	725100206	1	<input type="checkbox"/>	Check In

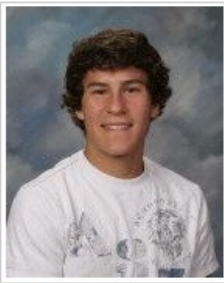
Patron Details tab:

This tab is used to view and edit the patron's personal information such as phone number, address, homeroom teacher, card number (student ID), etc... The image of patron can also be added or updated by clicking the **"Browse..."** button and locating the image on local computer. The image must be in one of the following formats:

- ✓ PNG
- ✓ GIF
- ✓ JPG
- ✓ JPEG
- ✓ XPM

Barry Kreyling (320907)

[Edit](#) [Add child](#) [Change Password](#) [Print](#) [More](#)



Barry Kreyling (320907)

336 E 1020 S
Ivins 84738

Home: 435-229-7396

Initials:

Date of birth: 02/19/1991

Sex: M

[Edit](#)

Library use

Card number:	320907
Borrowernumber:	1739
Category:	Student (ST)
Registration date:	12/15/2005
Expiration date:	06/22/2010
Registration branch:	Snow Canyon High School
Sort field 1:	2009
Sort field 2:	Ward, Rob
OPAC login:	09kreylbar
OPAC password:	*****

[Edit](#)

Manage Patron Image

To update the image for Kreyling, enter the name of the new image file to upload and click 'Upload.'
Click the 'Delete' button to remove the current image.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:

[Browse...](#)

[Upload](#) [Delete](#)

Alternate Address

...

[Check Out](#)

[Details](#)

[Fines](#)

At the bottom of the patron **"Details"** tab there is more information on items **"Checked Out"**, **"Fines & Charges"**, and **"On Hold"**.

On the **"Checked Out"** tab most of the same tasks can be performed as outlined above.

Checked Out Fines & Charges On Hold

Checked Out

Item Type	Title	Checked out on	Date due	Charge	Price	Renew select all none	Return select all none
Reference	History ; Publications International / Encyclopaedia Britannica, 36061	06/19/2009	05/24/2010	0.00		<input type="checkbox"/>	<input type="checkbox"/>
Non-Fiction	The Iranian Revolution / , by January, Brendan. ; Twenty-First Century Books, 130858	06/19/2009	06/20/2009	0.00	20.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Non-Fiction	Know it all! , by Flynn, James. ; Random House, 15711	06/19/2009	06/25/2009	0.00	12.70	<input type="checkbox"/>	<input type="checkbox"/>
Fiction	Twilight / , by Meyer, Stephenie. ; Little, Brown, 129279	06/19/2009	06/25/2009	0.00	22.00	<input type="checkbox"/>	<input type="checkbox"/>
Non-Fiction	Twilight ; , by Vaz, Mark Cotta. ; Little Brown, 725100206	06/19/2009	07/06/2009	0.00	14.44	<input type="checkbox"/>	<input type="checkbox"/>
Totals:				0.75	69.14	Renewal due date: <input type="text"/> Forgive fines on return: <input type="checkbox"/>	

Override Renewal Limit: [Renew or Return checked items](#) [Renew all](#) [Return all](#)

One additional feature is the option to forgive a fine when returning an item from this page. The cost of each item is also displayed.

The “*Fines & Changes*” information is just a quick view fines owed and cannot be paid from here.

Checked Out Fines & Charges On Hold

Fines and Charges

Total due: 0.75

The “*On Hold*” performs as outlined above. Hold can quickly be deleted from here.

Checked Out Fines & Charges On Hold

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Priority	Delete?
06/22/2009	Art :	Non-Fiction			1	No <input type="button" value="v"/>
06/22/2009	Careers in focus	Non-Fiction			1	No <input type="button" value="v"/>

[Cancel Marked Requests](#)

Fines tab:

Clicking the **“Fines”** tab will display a view of the patron’s account history and give you access to pay fines, create fines or debits (manual invoice), and create manual credits to an account.

Home > Patrons > Account for Barry Kreyling

Barry Kreyling (320907)



327 E 10th St
 Wins 84738
 435-227-7327
 No email stored
 Category: Student (ST)
 Home Library: Snow Canyon High School

Check Out
 Details
Fines
 Circulation History
 Modification Log
 Messaging

Edit Add child Change Password Print More

Account Pay fines Create manual invoice Create manual credit

Date	Description of charges	Amount	Outstanding	
06/19/2009	OverDue Fine 171570 View item	\$0.75	\$0.75	Edit Delete
05/19/2009	Payment,thanks -	\$-2.05	\$0.00	Edit Delete
05/18/2009	Overdue at 725 A Tale of Two Cities 03/11/2009 View item	\$2.05	\$0.00	Edit Delete
01/14/2009	Payment,thanks -	\$-0.30	\$0.00	Edit Delete
01/13/2009	Overdue at 725 A Tale of Two Cities 12/25/2008 View item	\$0.30	\$0.00	Edit Delete
08/27/2008	Lost Item 125526 View item	\$60.00	\$0.00	Edit Delete
08/27/2008	Writeoff View item	\$60.00	\$0.00	Edit Delete
05/16/2008	overdue at Snow Canyon High : The adventures of Huckleberry Finn / : Due 2008-02-16 View item	\$2.65	\$0.00	Edit Delete
01/07/2008	overdue at Snow Canyon High : All the pretty horses / : Due 2007-12-03 View item	\$0.80	\$0.00	Edit Delete
05/16/2007	Deception : 2007-01-20 View item	\$3.65	\$0.00	Edit Delete
11/09/2006	Deception : 2006-10-07 View item	\$1.65	\$0.00	Edit Delete
09/27/2006	Deception : 21/09/2006 View item	\$0.10	\$0.00	Edit Delete
Total due			\$0.75	

1. The above image shows the **“Account”** tab of the **“Fines”** tab. Here fines can be edited or delete by clicking the **“Edit”** or **“Delete”** links in the right column. By clicking the **“View item”** link next to the description of the fine the item’s information screen will be displayed. Items can be marked lost or damaged and public notes can be set as explained above in the **“Check Out”** tab section (see image below for reference).

Barcode 725100206

Item Information [\[Edit Items\]](#)

Home Library:	Snow Canyon High School
Item type:	Non-Fiction
Item Callnumber:	791.43 VAZ
Replacement Price:	14.44

Statuses

Current Location:	Snow Canyon High School
Checkout Status:	Checked out to 320907 . Due back on 07/06/2009
Lost Status:	<input type="text"/> <input type="button" value="Set Status"/>
Damaged Status:	<input type="text"/> <input type="button" value="Set Status"/>
Withdrawn?:	No <input type="button" value="Withdraw"/>

History

Accession Date:	04/25/2009
Total Renewals:	1
Total Checkouts:	2 (View item's checkout history)
Last seen:	06/19/2009
Last borrowed:	06/19/2009
Last Borrower:	12738
Paid for?:	
Public Note:	<input type="text"/> <input type="button" value="Update"/>

- The next tab on the **"Fines"** tab is **"Pay fines"** to pay a fine click the **"Unpaid"** Drop down box and chose Paid, Write Off or leave set to Unpaid. After setting each fine as desired click the **"Make Payment"** button.

Account Pay fines Create Manual Invoice Create Manual Credit

Fines & Charges	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Sub Total						0.00
Unpaid ▾	OverDue Fine 171570	F	1	0	0.75	0.75
Sub Total						0.75
Total Due						0.75

Make Payment [Cancel](#)

- The **"Create Manual Invoice"** tab can be used to create fines or debits that are not automatically assigned. Choose the **"Type"** of fine from the drop down menu. Enter in a barcode if the fine is associated with a bar coded item. Enter a description to clarify what the fine or debit is for. Now enter the amount of the fine and click the **"Save"** button.

Account Pay fines Create Manual Invoice Create Manual Credit

Manual Invoice

Type: Lost Item ▾

Barcode:

Description:

Amount:

Save [Cancel](#)

- The **"Create Manual Credit"** tab is similar to the **"Create Manual Invoice"** tab. Choose the **"Type"** of credit from the drop down menu. Enter in a barcode if the credit is associated with a bar coded item. Enter a description to clarify what the credit or debit is for. Now enter the amount of the credit and click the **"Save"** button.

Account Pay fines Create Manual Invoice Create Manual Credit

Manual Credit

Credit Type: Credit ▾

Barcode:

Description:

Amount:

Add Credit [Cancel](#)

Circulation History tab:

The “**Circulation History**” tab will display the patrons reading history showing the last 50 items that are or have been previously checked out (to view all items click “**Show All Items**” link at the top of the table). Columns can be sorted by Title, Author or Return Date by click the columns heading. By clicking the name of the item the screen will change to the records information page showing the holdings, items descriptions, etc...

Barry Kreyling (320907)



325 E 10th S
 Ivins 84738
 435-223-7323
 No email stored
 Category: Student (ST)
 Home Library: Snow Canyon
 High School

Check Out

Details

Fines

Circulation History

Edit Add child Change Password Print More

Reading Record

Showing Last 50 Items | [Show All Items](#)

Title	Author	Call No.	Barcode	Number of Renewals	Checked Out On	Due Date	Return Date
A Tale of Two Cities	Charles Dickens	F DIC	130535	1	10/30/2008	03/11/2009	05/19/2009
Calculus	Larson, Hostetler, Edwards	TXT	725000887		08/13/2008	05/08/2009	05/19/2009
CHEMISTRY	WILBRAHAM, ANTONY C.	TXT	118149		08/13/2008	05/08/2009	05/19/2009
History		R 909 His	36061		06/19/2009	05/24/2010	Checked Out
Introduction to teaching :	Kauchak, Donald,	TXT	725001774		01/14/2009	05/15/2009	04/29/2009
Know it all!	Flynn, James.	510 FLY	15711		06/19/2009	06/25/2009	Checked Out
The Canterbury Tales, selected works and related readings.	Chaucer, Geoffrey	NOV 821.17 CHA	115415		11/17/2008	01/12/2009	11/17/2008
The Iranian Revolution /	January, Brendan.	NF Jan 955.05	130858		06/19/2009	06/20/2009	Checked Out
The light in the forest /	Richter, Conrad,	NOV 813 RIC	116940		11/17/2008	01/12/2009	11/17/2008
The princess bride :	Goldman, William,	NOV F GOL	15480		11/17/2008	12/01/2008	11/17/2008
Twilight /	Meyer, Stephenie,	F MEY	129279		06/19/2009	06/25/2009	Checked Out

Modification Log tab:

This tab is for administrators to track changes made to a patrons account. It logs what user account made modifications to the patrons account.

