

Koha Serials Module: Features

The Serials Module in Koha provides a structured system to manage the full lifecycle of serial publications. This includes acquisition, cataloguing, receipt, tracking, and reporting. The module is designed to streamline the management of these resources, providing tools for subscription management, issue prediction, receipt, claims, routing, and integration with other library workflows.

1. Subscription Management

Koha facilitates the **end-to-end administration of serial subscriptions**, a critical element of serials control.

Bibliographic and vendor integration: Each subscription is linked to bibliographic records (title, ISSN, publisher) and vendor information.

Lifecycle management: Libraries can create, renew, cancel, or transfer subscriptions across branches.

Cost tracking and budgeting: Subscription records include financial details, enabling libraries to analyze expenditure.

2. Issue Tracking and Prediction Patterns

A central challenge in serials management is **predicting and recording issue arrivals**, especially for irregular publications. Koha addresses this by:

Prediction grids: Automatically calculating expected issue arrival dates using frequency and numbering patterns.

Flexible numbering systems: Supporting volume/issue enumeration, chronology (dates, seasons), and cyclical resets.

Irregularity handling: Allowing librarians to adjust or skip predictions when publishers deviate from stated schedules.

3. Claiming Process

The claiming functionality ensures accountability in vendor relations and continuity in collection development.

Automated claim cycles: Koha generates claims when predicted issues are delayed beyond a configurable threshold.

Vendor communication: Claims can be bulk-generated and sent to vendors, with responses recorded in the system.

Audit trail: Maintains a full history of claims, useful for vendor performance analysis.

4. Routing and Distribution

Routing lists and slips extend the role of serials beyond collection building into **user services**.

Internal routing: Issues can be circulated sequentially to designated staff, departments, or researchers.

External distribution: Patron lists can be created for targeted delivery of specialized titles.

5. Reporting and Analytics

Koha's reporting functions enable libraries to make **data-driven decisions** about serials management.

Subscription reports: Track costs, renewal status, and fund allocation.

Issue receipt reports: Monitor completeness of holdings.

Claims analysis: Identify problematic vendors or persistent supply delays.

6. Integration with Acquisitions

Shared vendor data: Subscriptions are linked to acquisition records, preventing duplication.

Seamless workflows: Ordering, invoicing, and receipt are integrated, reflecting **enterprise resource planning (ERP) principles** in libraries.

7. Alerts and Notifications

Koha's automated alerts enhance **proactive management** of serials.

Renewal alerts: Prevents lapses in access.

Issue receipt alerts: Signals delays or discrepancies.

8. Configuration and Customization

Koha allows libraries to tailor the module to local needs.

Custom fields for library-specific metadata.

Workflow templates to align with institutional practices.

9. OPAC Integration

Serials information is visible to patrons through the OPAC, supporting **transparency and access**.

Display of holdings and latest issues improves discovery.

Routing list visibility informs patrons of issue circulation order.

10. Advanced Functionalities

Supplements and special issues: Accurately captured for bibliographic integrity.

Binding: Combines loose issues into volumes, ensuring preservation and accessibility.

Irregularities management: Documents skipped or combined issues, preserving collection accuracy.

Conclusion

Koha's Serials Module offers comprehensive, automated management of the serial publication lifecycle, aligning with Library and Information Science (LIS) principles. Features include automated claim processing, accurate bibliographic control via MARC standards, and lifecycle coverage from subscription to reporting. Highly customizable and deeply integrated with Koha components, it ensures efficient workflows, financial transparency, and improved user access to current periodicals, making it a powerful tool for optimizing serials management.

Glossary: Serials Management in Koha

Term	Definition
Serials	Publications issued in successive parts, such as journals, magazines, and newspapers, intended to continue indefinitely.
Subscription	An agreement with a vendor to receive successive issues of a serial publication over a specified period.
Issue Tracking	The process of monitoring and recording the receipt status of individual issues of a serial publication.
Prediction Patterns	Rules or algorithms used to forecast the expected publication dates and numbering of future issues.
Claiming	The process of requesting missing or delayed issues from vendors.
Claim Tracking	Recording and monitoring claims submitted to vendors, including their status and resolution.
Routing Slip	A document that indicates the sequence of staff or patrons through which a serial issue should circulate.
Distribution List	A list of individuals or departments designated to receive specific serial publications.
Subscription Report	A report summarizing the status, costs, and renewal dates of serial subscriptions.
Issue Receipt Report	A report listing the receipt status of expected and received

