

580 Camino Mercado Arroyo Grande, CA 93420 805 543 6082 Blackgold.org

AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE AGENDA Wednesday, February 7, 2024– 10:00 a.m. Goleta Valley Library

- 1) 10:00 A.M. CALL TO ORDER Glynis Fitzgerald, Chair, Presiding Recorder; Kristina Uvalle (BG)
- 2) ADOPT AGENDA —
- 3) *APPROVE MINUTES January 3, 2023, by Kristina Uvalle (BG)
- 4) CIRCULATION
 - a) ***Patron Database clean-up –** review current state of the patron database clean-up. Review patron lists and discuss next steps.
 - b) *Patron section Circ Manual review patron section of the circ manual for updates and/or changes. Discuss options to add to Koha staff view.
- 5) TECHNICAL
 - a) **Koha/Aspen Issues** Discussion A chance to talk about issues happening in Koha or Aspen. Talk about a 'Wish List' of possible enhancements or workarounds for existing issues.
- 6) BLACK GOLD UPDATE
- 7) ROUNDTABLE
- 8) ITEMS TO BE FORWARDED
- 9) AGENDA BUILDING
- 10) NEXT MEETING 10:00 a.m., Wednesday, March 6, 2024 (Webinar)

11) ADJOURNMENT

Distribution — email notice of web-posted agenda packet (available at <u>www.ats.blackgold.org</u>): Meg Weber, PR; Joanne Britton-Holland SM; Shannon St. Arnaud, SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Directors [File Copy];

AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE MINUTES Wednesday, January 3, 2024– 10:00 a.m. Webinar

Attending: Joanne Britton-Holland SM; Shannon St. Arnaud, SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Brenda Goldy, SP; Megan Weber, PR; Kristina Uvalle, BG; Glynis Fitzgerald, BG.

- 1) 10:03 A.M. CALL TO ORDER Glynis Fitzgerald, Chair, Presiding Recorder; Kristina Uvalle (BG)
- 2) ADOPT AGENDA 1st SM/ 2nd GO. Approved.
- 3) *APPROVE MINUTES November 1, 2023, by Glynis Fitzgerald (BG) 1st SM/ 2nd SP. Approved.
- 4) CIRCULATION
 - a) *M*-***Patron types/expiration dates/patron account clean-up. (BG/PR) –** Review current patron types and their expiration dates. Discuss the pros and cons of deleting all expired cards within the system. Work out a schedule to do a patron clean-up and establish a policy going forward.

Reviewed existing patron types and their expiration dates. The following are the recommended types and expiration dates.

Adult – 3-5 years Foster – 1 year Homebound – 3-5 years Institution – 3-5 years Juvenile – 3-5 years Teen – 3-5 years Visitor – 3 months Welcome – 3 months

ACTION ITEM: These recommendations will be forwarded to the Administrative Council for approval.

b) *M* - Deleting Messages and permissions (Global setting) (GO) - Turn on the capability to delete messages added to a patron's account by other libraries. Currently, a library cannot delete or alter messages placed on a patron's account by another library. Even within a library group (i.e., Buellton cannot delete a message added by Goleta.)

The need to define the difference between notes, restrictions, and messages and when to use each of them in Koha. Add to the circulation manual. Check with Bywater whether it is possible to collapse the notes section of a patron account to keep the checkout section visible on the screen.

c) *No autorenewals on new releases (PR) – Discussion. Paso wants to reduce autorenewals on new releases to 0. We want new releases to circulate faster even when they haven't been put on hold by another patron. We want them back on the shelves and browsable. No other library expressed an interest in reducing the number of autorenewals for new releases.

5) TECHNICAL

a) **Cooperative Shared Wand for Inventory** – Wand has been purchased and is currently in Paso Robles. Training with Paso staff happened on Friday, December 22nd.

The new wand is currently at the Paso Robles library.

b) **Moving Data Centers** – Matt will be going to each library to replace Junipers and outside vendors may need to schedule time as well.

Matt will be going to each library to set up new junipers. Libraries may need to allow access to 3rd party vendors in some cases. These updates will be in February - March in preparation for the move to a new data center.

c) Koha/Aspen Issues – Discussion – A chance to talk about issues happening in Koha or Aspen. Talk about a 'Wish List' of possible enhancements or workarounds for existing issues. Next Koha upgrade is tentatively scheduled for 01/19/24.