Messaging tab:

This tab allows notices to be emailed to the patron to remind them of upcoming event, due dates and other information. This will work only if you have the patron’s email address entered in their details.

Barry Kreyling (320907)



325 E 10th S
 Ivins 84738
 435-223-7323
 No email stored

Edit Change Password Print More

Manage patron messaging settings

	Days in advance	Email	Digests only?	Do not notify
Item Checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Upcoming Events	0 ▾	<input type="checkbox"/>	-	<input type="checkbox"/>
Item DUE	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold Filled	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Item Check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Advance Notice	0 ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit Changes

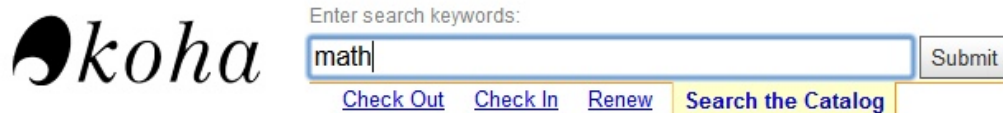
Cancel

Searching the Catalog:

There are two ways to search the catalog in Koha. A quick search can be done by using the “**Search the Catalog**” tab. An advanced search of the catalog can be done by clicking the “**Search**” menu in the Koha menu at the top of the page.

NOTE: *There is a difference between a Catalog search and a Cataloging search (Cataloging is found under the Koha “More” menu). The Catalog is used only to view and edit records and items that exist in your branch. Cataloging is used mainly to add new (MARC) records to the catalog but can be used to also modify existing records and items.*





By typing in a word or phrase into the “Search the Catalog” tab and pressing the enter key or clicking the “Submit” button a keyword search will be done on the catalog.



Below are the results of a quick search done with the keyword “math”.

Home > Catalog > Search for 'math' with limit(s): 'branch:Snow Canyon High School'

322 result(s) found for 'math' with limit(s): 'branch:Snow Canyon High School'. Sort By: Relevance Go

Results	Location
<p>1. Know it all! Flynn, James. Random House, Description: ; New York : , 2004 : 291 p. : ; 24 cm. ISBN: 0375763775 Non-Fiction ... <i>Math ... Presents brief lessons and exercises on algebra, geometry, graphs and probability, and other math areas, connecting them to interesting facts on a variety of topics. ... Mathematics ... Mathematics ...</i></p>	<p>1 item, None available 1 on loan:  Snow Canyon High School [510 FLY] (15711) (1) date due: 06/25/2009</p> <p>Holds</p>
<p>2. 501 math word problems. Skill builder in focus Learning Express, Description: ; New York : , 2006 : ix, 209 p. : ; 26 cm. ISBN: 1576855635 Non-Fiction ... <i>501 math word problems. ... Five hundred one math word problems ... Five hundred and one math word problems ... Miscellaneous math - Fractions - Decimals - Percents - Algebra - Geometry. ... Provides over five hundred math word problems for practice with step-by-step answer explanations, covering fractions, decimals, percents, algebra, geometry, and miscellaneous math. ... Mathematics ... Word problems (Mathematics) ...</i></p>	<p>1 item, 1 available: 1 available:  Snow Canyon High School [510.76 501] (15767) (1)</p> <p>Holds</p>
<p>3. 1001 math problems. LearningExpress, Description: ; New York : , 2004 : ix, 220 p. : ; 28 cm. ISBN: 1576855120 Non-Fiction ... <i>1001 math problems. ... One thousand one math problems ... One thousand and one math problems ... Miscellaneous math - Fractions - Decimals - Percentages - Algebra - Geometry. ... Contains over one thousand math problems designed to help students practice their skills and overcome math anxiety, covering fractions, decimals, percentages, basic algebra, basic geometry, and miscellaneous mathematics. ... Mathematics ...</i></p>	<p>1 item, 1 available: 1 available:  Snow Canyon High School [510.100] (15835) (1)</p> <p>Holds</p>
<p>4. Get wise! : mastering math word problems / Steddin, Maureen Thomson/Peterson's, Description: ; Australia ; Lawrenceville, NJ : , 2004 : vi, 304 p. : ; 23 cm. ISBN: 0769148023 Non-Fiction</p>	<p>1 item, 1 available: 1 available:  Snow Canyon High School</p>

- The keyword math resulted in 322 items in the catalog. On the left hand side of the screen there is a “**Refine your search**” pane that can be used to narrow the search down. If one of the authors is clicked, in this pane, only records by that author will be displayed. If a topic is clicked then records matching that topic will be shown.
- By clicking the title, author’s name or call number in the results table will display the records information page.
- By clicking the “Holds” link on the results table display the holds on this item and let you add a hold for the last patron viewed.

Note: To add a hold for a patron view the patrons page then do a catalog search for the item that need to be put on hold. Click the “Holds” link. Now click the radio button next to the item to place a hold on and click the “Place Hold” button. (patrons can place their own holds by logging into their OPAC accounts)

Place a hold on [Know it all!](#)

Patron name that hold will be for.

Hold	Item type	Barcode	Home Library	Last Location	Call no.	Copy no.	Information
<input checked="" type="radio"/>		15711	Snow Canyon High School		510 FLY		Due 06/25/2009 Not on hold

Advanced Search:

An advanced search of the catalog is done by clicking the Koha “**Search**” menu. From this page you can search by Keyword, Author, ISBN, Barcode or 25 other options. There are 3 search fields to help narrow the search. The search can also be limited to the items type. If you wanted to only look for Non-Fiction books in the search put a check in the Non-Fiction box (more than one box may be checked). Once all options have been set to your desired settings click the “**Search**” button at the bottom of the page.

[Circulation](#) [Patrons](#) [Search](#) [Check Out](#) [More ▼](#)

Advanced Search

Search For:

Keyword	<input type="text"/>
Keyword	<input type="text"/>
Keyword	<input type="text"/>

Limit type to: match any of the following:

<input type="checkbox"/> Audio CD	<input type="checkbox"/> Audio Tape	<input type="checkbox"/> CD-Rom	<input type="checkbox"/> Computers
<input type="checkbox"/> DVD Video	<input type="checkbox"/> Digital Audio	<input type="checkbox"/> Equipment	<input type="checkbox"/> Equipment for Checkout
<input type="checkbox"/> Fiction	<input type="checkbox"/> Kits	<input type="checkbox"/> Non-Fiction	<input type="checkbox"/> Novel Set
<input type="checkbox"/> Online Materials	<input type="checkbox"/> Periodical	<input type="checkbox"/> Reference	<input type="checkbox"/> Teacher Training Materials
<input type="checkbox"/> Temporary Item	<input type="checkbox"/> Text Book	<input type="checkbox"/> Video Cassette	

Subtype limits:

Any audience Any content Any format Additional content types

Location and availability:

Only items currently available

Individual Libraries: Snow Canyon High School

OR

Groups of Libraries -- none --

Sort by:

Relevance

[\[More options\]](#) [\[New search\]](#)

Cataloging:

Cataloging is used to add new MARC records to your catalog. It is important that you understand the difference in a MARC record and an item such as a VHS tape or a book. The MARC record is like a box with a label on it explaining what item is contained in the box. This label may have the following information: Name of the item, its size, date the item was made, keywords that help identify the item. So, the MARC will have all the information about the item: size, date, ISBN, Title, Author, etc... The item is the actual object being added such as a book, DVD, computer, art poster, CD, etc... The information that is associated with the item (NOT the MARC) would be: date acquired Cost, Barcode, Call Number, Item Type, and Public notes. With that little overview out of the way let's look at adding records to the catalog.

Since Koha uses a union (shared) catalog when adding records and items to there are five options to consider. They are listed in order of priority:

1. Received the MARC on disk or downloaded from the book vendor (such as Follett) and just need to import the record (This records often include the item information as well contact your vendor for details).
2. Has already added by another branch and just needs to be imported from the reservoir into your branch.
3. Needs to be created by a "**z39.50 Search**".
4. Needs to be downloaded and imported from a library like Salt Lake City Public Library's website.
5. Record needs to be created by hand.

Note: *If you are adding items like textbooks do not add more than 30 items to a single record because it will cause performance to slow. Create multiple records to work around this limitation.*

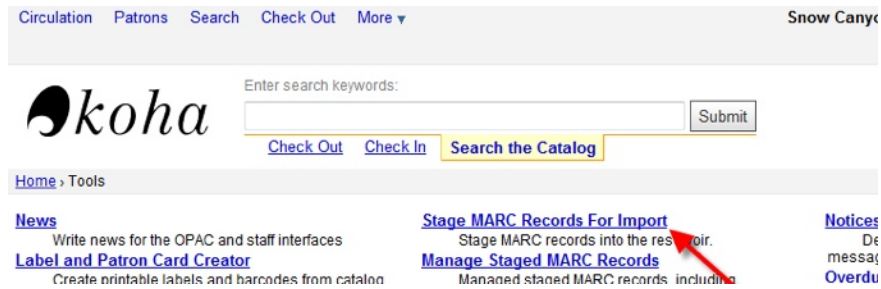
Downloading and importing from vendor:

When importing records from vendors they will first be added to the reservoir (in the union catalog but not in your branch) before they can be imported into your branch.