	issues for a serial.
Claims Report	A report summarizing claims made for missing or delayed issues, including vendor responses.
Integration	The linkage of the Serials Module with other Koha modules, such as Acquisitions, for seamless workflows.
Alerts and Notifications	Automated reminders for subscription renewals, late issues, and other serials-related tasks.
Custom Fields	User-defined fields added to serial records to capture additional library-specific data.
Binding	The process of combining multiple loose issues into a single bound volume for preservation and shelving.
Supplements / Special Issues	Non-regular issues associated with a serial, often thematic or commemorative.
Irregularity Management	The handling of deviations in publication schedules, such as skipped, merged, or delayed issues.

Koha Cataloguing Module

1. Purpose and Overview

Cataloguing refers to the process of creating and organizing descriptive records for library materials. The Cataloguing module manages the creation and organization of **bibliographic records** (which describe the intellectual content of items) and **item records** (which describe physical copies), ensuring accurate description and accessibility of library materials.

2. Key Features and Functions

A. Bibliographic Records Management

- i. **Record Creation:** Add, edit, and delete records for various materials (books, e-books, DVDs)
- ii. **Standards Support:** MARC21 (US standard) and UNIMARC (international standard) format compatibility
- iii. **Import/Export:**
- iv. **Z39.50/SRU protocols:** Standard methods for searching and retrieving records from external databases
- v. **Batch processing:** Handling multiple records simultaneously rather than individually

B. Framework System

- i. **Customizable Templates (Frameworks):** Pre-defined structures that determine which MARC fields are displayed for different material types
- ii. **Format-Specific Frameworks:** Different frameworks for books, serials, multimedia, etc.
- iii. **Consistency Enforcement:** Standardized data entry across all records

C. Item Records Management

- i. **Copy Information:** Add detailed data for individual items (barcode, location, status)
- ii. **Barcode System:** Generation and management of unique item identifiers using barcode technology
- iii. **Status Tracking:** Monitor item availability (Available, Checked Out, Lost, etc.)

D. Authority Control

Authority Control refers to the process of maintaining consistent forms of names, subjects, and series across all records. This ensures that all works by an author or on a subject are grouped together regardless of how they are cited.

- i. **Standardized Headings:** Maintain consistency in names, subjects, and series
- ii. **Validation:** Real-time authority checking during cataloguing

E. Batch Processing

Batch Processing means handling multiple records simultaneously rather than individually, significantly improving efficiency.

- i. **Bulk Operations:** Simultaneous import, export, and updating of multiple records
- ii. **Validation Tools:** Duplicate checking and data integrity maintenance
- iii. **Efficiency Tools:** MARC modification templates for consistent changes

F. Inventory Management

Inventory Management involves physically verifying that items are where they should be in the collection.

- i. **Barcode Scanning:** Physical inventory verification using scanners
- ii. **Stocktaking Tools:** Regular collection audits and status updates
- iii. **Discrepancy Reporting:** Identification of missing or misplaced items

G. Automated Data Enhancement

Automated Data Enhancement encompasses tools that automatically supplement catalog records with additional information, reducing manual effort and enriching metadata.

H. Stage MARC Records

Staging refers to temporarily holding imported records in a separate area for review and editing before adding them to the main catalogue.

- i. **Review Process:** Checking records for errors before final import
- ii. **Editing Capability:** Modifying records while in staging

I. Metadata Harvesting

Metadata Harvesting involves automatically gathering descriptive information from other systems using protocols like OAI-PMH (Open Archives Initiative Protocol for Metadata Harvesting).

- i. **Z39.50/SRU Connectivity:** Search and retrieve from external databases
- ii. **OAI-PMH Support:** Metadata harvesting and sharing capabilities
- iii. **Interoperability:** Data exchange with other library systems

Authorities Module

1. Role of Authorities in Koha

Purpose: To provide **controlled vocabularies** for names, subjects, series, and other bibliographic access points.

Function: Ensures **consistency** in cataloguing, prevents variant spellings or forms, and supports **linked bibliographic data**.