GO staff have reports that the Aspen LiDA app is slow to load. SP reports that Aspen loads slowly when using Chrome.

- 6) BLACK GOLD UPDATE There is a discussion about possibly turning delivery with SLO and SB back on. The most recent draft of the Circ Manual is on the website.
- 7) ROUNDTABLE N/A
- 8) **ITEMS TO BE FORWARDED** Patron types and expiration dates to the Admin Council.
- 9) AGENDA BUILDING N/A
- 10) NEXT MEETING 10:00 a.m., Wednesday, February 7, 2024 (Goleta)
- 11) ADJOURNMENT at 12:35 pm.1st GO/ 2nd SP.

Distribution — email notice of web-posted agenda packet (available at <u>www.ats.blackgold.org</u>): Meg Weber, PR; Joanne Britton-Holland SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Directors [File Copy];

ΤΟΡΙϹ:	Patron Database Cleanup		PRIORITY LEVEL: (1-Low 3 – High)	□ 1 □ 2 ⊠ 3	
SUBMITTED BY:	Black Gold				
TYPE OF ITEM:	$oxtimes$ For Discussion $oxtimes$ For Recommendation \Box Other:				
	BACKGROUND STATEMENT				
BACKGROUND: Describe why you are bringing this item before the committee. What problem are you trying to solve?	 At the Admin Council meeting on 1/19/24, we discussed cleaning up establishing new expiration policies. Based on decisions made at th updated all the Patron types in Koha with new expiration months to 48 months). removed all Patron types that are no longer valid. are working with ByWater to expire and delete the PACRI barcodes. Patrons will receive notification that their car are working with ByWater to batch update all eCards that expiration date. They will all expire 3 months from the date at the expiration date. They will all expire 3 months from the date at expiration date. They will all expire 3 months from the date at the expiration date. They will all expire 3 months from the date at the expiration date. They will all expire 3 months from the date activity since Jan 2020 eCard – lists all your patrons with your branch code and activity since Jan 2020 eCard – lists all eCards assigned to your prefix by Quipu. Prior to 2020 – lists patrons who have not had any activite No Activity – lists patrons with your branch code that she history. <i>This list is sorted by date enrolled</i>. Out of Jurisdiction – This list shows patrons who have a jurisdiction but lists your library as your home library. PACREG-SLO-SB – This page lists all PACREG, SLO or SE your branch. <i>This list is currently in the process of being</i> 6 Staff – This is a list of all of your assigned staff accounts. a patron list for their staff accounts, and they are not listed odd accounts that were probably used for training purpored accounts that were probably used for	EGs ate a da ba ba ba ba ba ba ba ba ba ba ba ba ba	ne patron da meeting, we ates (examp ates (examp s, SLO and S are expiring existed prior of the chan r patrons. Ye rcode prefix rary card prefix rary card fro prefix cardho bired and de e aware that There is als s.	tabase and have le: change from 99 B g in 30 days. to the new 3-mon ge. ou will notice that i t that have had aber31, 2019. and/or checkout om another lders assigned to <i>leted.</i> some libraries us to a list of random	99 th it

	OUTCOME(S)					
DESIRED	Based on discussions at the Admin Council meeting, we will be:					
OUTCOME(S):	 reviewing the Prior to 2020 lists for those patrons with no activity since 1/1/2020 to 					
Describe your	determine if we expire and delete them.					
desired outcome(s)	 reviewing the No Activity list to determine whether to expire and delete accounts enrolled prior to 01/01/2020. 					
	• reviewing star accounts for current start members and verifying that the correct permissions are assigned.					
	 reviewing odd accounts to determine whether to delete or maintain them. 					
	• Reviewing the Out of Jurisdiction lists and determining how or if we need to make any effort to update those accounts with the proper barcode.					
	Note: Koha prevents deleting a patron if they have outstanding balances or checked out items. A patron that only has messages can be deleted. To delete patrons with outstanding balances, those balances will need to be resolved first by writing them off. Any items that show checked out items will have to be checked in as well. This can be determined by jurisdiction. Each library can choose to expire-delete accounts in a way that suits their needs.					
	Questions to ask your director prior to the meeting:					
	 Do you want to expire out-of-jurisdiction cards? If we expire them, the patron will receive a 30-day notice to come into your library at which time they can get a library card from your jurisdiction. 					
	 Is your staff list complete? Do they have the correct permissions for their position? Should any of them be deleted? 					
	 How do you want to handle the accounts on the No Activity tab? We can expire and delete all of them registered prior to 2020. Since there has been no activity at all, do you want to expire and delete all of those registered since 1/1/2020 as well? Establish a schedule for patron clean-up going forward. 					
OTHER COMMENTS:	We ask that you do not make any batch modifications of patron accounts at this time. We are working with Bywater to complete the larger modifications needed to get all our patrons accurate and up to date.					