1. Download MARC file from vendors site to your desktop or insert disk
2. Click on the "**More**" menu then click on "**Tools**"



- Click on **“Stage MARC Records For Import”**




- Click the **“Choose File”** button and locate the file on your desktop or disk. The name of the file now appears next to the **“Choose File”** button. Click the **“Upload file”** button.

Stage MARC Records For Import

- Select a MARC file to stage in the import reservoir. It will be parsed, and each val
- You can enter a name for this import. It may be useful, when creating a biblio, to from!

Stage records into the reservoir

Select the file to stage: no file selected

Upload progress:  100%

Comments about this file: ← Type information that helps identify the in coming file

Character encoding:

Look for existing records in catalog?

Record matching rule:

Action if matching bibliographic record found:

Action if no match is found:

Check for embedded item record data?

Yes
 No

How to process items:

You should set the **“Look for existing records in catalog?”** section to the following options to avoid having multiple MARC records for the same item add to the union catalog:

Look for existing records in catalog?

Record matching rule:

Action if matching bibliographic record found:

Action if no match is found:

- Click the “**Stage for import**” button. Staging results are displayed.

Stage MARC Records For Import

MARC Staging results :

- 10 records in file
- 0 records not staged because of MARC error
- 10 records staged
- Did not check for matches with existing records in catalog
- 10 item records found and staged
- [Manage staged records](#)
- [Back](#)

In this example there were 10 MARC records and all 10 were added to the reservoir and each record has an item (book) attached to it.

- Now click the “**Manage staged records**” link (this is the same as clicking the link to the left “**MARC Import (managing batches)**”). The Manage Staged Records page appears (see image below).

Manage Staged MARC Records › Batch 865

File name	542009FB.mrc
Comments	Follett 052709(none)
Staged	2009-06-23 21:20:04
Status	staged
Matching rule applied	No matching rule in effect
Action if matching record found	create_new
Action if no match found	create_new
Item processing	always_add

New matching rule	Do not look for matching records ▼
Action if matching record found	Add incoming record ▼
Action if no match found	Add incoming record ▼
Item processing	Always add items ▼
<input type="button" value="Apply different matching rule"/>	

#	Citation	Status	Match?	Bib
1	A brief political and geographic history of the Middle East : Davenport, John. (1584156228)	staged	no_match	
2	Ceramics for beginners : Amber, Shay. (1600592430)	staged	no_match	
3	The CIA world factbook 2009 / (160239282X)	staged	no_match	
4	Encyclopedia of gangs / (0313334021)	staged	no_match	
5	Germ theory / Herbst, Judith. (0822529092)	staged	no_match	
6	The hipster librarian's guide to teen craft projects / Coleman, Tina. (083890971X)	staged	no_match	
7	I before E (except after C) : Parkinson, Judy. (0762109173)	staged	no_match	
8	Teen spaces : Bolan, Kimberly. (0838909698)	staged	no_match	
9	Teen : (1588167437)	staged	no_match	
10	The universe in a mirror : Zimmerman, Robert. (0691132976)	staged	no_match	

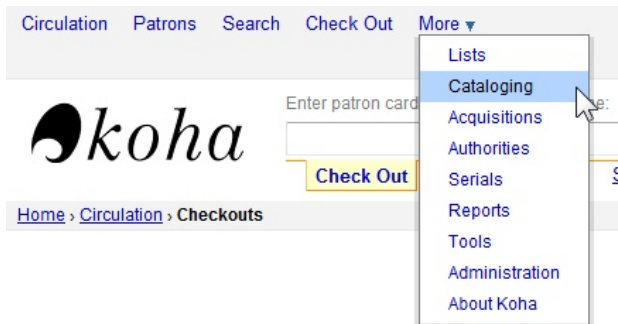
- By clicking on the Citations at the bottom of the page the catalog MARC will be displayed.

8. To add these records and their items click the **“Import into catalog”** button. The results of the import are displayed.
9. When importing from Follett or other vendors the item type is not set. The item type is used to set the issuing rules such as loan period, fine amount, etc... To set the item type search for the item in the catalog. If more than one record matches click the title of the correct record (the one just added). Now click the **“Edit”** button and choose **“Edit Item”**. Now click the **“Edit”** link and set the **“Koha item type”**
10. It is possible to undo an import at any time by going to the Koha **“More”** menu, click tools, and clicking the **“Manage Staged MARC Records”** link. Find the file name of comments of the import to be undone. Click the file name. Now click the **“Undo import into catalog”**.

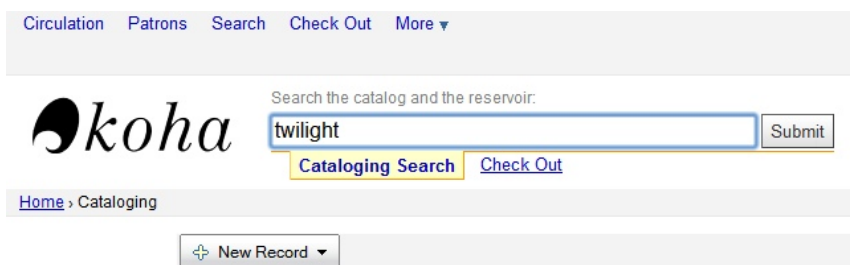
NOTE: When adding records without items attached you will have to do a catalog search and manually add the items (books, DVD, etc...) to the record (this will be covered later in this section)

Import from the reservoir:

1. To open the Cataloging page click on the Koha **“More”** menu and choose **“Cataloging”**:



2. Type in the **“Cataloging Search”** tab the name of the item to be added. If the item does not show up by a keyword try searching by ISBN or LCCN.



3. The results will be displayed. If the record you are looking for shows up in the branch then click the **“Add holdings”** link to add a copy of the item to that record. If the record is not in the branch, look at the bottom of the page at the **“Biblios in reservoir”** section. If you see a record that you think is a match to your search click on the **“MARC”** link and **“Card”** link to verify that the record is a match. If it is click the **“Add biblio”** to add the record to the branch catalog (see image on next page).

New Record ▾

Records already in branch catalog

40 result(s) found in catalog. [31 result\(s\) found in reservoir](#) << < 1 2 > >>

Title	Location	preview		
Caves Armentrout, Patricia,		MARC Card	Edit biblio	Add holdings
Twilight Hunter, Erin. - 0060827645 0060827661 (lib. bdg.) 9780060827649 9780060827663 - HarperCollins, ; New York : - 319 p. : ; 22 cm.		MARC Card	Edit biblio	Add holdings
Tigers at twilight / Osborne, Mary Pope. - 0679890653 (trade) 0679990658 (lib. bdg.) 0679890653 (pbk.) - Random House, ; New York : - 71 p. :		MARC Card	Edit biblio	Add holdings
Twilight / Meyer, Stephenie, - 0316160172 - Little, Brown, ; New York : - 498 p. : ; 22 cm.	Checked out (1),	MARC Card	Edit biblio	Add holdings
Caves Armentrout, Patricia,		MARC Card	Edit biblio	Add holdings
Twilight / Hunter, Erin. - 006082767X - HarperTrophy, ; Nev		MARC Card	Edit biblio	Add holdings
Dragons of autumn twilight / Weis, Margaret. - 0880381736 (pbk.) : - TSR, ; L cm.		MARC Card	Edit biblio	Add holdings

Records in union catalog that can be imported into branch

Biblios in reservoir

Title	ISBN	coming from	preview		
Twilight Hunter, Erin.	0060827645 0	springdale_koha_export.mrc	MARC Card	Add biblio	
Twilight Hunter, Erin.	0060827645 0	springdale_koha_export.mrc	MARC Card	Add biblio	
Twilight Hunter, Erin.	0060827645 0	DHM_koha_export.mrc	MARC Card	Add biblio	
Twilight Hunter, Erin.	0060827645 0	HIS_koha_export.mrc	MARC Card	Add biblio	
Twilight Hunter, Erin.	0061215066	HIS_koha_export.mrc	MARC Card	Add biblio	
Twilight		z3950.loc.gov	MARC Card	Add biblio	
Twilight		z3950.loc.gov	MARC Card	Add biblio	
Twilight	0792152913 9	export(11).txt	MARC Card	Add biblio	
Twilight / Meyer, Stephenie.	0316160172 :	CCES_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie.	0316160172 :	CCES_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie.	0316160172 :	DHM_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie,	9780316160179	DHM_koha_export.mrc	MARC Card	Add biblio	
Twilight / Cabot, Meg.	0060724676 0	HIS_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie.	0316160172 :	HIS_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie.	0316160172 :	HIS_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie.	0316160172 :	SCHS_koha_export.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie,	0316160172	350740FB.mrc	MARC Card	Add biblio	
Twilight / Hunter, Erin.	006082767X	350740FB.mrc	MARC Card	Add biblio	
Twilight / Meyer, Stephenie,	0316015849	366225_B.mrc	MARC Card	Add biblio	
Twilight / Cabot, Meg.	0060724692	366225_B.mrc	MARC Card	Add biblio	
Twilight / Hunter, Erin.	006082767X	366225_B.mrc	MARC Card	Add biblio	
Twilight / Cabot, Meg.	9780060724696	MICROLIF.001	MARC Card	Add biblio	
Twilight / Meyer, Stephenie,	0316160172	z3950.loc.gov	MARC Card	Add biblio	
Twilight / Meyer, Stephenie,	0316015849	407380_B.mrc	MARC Card	Add biblio	
Twilight / Hunter, Erin.	006082767X	C:\Users\Media Office\Desktop\microlif.001	MARC Card	Add biblio	
Twilight / Hunter, Erin.	006082767X	C:\Users\Media Office\Desktop\microlif.001	MARC Card	Add biblio	
Twilight : Hardwicke, Catherine.	9780316070522	z3950.loc.gov	MARC Card	Add biblio	
Twilight : Vaz, Mark Cotta.	0316043133	C:\Users\jkreyling\Desktop\542009_B.mrc	MARC Card	Add biblio	
Twilight Child Warner, Sally	0670060763	DHM_koha_export.mrc	MARC Card	Add biblio	
Twilight comes twice / Fletcher, Ralph J.	9780395848265	DHM_koha_export.mrc	MARC Card	Add biblio	
Twilight eyes / Koontz, Dean R.	0425100650	SCHS_koha_export.mrc	MARC Card	Add biblio	

- After the record is added changes can be made to the TAGs if need before saving it.