Impact: Enhances **search accuracy**, enables authority-controlled navigation (e.g., broader/narrower terms), and maintains data integrity across the catalogue.

Authority Control

Authority Control is the process of creating and using a set of official, standardized headings (like names and subjects) for the library's catalog. It acts as the library's official "dictionary" to ensure everyone uses the same term for the same thing.

2. Roles and Importance

Consistency: Maintains standardised headings for authors, subjects, and titles.

Efficiency: Reduces duplication of cataloguing effort by linking bib records to common authority records.

Navigation: Supports user browsing with broader/narrower/related term hierarchies.

Interoperability: Facilitates record exchange and use of external vocabularies (via Z39.50/SRU).

Scalability: Large-scale catalogues efficiently.

3. Understanding the Authorities Module with Arundhati Roy:

Imagine a library has several books by the author who wrote the Booker Prize-winning novel *The God of Small Things*. Over the years, different cataloguers might enter her name in various ways when adding her books:

- i. Roy, Arundhati
- ii. Arundhati Roy
- iii. Roy, Suzanna Arundhati (her full name)

To a computer, these are three different authors. If a student searches for "Roy, Arundhati," they might not find her non-fiction works entered under "Roy, Suzanna Arundhati." This is a major problem for both library users and staff. The Authorities Module is the tool that fixes this.

The Authorities Module is where a cataloguer manages this official dictionary.

- i. Create an "Authority Record": A cataloguer creates a single, official record for Arundhati Roy. This record acts as the master entry. It might look something like this:
 - a. The Official, Approved Heading: Roy, Arundhati
 - b. Also Known As (See From): Roy, Suzanna Arundhati

How Does This Help the Library and its Users?

- i. **For the Cataloguer (Consistency):** The cataloguer no longer has to guess how to enter the name. They simply find the official authority record and link to it. This makes cataloguing faster, easier, and far more accurate.
- ii. **For the Patron (Powerful Searching):** This is the most important benefit. Because all books by Arundhati Roy are linked to the same official heading:

Simple Analogy: UPI ID (like Google Pay/PhonePe)

4. Key Takeaway for Students

The Authorities Module is not for cataloguing books. It is a specialized tool for creating and managing a controlled vocabulary (an official dictionary of names and subjects). Its main purpose is to enforce consistency in the catalogue, which dramatically improves the accuracy and power of the search function for all users.

Glossary of Technical Terms

Term	Definition
Authority Record	A record that defines a controlled form of a name, subject, or title.
Authority Control	The process of linking bibliographic fields to standardised authority records.
Broader/Narrower Term	Hierarchical relationship in subject authority files.
Indicators	Numeric codes in MARC fields that refine meaning or control system processing.
Z39.50 / SRU	Protocols that allow searching and importing authority records from external catalogues.
Thesaurus	A controlled vocabulary source (e.g., LCSH, MeSH) used for subject authorities.

Item Search & Advanced Search

1. **Item Search**

Purpose: To locate physical items based on their internal library identifiers, location, status, or usage history.

Key Functions:

- i. Find items by specific data points like **barcode**, **call number**, or the **library that owns them**.
- ii. Filter by an item's current physical **location** (e.g., Main Library Stacks, Branch Reference Desk).
- iii. Search for items with specific **statuses**: Lost, Withdrawn, Damaged, or In Transit.
- iv. Generate reports based on **circulation history**, such as items with a high number of checkouts or items that have not been borrowed in a long time.

Example:

A librarian needs to find a specific copy of a book using its unique barcode. They would use Item Search, enter the barcode number, and immediately retrieve the record for that single physical item to see its status and location.

2. **Advanced Search**

Purpose: To find bibliographic records by constructing complex queries across multiple data indexes.

Key Functions:

Search across multiple fields simultaneously (e.g., Title, Author, Subject, ISBN).

Combine search terms using Boolean operators (AND, OR, NOT).

Apply limits to refine results by publication date, language, audience, or format.

Restrict results to items available at a specific branch or set of branches.

Sort results by relevance, date, title, or popularity.

A student needs to find novels by R. K. Narayan but wants to avoid any literary criticism about his work. Using Koha's Advanced Search, they would enter R. K. Narayan in the first box and select Author. They would add a second line, enter criticism, and select Subject. By changing the operator between the boxes to NOT, the search results will show only Narayan's original works while excluding all critical analyses.