Patron Information

INPUT STANDARDS PATRON REGISTRATION

- 1. When a patron applies for a library card, check for a pre-existing patron account using the following methods in this order:
 - a. Search by name using the patron's last name, comma and first three letters of the first name. Confirm results using date of birth.
 - b. Search using privacy-protected format of driver's license number. Confirm results using date of birth. Entering the Full driver's license will not retrieve patron account; must enter the last four digits of the ID. Koha will search for other IDs so long as the format includes the privacy format.
 - c. Search using patron's date of birth.

BARCODE

- 1. New patrons scan account number from library card.
- 2. Existing patrons If a pre-existing account for a patron is located do not assign a new barcode. See "Replacement Library Cards".

REPLACEMENT LIBRARY CARDS

No agency charges replacement fees for normal wear and tear or for name changes. Some agencies may charge for a replacement card if the patron has lost or misplaced a card. An ID is required to replace a library card.

If a patron is currently registered at your library and wishes to have the card replaced, assign a new barcode. For Best Practice, the barcode prefix and registered library should match.

If a patron is not currently registered at your library and wishes to have the card replaced, confirm the patron wants to change their registered library. If necessary, update all fields and add new barcode.

- If the patron wishes to change libraries assign a new barcode and change the registered library. The barcode prefix and library should match. Online digital accounts may also need to be updated or deleted.
- 2. If the patron does not wish to change libraries follow best practices at your location to allow checkout and have the patron, follow up at their registered library to obtain a new card.
- 3. The patron's previous barcode should be noted in the Previous Barcode field. This allows staff to verify the previous barcode when troubleshooting e-material issues (Overdrive, Hoopla, etc.).

SCANNER – PATRON ENTRY

A patron can be registered by scanning a driver's license. All information in the patron record is entered with ALL Caps in this instance. You do not need to change the entry to standards as below (re. Capitalization of first letter only). Please confirm the information on the license is correct.

LAST NAME

Legal last name printed on identification. First letter capitalized. Names with punctuation or spaces should be entered exactly as seen on the ID.

RULE	EXAMPLE
Enter exactly as spelled on the ID, omitting	ID: Laurence Quarri
diacritical marks.	Last name: Quarri
If the last name consists of more than one	ID: John Van Duzer
name, enter all parts in the Last name field	Last name: Van Duzer
exactly as ID has it printed.	
	ID: James Madison-Park
	Last name: Madison-Park
	ID: Roberto Gonzales Chavez
	Last Name: Chavez
	ID: Toby O'Connor
	Last name: O'Connor
If "Jr" or any other addition appears as a part of	ID: Eli Jackson Jr
the last name, enter it in the Last Name field.	Last name: Jackson
	ID: John Jones III
	Last name: Jones

FIRST NAME

Legal first name printed on identification (do not use nickname or abbreviations). First letter capitalized. Optional 'Legal name if different' field available for patrons who use names other than their legal names for patron account.

RULE	EXAMPLE
Enter exactly as spelled on ID.	ID: Tommy Smith
	First name: Tommy
If the first name is hyphenated, enter both	ID: Mary-Jane Jones
names in the First name field exactly as printed	First name: Mary-Jane
on ID.	
	ID: Jean-Pierre Smith
	First name: Jean-Pierre

MIDDLE NAME

Middle name (initial if full name unavailable). Enter in Initials field of patron registration.

RULE	EXAMPLE	
Enter the whole middle name as spelled	ID: John Quincy Adams	
	Middle name: Quincy	
If only a middle initial is available, enter that in	ID: Lou Q. Stewart	
the Middle name field.	Middle name: Q	
Do not type a period.		
If more than one middle name is given, enter	ID: John Francis Xavier Smith	
them all.	Middle name: Francis Xavier	

LIBRARY

New patrons – automatically set in patron registration wordform using the library location where the card is being created (barcode prefix matches branch).

