

Library Setup

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Library Configuration

Library Setup

Setting up a library in Koha's staff interface involves configuring various aspects of your library's operations, including defining library branches, item types, circulation and fine rules, patron categories, and more. Here's a step-by-step guide to setting up your library in Koha:

1. **Navigate to Administration:** Click on the "Administration" tab in the top menu bar. This will open a dropdown menu with various administrative options.
2. **Configure Libraries and Groups:**
 - Click on "Libraries" under the "Library" section. Here, you can configure library branches and define the organizational structure of your library system. You can add, edit, or delete libraries and library groups as needed.
3. **Define Item Types:**
 - Under the "Catalog" section, click on "Item Types." Item types define the different types of items in your library's collection (e.g., book, DVD, magazine). You can add, edit, or delete item types and customize their properties.
4. **Configure Circulation and Fine Rules:**
 - Click on "Circulation and Fine Rules" under the "Circulation and Fine Rules" section. Here, you can define circulation rules, loan periods, fine policies, and other circulation-related settings. Customize these rules based on your library's policies and requirements.
5. **Set Up Patron Categories:**
 - Under the "Patrons and Circulation" section, click on "Patron Categories." Patron categories define the different types of library patrons (e.g., adult, child, staff). Create patron categories and customize their borrowing privileges, loan limits, and other settings.
6. **Configure Authorized Values:**
 - Under the "Administration" section, click on "Authorized Values." Here, you can configure various controlled vocabularies used throughout Koha, such as shelving locations, material types, and more. Customize these authorized values to match your library's cataloging standards and practices.
7. **Customize Notices and Slips:**
 - Under the "Tools" section, click on "Notices and Slips." Customize the email notices and print slips that Koha sends to patrons for various library transactions, such as checkouts, holds, and overdue reminders.

By following these steps, you can set up your library in Koha's staff interface and configure it according to your library's specific needs and requirements.

Configuring libraries and groups

Configuring libraries and groups in Koha allows you to define the organizational structure of your library system, including multiple branches and libraries within your network. Here's how you can configure libraries and groups in Koha:

1. **Access Libraries and Groups Configuration:** Under the "Library" section in the dropdown menu, click on "Libraries." This will take you to the Libraries and Groups page, where you can configure libraries and library groups.
2. **Add Library Group (Optional):** If your library system consists of multiple libraries grouped together, you can create a library group to represent this structure. To add a library group, click on the "Add New Group" button and enter the group's name and description.
3. **Add Library:** To add a new library or branch to your system, click on the "Add New Library" button. Fill in the required information, including the library's name, code, description, and address details. You can also assign the library to a group if applicable.
4. **Edit or Delete Libraries:** Once you've added libraries to your system, you can edit their details or delete them if necessary. Use the "Edit" and "Delete" buttons next to each library entry to make changes or remove libraries from your system.
5. **Save Changes:** After making any changes to libraries or groups, be sure to click the "Save Changes" button to apply your modifications.
6. **Configure Branches and Locations:** Within each library, you can further define branches and locations to represent physical or virtual collections within the library. You can access the branches and locations configuration by clicking on the "Branches and Locations" link next to each library entry.

Defining item types

Defining item types in Koha allows you to categorize and differentiate the various types of items in your library's collection, such as books, DVDs, CDs, etc. Each item type can have its own set of circulation rules, loan periods, and other attributes. Here's how you can define item types in Koha:

1. **Navigate to Administration:** Click on the "Administration" tab in the top menu bar. This will open a dropdown menu with various administrative options.
2. **Access Item Types Configuration:** Under the "Catalog" section in the dropdown menu, click on "Item Types." This will take you to the Item Types page, where you can define and manage item types.
3. **Add New Item Type:** To add a new item type, click on the "New Item Type" button. This will open a form where you can enter the details of the new item type.
4. **Enter Item Type Details:** In the form for adding a new item type, fill in the following details:
 - **Name:** Enter the name of the item type (e.g., Book, DVD, CD).
 - **Description:** Optionally, provide a description of the item type.
 - **Max Issue Days:** Set the maximum number of days that items of this type can be checked out.
 - **Not for Loan:** Check this box if items of this type should not be available for loan.
 - **Fine Calculation:** Specify how fines are calculated for items of this type (e.g., per day, per hour).
5. **Save Item Type:** After entering the details of the new item type, click the "Save" button to add it to your library's list of item types.
6. **Edit or Delete Item Types:** Once you've defined item types, you can edit their details or delete them if necessary. Use the "Edit" and "Delete" buttons next to each item type entry to make changes or remove item types from your system.

By following these steps, you can define item types in Koha to categorize and manage the different types of items in your library's collection effectively.