Add MARC Record

Change framework: Default ▾

0 1 2 3 4 5 6 7 8 9

000 - LEADER
 00711nam a22002055a 4500

001 - CONTROL NUMBER -
 15608934

003 - CONTROL NUMBER IDENTIFIER

005 - DATE AND TIME OF LATEST TRANSACTION

- Click the **“Save”** button. If the systems think the record is a duplication the following warning will appear.

Duplicate Record suspected

Is this a duplicate of [Twilight :director's notebook /?](#)

- The **“Add Item”** page will now appear. Fill in the needed information and click the **“Add item”** button. The following fields should always be filled in:

- Full call number
- Barcode
- Cost
- Koha Item type

Items for Twilight :director's notebook / by Hardwicke, Catherine. (Record #108464)

Add Item

0 - Withdrawn status	<input type="text"/>
1 - Lost status	<input type="text"/>
4 - Damaged status	<input type="text"/>
5 - Use restrictions	<input type="text"/>
7 - Not for loan	<input type="text"/>
a - Permanent Location	<input type="text" value="Snow Canyon High School"/>
b - Current Location	<input type="text" value="Snow Canyon High School"/>
c - Shelving location	<input type="text"/>
d - Date acquired	<input type="text"/>
e - Source of acquisition	<input type="text"/>
o - Full call number	<input type="text"/>
p - Barcode	<input type="text"/>
v - Cost, replacement price	<input type="text"/>
y - Koha item type	<input type="text"/>
z - Public note	<input type="text"/>

Creating a record using a “z39.50 Search”:

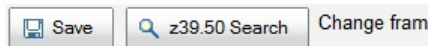
After doing a cataloging search if the item is not found in the catalog or reservoir a z39.50 search should be tried. A z39.50 search is a function build into Koha that will search the Library of congress and other websites for a MARC record matching the search. As before if the item is not found by title try ISBN, LCCN or Author.

1. After searching in cataloging or clicking the Koha “More” → “Cataloging” menu, click the “New Record” button and choose “Default Framework”.



2. Click the “z39.50 Search” button.

Add MARC Record



3. The z39.50 Search window opens. Type in the search criteria, check which organizations to search. Click the “Search” button.

Z39.50 Search Points

Title: <input type="text"/>	Author: <input type="text"/>
ISBN/ISSN: <input type="text" value="9780545054744"/>	Subject Heading: <input type="text"/>
LC Call Number: <input type="text"/>	Dewey: <input type="text"/>

Search targets [Select All](#) [Clear All](#)

- AMICUS [amicus.collectionscanada.gc.ca]
- NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]
- NEW YORK PUBLIC LIBRARY [catnyp.nypl.org]
- COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]
- SMITHSONIAN INSTITUTION LIBRARIES [sirius-libraries.si.edu]
- LIBRARY OF CONGRESS [z3950.loc.gov]



4. When the result are displayed click the “MARC” and “Card” links to verify which record to import. Click the “Import” button of the desired record.

NOTE: If no results are returned try the search again with different search options.

Results

Server	Title	Author	ISBN	LCCN	Preview
LIBRARY OF CONGRESS	Marcelo in the real world /	Stork, Francisco X.	9780545054744(hardcover:alkpaper)	2008014729	MARC Card Import
AMICUS	Marcelo in the real world /	Stork, Francisco X.	9780545054744(hardcover:alkpaper)	2008014729	MARC Card Import

- Now make changes to any TAGs that are needed (this should not be necessary) and click the **“Save”** button.

Add MARC Record

Change framework: Default ▾

000 - LEADER

00957nam a22002658a 4500

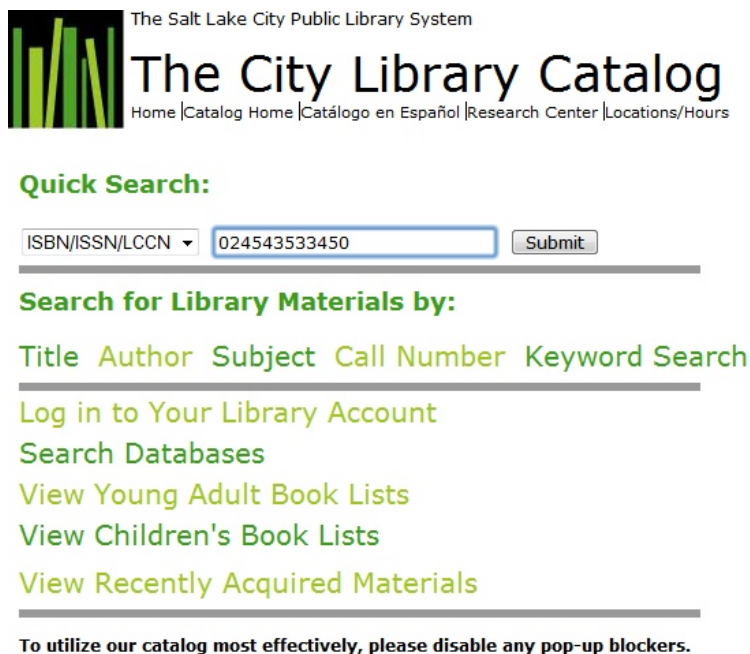
- The **“Add Item”** page will now appear. Fill in the needed information and click the **“Add item”** button. The following fields should always be filled in:

- Full call number
- Barcode
- Cost
- Koha Item type

Download from a Public Library’s website:

If a MARC record cannot be found by one of the above methods try using a public library catalog like “The Salt Lake City Public Library Catalog” at <http://catalog.slcp.org>. The SLCP is a great recourse for importing LDS works and Movie DVDs MARC records. Below is a step-by-step guide on finding records at SLCP, downloading and importing them into Koha.

- Open a browser and go to <http://catalog.slcp.org> and do a quick search by title, ISBN, Subject or Author. In the following example 2 MARCs for DVD movies will be located, downloaded and imported into Koha. The first search will be by ISBN and the second by title.



The Salt Lake City Public Library System

The City Library Catalog

Home | Catalog Home | Catálogo en Español | Research Center | Locations/Hours

Quick Search:

Search for Library Materials by:

[Title](#)
[Author](#)
[Subject](#)
[Call Number](#)
[Keyword Search](#)

[Log in to Your Library Account](#)
[Search Databases](#)
[View Young Adult Book Lists](#)
[View Children’s Book Lists](#)
[View Recently Acquired Materials](#)

To utilize our catalog most effectively, please disable any pop-up blockers.

- Change the search to ISBN for “Horton Hears a Who” and enter the number. Click the “**Submit**” button. If a match is found the record will display on the screen with links to all the locations that have the item. It should be clear from the description if this is the correct record. Click the “**Save Records**” button (the one with the shopping cart icon).

The Salt Lake City Public Library System

The City Library Catalog

Home | Catalog Home | Catálogo en Español | Research Center | Locations/Hours

Start Over
 Request
 Save Records
 MARC Display
 Limit/Sort Search
 Another Search

ISBN/ISSN/LCCN: 024543533450 System Sorted

Limit results to available items

Record: [Prev](#) [Next](#)

Title Dr. Seuss' Horton hears a Who! [videorecording] / Twentieth Century Fox Animation pre production ; Twentieth Century-Fox Film Corporation ; produced by Bob Gordon, Bruce Al Daurio, Cinco Paul ; directed by Jimmy Hayward, Steve Martino.

Imprint Beverly Hills, Calif. : Twentieth Century Fox Home Entertainment, c2008.

Rating ★★★★★

LOCATION	CALL #
ANDERSON-FOOTHILL	DVD j 791.433 H82331
ANDERSON-FOOTHILL	DVD j 791.433 H82331
CHAPMAN	DVD j 791.433 H82331
DAY-RIVERSIDE	DVD j 791.433 H82331
DAY-RIVERSIDE	DVD j 791.433 H82331
MAIN - CHILDREN'S	DVD j 791.433 H82331
MAIN - CHILDREN'S	DVD j 791.433 H82331
MAIN - CHILDREN'S	DVD j 791.433 H82331
MAIN - CHILDREN'S	DVD j 791.433 H82331
MAIN - CHILDREN'S	DVD j 791.433 H82331

Descript Note 1 videodisc (ca. 86 min.) : sd., col. ; 4 3/4 in. Originally released as a motion picture in 2008. Based upon the book by Dr. Seuss.

- Now let's search for the second DVD record of “High School Musical 3 Senior Year”. Change the search to title and enter the title and Click the “**Search**” button. This time the record does not show up on the screen. Click into the four choices to find which one if any will be a match.

The Salt Lake City Public Library System

The City Library Catalog

Home | Catalog Home | Catálogo en Español | Research Center | Locations/Hours

Start Over
 Extended Display
 Limit/Sort Search
 Search As Words
 Another Search
 View Saved
 Clear Saved Records

(Search History)

TITLE: High School Musical 3 System Sorted

Limit results to available items

Num	Save	TITLES (1-4 of 4)	Year	Entries Found
1	<input type="checkbox"/>	High School Musical 3 (Motion Picture)		3
2	<input type="checkbox"/>	High School Musical 3		2
3	<input type="checkbox"/>	High School Musical 3 :	2008	1
4	<input type="checkbox"/>	High School Musical 3. Senior Year : : Grace, N. B.	c2008	1

Start Over
 Extended Display
 Limit/Sort Search
 Search As Words
 Another Search
 View Saved
 Clear Saved Records

(Search History)

- After clicking all four it is found that the second one has the DVD record. Click to go to the second one in the list.