Existing patrons – If a patron has moved or wishes to change their registered library the registered library should match the barcode prefix so the card may need to be replaced. See "Replacement Library Cards" to allow checkout.

PATRON CODE

Select the appropriate patron type. Not all jurisdictions use the same codes. The following are examples only: Adult, Teen, Juvenile, Internet Only.

ADDRESS

A valid home address is required for all patrons except for "internet only" and 'Welcome". State law requires that patrons receive written notices before being sent to collections. It is imperative we have a valid address.

To add an address, use the Main Address field (or Alternate Address if adding multiple addresses). If entering a second address, list the mailing or local address in the Main Address section.

Enter zip code, city, and state.

For "internet only" patrons, enter "internet only" in the address field and add the library's zip code.

RULE		Example
Enter the street address and apartment		
number (if applicable)), or PO box number.	
Use the following abb	reviations:	
Apartment	Apt	
Avenue	Ave	Address: 15 Main St
Boulevard	Blvd	
Building	Bldg	Address: 123 W 45 St Apt 67
Circle	Cir	
Highway	Hwy	Address: 89 Grand Ave Ste 10
Lane	Ln	
Place	PI	Address: PO Box 333
Road	Rd	
Room	Rm	
Street	St	
Suite	Ste	
If a street address ir	ncludes a compass	
direction, use N, S, E, W, NE, NW, SE, or		Address: W Main St Apt 4B
SW		
		Address: 1200 Parks Ave NW
If a street name is a numbered street, use the		
cardinal number only, (without the "-st", "-nd",		Address: 13 E 67 St
"-rd", "-th")		

TELEPHONE/EMAIL, ETC.

Enter as appropriate. Set notification option according to patron's choice. Not required fields in Koha.

RULE	EXAMPLE
Enter the number in the Primary phone	
field.	Telephone #: 805-777-7777
If a second number has been provided,	
enter it in the Secondary phone field.	

PHONE FIELD ENTRY GUIDELINES

"Primary phone' is a mandatory field in the current automated system. For patrons who do not have a telephone, or refuse to give a telephone number, as of November 17, 2010, the agreed upon standard for this field on the patron registration screen is "none" or "refused" (no note in the patron record).

If a patron refuses to give either an email address or a telephone number, the staff member should put an agreed upon staff email address in the email field. Failure to do so will result in a patron

account with fees/fines over \$40 going to Collections without any prior notice, or not going to Collections at all if the notice cycle cannot begin/complete.

Email or telephone notification is required for the notice cycle to begin. Telephone overdue notices that are not completed (answered) will receive a print bill notice after 30 days.

TELEPHONE INPUT STANDARDS FORMAT

The acceptable format for telephone numbers for automated calling is: AAA-PPP-NNNN. "AAA" is area code, "PPP" is prefix, "NNNN" is number. Some general rules:

- Format applies to all telephone fields in the record.
- Only one telephone number per field (not "PPP-NNNN or PPP-NNNN" in the same line)
- The iTiva system can only call a direct number. If the phone number contains any of the following, it cannot be used:
 - An extension number.
 - A work number that needs to go through a switchboard.
 - A call blocking service access number such as *82

0

- Words in the telephone number are acceptable as the iTiva system ignores them. Examples: parents' home, work, cell.
- Do not enter any symbols such as # or *.
- Do not use a contiguous set of numbers such as 1111111 or 999. This could result in the automated system dialing 9-1-1 as it uses dialing formats to reach outside lines.

PASSWORD

Will default overnight to the last four digits of phone number if nothing is entered. If no phone number is entered, default to '1234'.

PREVIOUS BARCODE

If the patron is replacing their card rather than creating a new account, copy and paste the former account number into this field.

DATE OF BIRTH

Enter the date of birth, which is required, in the (MM/DD/YYYY) format. If the patron refuses to provide the year of birth, enter the birth year as 01-01-1900.

UNIQUE ID

Enter the last four digits of the ID number, followed by the type of ID in this order:

Driver's License

1. Enter the last four digits of the number, followed by a space.

 Enter the abbreviation of the issuing state, followed by DL to denote Driver's License, (with the exception of California which would be entered as CDL). Do not place a space between the two (i.e. AZDL, not AZ DL).

