



LibLime Koha Release Notes Version 4.8

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Combined Release Notes – LibLime Koha 4.4 - 4.8

Features

1 Administration

1.1 Addition of Plack to increase response time

The way the Koha traditionally is run, each time a new request comes in through the web server (i.e. a user has clicked on a link), Koha has to start up from scratch. The web server has to 1) start up a new Perl interpreter, 2) Perl has to load up all the Koha source code and compile it, then 3) Koha has to load up its configuration options and related data, and then finally 4) Koha can start doing the work of servicing the request and sending back data.

Plack allows Koha to skip steps 1-3, and only spend time doing step 4 when a request comes in. It runs those three steps once and only once and keeps things set up so that Koha can focus only doing the bare minimum to service the request rather than worrying about resolving library dependencies, parsing code, and configuring itself over and over again. Removing this startup penalty dramatically reduces response time in the simplest cases, going from around one second to less than 1/4 of a second. It's important to note, however, that Plack does not necessarily speed up step 4.

On a longer-term architectural note, many of the software engineering tools available that help developers write better, faster software come at the expense of incurring even more overhead at startup time. These tools have previously been out of reach of Koha because the startup cost was just too great, amplifying any delayed response. Using Plack, we can now employ these tools that will help stabilize Koha as a development platform and enable more rigorous testing.

1.2 Billing Notices and Debt Collection

1.2.1 Usage

PTFS wrote a feature to send patrons billing notices and then refer them to Unique Management debt collection agency if fines are not paid, and this version contains some updates. There are two system preferences, EnableOwedNotification (to turn on billing notices), and OwedNotificationValue (the amount owed above which people should be reported). You will also need to configure a circulation billing notice. There is a delivered BILLING notice under Tools, Notices. If only one branch (or the entire system) is using Unique Management you can use that, or you can create one for each branch using UM, perhaps with a name like BILLING_AAA for branchcode AAA. You'll want to phrase the notice to your practices, like "you will be sent to a collection agency if you don't pay in X days."

The script `amountdue_notices.pl` runs every night looking for people who owe above the threshold value, and sends an email billing notice if one hasn't been sent already. There is also a print notice option for patrons without email addresses; run cron job as `perl amountdue_notices.pl -v -html /path/to/notice/directory --` it will name the file `amtduenotices-datestamp`.

In this release, options have been added to the billing notice script to allow use of a different billing notice name (example: `-code BILLING_AAA`) and to limit the run to a particular branch (example: `-library AAA`). This will allow multiple libraries to have their own billing notice text and separate script runs, without affecting patrons at branches which are not using the feature. The print output can go into different specified subdirectories for each branch, if desired. If a site's policies require written notice of intent to submit to collection (no email), this can be accommodated by using the `-n` flag.

A complete cron entry with the above settings might look like this:

```
30 4 * * * $KOHA_CRON_PATH/amountdue_notices.pl -library AAA -code BILLING_AAA -html /home/mylib/public_html/aaa -n
```

The debt collection piece is a script that checks for patrons who received the billing notice but haven't yet paid. The output is in the format specified by Unique Management Inc.; it could be adapted to other collection agencies. Options are configured via command line to the script. As well as the original debt collect notification, when a patron makes a payment which needs to be submitted as an update to the company, the script checks for all activity since the last report date, and bundles it all into an update. It actually compares the current total and the last reported total, then tries to resolve that by checking for payments.

In this release, options have been added to limit the script run to a particular branchcode (example: `--library AAA`) so that only patrons from branches using debt collect are submitted.

The cronjob has several parameters which you'll want to specify. `--wait 30` is how long (in days) to wait after the billing notice is sent. `--fine 10 --once` puts a \$10 charge on the patron's account as a fee for being sent to collection. `--to` specifies the email addresses that should get the debt collect script output (usually someone at your library plus someone at UM). `--subject` is the email's subject line. `--confirm` means run it for real – you can run it in test mode if you want to check the output. `--ignore` lets you exclude certain patron categories (library staff, homebound, etc.). `--max-wait` says don't include anyone who's charges are older than this number of days (to exclude very old charges on the patron record). There is also a limitation for branchcode, so only people from desired branch(es) are sent to debt collect.

Sample command line options: `perl debt_collect.pl --library AAA --w 21 --to email1,email2 --confirm --ignore LS,SO,ILL --verbose --max-wait 180`

In summary, the billing notice script generates notices directly to the patrons, while the debt collect script generates an email message to the library staff and Unique Management. The debt collect generates two types of messages, "submit" (people being newly reported) and "update" for people with changes since they were reported.