The Salt Lake City Public Library System

The City Library Catalog

Home | Catalog Home | Catálogo en Español | Research Center | Locations/Hours

Start Over | Return to List | Limit/Sort Search | Another Search | View Saved | Clear Saved Records

(Search History)

TITLE High School Musical 3 System Sorted Sort Search

Limit results to available items

Save Marked Records Save All On Page

TITLES (1-2 of 2)

High school musical 3

1	<p>High school musical 3 [sound recording] : senior year.</p> <p>Burbank, CA : Walt Disney Records, p2008. 1 sound disc : digital ; 4 3/4 in. CD ZL HIGH D03</p> <p>Circulation availability : 3 copies available at CHAPMAN, DAY-RIVERSIDE and SWEET</p>	<p>Request</p> <p>Full Record</p> <p>Other Resources</p>	<p>p2008</p> <p>Music-CD</p> <p>Rate it!</p> <p>★★★★★</p>
2	<p>High school musical 3. Senior year [videorecording] / Walt Disney Pictures presents a Borden & Rosenbuch Entertainment production, a Kenny Ortega film ; produced by Bill Borden and Barry Rosenbush ; written by Peter Barsocchini ; directed by Kenny Ortega.</p> <p>Burbank, CA : Distributed by Walt Disney Studios Home Entertainment, [2009] 1 videodisc (112 min.) : sd., col. ; 4 3/4 in. DVD j 791.43 H6384443</p> <p>Circulation availability : No copies available</p>	<p>Request</p> <p>Full Record</p> <p>Other Resources</p>	<p>2009</p> <p>DVD</p> <p>Rate it!</p> <p>★★★★★</p>

Save Marked Records Save All On Page

- Put a check in the "Save" box on number 2 and click the "Save Marked Records". Now click the "View Saved" button (the one with the shopping cart icon) to download the records.

The Salt Lake City Public Library System

The City Library Catalog

Home | Catalog Home | Catálogo en Español | Research Center | Locations/Hours

Start Over | Extended Display | Previous Screen | Clear Saved Records

<p>Format Of List</p> <p><input type="radio"/> Full Display</p> <p><input type="radio"/> Brief Display</p> <p><input checked="" type="radio"/> MARC</p>	<p>Send List To</p> <p><input type="radio"/> E-Mail</p> <p>Mail To: <input type="text"/></p> <p>Subject: From the Salt Lake City Public Library</p> <p><input checked="" type="radio"/> Local Disk</p>
--	---

Submit

Your List of Saved Records

Select All Clear All Delete Selected

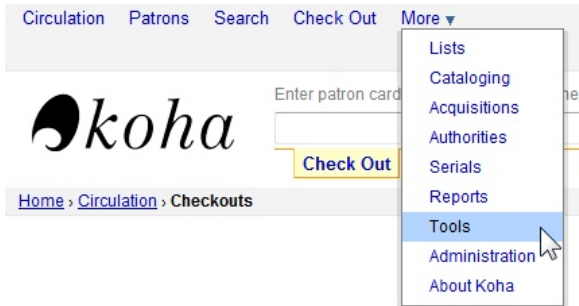
Num	Save	Exports (1-2 of 2)	Media	Year
1	<input type="checkbox"/>	Dr. Seuss' Horton hears a Who! [videorecording] / Twentieth Century Fox Animation presents	DVD	c2008
2	<input type="checkbox"/>	High school musical 3. Senior year [videorecording] / Walt Disney Pictures presents	DVD	2009

Select All Clear All Delete Selected

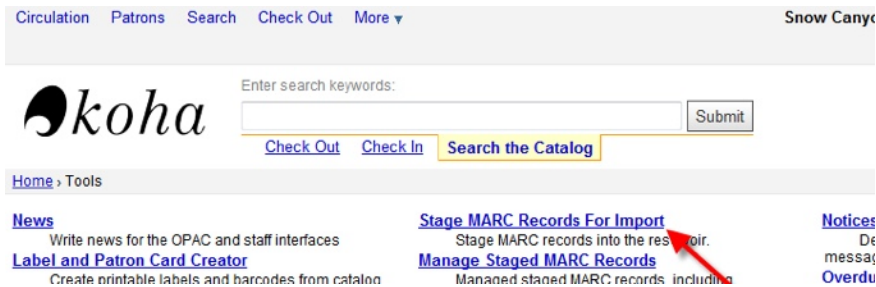
- (Refer to the above image). Now click **"MARC"** under the **"Format Of List"** box and **"Local Disk"** under the **"Send List To"** box. Click the **"Submit"** button to name and save the record to the desktop.

NOTE: Both records are saved to a single file and will be imported at the same time. If you have multiple records to import from this site find all records first, save them the cart, and then download them to the desktop. This will save a lot of time since you will have to only import one file.

- Click on the **"More"** menu then click on **"Tools"**



- Click on **"Stage MARC Records For Import"**



- Click the **“Choose File”** button and locate the file on your desktop or disk. The name of the file now appears next to the **“Choose File”** button. Click the **“Upload file”** button.

Stage MARC Records For Import

- Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalog.
- You can enter a name for this import. It may be useful, when creating a biblio, to remember where the suggested MARC data comes from!

Stage records into the reservoir

Select the file to stage: no file selected

Upload progress:
100%

Comments about this file:

Character encoding:

Look for existing records in catalog?

Record matching rule:

Action if matching bibliographic record found:

Action if no match is found:

Check for embedded item record data?

Yes
 No

How to process items:

- You should set the **“Look for existing records in catalog?”** section to the following options to void having multiple MARC records for the same item add to the union catalog:

Look for existing records in catalog?

Record matching rule:

Action if matching bibliographic record found:

Action if no match is found:

- Type in a comment in the **“Comments about this file”** field. Click the **“Stage for import”** button.

Staging results are displayed.

Stage MARC Records For Import

MARC Staging results :

- 2 records in file
- 0 records not staged because of MARC error
- 2 records staged
- 0 records with at least one match in catalog per matching rule "ISBN"
- 0 item records found and staged
- [Manage staged records](#)
- [Back](#)

In this example there were 2 MARC records and all 2 were added to the reservoir and each record has an on item (DVD) attached to it. After importing them into the catalog the item (DVD) will have to be added to the records.

- Now click the **“Manage staged records”** link (this is the same as clicking the link to the left **“MARC Import (managing batches)”**). The Manage Staged Records page appears (see image below).

Manage Staged MARC Records › Batch 866

File name	DVDsFromSLCPL.txt
Comments	
Staged	2009-06-24 21:24:29
Status	staged
Matching rule applied	ISBN (020\$a)
Action if matching record found	ignore
Action if no match found	create_new
Item processing	always_add

New matching rule	ISBN (020\$a) ▼
Action if matching record found	Ignore incoming record (its items may still be processed) ▼
Action if no match found	Add incoming record ▼
Item processing	Always add items ▼

#	Citation	Status	Match?	Bib
1	Dr. Seuss' Horton hears a Who!	staged	no_match	
2	High school musical 3. (0788895346 9)	staged	no_match	

- By clicking on the Citations at the bottom of the page the catalog MARC will be displayed.
- To add these records click the **“Import into catalog”** button. The results of the import are displayed.
- To add items click on the Bib number (see image below) of one of the records. This will bring up the record’s page where items can be added.

Completed import of records

Number of records added	2
Number of records updated	0
Number of records ignored	0
Number of items added	0
Number of items ignored because of duplicate barcode	0

#	Citation	Status	Match?	Bib
1	Dr. Seuss' Horton hears a Who!	imported	no_match	109575
2	High school musical 3. (0788895346 9)	imported	no_match	109576

16. Click the **“New”** button and choose **“New Item”**. The **“Add Item”** page will now appear. Fill in the needed information and click the **“Add item”** button. The following fields should always be filled in:

- Full call number
- Barcode
- Cost
- Koha Item type

17. There are two ways to enter an item to the other record.

- i. Now add an item (DVD) to the other record by clicking on the Koha **“More”** menu, then choose **“Tools”** and click the **“Manage Staged MARC Records”** link. Click on the File of the Records just imported (should be top on the list). Repeat steps 13 and 14.
- ii. Click on the Koha **“More”** menu, then choose **“Cataloging”** type in the title, and then click the **“Add holdings”** link. Repeat step 14.

Creating a MARC record by hand:

All other steps should be tried before creating your own MARC record. Sometime you can use one of the above methods to find a record that closely matches what you are looking for and then you can Modify the TAG's to meet your needs. If that's not possible then use the steps below to create your own MARC record.

Remember: *MARC records are very important. MARCs are where the computer gets its information when searches are preformed. If a MARC is not in good form it will make it harder for patrons to find the information they are looking for.*

1. Click the Koha **“More”** menu, choose **“Cataloging”**, click the **“New Record”** button and choose **“Default Framework”**.
2. Type in the information for all the TAGs that are important and click the **“Save”** button.

Add MARC Record

000 - LEADER

3. Here are some import TAGs:

0XX computer does

020 ISBN

040 Cataloging Source

1XX, 4XX, 6XX, 7XX, and 8XX tags

100 main access point

245 indicator 1 title added entry - 0 means no author

400 series statement (For a book that is in a series)

5XX -- 520 summary note (jacket cover information).