Glossary

Term	Definition
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Home library	The branch that owns the item, where it is normally held.
Current library	The branch where the item is physically located at the moment (after transfers or returns).
Shelving location	The physical area within a library where an item is shelved (e.g., Stacks, Reference, New Books).
Item type	A category linked to circulation rules, such as Book, DVD, Journal.
Collection	A statistical grouping of items, e.g., Fiction, Non-fiction, Local History.
Status	The workflow flag of an item (Available, On loan, On hold, In transit, Lost, Withdrawn, Damaged).
Availability filter	A search option to include all items (<i>Ignore issued</i>), only currently borrowed (<i>Issued</i>), or only available on the shelf (<i>Not checked out</i>).
Call number range	The classification span (e.g., Dewey 500–599) used to filter items within a shelf sequence.
Issue count	The total number of times an item has circulated.
Last checkout date	The most recent date an item was loaned.
Boolean operators	Logical connectors (AND, OR, NOT) used in Advanced Search to combine or exclude terms.
Facet	A filter displayed after search results (e.g., author, subject, branch, year) used to narrow results.
Sorting	The order in which search results are displayed (e.g., Relevance, Title, Author, Call number, Publication year).
Output options	Formats for displaying or exporting results (Screen, CSV file, Barcodes file).
Batch operations	Tools that can act on sets of items or records exported from search results (e.g., batch item modification).
Bibliographic record	The catalogue entry describing a resource (title, author, subject, publisher, etc.), distinct from item records.
Item record	The administrative record for a physical copy, including barcode, call number, status, and location.

Koha Circulation Module: Features

The **Circulation Module** is a core component of Koha, responsible for managing the lending and return of materials, renewals, holds, transfers, overdues, and offline transactions. It automates daily operations, ensures compliance with circulation rules, and provides accurate records of patron and item activity.

1. Core Circulation Functions

- i. **Issue (Check-Out)**
Registers a loan to a patron. The system verifies patron eligibility (loan limits, fines, patron category) and item availability (not lost, not withdrawn, not already on hold). A due date is assigned based on circulation rules.
 - ii. **Return (Check-In)**
Discharges an item from a patron's account, updates its status to "available" or "in transit," calculates fines if overdue, and captures holds if another patron has reserved the item.
 - iii. **Renew**
Extends the loan period without requiring the physical return of the item. Renewal may be staff-initiated, patron-initiated (via OPAC), or automatic (if enabled). Renewal limits and holds are enforced.
 - iv. **Set Library**
Allows staff to switch the active branch for their session in multi-branch systems. This affects loan rules, pickup locations, transfers, and circulation statistics.
 - v. **Fast Cataloguing**
Provides a quick way to create a brief bibliographic and item record directly from the circulation desk. This ensures items can circulate immediately, with full cataloguing completed later.
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2. Holds and Bookings

- i. **Holds (Reserves)**
Enables patrons to request items currently checked out or located at another branch. The system manages queues and pickup notifications.
- ii. **Reserves Queue**
Displays the order of patrons waiting for specific items.
- iii. **Reserves to Pull**
Generates a list of items currently available on shelves that must be retrieved to satisfy holds.
- iv. **Reserves Awaiting Pickup**
Lists items placed on the hold shelf, awaiting collection by patrons.
- v. **Reserve Ratios**
Statistical data showing hold demand per title, helping libraries identify high-demand resources.

- vi. **Bookings**
Allows time-based reservations for specific items (e.g., equipment or high-demand books).
 - vii. **Bookings to Collect**
Shows items reserved for specific dates/times that are ready for collection.
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3. Transfers

- i. **Transfer**
Moves items between branches, either manually (for collection management) or automatically (to fulfill a hold at another branch).
 - ii. **Transfers to Receive**
Lists items in transit to the branch, requiring staff to check them in to confirm arrival.
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4. Overdues

- i. **Overdues**
Identifies items not returned by their due date, with lists sorted by lateness.
 - ii. **Overdues with Fines**
Highlights overdue items where fines have been calculated according to library rules.
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5. Offline Circulation

Ensures continuity of service during system or internet outages.