1.2.2 Data changes

If a library migrating to LibLime is already using Unique Management, there are several data changes that have to be made as part of the migration. Once the final patron load is done, we have to generate a .csv file of patrons to send to Unique Management. Ideally UM would like a data file with the old system's unique identifier, the Koha borrowernumber, surname, firstname, and if possible total due. UM takes this file and updates its data to use the new Koha borrowernumber rather than the old system's identifier.

UM then sends back a data file of all patrons for the library who are currently in debt collect. The needed pieces from that file are the Koha borrowernumber, the amount currently owed, and the last transaction date. Those need to get loaded into the Koha patron record. For each borrowernumber, we will update the last_reported_date fields with the UM date, the amount_notify_date with a date at least one month before the UM date, and the last_reported_amount field with the amount currently owed.

The Koha accountlines data also has to be checked and updated. We need to know how the collection agency fee was recorded in the previous system's fines. It might be something like "Debt Collection Security Debt Collect" or "Force to Debt Collection" or some other variation.

For all variations, in the Koha accountlines table, the description needs to be "Sent to collections agency - " (without the quotes but note the space hyphen space at the end, and match the case), The accounttype needs to be A, and notify_id needs to be 1.

All of the above needs to be done before running the billing notices and debt collect scripts on the new site. The scripts are looking for specific flags and types of entries, and the data must match.

1.2.3 Validating barcode formats

Koha can now validate barcodes against the 14-digit Codabar standard. Barcodes entered when adding, editing or deleting an item or patron are validated and an error message appears to alert the user to an invalid barcode [See figure below]. Item and patron barcode prefixes are defined by library in Administration > Libraries and Groups. A new system preference, barcodeValidationRoute, controls this feature. Use the "codabar" option for Codabar validation or leave blank to allow any barcode string.



1.3 Telephone interface support

With this release, Talking Tech support has been integrated into Koha. The Talking Tech system is composed of two parts:

1. An outgoing MESSAGE file that is created through the Koha API
2. Support of incoming calls (via SIP2) that allows patrons to do renewals, etc.

System preferences for Talking Tech:

TalkingTechEnabled - Turn on Talking Tech phone messaging

TalkingTechFileName - Set the file system path for the Talking Tech MESSAGE file

1.4 Customizable Receipt Templates

A new interface for customizable receipts has been added in Tools > Receipt Template Manager. This feature is turned on/off using the UseReceiptTemplates system preference. Two patron permissions have been created for this feature. *Manage_receipts* controls the adding, editing and deleting of receipt templates and *receipts_assign* controls assigning receipt templates.

Libraries can create new receipt templates for each library by clicking New Receipt Template in the Receipt Template Manager. Once created, the template must be applied to a triggering event in Koha by using the Assign Receipt Templates button. Koha determines the active library and only displays templates for that library only. To set receipt templates for a different library, click "Set" in the upper right-hand corner of the screen to change your library.

Receipt templates can be applied to the following areas/actions in Koha:

- Circulation
 - Check Out receipts – printed after a patron checks items out.
 - Check in receipts – printed after items are checked in.

- Item not in computer – printed when a barcode is scanned that does not match any item barcodes in the system.
- Claims Returned Found – printed when an item with a “claims returned” status is checked in.
- Lost Item Found – printed when an item with a “lost” status is checked in.
- Needs Cataloging – printed when an item flagged for cataloging is checked in.
- Holds
 - Hold found – printed when an item is checked in and trapped to fill a hold at the selected library.
 - Transit Hold – printed when an item is checked in and trapped to fill a hold elsewhere in the library system.
- Payments
 - Payment received receipt - printed after payment is posted in the patron record. The Print button in the Fines/Pay Fine page defaults to this receipt.

For Transit Hold, Item not in computer, claims returned found, lost item found and needs cataloging, a new pop-up notification appears with an alert message. Staff have three options – “Ok,” “Ok, print slip” and “Cancel.” The “Ok, print slip” option will trigger the receipt printing. These receipts will not print automatically.

2 Circulation

2.1 Ability to batch load course reserves (12849423)

Libraries can now add multiple items to Course Reserves at one time. On the Add a Course Reserve page, the Item Barcodes field has been made into a text box that will accept one barcode per line.

To put multiple items on Course Reserve:

1. Go to **Circulation > Course Reserves**
2. Select a course (or add a new one)
3. Click the **Put Items on Reserve** button
4. On the **Add a Course Reserve** page, enter item barcodes (one per line).

