Notes and Messages in Koha

Explanation

The Voyager Integrated Library System had 5 different kinds of notes to store information that needed to be attached to a patron's account or communicated to patrons at the circulation desk. Koha has two types of "Notes" to attach permanent information to a patron's account plus two different types of "Messages" to allow staff to communicate information to patrons either via the OPAC or at the circulation desk.

The purpose of this document is to explain Koha "Notes" and "Messages" to Latah County Library District staff.

Koha "Notes:"

1. In Koha, the term "Notes" describes a permanent note that is always attached to a patron's account. In Koha these notes can only be edited or deleted in the circulation module during the "Edit Patron" process. Notes can be designed so that they are OPAC notes – i.e. the patron can see them when they log into the catalog – or circulation notes – i.e. only library staff can see them.

Only staff with permission to edit patron accounts can add, modify, or delete "Notes" in Koha.

2. To add a permanent "Note" to a patron's account:

    a. Open the patron's account and click on the Edit button on the toolbar.

b. Scroll down to the section titled "Library Setup" and add or edit whichever note you wish to alter.

c. After you've added or edited notes you will be able to see them in the "Library Use" block on the details page in the patron's account.

You can also click on the "Edit" link just below this section to edit or delete notes.

d. You can also see "Circulation notes" when checking items out to a patron. You cannot see "OPAC Notes" on the check-out page.

You also cannot edit or delete notes on this page. "Notes" can only be added or edited from the patron account details page.

==A patron can only have one circulation note and one OPAC note on their account but the text of those notes can be of unlimited size.==

Id | **More** ▼

Attention:

Notes:
Circulation Notes go here

Messages:
Add a new message

Koha "Messages:"

1. In Koha, the term "Messages" describes temporary messages that can be added to a patron's account only at the check-out page. Messages can be designed so that they are OPAC messages – i.e. the patrons can see them when they log into the catalog and staff can see them when checking out materials to the patron – or they can be messages "for other librarians" which only staff can see when checking out materials to the patron.
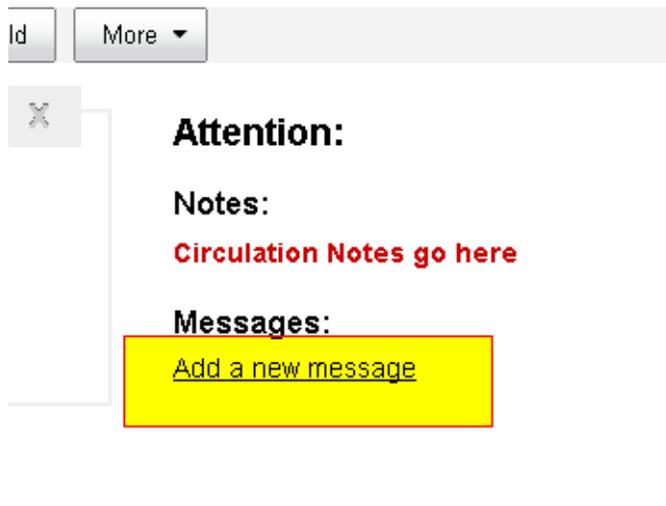
Attention:

Notes:
Circulation "Notes" appear here

Messages:
› 04/04/2012 MOS *"Circulation "Messages" appear here in RED"* [Delete]
› 04/04/2012 MOS *"OPAC "Messages" appear here in BLACK"* [Delete]
Add a new message

2. To add a "Message" to a patron's account:

    a. Open a patron's account in the check-out page and click on "Add a new message."
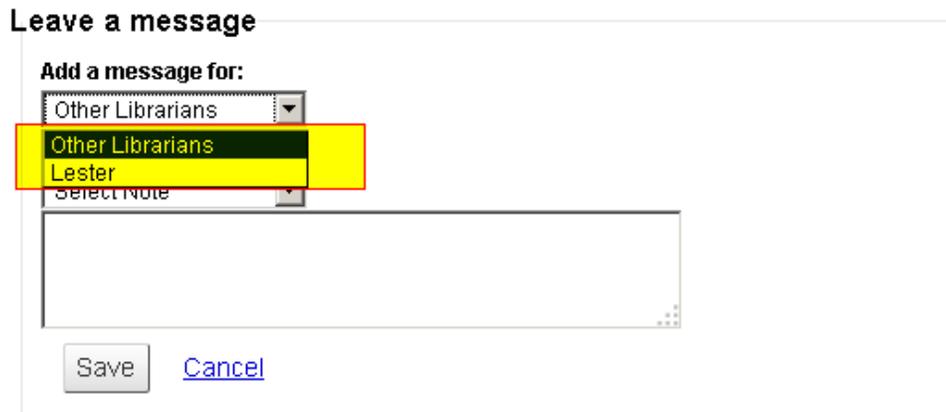
    Id | **More ▾**

    ⚊

    Attention:

    Notes:

    Circulation Notes go here

    Messages:

    Add a new message

    b. Select "Other Librarians" to leave a message that only library staff can see.

        Select the patron's first name to leave a message that library staff in the staff client and that the patron can see if they log into their account in the OPAC.

    Leave a message

    Add a message for:

    Other Librarians ▼

    Other Librarians
    Lester
    Select Note ▼

    Save | Cancel

c. Koha has the ability to store "Predefined messages" that can be quickly added as messages to a patron's account. If you select one of the messages from the drop down menu, the text of that message will be moved into the message's text box.

Leave a message

Add a message for:
[Other Librarians ▼]

Predefined notes:
[Select Note ▼]

Select Note
REQUEST EXPIRED: Item: BC: was held for more than 7 days and not picked up.
UPDATE PHONE NUMBER: Patron cannot be reached at _. Please update.

[Save] Cancel

d. If none of the predefined messages match the message you wish to communicate to the patron, put the cursor into the note's text box and type the message you wish to pass on to the patron.

Leave a message

Add a message for:
[Other Librarians ▼]

Predefined notes:
[Select Note ▼]

Type whatever crazy message is appropriate in this box here.

[Save] Cancel

e. After you've typed your message, click on "Save" and your note will appear on the right side of the screen whenever you check an item out to this patron.

Attention:

Notes:

Circulation Notes go here

Messages:

› **04/01/2012 MOS** *"Type whatever crazy message is appropriate in this box here."* [Delete]
Add a new message

f. You should also observe that circulation "Messages" and Circulation "Notes" appear in red but OPAC messages appear in black.

You should also observe that messages cannot be edited or modified. They can only be added or deleted.

There is no limit to the number of messages that can be added to a patron's account.

Attention:

Notes:

Circulation Notes go here

Messages:

› **04/01/2012 MOS** *"Circulation Message"* [Delete]
› 04/01/2012 MOS *"OPAC Message"* [Delete]
Add a new message