- i. **Upload Offline Circulation File (.koc)**
Offline transactions are saved in a .koc file and uploaded later to update the Koha database.
- ii. **Pending Offline Circulation Actions**
Lists offline transactions waiting to be processed and synced.
- iii. **Get Desktop Application**
Downloadable application to manage offline loans and returns.
- iv. **Get Firefox Add-On**
Browser extension to perform offline circulation tasks.

Glossary of Terms (Circulation Module)

Term	Definition
Issue (Check-Out)	The process of lending an item to a patron, recording the loan and assigning a due date.

Return (Check-In)	The process of recording an item as returned and making it available for use again.
Renewal	Extending the loan period of an item without physically returning it.
Set Library	Switching the active branch in a multi-branch library system to apply correct policies.
Fast Cataloguing	A simplified method for creating minimal bibliographic and item records to allow immediate circulation.
Hold (Reserve)	A request placed by a patron to borrow an item currently unavailable.
Reserves Queue	The ordered list of patrons waiting for an item.
Reserves to Pull	A staff report listing items that must be retrieved from shelves for patrons with holds.
Reserves Awaiting Pickup	Items that are reserved and waiting on the hold shelf for patron collection.
Reserve Ratios	A statistical measure of demand, showing the number of holds per title or copy.
Booking	A reservation for an item to be used at a specified time.
Transfers	The process of moving items between branches or locations.
Overdues	Items not returned by their due date.
Fines	Monetary charges applied to overdue or lost items.
Offline Circulation	Circulation transactions recorded without internet or server access, later uploaded to Koha.
.koc File	A Koha offline circulation file containing transactions performed offline.

Lists and Cart

1. Lists (Saved Lists / Virtual Shelves)

Role:

- i. Serve as **permanent collections of bibliographic records**, curated for reference, teaching, or public display.
- ii. Used to **organise, preserve, and share** sets of records.

Features and Functions:

- i. **Persistence:** Lists remain stored in Koha's database until deleted.
 - ii. **Visibility:** Can be set as *Private* (owner only) or *Public* (visible to all, including OPAC users if enabled).
 - iii. **Ownership and Control:** Each list has an owner with authority to edit, transfer, or delete the list.
 - iv. **Sorting:** Lists can be arranged by fields such as title, author, call number, or date added.
 - v. **Permissions:** Control over who can add/remove items (Owner only, Staff only, Permitted staff only, or Anyone seeing the list).
 - vi. **Export and Sharing:** Lists can be downloaded in formats like CSV, tab-delimited text, or XML; emailed using Koha's **LIST** notice template; or printed.
 - vii. **Library Applications:** Ideal for creating reading lists, subject guides, new arrivals, staff picks, and research bibliographies.
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2. Cart (Temporary Record Storage)

Role:

- i. Provides a **temporary workspace** for bibliographic records during a session.
- ii. Facilitates quick, short-term grouping of records for export, emailing, or batch processing.

Features and Functions:

- i. **Temporary Nature:** The cart is emptied automatically at logout or when the browser is closed.
- ii. **Capacity:** Holds up to **1,000 records**.

- iii. **Session-based:** No permanent ownership; tied only to the current login session.

Functions Available:

- i. View contents and access item details.
- ii. **Email** the cart (using the **CART** notice template).
- iii. **Download** in various formats, including custom CSV profiles.
- iv. **Print** in a ready-to-use format.
- v. **Batch Modify** bibliographic records (staff interface only).
- vi. **Clear/Hide** cart when tasks are complete.

System Preferences:

opacbookbag – enables/disables the cart in OPAC.

intranetbookbag – enables/disables the cart in the staff interface.

Library Applications: Useful for temporary shortlisting, batch exports, quick printing, and reference service support.