9760 CDL 1721 WADL

<u>State ID</u>

Follow the same entry procedure as Driver's License; use ID to denote identification. 9760 CID

Military ID

1. Enter the last four digits of the number, followed by a space, then MLID 0628 MLID

Alien Resident Number

- Enter the last four digits of the number, followed by a space
- Enter INSID (Immigration & Naturalization Identification) and the issuing country.

0497 INSID Mexico

Passport Number

- 1. Enter the last four digits of the number, followed by a space.
- 2. Enter **PPN**, followed by a space.
- 3. Enter the country of origin, or the country's abbreviation (e.g. USA).

9023 PPN USA 4568 PPN FRA

Border Crossing Card

- 1. Use the back of the card (no photo)
- Use the last four digits of the number at the bottom on the first line beginning with MEX

MEX 6789

Matricula Consular

- Enter the last four digits of the number in the lower right corner on the picture side of the ID location below the expirations date followed by a space
- Enter the country abbreviation followed by a space then MAT CON

1244 MX MAT CON

Employment Authorization Document

- 1. Use the front of the card (photo)
- Under the name is a USCIS number. Enter the last four digits of the number followed by a space, then USEA

1244 USEA

PARENT/GUARDIAN

Only use for Juvenile or Teen cards. Input information in ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., 9760 P/CDL, 9760 P/CID, 0628 P/MLD, etc.

Enter first name first, middle initial or name, and last name last: Mary Jane Patron

STAFF INITIALS

Use your library's 2-letter code as used in Koha and a forward slash and your initials: LM/ss

STANDARDS FOR PATRON NOTES IN KOHA

Select the appropriate type of note to deliver the message to patron and/or staff.

- All notes should be brief and include only pertinent facts.
- All free-text notes should include date first, then Branch/staff initials
- In Patron Status Notes put most recent note at the top, date first, then Branch/staff initials.

If the notes field is full, refer to the supervisor for review.

PATRON REGISTRATION REQUIREMENTS

A jurisdiction should only change another library's patron codes if the individual has moved to that jurisdiction.

TYPE	SP	LM	PR	SM 2	GV	CC
Adult	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address see below 1	See below 1
Group Cards	n/a	n/a	n/a	n/a	parent ID & proof of address see below 1	n/a
Juvenile	parent ID& proof of address	parent ID	parent ID	parent ID & proof of address	see below 1	See below 1
Welcome	ID	ID	ID	ID	see below 1	n/a
Teen	N/A	n/a	parent ID	n/a	Age 13-17 issued w/out ID and w/out proof of address	Ages 13-17 issued w/out ID
Internet Only	N/A		N/A		Ages 18 & up issued w/out ID	Ages 18 & up issued w/out ID

1 GO will issue a card with a government-issued ID with photo and proof of address. If there is no proof of address the patron will be asked to write the address on a preprinted confirmation postcard which will be mailed. The subsequent presentation of this card with its postmark shall constitute proof of address. GO issue cards to institutions with proper institutional ID and with individuals associated with institutions accepting personal responsibility.

2 SM will mail cards to patrons who have no other way to verify their mailing address. Patron is allowed to check out 2 items before card is mailed.

LIBRARY CARDS

It is a common practice to issue library cards to individuals only, with the exception of ILL institutions.

Lompoc issues cards to the prison. The prison gets a higher checkout limit.

In October 2020, the Administrative Council voted that juvenile or teen patrons 'aging up' to adult cards should have existing fines and fees removed from their account.

ONLINE REGISTRATION

Patrons may register online and receive a temporary barcode starting with the library prefix and then an 'E' (example 22138E). Libraries are assigned based on zip code designations through a 3rd party vendor that does address verification. "E" cardholder registration expiration varies by jurisdiction. These cardholders may place holds and use online services such as Overdrive. Online registrations should be deleted if there is no activity on the account for more than six months.

CARD EXPIRATION

On March 23, 2013, the Administrative Council voted to set Card Expiration to 99 years. Address Check is determined by jurisdiction.

