

Complete Koha Test Plan

The following test plan will help you learn to use the new features in your Koha system.

- Search the catalog via the staff client for a specific author or series. Review the results and make sure that the titles, authors, publisher, etc all look right.
- ~~Search the catalog via the OPAC advanced search page for a title and author combination. Review the results and make sure that the data looks as you expect it to. ([Learn more](#))~~
- ~~Search the catalog via the OPAC advanced search page for a keyword in the title field and limit your results to one or two item types. Review the results and make sure that the data looks as you expect it to. ([Learn more](#))~~
- ~~Search the catalog via the OPAC for your favorite topic. Use the filters on the left to find more specific results. Review the results and make sure that the data looks as you expect it to. ([Learn more](#))~~
- Search the catalog via the staff client advanced search page for a keyword in the title field and limit your results to one or two item types. Review the results and make sure that the data looks as you expect it to.
- Search the catalog via the staff client advanced search page for a title and author combination. Review the results and make sure that the data looks as you expect it to.
- Browse your patrons by the first letter of their last name. Confirm that the data looks as you expect it to. ([Learn more](#))
- Search for a patron by last name. Confirm that the data looks as you expect it to. ([Learn more](#))
- Search for a patron by first name. Confirm that the data looks as you expect it to. ([Learn more](#))
- Search for a patron by full name (first then last or last than first). Confirm that the data looks as you expect it to. ([Learn more](#))
- Search for a patron by card number/barcode. Confirm that the data looks as you expect it to. ([Learn more](#))
- Search for a patron by first name in a specific patron category. Confirm that the data looks as you expect it to. ([Learn more](#))
- Perform a broad patron search. Confirm that the data looks as you expect it to. ([Learn more](#))
- Add a new adult patron. ([Learn more](#) | [Tutorial Video](#))
- Attach a child patron to the adult patron you just added (if you have a children type at your library). ([Learn more](#) | [Tutorial Video](#))
- Add a new child patron from the main patron's page. ([Learn more](#) | [Tutorial Video](#))
- Add a staff patron. ([Learn more](#) | [Tutorial Video](#))
- Add a statistical patron. ([Learn more](#) | [Tutorial Video](#))

- Give your new staff patron permissions needed at your circulation desk. ([Learn more](#) | [Tutorial Video](#))
- Edit your adult patron and flag their library card as lost. ([Learn more](#))
- Change your privacy settings in the OPAC. ([Learn more](#) | [Tutorial Video](#))
- Review your personal information. ([Learn more](#) | [Tutorial Video](#))
- Check out a book to your new adult patron. ([Learn more](#))
- Check out a book to your new adult patron and specify a due date. ([Learn more](#) | [Tutorial Video](#))
- Place a hold on a checked out book for your adult patron. ([Learn more](#))
- Check in an item. ([Learn more](#))
- Check in an item with a hold on it and confirm the hold. ([Learn more](#))
- Create a manual invoice for your adult patron without entering a barcode. ([Learn more](#))
- Mark one of the items checked out to your adult patron as lost. Confirm that the patron was charged the item's replacement price. ([Learn more](#))
- Pay a part of the patron's total fine bill. ([Learn more](#) | [Tutorial Video](#))
- Create a manual invoice for your adult patron with a barcode. ([Learn more](#))
- Write off one of the fines on your adult patron's account. ([Learn more](#) | [Tutorial Video](#))
- Pay off one line item on your patron's account. ([Learn more](#) | [Tutorial Video](#))
- Leave a message for your adult patron via the check out screen. ([Learn more](#))
- Find a title with several holds on it. Move the person at the bottom of the holds queue to the top. ([Learn more](#))
- Find a title with several holds on it. Move the person at the top of the queue down a spot or two. ([Learn more](#))
- Find a patron with at least one item on hold. Cancel that hold. ([Learn more](#))
- Try to check out a barcode that you know isn't in your system and fast catalog a title to go with that barcode. ([Learn more](#))
- Record local use for a few items in your system. ([Learn more](#) | [Tutorial Video](#))
- Install the [Offline Circulation Tool](#). ([Learn more](#) | [Tutorial Video](#))
- Check out an item in the Offline Circulation Tool. ([Learn more](#) | [Tutorial Video](#))
- Check in an item in the Offline Circulation Tool. ([Learn more](#) | [Tutorial Video](#))
- Check out an unknown barcode in the Offline Circulation Tool. ([Learn more](#) | [Tutorial Video](#))
- Load your KOC (Koha Offline Circulation) file in to Koha. Note the messages that appear. ([Learn more](#) | [Tutorial Video](#))