3. Comparative Roles: Lists vs. Cart

Aspect	Lists	Cart
Nature	Permanent, stored in Koha database	Temporary, session-based only
Visibility	Private or Public	Private to session
Ownership	User account-based (transferable)	Session only, no owner
Capacity	Unlimited	Up to 1,000 records
Use Case	Curation, bibliographies, subject guides, shared lists	Short-term tasks, quick exports, batch processing

Glossary of Technical Terms

Term	Definition
List	A permanent, saved collection of bibliographic records in Koha.
Cart	A temporary holding area for bibliographic records during a single session.
Private List	A list visible only to its owner.
Public List	A list visible to all users, including OPAC patrons (if enabled).
Owner	The account that created or controls a list.
Biblionumber	A unique internal identifier assigned to each

	bibliographic record in Koha.
Barcode	A unique identifier assigned to each physical item, used in circulation and inventory.
CSV Profile	A predefined export format for lists or carts, created in the Tools module.
LIST Notice	Email template used when sending a saved list.
CART Notice	Email template used when sending the cart.
opacbookbag	A system preference that controls whether the cart is available in OPAC.
intranetbookbag	A system preference that controls whether the cart is available in the staff interface.

Koha 25.05 – Reports Module

1. Home-Screen Blocks

- i. **Create guided report** – step-by-step wizard, no SQL required.
- ii. **Create from SQL** – blank editor for advanced users to write queries.
- iii. **Use saved** – access the library of previously stored reports.
- iv. **Search by keyword** – quickly filter report titles.
- v. **Statistics wizards** – one-click numerical summaries (counts, sums).
- vi. **Report plugins** – optional add-ons extending reporting features.

2. Key Terminology

SQL (Structured Query Language): A text-based language used to query the Koha database.

Runtime Parameter: A filter (e.g., date picker, branch drop-down) displayed before a report runs.

Autocomplete: SQL editor helper that suggests table or column names.

Cache Expiry: The time (in minutes) a report result is stored in memory to reduce server load.

Public Report: A report accessible via a link without login (should not be used if patron data is included).

Report Group / Subgroup: Organizational folders for storing and categorizing reports.

Mana KB: A community-driven repository of pre-written SQL reports that can be imported.

Hyperlink Column: A SQL output formatted as clickable links in Koha (e.g., patron number → patron record).

Batch Operations Button: Exports report results into Koha's batch tools (item modification, patron editing).

Statistics Wizard: A guided tool for simple numerical reports without SQL.

Report Dictionary: Predefined reusable filters (e.g., item statuses, branches).

4. Guided Report Wizard (Six Steps)

- i. Choose module (e.g., Acquisitions, Circulation, Patrons).
- ii. Choose type (currently only **Tabular**).
- iii. Select columns to display.

- iv. Add limits (filters such as branch or category).
- v. Add calculations (Count, Sum, Average).
- vi. Define sort order → Finish.

Koha generates SQL code automatically, which can be saved or edited.

6. Saved Reports

List shows report name, creator, last modified, next run, and available actions.

Actions menu: Run, edit, duplicate, delete, schedule, download, or show SQL.

Export formats: CSV, TSV, ODS (OpenDocument Spreadsheet).

7. Statistics Wizards

Prebuilt summaries for:

- i. **Acquisitions** (funds, vendors, branches).
- ii. **Patrons** (categories, branches, age ranges).
- iii. **Catalogue** (item types, collections, branches).
- iv. **Circulation** (checkouts, renewals, in-house use).
- v. **Serials** (subscriptions, late issues).
- vi. **Cash Register** (payments by method).
- vii. **Holds** (placed, filled, cancelled, expired).

8. Pre-Configured Reports

Top Lists: Users with most checkouts, most-circulated items.

Inactive Reports: Patrons with no loans, items with no issues.

Other: Lost items, orders by fund, catalogue by item type, average loan time.

9. Example SQL Queries

New patrons this month:

```
SELECT cardnumber, surname, firstname, dateenrolled
FROM borrowers
WHERE dateenrolled >= DATE_SUB(CURDATE(), INTERVAL 1 MONTH)
ORDER BY dateenrolled DESC;
```

Items currently overdue:

```
SELECT i.barcode, b.title, i.itemcallnumber,
```

```

DATE_FORMAT(issues.date_due, '%Y-%m-%d') AS due_date
FROM issues
JOIN items i ON issues.itemnumber = i.itemnumber
JOIN biblio b ON issues.biblionumber = b.biblionumber
WHERE issues.date_due < CURDATE()
ORDER BY due_date;

```

Patrons with more than 10 checkouts:

```

SELECT borrowernumber, cardnumber, COUNT(*) AS total
FROM issues
GROUP BY borrowernumber
HAVING total > 10;

```

☑ This module provides libraries with **data-driven decision-making tools**, supporting collection analysis, patron activity tracking, and operational reporting.