Add	patron	(ADULT)
-----	--------	---------

14 of 26

Show collapsed fields: Alternate contact | Housebound roles | Patron account flags | Patron restrictions |



Import address from drivers license

Scan drivers	
license:	

Patron identity

Last Name:		Required
First name:		Required
Middle name:		
Date of birth:		× Required
	(MM/DD/YYYY)	
Initials:		
Pronouns:		
Legal name if different:		

Main address

Address:			Required
Address 2:			
City:		Required	
State:		Required	
ZIP/Postal code:	Required		

Contact information

Primary		
phone:	Shows on transit slips	
Secondary phone:		
Other phone:		
Primary email:]
	Shows on transit slips	
Secondary email:]
Main contact method:	```	

Alternate address

Address 2:			
		17	
City:			
State:			
7ID/Doetsl	23		
code:			
Phone:			
Email:			
ntact note:			

Alternate	contact
-----------	---------

16 of 26

Library management

Card number:	Required		
	Card number must be exactly 14 characters.		
Library:	Paso Robles City Library	~	Required
Category:	ADULT		
Overdues preference:	Required		
Sort 2:			

Library setup

Registration	02/01/2024	×	
date:	(MM/DD/YYYY)		
Expiry date		×	
for auto calc):	(MM/DD/YYYY)		
OPAC note:			
	This message appears on	this patron's user page in the OPA	C
Circulation note:		and subsector	
			//
	This message displays wh	en checking out to this gatron	

OPAC/Staff interface login

17 of 26

Username:		Required
Password:		1
	Minimum password length: 3	
Confirm		
password:		

Patron restrictions

Additional attributes and identifiers



Patron messaging preferences

	Days in advance	SMS	Phone	Email	Digests only 0
ltem due	1.	0	С.		
Advance notice	2 🗙				
Hold filled	1				
tem check-in	14) (14)				8
Item checkout and renewal	-		5		
Auto renewal	1		8		
Hold reminder	-				*

Alternate contact

18 of 26

Surname:		
First name:		
Address:		
Address 2:		
City:		
State:		
ZIP/Postal code:		
Country:		
Phone:		

Patron restrictions

Patron is currently unrestricted.

+ Add manual restriction

Add manual restriction

Comment:		
Expiration:	×	Clear date
Cancel		

19 of 26

+ New entry +

Additional contents (News)

See News | HTML customizations | Pages | OPACUserJS | OPACUserCSS

Showing 1 to 2 of 2 entries (filtered from 29 total entries)

	Location +	Library \$	Number o	Publication _	Expiration date ¢	Title \$	Author ¢	News ¢	Actions
	Slip	Santa Maria Public Library	0	04/15/2022		Renewals	Glynis Fitzgerald (BGfitzgerald**)	Preview content	Fedit Delet
0	Staff interface	All libraries	3	11/05/2020		Training	BWS (legal name) bwssupport (bwssupport1234)	Preview content	PEdit Delet

Delete selected

New additional content (News)

21 of 26

locatio	on:	nterface	and O	PAC N	•														
Librai	ary: All libr	aries										~							
ublicati dat	ion ate: (MM/DD	DAYYYY)				×													
Expiration dat	ion ite: (MM/DC News w	o/YYYY) vill still be	access	sible by	direct		expire	d.											
Appear positio	on:																		
Appear positio	r in on: English (en)	Es	paño	l (es-E	S)														
Appear positio t E	r in on: English (en)	Es	spaño	l (es-E	S)														
Appear positio t E	r in english (en)) Es	spaño	l (es-E	S)														
Appear positio E le: entent: Elle Ed	r in on: English (en) dit View) Es	spaño Forma	I (es-E it To	S)	Table]		
Appear positio t E tle: ontent: File Ed	r in con:	Insert B	spaño Forma	l (es-E at Too	s) ols	Table	14		ĮĮ	ē	Ē.	E	S]		
Appear positio t E de: intent: File Ed Paragrap B ~	r in con: English (en) dit View ph ~	Insert B S	spaño Forma I ∂	I (es E at Too K I_x	s) Dis ©	Table Ω	li A	= .	∃ ₹_~	ē 0	Ę.	E	S	ž]		

New additional content (Pages)