Configure Circulation and Fine Rules

Configuring circulation and fine rules in Koha allows you to define the borrowing policies and fine calculation methods for your library. Here's how you can configure circulation and fine rules in Koha:

1. **Navigate to Administration:** Click on the "Administration" tab in the top menu bar. This will open a dropdown menu with various administrative options.
2. **Access Circulation and Fine Rules Configuration:** Under the "Circulation and Fine Rules" section in the dropdown menu, click on "Circulation and Fine Rules." This will take you to the Circulation and Fine Rules page, where you can configure circulation and fine-related settings.
3. **Configure Circulation Rules:**
 - Click on the "Circulation Rules" tab to access the circulation rules configuration. Here, you can define rules for loan periods, renewals, holds, and more.
 - For each rule type (e.g., loan periods, renewals), you can define different rules based on item type, patron category, and location. Click on the "Add Rule" button to create a new rule, and enter the rule details (e.g., duration, renewal limits) as needed.
4. **Configure Fine Rules:**
 - Click on the "Fine Rules" tab to access the fine rules configuration. Here, you can define rules for fine calculation, maximum fines, grace periods, and more.
 - Define how fines are calculated for overdue items (e.g., per day, per hour) and set the maximum fine amount that patrons can accrue. You can also configure grace periods to give patrons additional time before fines are applied.
5. **Save Changes:** After configuring circulation and fine rules, click the "Save Changes" button to apply your modifications.

By following these steps, you can configure circulation and fine rules in Koha to define borrowing policies and fine calculation methods that align with your library's requirements.

Setting up patron categories

Setting up patron categories in Koha allows you to define different types of library patrons and specify their borrowing privileges, loan limits, and other settings. Here's how you can set up patron categories in Koha:

1. **Navigate to Administration:** Click on the "Administration" tab in the top menu bar. This will open a dropdown menu with various administrative options.
2. **Access Patron Categories Configuration:** Under the "Patrons and Circulation" section in the dropdown menu, click on "Patron Categories." This will take you to the Patron Categories page, where you can configure patron categories.
3. **Add New Patron Category:** To add a new patron category, click on the "New Patron Category" button. This will open a form where you can enter the details of the new patron category.
4. **Enter Patron Category Details:** In the form for adding a new patron category, fill in the following details:
 - **Name:** Enter the name of the patron category (e.g., Adult, Child, Staff).
 - **Description:** Optionally, provide a description of the patron category.
 - **Circulation Rules:** Define the circulation rules for patrons in this category, including loan periods, renewal limits, and holds privileges.
 - **Fines and Fees:** Specify the fine rules and fee policies for patrons in this category, including maximum fines, grace periods, and billing thresholds.
5. **Save Patron Category:** After entering the details of the new patron category, click the "Save" button to add it to your library's list of patron categories.
6. **Edit or Delete Patron Categories:** Once you've defined patron categories, you can edit their details or delete them if necessary. Use the "Edit" and "Delete" buttons next to each patron category entry to make changes or remove patron categories from your system.

By following these steps, you can set up patron categories in Koha to define different types of library patrons and specify their borrowing privileges and fine policies according to your library's requirements.

Configure Authorized Values

To configure authorized values in Koha, you can define controlled vocabularies for various attributes such as shelving locations, material types, item statuses, and more. Here's how you can configure authorized values:

1. **Navigate to Administration:** Click on the "Administration" tab in the top menu bar. This will open a dropdown menu with various administrative options.
2. **Access Authorized Values Configuration:** Under the "Administration" section in the dropdown menu, click on "Authorized Values." This will take you to the Authorized Values page, where you can configure controlled vocabularies for different attributes.
3. **Select the Category:** On the Authorized Values page, you'll see a list of authorized values categories. Each category represents a different attribute or aspect of your library's collection and operations. Click on the category you want to configure (e.g., shelving locations, material types, item statuses).
4. **Add New Authorized Value:** To add a new authorized value, click on the "Add Value" button next to the authorized values category. This will open a form where you can enter the details of the new authorized value.
5. **Enter Details:** In the form for adding a new authorized value, fill in the following details:
 - **Value:** Enter the name or code of the authorized value (e.g., "Fiction," "DVDs," "Available").
 - **Description:** Optionally, provide a description of the authorized value.
6. **Save Authorized Value:** After entering the details of the new authorized value, click the "Save" button to add it to the list of authorized values for the selected category.
7. **Important Authorized Values:** Some authorized values are mostly important, like LOC, LOST, Withdrawn etc.
8. **Edit or Delete Authorized Values:** Once you've defined authorized values, you can edit their details or delete them if necessary. Use the "Edit" and "Delete" buttons next to each authorized value entry to make changes or remove authorized values from your system.

By following these steps, you can configure authorized values in Koha to define controlled vocabularies for various attributes and ensure consistency in cataloging and managing your library's collection.