Glossary: Reports Module

Term	Definition
SQL (Structured Query Language)	A programming language used to query and manipulate data in Koha's MySQL database.
Guided Report Wizard	A six-step tool that generates SQL queries automatically, without requiring SQL knowledge.
Mana KB	A community-driven knowledge base where libraries share and import pre-written SQL reports.
Statistics Wizard	A built-in tool for generating counts or sums without SQL (e.g., circulation totals).
Saved Reports	A library of previously created SQL or guided reports that can be run, edited, or duplicated.
Top Lists	Pre-configured reports showing most-circulated items, most active patrons, or inactive users/items.
Export Formats	File types in which report results can be downloaded (CSV, TSV, ODS).

Point of Sale (PoS) Module

1. Definition and Architectural Position

The Point of Sale (POS) module is a **specialised financial transaction subsystem** integrated within the Koha staff interface. Its primary function is to process the immediate sale of goods or services that are **extrinsic to the core library circulation functions**. Crucially, it operates independently of the patron management system, ensuring transactions remain outside the individual borrower accounting ledger.

2. Purpose and Strategic Value

Revenue Generation: Facilitates income from ancillary library services and goods (e.g., sale of weeded materials, merchandise, facility bookings, or service credits).

Financial Data Integrity: Serves a critical data hygiene function by **isolating non-circulation revenue** from patron fines and fees. This prevents the contamination of financial reports and ensures clarity in accounting.

Auditability: Provides a foundational framework for financial accountability. Every transaction is intrinsically linked to a cash register and an operator, creating a transparent and reconcilable audit trail from the initial sale to end-of-day cash-up procedures.

3. Currency Limitation (One Type of Money):

The entire POS system can only work with one type of currency (e.g., only INR, or only \$). This currency is set for the whole Koha system, and the POS module cannot handle multiple currencies at the same time.

4. Audit Trail and Financial Reconciliation Mechanism

When a sale is made, Koha records the transaction in two separate places to ensure accuracy:

- i. **What was sold:** A record is made showing which item was sold and for how much.
- ii. **How it was paid for:** A second record is made showing the payment method (e.g., cash) and the staff member who handled the sale.

This two-part system creates a strong audit trail.

The "cash-up" process is how the library balances the register. At the end of the day, staff compare the actual cash in the drawer to the total cash sales recorded in the system. This confirms that all money is accounted for.

Koha Tools Module

The Koha Tools module contains a collection of administrative functions for managing the library system, its data, and its users on a large scale. These functions are separate from the daily, one-on-one transactions found in modules like Circulation. The primary purpose of the Tools module is to provide staff with the means to perform batch operations, customize the system, and automate routine tasks.

1. Patron Lists

- a. Create and save groups of patrons (e.g., "Faculty" or "Book Club members").
- b. Use lists for batch actions like modifications, deletions, or printing cards.

2. Batch Patron Operations

- a. **Modify patrons in bulk** (e.g., update home library for a group).
- b. **Delete or anonymize patrons** (removes personal data while preserving loan statistics).

3. Patron Clubs

- a. Manage reading clubs or programs (e.g., summer reading).
- b. Enroll patrons and track participation.

4. Notice & Slip Customization

- a. Design and customize emails and print slips for holds, overdues, and checkouts.
- b. Tailor messages to match library branding and policies.

5. Overdue Notice Triggers

- a. Automate overdue processes (e.g., send notices after 3 days, block accounts after 14 days).

6. News & HTML Customizations

- a. Add custom content (text, images, links) to the OPAC and staff interface without coding.

7. Calendar Management

- a. Set library closed dates to avoid due dates on holidays or closures.

8. Patron Import Tool

- a. Bulk import patron records via CSV files (useful for schools or universities adding new students).

9. Task Scheduler

- a. Schedule reports to run automatically and email results to staff.

10. Log Viewer

- a. Audit system activity by viewing logs for troubleshooting and security.

11. Patron Card Creator

- a. Design and print physical library cards with flexible layouts.

13. Comments Moderation

- a. Approve or delete patron comments on catalogue items from the OPAC.