22 of 26

Display	Staff in	terface		v												
location:	A 11 171										201					
Library:	All libra	aries									~					
ublication					×											
uate.	(MM/DD	mm)														
Expiration					×											
date:					-											
t Engl	(MM/DD lish (en)	Esp	añol (e	s-ES)												
t Engl tle:	(MM/DD lish (en)	Esp	añol (e	₃-ES)												
t Engl tle: ontent: File Edit	(MM/DD lish (en) View	Esp	añol (e rmat	s-ES) Tools	Table											
t Engl tte: ontent: File Edit Paragraph	(MM/DD lish (en) View	Insert Fo	añol (e rmat	Tools	Table C	16		1	Ū	ĨĤ.	E 5	- 				
t Engl tle: ontent: File Edit Paragraph E ~ :=	(MM/DD lish (en) View ~ E]E	Insert Fo	añol (e rmat Jt	Tools	Table C Ω	E A	≡ 2		ē	Ē	5 d	». —				
tle: ontent: File Edit Paragraph	(MM/DD lish (en) View	Insert Fo	rmat	Tools	Table Ĉ	E A	= ~ 2	=	ē ⇔	Ē	5 d	× -				

Pages<u>3</u>

• Get there: More > Tools > Additional tools > Pages

The pages tool is a tool to create custom additional pages in the OPAC and in the staff interface. It is based on the same tool as the news and the HTML customizations, therefore it works in the same way.

Add See N Show	Additional contents (Pages) re News HTML customizations Pages OPACUserDS OPACUserCSS Showing 1 to 5 of 5 entries												
Shov	Jow 20 v entres < Piervois I Noti > Last > Search: X Clear titler Location 0 Library 0 Number 0 Publication odate Title 0 Author 0 Page URL 0 Page 0 Actions												
	All	All libraries		01/02/2023		How to use the library	Staff Staff (23529001223637)	OPAC: Default OR Current language Librarian interface: Default OR Current language	Preview content	Folt Delete			
	Librarian interface	All libraries		01/02/2023		How to contact the Catalyst Koha team	Staff Staff (23529001223637)	Librarian interface: Default OR Current language	Preview content	Fedt Delete			
	OPAC	All libraries		01/01/2023		Enquiry form	Staff Staff (23529001223637)	OPAC: Default OR Current language	Preview content	Ficit . Delete			
	OPAC	All libraries				How to use eBooks	Staff Staff (23529001223637)	OPAC: Default OR Current language	Preview content	Fidt			
	All	All libraries				Table of contents: History of ethics : essential readings with commentary	Staff Staff (23529001223637)	OPAC: Default OR Current language Librarian interface: Default OR Current language	Preview content	Ficit			
Shov	Showing I to 5 of 5 entries < First < Previous 1 Next > Last > Detelle selected												

To add a new page:

• Click 'New entry'

New addition	al co	ntent (P	ages))										
🖺 Save 👻 🗙 🤇	Cancel													
Display location:	Staff interface and OPAC V													
Library:	All libra	ries		~	v									
Publication date:				×										
Emination datas														
Expiration date:				×										
	(DD/IVIW													
Default Englis	sh (en)													
Title:														
Content:														
File Edit	e Edit View Insert Format Tools Table													
Paragraph	~	B I	χı	ōÔ	ΞΞ	⊒	ēž	\$	6	—				
⊞~ ∷		\leftrightarrow	<u></u> ×	ΘΩ	<u>A</u> ~	<u>*</u> ~	<>							

- Display location: choose the interface from which this page should be accessed (we can only create pages for the staff interface)
 - Librarian and OPAC interfaces: two links will be created, one for the OPAC and one for the staff interface
 - Librarian interface: a link for the staff interface will be created
 - OPAC: a link for the OPAC will be created
- Library: choose the library for which this page will be available
 - If an OPAC page is limited to a library, only logged in users whose home library matches the page library will be able to access the page.
 - Pages limited to a library will not be accessible to OPAC users who are not logged in, unless your system administrator has configured an 'OPAC_BRANCH_DEFAULT' override in virtual host configuration.
 - If a staff interface page is limited to a library, only staff logged into that library will be able to access the page.

- Publication date: use the publication date field to control from which date your page is accessible, if it should only be accessed at a future date.
- Expiration date: use the expiration date field to remove the page after a specific date.
 - If this field is empty the page will be available until you remove it manually
- You can enter the page title and content for each language installed

Note

You can choose which type of editor to use here (either a text editor or a WYSIWYG (what you see is what you get) editor) with the AdditionalContentsEditor system preference.