6XX Subjects field are very important

655 Genre heading (used for fiction and drama)

7XX for other names like that of an illustrator

8XX other series information

4. The **“Add Item”** page will now appear. Fill in the needed information and click **“Add item”** button. The following fields should always be filled in:

➤ Full call number

➤ Barcode

➤ Cost

➤ Koha Item type

Making Lists:

If a teacher has a list of books they want students to choose from to read or use as a reference for a project a list of the books can be created for students to see in the OPAC system. To create a list following the steps below:

1. Click on the Koha **“More”** menu then choose **“Lists”** and click the **“New List”** button.



[New List](#)

Create a new List

Name:

Owner: jkreyling

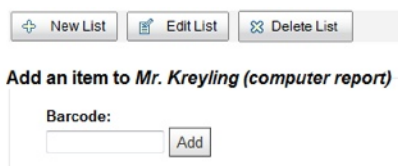
Sort this list by:

Category:

[Cancel](#)

- A **Private** List is managed by you and can be seen only by you.
- A **Public** List can be seen by everybody, but managed only by you.
- A **Open** List can be seen and managed by everybody.

2. Name the list something that will be descriptive for the patrons, pick how the list will sort the books, and choose whether the list will be a Private, Public, or an Open list. See the image above for the difference in the type of list. Click the **“Save”** button.
3. Now type in the barcode of the items you want to appear on the list. Click the **“Add”** button after each one.



[New List](#) [Edit List](#) [Delete List](#)

Add an item to **Mr. Kreyling (computer report)**

Barcode:

- After all items are added to the list. Open the OPAC page.

Contents of Mr. Kreyling (computer report)

[Select All](#) [Clear All](#)

	Title	Author	Call Numbers	Date Added	
<input type="checkbox"/>	The art of 3D computer animation and effects /	Kerlow, Isaac Victor.	006.6 KER	06/25/2009	Holds
<input type="checkbox"/>	Computer evidence /	Dahl, Michael.	363.25 DAH	06/25/2009	Holds
<input type="checkbox"/>	CGI : the art of the 3D computer-generated image /	Weishar, Peter.	776 WEI	06/25/2009	Holds
<input type="checkbox"/>	Mathematics for 3D game programming and computer graphics /	Lengyel, Eric.	794.8 LEN	06/25/2009	Holds
<input type="checkbox"/>	Little Black Book of Computer Security	Dubin, Joel	005.8 DUB	06/25/2009	Holds
<input type="checkbox"/>	Computer investigation /	Bauchner, Elizabeth.	363.25 BAU	06/25/2009	Holds
<input type="checkbox"/>	Illustrated computer graphics dictionary /	Spencer, Donald D.	R 006.6 SPE	06/25/2009	Holds
<input type="checkbox"/>	Mathematicians and Computer Wizards		R 510 MAT	06/25/2009	Holds
<input type="checkbox"/>	Hackers : heroes of the computer revolution /	Levy, Steven.	76.6 LEV	06/25/2009	Holds
<input type="checkbox"/>	Digital evidence and computer crime : forensic science, computers, and the Internet /	Casey, Eoghan.	363.25 CAS	06/25/2009	Holds

Add an item to Mr. Kreyling (computer report)

Barcode:

- Once the OPAC page opens click the “**Lists**” button then choose a list to review.

Public Lists

- Mr. Kreyling (computer report) textbooks
- [Log in to Create Your Own Lists](#)

Account:

- Now patrons can see a list of items that they are to use for their report.

[Lists](#) → [Mr. Kreyling \(computer report\)](#)

Title	Author	Copyright	Call Numbers
Hackers : heroes of the computer revolution /	Levy, Steven.	2001	76.6 LEV
Illustrated computer graphics dictionary /	Spencer, Donald D.	1993	R 006.6 SPE
Mathematicians and Computer Wizards		2001	R 510 MAT
Digital evidence and computer crime : forensic science, computers, and the Internet /	Casey, Eoghan.	2004	363.25 CAS
Little Black Book of Computer Security	Dubin, Joel		005.8 DUB
CGI : the art of the 3D computer-generated image /	Weishar, Peter.	2004	776 WEI
Computer evidence /	Dahl, Michael.	2005	363.25 DAH
Computer investigation /	Bauchner, Elizabeth.	2006	363.25 BAU
The art of 3D computer animation and effects /	Kerlow, Isaac Victor.	2004	006.6 KER
Mathematics for 3D game programming and computer graphics /	Lengyel, Eric.	2004	794.8 LEN

Acquisitions:

For most schools the only thing that the acquisitions page will be used for is to manage a list of suggested books the patrons might request from their account on the OPAC system. To see the list of suggested titles click on the Koha “More” menu then choose “**Acquisitions**”.

- [Late orders](#)
- [Manage suggestions](#)
- [Funds and Budgets](#)

[+ New Vendor](#)

Acquisitions

Start, receive, or modify any order

You must [define a budget in Administration](#)

Vendor

Pending suggestions

1 suggestions waiting [Manage suggestions](#)

1. The list can be viewed by clicking the “**Manage Suggestions**” link on the left or the “**Manage Suggestions**” link in the middle of the page under the Pending suggestions section.

2. The Suggestions page will list suggested titles to be “**Accept**”, “**Reject**” or “**Delete**” ed. There is also an “**Accepted**” tab and a “**Rejected**” tab to review past decision of suggested items.

Suggestions

AcceptedPendingRejected

Suggestion	Suggested by	Date	Reason	Accept	Reject	Delete
Little Man in the Moon © 2008	Kreyling , Barry (725)	06/30/2009	-- Choose a reason --	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Choose a reason for all marked entries: -- Choose a reason -- [Mark all with this reason](#)

3. After making any changes click the “**Change Status**” button.

Reports:

Most reports are self explanatory. This section will cover only five reports. Doing so will cover most of the options that can be found in all other reports.

1. There are two locations for reports. The first one is Circulation. Click the Koha “**Circulation**” menu or from the home screen click the “**Circulation**” link to see the Circulation Reports. These reports are mainly to check on items that have been placed on hold by patrons. There are two reports that cover overdue items. This is a quick way to see what titles are overdue so you can

contact the patrons about their overdue items.

Circulation Reports

- [Holds Queue](#)
- [Holds to pull](#)
- [Holds awaiting pickup](#)
- [Hold ratios](#)
- [Transfers to receive](#)
- [Overdues](#) - **Warning:** This report is very resource intensive on systems with large numbers of overdue items.
- [Overdues with fines](#) - Limited to your library. See report help for other details.

2. That next set of reports can be accessed by going to the home screen (clicking the Koha logo) and clicking the “**Reports**” link or click on the Koha “More” menu and choose “Reports”. The five reports that will be covered are:

- Checked Out Books
- Overdue Copies and Fines
- Catalog Inventory
- Items with no check checkouts
- Most-Circulated Items

Reports

Custom Reports

- [Checked Out Books](#)
- [Reserved Copies](#)
- [Copies With No Checkouts](#)
- [Overdue Copies And Fines](#)
- [Fines](#)
- [New Copies](#)
- [Collection Age](#)
- [Titles By Various Criteria](#)
- [Catalog Inventory](#)
- [Items With No Item Type](#)
- [Copies Without a Call Number](#)
- [Lost Copies](#)
- [Used Barcodes](#)
- [List Borrowers](#)

Guided Report Wizard

- [Guided Reports](#)

Statistics wizards

- [Acquisitions](#)
- [Patrons](#)
- [Catalog](#)
- [Circulation](#)
- [Serials](#)

Inactive

- [Patrons who haven't checked out](#)
- [Items with no checkouts](#)

Top Lists

- [Patrons checking out the most](#)
- [Most-Circulated Items](#)

Other

- [Items lost](#)
- [Catalog by itemtype](#)
- [Average loan time](#)

Checked Out Copies:

1. Click the “**Checked Out Copies**” link under the Custom Reports sections of the reports page.

Checked Out Copies

The screenshot shows a web form for generating a 'Checked Out Copies' report. It includes several sections:

- sort1:** A dropdown menu.
- sort2:** A dropdown menu with 'Baggaley, John' selected.
- Item Types:** A list box containing 'Audio Tape', 'Audio CD', 'Computers', and 'Digital Audio'.
- Sort By:** A dropdown menu with 'Patron' selected.
- Only Overdues:** An unchecked checkbox.
- Page Breaks:** Radio buttons for 'No Breaks' (selected) and 'One Student Per Page'.
- Output:** Radio buttons for 'To screen into the browser:' (selected) and 'To a file:'. The 'To a file:' option has a text input field with 'Export' and a 'With Delimiter' dropdown menu.
- Generate Report:** A button at the bottom.

The first two options “**sort1:**” and “**sort2:**” are really filters. The “**sort1:**” will limit the return to those patrons with a certain graduation year. “**sort2:**” will return only patrons with the selected homeroom teacher (this is true for all reports with these field). If both fields are set then both filters are set and the results will be limited to graduation year and homeroom teacher.

Note: *Not setting “**sort1:**” and “**sort2:**” all patrons with checked out items will be displayed.*

2. By setting the Items (holding down the “**CTRL**” key while clicking will allow you to choose multiple item types) only those types selected will be displayed. Choose any other desired options for the report. Leave blank to see all items.
3. After all options are set click the “**Generate Report**” button to display the results to the screen. If you want to save the results to your computer click the “**To a file:**” and type in a name for the file and set the “**With Delimiter**” to a “,”. This file can be opened up in a spreadsheet like Excel.

- With the settings in the image above every patron with items checkout and Mr. Baggaley as their homeroom teacher will be displayed to the screen.

Filtered on

Homeroom Teacher = Baggaley, John
 School = Snow Canyon High School

Homeroom Teacher	Date Due	Borrower	Borrowers School	Title	Call Number	Barcode	Replacement Price	Copy notes
Baggaley, John	2009-05-08	Casuse, Veronica	Snow Canyon High School	CHEMISTRY	TXT	118220	56.00	
Baggaley, John	2009-05-08	Raymond, Paris	Snow Canyon High School	Black boy :	NOV 920 WRI	30225	12.00	
Baggaley, John	2009-05-08	Siteine, Jordan	Snow Canyon High School	Hole's Essentials of Human Anatomy and Physiology	TXT	119420	65.00	
Baggaley, John	2009-05-08	Siteine, Jordan	Snow Canyon High School	EBSI rich dad's rich kid, smart kid :	TXT	130324	14.00	
Baggaley, John	2009-05-08	Siteine, Jordan	Snow Canyon High School	Glencoe Health	TXT	127458	85.00	
								5

- For this teacher there are three patrons in his 1st hour class that have a total of five items still checked out. This report could be given to the teacher to let them know what students have items checked out.