- Add a new record to your catalog using the Z39.50 search. ([Learn more](#) | [Tutorial Video](#))
- Search Z39.50 for a title you already have in your library and try to add it to your catalog. ([Learn more](#) | [Tutorial Video](#))
- If you have a MARC file from a book vendor or OCLC, import it in to Koha. ([Learn more](#) | [Tutorial Video](#))
- Add one item to a bib record in your system. ([Learn more](#) | [Tutorial Video](#))
- Add multiple items to a record in your system using 'Add & duplicate' or 'Add multiple.' ([Learn more](#))
- Move an item from one bib record to another. ([Learn more](#))
- Search your system for duplicates and merge them together. ([Learn more](#) | [Tutorial Video](#))
- Edit an item record and change the barcode. ([Learn more](#))
- Create a new record by duplicating an existing one. ([Learn more](#))
- Edit a bibliographic record by adding a note to the record. ([Learn more](#))
- Choose two or more items and edit them as a batch by changing their shelving location, collection code or home branch. ([Learn more](#) | [Tutorial Video](#))
- Choose two or more items and delete them as a batch. ([Learn more](#) | [Tutorial Video](#))
- Choose an item that you have circulated since starting your Koha testing and review its circulation history. ([Learn more](#))
- Customize your overdue notice. ([Learn more](#) | [Tutorial Video](#))
- Add a second overdue notice. ([Learn more](#))
- Review all of your notice templates and make sure the text meets the policies at your library. ([Learn more](#))
- Set up your overdue notice triggers. ([Learn more](#) | [Tutorial Video](#))
- Set up the holidays and library closings for all of your branches. ([Learn more](#) | [Tutorial Video](#))
- If you plan on using Koha's label maker, set up label template (you will need the measurements for your label sheet). ([Learn more](#))
- If you plan on using Koha's label maker, set up label layout. ([Learn more](#))
- If you plan on using Koha's label maker, generate a batch of labels. ([Learn more](#) | [Tutorial Video](#))
- If the labels you've printed out aren't lined up properly you might need to create a profile. ([Learn more](#))
- If you plan on using Koha's patron card creator, set up card template (you will need the measurements for your label sheet). ([Learn more](#) | [Tutorial Video](#))
- If you plan on using Koha's patron card creator, set up card layout. ([Learn more](#) | [Tutorial Video](#))
- If you plan on using Koha's patron card creator, generate a batch of cards. ([Learn more](#) | [Tutorial Video](#))

- Enter in email addresses for all of your library branches. ([Learn more](#) | [Tutorial Video](#))
- Review your collection codes (if you're using them). Add a description to each that will make sense to your patrons. ([Learn more](#))
- Review your shelving locations (if you're using them). Add a description to each that will make sense to your patrons. ([Learn more](#))
- Review your patron categories and make sure they make sense for your library. ([Learn more](#) | [Tutorial Video](#))
- If you'd like you can add a preset list of cities and states where your patrons live. ([Learn more](#))
- If you need additional patron fields (special IDs or department information) add those fields as patron attributes. ([Learn more](#))
- Review and/or set up your circulation and fine rules for each branch in your system. ([Learn more](#) | [Tutorial Video](#))
- Review the cataloging frameworks that come with Koha. ([Learn more](#))
- Alter one of the frameworks by adding or deleting a field. ([Learn more](#) | [Tutorial Video](#))
- After altering a framework, run the Framework Test to make sure that all frameworks still work as expected. ([Learn more](#))
- Check to make sure that your currency is set as active. ([Learn more](#))
- Create a budget for your budget year. ([Learn more](#))
- Add at least one fund to your budget ([Learn more](#))
- Map your 245\$b subfield to the subtitle for displaying on staff client search results. ([Learn more](#) | [Tutorial Video](#))
- Create a mailing list report using the guided report wizard. ([Learn more](#) | [Tutorial Video](#))
- Review your patron statistics using the statistics wizard. ([Learn more](#))
- Find a report on the [Koha wiki](#) and put it on your system. ([Learn more](#) | [Tutorial Video](#))
- Check some of your titles with diacritics and make sure that they migrated properly.
- Check titles in a series and make sure that series information migrated properly.
- Make sure that your patrons have their contact information in the right fields.
- Add a new vendor. ([Learn more](#))
- Approve a purchase suggestion. ([Learn more](#) | [Tutorial Video](#))
- Reject a purchase suggestion. ([Learn more](#) | [Tutorial Video](#))
- Edit a purchase suggestion and update the bibliographic information. ([Learn more](#))
- Create a new basket for your vendor. ([Learn more](#))

- Order another copy of book you already have in your collection. ([Learn more](#) | [Tutorial Video](#))
- Order from a new blank record. ([Learn more](#) | [Tutorial Video](#))
- Order from an external target. ([Learn more](#) | [Tutorial Video](#))
- Stage a MARC record for import, do not complete the import, this file will be used for ordering. ([Learn more](#))
- Order from a staged file. ([Learn more](#) | [Tutorial Video](#))
- Order from an approved purchase suggestion. ([Learn more](#) | [Tutorial Video](#))
- Close your basket. ([Learn more](#))
- Perform several advanced order searches. ([Learn more](#))
- Receive some items. ([Learn more](#) | [Tutorial Video](#))
- Catalog a bib record for a serial. ([Learn more](#))
- Attach a subscription to your new bib record. ([Learn more](#) | [Tutorial Video](#))
- Receive at least one issue of your subscription. ([Learn more](#) | [Tutorial Video](#))
- If your serials data was migrated search for these records in the catalog and confirm that they look right.
- If your serials data was migrated search for these records in the serials module and confirm that they look right.
- Check marc records to verify a variety of items are cataloged correctly
- Check cataloging process to see if all necessary fields are available
- If fines are migrated, check to see that they are applied correctly
- If holds are migrated, check to see they are accurate in catalog and patron record
- If you plan on keeping system logs, search through the log viewer tool. ([Learn more](#) | [Tutorial Video](#))
- Review your libraries and branches and make sure the contact information is right for all of them. ([Learn more](#) | [Tutorial Video](#))
- Make sure that your receipt printers are set up ([Learn more](#))
- Print out a few circulation receipts ([Learn more](#))

If you have further questions on how to use Koha be sure to use your support provider's ticketing system or the [Koha mailing lists](#) and [chat room](#).

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