- After filling in all of the fields, click 'Save' at the top of the page.
 - Alternatively, click the arrow next to the 'Save' button and choose 'Save and continue editing' if you need to stay on this page to continue editing the news item.
- In the table, a link will be generated for the OPAC or the staff interface or both. Use this link in HTML customizations, news or system preferences such as IntranetNav or IntranetmainUserBlock so that the patrons or staff members can access the new page.

Note

To link to a specific page, use the code in the URL with the code= parameter. For example:

OPACBASEURL/cgi-bin/koha/opac-page.pl?code=staff_and_opac_42

STAFFCLIENTBASEURL/cgi-bin/koha/tools/page.pl?code=staff_and_opac_42

In multi-language installations, use the language parameter followed by the language code to link to the page in a specific language. For example:

OPACBASEURL/cgi-bin/koha/opac-page.pl?code=staff_and_opac_42&language=fr-CA

STAFFCLIENTBASEURL/cgi-bin/koha/tools/page.pl?code=staff_and_opac_42&language=fr-CA

To use a custom page

Once the page has been developed and saved, you will see a summary table of all custom pages. This table also displays the generated links to access these custom pages. The links will be available in both the default language, and the installed language currently in use by the logged in staff member.

See N Show	e News HTML customizations Pages OPACUserJS OPACUserCSS intowing 1 to 5 of 5 entries Show 20 v entries < First < Previous 1 Next > Last > Search: X Clear Titler														
	Location 0	Location • Library • Number • Publication • Expiration • date • Title • Author • Page URL								Actions					
	All	All libraries		01/02/2023		How to use the library	Staff Staff (23529001223637)	OPAC: Default OR Current language Librarian Interface: Default OR Current language	Preview content	Fedt Delete					
	Librarian interface	All libraries		01/02/2023		How to contact the Catalyst Koha team	Staff Staff (23529001223637)	Librarian interface: Default OR Current language	Preview content	Fot Delete					
	OPAC	All libraries		01/01/2023		Enquiry form	Staff Staff (23529001223637)	OPAC: Default OR Current language	Preview content	Fot Delete					
	OPAC	All libraries				How to use eBooks	Staff Staff (23529001223637)	OPAC: Default OR Current language	Preview content	Fidt					
	All	All libraries				Table of contents: History of ethics : essential readings with commentary	Staff Staff (23529001223637)	OPAC: Default OR Current language Librarian interface: Default OR Current language	Preview content	Fick Delete					
Shov	Showing 1 to \$ of \$ entries < First < Previous 1 Next > Last >														
	Delete selected			Palaka salawal											

There is a button to preview the created page. This is helpful to check how the page looks and functions before it is deployed.

+1 Add See N	Avec entity + itional con eves HTML costs wing 1 to 5 of 5 er	tents (Pi mizations () thes	ages) ^{ages OPAC}	Preview of: "H Catalyst If you would is support@catalys Follow Catalys Subscribe to o	ew to contact the 0 Koha ee some support w yst-su net (Austra it Koha on Twitterf ar monthly newsle	Catalynt Koha team" th your Koha Instance, you are welcome to ema laa). Ber	l us at koha-support@cata?	yst net.ng (New Zealand) or koha-		
Show	20 v entres	e Pest	C Phenose					Close		
	Location ©	Library a	Number 1	Publication -	Expiration date	Title	Author 9	Page URL 8	Page I	Actions
0	AL	All Boarles		01/02/2023		How to use the library	Staff Staff (23529001223637)	OPAC: Default OR Current language Librarian Interface: Default OR Current language	Presing content	
0	Librarian Interface	All libraries		01/02/2023		How to contact the Catalyst Koha lears	Staff Staff (23529001223637)	Librarian Interface: Detault OR Current language	(* Preserv content)	(Fill + Door
0	OPAC	All Ibraries		01/01/2023		Ecquary form	Staff Staff (23529001223637)	OPAC: Detaux OR Current language	Proview consult	FEIT . DOUT
0	OPAC	All Revariors				How to use eBooks	Staff Staff (23529001223637)	OPAC. Default OR Current language	Proview content	Fill . B Orne
0	A8	All				Table of contents: History of ethics - essential readings with commentary	Staff Staff (23529001223637)	OPAC: Default OR Current language Librarian Interface: Default OR Current language	* Preview content	For a Denne
Show	ning 1 in 5 of 5 even Sector Semicord	es KEO	4 Pantos	s (1881) 1994 I	Last b					