Overdue Copies And Fines:

The Overdue copies and fines report is a good report to run at the end of a term or year to help patrons clear up any fines they may have and remind them what books they still have out and need to get returned before the last day of the term or year.

- Running this report with the following settings will display all patrons that are students in Mr. Despain's 1st hour class that have any items checked out, whether the item is overdue or not (this is because the **"Show All Checked Out Copies:"** is checked). The report will also show the replacement cost of any items checked in the student's total amount they owe the library. This helps them know if they don't return the items checked out to them how much they will have to pay to clear their account.

Overdue Copies And Fines

sort1 :

sort2 :

Patron Category :

One Patron Per Page :

Show All Checked Out Copies :

Concise Check Out Info :

Output

To screen into the browser:

To a file: Named: for a s

- In these results Crystal owes a total of \$5.55 for overdue books. Candice will owe \$60.00 if she does not return her Literature textbook. Yolanda owes \$9.10 in overdue fines and will owe \$23.00 if the books “Night” and “A man named Dave” are not returned. The total amount owed by all students in Mr. Despain’s 1st hour class is \$97.65

Filtered on

sort2 = Despain, Deric
 Patron Category = ST
 School = Snow Canyon High School

Homeroom Teacher	Patron	Description	Amount Outstanding
Despain, Deric	Barnes, Crystal	Overdue at 725 Alicia : 02/05/2009	0.70
Despain, Deric	Barnes, Crystal	Overdue at 725 Alicia : 11/25/2008	0.20
Despain, Deric	Barnes, Crystal	Overdue at 725 Thursday's child / 10/01/2008	2.30
Despain, Deric	Barnes, Crystal	Overdue at 725 Thursday's child / 12/25/2008	2.35
			5.55
Despain, Deric	Jerman, Candice	122314 Literature The Reader's Choice American Literature (The Blue Book)	60.00
			60.00
Despain, Deric	Salazar, Yolanda	109965 Night /	10.00
Despain, Deric	Salazar, Yolanda	121840 A man named Dave : a story of triumph and forgiveness /	13.00
Despain, Deric	Salazar, Yolanda	Overdue at 725 A man named Dave : 02/10/2009	4.45
Despain, Deric	Salazar, Yolanda	Overdue at 725 Night / 01/30/2009	4.65
			32.10
			97.65

Catalog Inventory:

Doing an inventory of all items in the media center can be very time consuming to perform. To help with this there is the catalog inventory report. This is how the report works: In the catalog, whenever a item is scanned (checked in, checked out, or renewed) it sets the items “**Last Seen**” date to the date that it was last scanned. The date of the start of the inventory is set and the report checks items to see if they have been seen on or after that date. If an item has not been seen on or after that date it will be on the report. These items are not accounted for and are possibly missing. Follow the steps below to start the inventory process.

- To start the inventory mark the date (this date will be needed when the Inventory report is run) the inventory is to start.

Catalog Inventory

Last Seen :

Order result by : ▼

Skip Copies On Loan :

Set Copies As Missing :

Output

To screen into the browser:

To a file: Named: for a spreadsheet application With Delimiter ▼

- Start scanning the items that are in the library into the check in field (this sets the “**Last Seen Date**”). This process may take a couple of weeks to complete depending on the amount of library staff that are able to help and the number of holding that the library has. It is fine to continue to renew items and check them in and out during this time.

3. After scanning all items click on the **“Catalog Inventory”** link on the reports page. Set the **“Last Seen:”** field to the date the inventory process started.
4. Put a check in the **“Skip Copies On Loan:”** box.
5. Make sure the **“Set Copies As Missing:”** is not checked.
NOTE: After you are sure that the items on this report cannot be located or accounted for return to the **“Catalog Inventory”** page and run the report again with the **“Set Copies As Missing”** option checked. This will mark all the items on the report as missing and this will make it so these items will not show up in OPAC searches. If the item is later found and checked in it will be set back to normal status in the catalog. It will show up again when searched for in the OPAC system.
6. Click the **“Generate Report”** button. This will show all item not accounted for.

Items with no checkouts:

This report shows what items in the library have never been checked out. This information can be helpful when weeding items out of the library. It will also be useful in knowing what items may need to be promoted to faculty and students so they are aware that these items are available for check out.

1. Click the **“Items with no checkouts”** link.
2. Choose which **“Library”** to run the report on.
3. Set the **“Document Type”** (Item Type) if you want to see how certain items are being checked out (Example: If you what to see what DVD Videos have not been checked out change the Document type to “DVD Video”). Leave it set to “Any Document type” if wanting to see all items that have not been checked out.

Items with no checkouts

Library:	Snow Canyon High School ▾
Document Type:	Any Document type ▾
Limits	
Limit to:	None ▾
By:	None ▾
Output	
To screen into the browser:	<input checked="" type="radio"/>
To a file:	<input type="radio"/> Named: <input type="text" value="Export"/> Into an application
<input type="button" value="Submit"/>	



4. The number of items to display can be set with the **“Limit to:”** field. After setting all options click the **“Submit”** button to view report.



Most-Circulated Items:


This report will help you see which items in the library are being checked out the most. This can also be helpful in knowing what type of books or other items to add to your collection in the future, also which books may need additional copies added.


1. On the reports page click the “Most-Circulated Items” link.


Most-Circulated Items

Checkout date from:  To: 

Check-in date from:  To: 

Library: Snow Canyon High School 

Item Type: Fiction 


Patron Category: Any Category code 


Day:

Month:

Year:

Limits

Limit to: 50 

By: None 

Output

To screen into the browser:

To a file: Named: Into an application

2. Set date range (checkout/check-in date from and to) if wanting to see what items are checked out during a certain time period (example: this could be used if you wanted to see what items are circulated at Christmas time). If no date range is set then the results will return the items that have been circulated the most since your library started using Koha.
3. Set the library to your branch.
4. Choose an “Item Type”. If no item type is chosen the results will return all items with the highest circulation counts.
5. If you want to only see a certain number of results set the “**Limit to:**” option.
6. Click the “Submit” button.

Tools:

Some of the functions on the tools page have been covered in previous sections of this manual. The following functions on the tools page (click the Koha **“More”** menu, then choose **“Tools”**) will be covered here:

- Label and Patron Card Creator, used for printing out class lists (in the left column of page)
- Circulation and fines rules (in the left column of page)
- Calendar (in the left column of page)
- Add Copies To A Record (in the middle column of page)
- Export bibliographic and holdings (in the middle column of page)
- Set Item Type on copies (in the middle column of page)
- Upload patron images (in the middle column of page)

Label and Patron Card Creator (Class Lists) ***(Printing out class list of patrons with barcodes):***

This function will allow the printing of a list for a teacher with students name and barcode for making the checkout of items to a class much quicker. Follow the steps below to complete this task:

1. Go to the tools page by clicking the Koha **“More”** menu then **“Tools”**.
2. In the left hand column click the **“Label and Patron Card Creator”** link.
3. Set Active Layout to **“Patrons”** by checking the option circle. Now click the **“Save”** button.

Set Active Layout

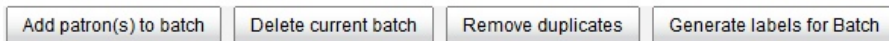
Layout	Barcode Type	Print Type	Fields to Print	Edit	Delete	Active
Biblio and Barcode	CODE39	BIBBAR	Author Title Item Type Call Number	Edit	Delete	<input type="radio"/>
Alternating	CODE39	BAR	Author Title ISBN	Edit	Delete	<input type="radio"/>
Barcode only	CODE39	BAR	Barcode	Edit	Delete	<input type="radio"/>
Patrons	CODE39	PATCRD	surname, firstname, cardnumber	Edit	Delete	<input checked="" type="radio"/>
Title and Barcode	CODE39	BIBBAR	Title Barcode	Edit	Delete	<input type="radio"/>

4. Now click the **“New Patron Card Batch”** button (on the far right).

Set Active Layout

Active Settings

- Click the **“Add patron(s) to batch”** button (on the far left).



Patron Cards to be Printed for Batch 15 (0 **Active Settings**

- Choose the teacher from the **“Search by sort2 field:”** drop down menu that you wish to print a class list for.

Patron Search

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Search by sort1 field:

Search by sort2 field:

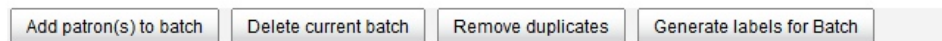
- Click the **“Select All”**, click the **“Add Checked”** button, then click the **“Done”** button.

Results 1 to 34 of 34 found for ' BaggaLey, +John'

[Select All](#) [Clear All](#)

Select	Card	Name	Category	Library	Expires on	Notes	
<input type="checkbox"/>	321383	Bloxham, Samuel 2286 Malaga Ave Santa Clara	Student (A)	725	06/30/2016		Add
<input type="checkbox"/>	321399	Buehner, Sahara 2495 Arrowhead Trail Santa Clara	Student (A)	725	06/30/2016		Add
<input type="checkbox"/>	321703	Caster, Jessica 3116 SWISS DR Santa Clara	Student (A)	725	06/30/2016		Add

- Now to print the class list, click the **“Generate labels for Batch”** button. This will allow you to save and print an Adobe PDF file.