New Course

Add a Course Reserve

Item Barcodes
30126001114658
30126000126489
30126002055736

Item Type LEAVE UNCHANGED

Collection Code LEAVE UNCHANGED

Shelving Location LEAVE UNCHANGED

Library LEAVE UNCHANGED

Staff Note

Public Note

Submit Cancel

5. Complete the rest of the form as necessary and click **Submit**.

Verify that all of the items entered appear as course reserves

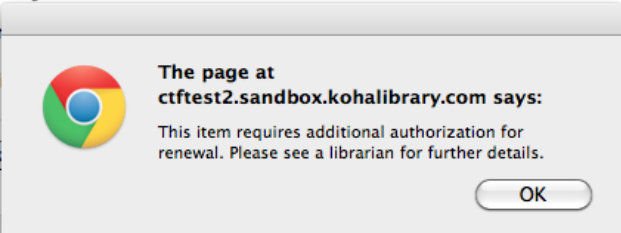
2.2 Block renewals at self check out if item is on hold for someone else

When a patron attempts to renew an item on hold for another patron using Koha's native self-checkout module, a blocking message will appear.

Regis Jesuit High School Self Checkout System
You are logged in as Clay Fouts.

Check out or return an item
Scan a new item or enter
Scan next item, or

Issues for Clay Fouts (7)



			Action
The first man / Camus, Albert. (21333)	Fic Camus	06/24/2011	<input type="button" value="Renew Item"/>
The selected poems of Nikki Giovanni. Giovanni, Nikki. (21345)	811.54 Gio	06/20/2011	<input type="button" value="Renew Item"/>
Davis and Lee at war / Woodworth, Steven E. (21349)	973.73 Woo	06/07/2011	<input type="button" value="Renew Item"/>
Democracy on trial : Smith, Page. (21346)	940.53 Smi	06/07/2011	<input type="button" value="Renew Item"/>
Famous trials : McLynn, F. J. (21347)	347.07 McL	06/07/2011	<input type="button" value="Renew Item"/>
A new age now begins : Smith, Page. (21313)	973 Smi v1 c2	06/07/2011	<input type="button" value="Renew Item"/>
The outdoor survival handbook / Mears, Raymond. (21334)	613.6 Mea	06/07/2011	<input type="button" value="Renew Item"/>

2.3 Patron Record Ownership

In the past, there was no way to restrict the editing of patron records by library in Koha when using a union catalog. All staff in the system could view/edit any patron record as long as they had the appropriate permissions assigned to their account. This piece of development uses the library groups feature to create restrictions on who can see and edit patrons based on the patron's home library. It's particularly useful for consortiums that do not wish to see/edit patron records from other libraries in the consortium, but still want the convenience of a union catalog.

In Libraries and Groups, create a new group with the category type "patrons."

Add Group

Category code:	<input type="text"/>
Name:	<input type="text"/>
Description:	<input type="text"/>
Category Type:	<input type="text" value="patrons"/>

Click “Update” to save the group. Then, edit the libraries in Libraries and Groups to add them to the patron group just created. A library can belong to multiple groups. After the feature is set up, the viewing/editing writes of patron records take effect. If no groups are set up, Koha behaves as though the feature does not exist.

Example: Libraries X and Y belong to Group 1, and Library Z belongs to Group 2. A staff member from Library X searches for patrons. The search results will display matching patrons with a Library of Library X OR Library Y. They will not be able to see any patrons from Library Z. Conversely, staff at Library Z will only be able to see patrons from Library Z.

2.4 Retaining patron history, including fines and fees assessed and paid, blocks, holds cancelled, notices sent and claims returned

Koha now logs substantially more information about changes made to the patron record. Patron activity, including fines and fees, blocks, holds, notices and lost items are also logged. The Circulation History tab in the patron account contains the following:

- Reading Record
- Reserves History (including reserves placed and reserves cancelled)
- Sent Notices History
- Patron Edit History
- Patron Block History

The following are now being logged:

- Creations, edits and deletions to any patron record fields
- Edits to the patron’s attributes
- Edits to the patron’s permissions
- Patron renewals (This is when a patron record itself is renewed, not when items are renewed)
- Edits to Patron messaging preferences
- Adding or removing child patrons from a patron record
- Deleting a patron
- Borrowing, renewing and returning items
- Blocking and unblocking patrons from borrowing

Each of these events is logged with the date and time, the staff member who made the change and the before and after values.

2.5 Setting overdue items to lost after an interval, keeping the item linked to the patron record but off the patron's charged items account

A “Lost Items” tab has been added to the patron record. This view contains a table listing all lost items associated with a patron even if the lost item fees have been paid. The Lost Items tab can be displayed by turning the LinkLostItemsToPatron system preference ON. Staff may remove one or more lost items from a patron’s record on the lost items view. A patron’s lost items will not display in the public interface, and will not create any blocks in the system.