14. Rotating Collections

- b. Manage collections that rotate between branches on a schedule.

15. Database Maintenance

- a. Use scripts to clean up problematic data.

16. Custom Reports

- a. Generate and schedule reports for circulation, inventory, or patron activity.

Key Purposes of the Tools Module:

- a. **Batch Operations:** Perform large-scale actions efficiently.
- b. **Customization:** Adapt Koha to your library's needs.
- c. **Automation:** Schedule tasks and triggers to reduce manual work.
- d. **Data Management:** Import, export, and maintain data integrity.

Glossary of Key Library System Terms

I. Core Library Concepts & Operations

- i. ILS (Integrated Library System): The complete software system for a library, used to manage all core functions like tracking items, managing patron accounts, handling orders, and more. Koha is an ILS.
- ii. OPAC (Online Public Access Catalog): The public-facing website that allows library users (patrons) to search the library's collection, place holds, and manage their accounts.
- iii. Cataloguing: The process of creating and managing the descriptive records (bibliographic records) for all materials in the library's collection.
- iv. Acquisitions: The process of ordering, receiving, and paying for new library materials from suppliers (vendors).
- v. Serials: Publications that are issued in successive parts, such as journals, magazines, and newspapers.
- vi. Consortium: A group of libraries that work together to share resources, services, and often a single ILS installation like Koha.
- vii. e-Resources (Electronic Resources): Digital materials such as e-books, e-journals, and databases that the library provides access to.

II. Patron (User) Management

- i. Patron: Any registered user of the library, such as a student, faculty member, or community member.
- ii. Patron Category: A classification assigned to patrons (e.g., "Undergraduate," "Faculty," "Child") that determines their borrowing rules, such as loan periods and fine rates.
- iii. Guarantor: An adult or organization that is financially responsible for a child's or dependent's library account.
- iv. Card Number: The unique number, often found under the barcode, on a patron's physical library card, used to identify their account.
- v. Borrower Number: A unique internal ID number that Koha automatically assigns to every patron record in the database.

III. Cataloguing & Metadata Standards

- i. MARC (Machine-Readable Cataloging): The international standard format for creating bibliographic records. It uses a system of fields and subfields so that computers can read, share, and interpret cataloging information.
- ii. Authority Control: The process of using a single, official form for a name, subject, or series to ensure all records are consistent. This makes searching more reliable.
- iii. Authority Record: The official "dictionary entry" that establishes the correct heading for a name or subject (e.g., establishing "Narayan, R. K." as the official author name).

- iv. Z39.50 / SRU (Search/Retrieve via URL): Standard protocols that allow a cataloger to search other libraries' databases and import MARC records directly into Koha, saving time and reducing errors.
- v. OAI-PMH (Open Archives Initiative Protocol for Metadata Harvesting): A protocol used to automatically collect (or "harvest") metadata from other digital libraries and repositories.

IV. Search & Discovery

- i. Elasticsearch: The powerful search engine technology that Koha uses to provide fast and relevant search results in the OPAC.
- ii. Faceted Search: A search feature that allows users to filter and narrow down their search results using categories like "Format," "Publication Year," or "Language."
- iii. Indexing: The process the search engine uses to organize data from the catalog records into a special structure (an index) that allows for extremely fast retrieval.

V. System Administration & Technical Protocols

- i. Cron Jobs: Automated tasks scheduled to run at specific times on the server (e.g., sending overdue notices, performing system backups).
- ii. LDAP (Lightweight Directory Access Protocol): A protocol that allows Koha to connect to a central user directory (like a university's campus-wide login system) to authenticate users.
- iii. SIP2 (Standard Interchange Protocol v2): The primary protocol used for communication between Koha and self-service machines like self-checkout kiosks and automated return systems.
- iv. NCIP (NISO Circulation Interchange Protocol): A standard protocol used for exchanging circulation information between different library systems, often for interlibrary loans.
- v. SMTP (Simple Mail Transfer Protocol): The standard internet protocol for sending emails. Koha uses it to send all notices and communications to patrons.
- vi. REST (Representational State Transfer): A modern architectural style that allows other applications to easily request and receive data from Koha in a machine-readable format.
- vii. SQL (Structured Query Language): The programming language used to communicate with and manage the data stored in Koha's underlying database.