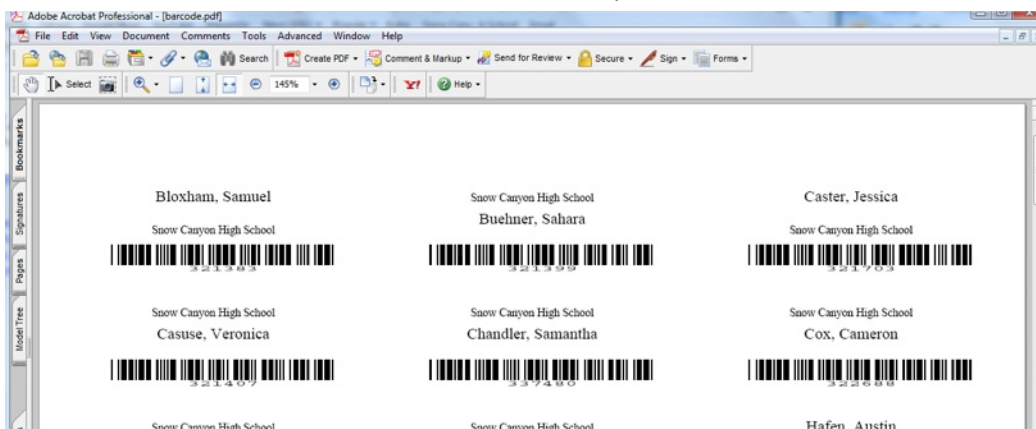


Patron Cards to be Printed for Batch 15 (34 items) **Active Settings**

Card Num.	Patron Name	Borrower Number	Card Number	Delete
1	Samuel Bloxham	17068	321383	Remove
2	Sahara Buehner	17082	321399	Remove

Layout:	Patrons
Template:	Avery 5160 1 x 2-5/8
Batch:	15

- Here is a screen shot of the results of the above steps:



Circulation and fines rules:

This is the page that will control the loan period of items and how fines will be charged for overdue items. To add issuing rules make sure to change the **“Select a library:”** to your library if it’s not set.

To modify a rule, create a new one with the same patron type and item type.

Select a library : Snow Canyon High School

Patron Category	Item Type	Fine Amount	Fine Grace Period	Fine Charging Interval	Current Checkouts Allowed	Loan Period	
Default	Text Book	\$0.05	10 day(s)	1 day(s)	1	270 day(s)	Delete
Default	Default	\$0.05	4 day(s)	1 day(s)	5	10 day(s)	Delete
Default	Default	\$	day(s)	day(s)		day(s)	Add

1. To start lets set a default three default setting for the following **“Patron Category”**(s):

- Default (just in case the patron is not set as expected)
- Student
- Teacher

For all three Patron settings leave the **“Item Type”** set to **“Default”**

2. For the Default set the **“Item Type”** to Default, **“Fine Amount”** to .05, **“Fine Grace Period”** to 4, **“Fine Charging Interval”** to 1, **“Current Checkouts Allowed”** to 5, and **“Loan Period”** to 10. Click the **“Add”** button.

This will allow a patron to check out up to 5 items due back in 10 days. There is a 4 day grace period before a fine is charged of 5 cents a day. This rule is applied to all patrons and items unless a different rule is set for a patron and item type.

3. For the Student set the **“Item Type”** to Default, **“Fine Amount”** to .05, **“Fine Grace Period”** to 4, **“Fine Charging Interval”** to 1, **“Current Checkouts Allowed”** to 5, and **“Loan Period”** to 10. Click the **“Add”** button. This will allow a Student to check out up to 5 items due back in 10 days. There is a 4 day grace period before a fine is charged of 5 cents a day. This rule is applied to all Students for all items unless a different rule is set for a Student and item type.

Note: If you need to change an existing rule you don’t have to delete it. Just set the Patron and Item Type of the rule you wish to change and type in the new values. Click **“Add”**

4. For the Teacher set the **“Item Type”** to Default and **“Loan Period”** to 365. Click the **“Add”** button. This will allow teachers to check out as many items as they want for a year (365 days) with no fines even after a due date.

Above are some default examples to cover the basics. Now you should set fine rules for patrons and item types. Below is a quick list of some example settings. These settings will be applied to the four items types listed for students. Any other items will have the setting in step 3 applied to them.

- For students they can have Kits checked out for a total of 10 days (7 for loan period and 3 grace days) before they start paying a 5 cent fine every 2 days (2 days overdue 5 cents, 4 days overdue fine is now 10 cents, etc...). They can checkout up to 2 kits

- Novel Sets can be checked out for 45 days for students before they start paying a fine of 5 cents every day. They can checkout up to 4 Novel Sets
- Teacher Training Materials for students can be checked out for a total of 14 days before they start paying 5 cents a day fine. They can have up to 5 teacher training materials checked out at one time.
- Students can have up to 15 textbooks checked out for 280 days before they start paying 5 cent a day fine.

Patron Category	Item Type	Fine Amount	Fine Grace Period	Fine Charging Interval	Current Checkouts Allowed	Loan Period
Student	Kits	\$0.05	3 day(s)	2 day(s)	2	7 day(s)
Student	Novel Set	\$0.05	5 day(s)	1 day(s)	4	40 day(s)
Student	Teacher Training Materials	\$0.05	4 day(s)	1 day(s)	5	10 day(s)
Student	Text Book	\$0.05	10 day(s)	1 day(s)	15	270 day(s)

Note: *These are just examples and you should set the fine rules that work best for the patrons of your library.*

Calendar:

Setting up the school calendar is important because it will effect what days will to be counted against the due date of an item. Christmas break or other holidays should not be counted when figuring due dates they must be entered in calendar as a holiday.

Define the holidays for :

Select a library : Snow Canyon High School ▾

- Search in the calendar the day you want to set as holiday.
- Complete the information in the right area.
- Once you finish the steps above, click Save.

Working day Unique holiday Repeatabe holiday Holiday exception

Calendar information

June, 2009							
Today							
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
22		1	2	3	4	5	6
23	7	8	9	10	11	12	13
24	14	15	16	17	18	19	20
25	21	22	23	24	25	26	27
26	28	29	30				

Select date

1. To set a holiday use the < and > buttons to switch between months (the << and >> button move between years). << < Today > >>

2. To put in Labor Day move to September. Now click on the day, type in a description and click the "Save" button.

NOTE: *For holidays longer then one day repeat the process for each day in the holiday break. If school does not meet on Fridays you can set Friday's to a "Holiday repeated every same day of the week". By setting this option every Friday would be a "holiday" and would not count against the loan period.*

Working day Unique holiday Repeatable holiday Holiday exception

Add new holiday

Library 725

Day name Monday

Day 7 Month 9 Year 2009

Description:

Holiday only on this day.
 Holiday repeated every same day of the week.
 Holiday repeated yearly on the same date.

Save Cancel

Calendar information

September, 2009							
Today							
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
35			1	2	3	4	5
36	6	7	8	9	10	11	12
37	13	14	15	16	17	18	19
38	20	21	22	23	24	25	26
39	27	28	29	30			
Mon, Sep 7							

Add Copies To Record:

This is a way to add multiple copies of a book to a record. For example if you have a textbook with 100 copies you can add them all at the same time. To do this make sure the barcodes are in consecutive order. Make the MARC record and copy or write down the biblio number. Now go to the Koha "More" menu, then choose "Tools" and click the "Add Copies To Record" link.

1. Type in the "Biblio Number:" and the "First Barcode:" in the range, and then the "Last Barcode:" in the range.

Add Copies To Record

Biblio Number:

First Barcode:

Last Barcode:

Call Number:

Price:

Item Type: Text Book

Add Copies Cancel

2. Now enter the "Call Number:" to be assigned to each of the books (for textbooks enter TXT)
3. Now enter the replacement "Price:" for the book this price will be assigned to each book.
4. **IMPORTANT:** Set the "Item Type:" to be assigned to each book.

- Now click **"Add Copies"**. Now all 100 books have been added to the record with the Call Number, Price and Item Type set.

NOTE: *If you are adding to an existing record follow the same steps above. To find the biblio number, search the catalog for the record.*

Set Item Type On Copies:

If somehow items have been added without an item type set or the item type was set incorrectly the easiest way to correct the problems is with the **"Set Item Type On Copies"** page. For example if a textbook got added without an item type but the call number was set to TXT do the following:

Set Item Type On Copies

Call Number Starts With:

Item Type:

[Cancel](#)

- Type TXT into the **"Call Number Starts With"** and choose **"Textbook"** from the **"Item Type:"** drop down menu.
- Click the **"Set"** button.

NOTE: *If you know you have books that should be set to Fiction and the call number start with FIC or F you can use the same process above. Also with non-fiction books just type the start of the call number like 1, 2, 3, etc... a 1 will set all the 100s, a 2 will set all the 200s and so on.*

After setting all known types with the above method run the **"Items With No Item Type"** report to view items that may not have an item type assigned to them.

- Click on the Koha **"More"** menu then choose **"Reports"**.
- Click on the **"Items With No Item Type"** report under the Custom Reports section.
- Click the **"Generate Report"** button.
- From this results page you can use the information to return to the **"Set Item Type On Copies"** and set the item types or click on the barcode link and manually set the item type for each item listed.

Filtered on

School = Snow Canyon High School

Library	Barcode	Call Number	Title
725	124758	TRL 513.2 LEE (Idea)	2 x 2 = boo! :
725	14924	025.5 WHI	99 jumpstarts to research :
725	725100231	956 DAV	A brief political and geographic history of the Middle East : Places in time, a kids historic guide to the changing names and places of the world
725	13902	081 PAU	A mathematician reads the newspaper /
725	725000441		A room of one's own /
725	128203		African Grace- A West African Dance for Cardio Fitness
725	128202		African Healing Dance
725	14992	070.1 EL-	Al-Jazeera :
725	124621	TRL F JOH (Word Choice)	Amber on the mountain /