Edit Change Password Print More

PTFS Administrator has the following lost items

Title	Callnumber	Home Library	Item Type	Barcode	Date Lost	Claims Returned	
Another test record		ACL	ART	39078002225302	2011-03-15	Make Claims Returned	Delete
Astronomy :	520 M715a5	MAD	BKA28	39078043945238	2011-03-14	Claims Returned (Undo)	Delete
Ulterior motives	Olsen	MAD	BKA28	39078069231695	2011-02-21	Make Claims Returned	Delete
Hearts in Atlantis	King	MAD	BKA28	39078036753516	2011-02-07	Claims Returned (Undo)	Delete
Anatomy of wonder :	808.838762016 An16a5	MAD	BKA28	39078053165511	2011-01-21	Make Claims Returned	Delete
Best of the best :	Best of the best	LAK	BKA28	39078050501742	2011-01-17	Make Claims Returned	Delete
Magic.	J 793.8 M272ma	MAD	BKA28	39078039124640	2010-12-14	Claims Returned (Undo)	Delete
Concerto for sitar and orchestra	CL-SH CLASSICAL CD	MID	CDAMS	39078058887176	2010-12-08	Make Claims Returned	Delete
Concerto for sitar and orchestra	CL-SH CLASSICAL CD	MID	CDAMS	39078058887176	2010-12-08	Make Claims Returned	Delete
Thirteenth child /	YA FIC WRE	BRD	BKA28	39078062329421	2010-11-30	Make Claims Returned	Delete

Figure 2.2.1 - Lost Items tab in patron account

A new patron account transaction type, for “Lost Item Refund” was added to the system. This account type may be used for both manual and automatic transactions. A new system preference,

RefundLostReturnedAmount, was also added which, if ON, will refund a returned lost item rather than applying it to an outstanding balance. The default value for this system preference is OFF.

If the LinkLostItemsToPatron system preference is “On,” when the longoverdue.pl script sets items to lost, it will record the item as a lost item for the patron, along with the date it was set to lost and the amount of lost item fees assessed. This is in addition to setting the lost item status on the item and applying the lost item fee to the patron’s account.

If the LinkLostItemsToPatron system preference is “On”, when staff manually set an item to lost, Koha will record the item as a lost item for the patron, along with the date it was set to lost and the amount of the lost item fines assessed. This is in addition to setting the lost item status on the item and applying the lost item fee to the patron’s account.

If LinkLostItemsToPatron is “on,” when an item that is attached to a patron’s list of lost items is returned, the staff member will be notified of this and will be asked whether to remove the item from the patron’s list of lost items. The default option on the confirmation dialog will be “yes” to remove the item from the patron’s list of lost items. This will not affect the item’s lost status.

If MarkLostItemsReturned is set to ON the checkin status is removed; the item remains linked to the patron as Lost, however, in the patron record. If this system preference is set to OFF the item will still indicate it is checked out to the patron

2.6 Showing lost and claims returned items on the check out form

Lost and claims returned items are now displayed on the Check Out screen in the patron record [see figure below].

Lost Items: [View all 10 lost items](#)

Title	Barcode	Call no	Date Lost	Claims Returned
Another test record	39078002225302		03/15/2011	
Astronomy :	39078043945238	520 M715a5	03/14/2011	Claims Returned
Ulterior motives	39078069231695	Olsen	02/21/2011	
Hearts in Atlantis	39078036753516	King	02/07/2011	Claims Returned
Anatomy of wonder :	39078053165511	808.838762016 An16a5	01/21/2011	

Figure 2.3.1 - Lost items table shown on the Checkout screen

A new Boolean status for the lost_items table was added. The setting is controlled in the Lost Items tab

of the patron account page. A new “Claims Returned” button was added -- clicking Make Claims Returned will toggle the value and display “Claims Returned” in a column of the patron’s lost items table [see figure below].

If a lost item is switched to “Claims Returned”, the lost item fee and surcharge will be removed from the patron’s account.

If a lost item that is marked “Claims Returned” is checked in, and thus found, the patron will be charged the maxfine overdue fine. The library who finds the item will then assess whether or not to waive/forgive the fine.

2.7 Blocks and thresholds per patron category

This development replaces system preferences maxreserves, maxoutstanding, and noissuescharge with maxholds, holds_block_threshold, and circ_block_threshold respectively found in Administration > Patron Categories.

Code	Category name	Type	Enrollment period	Age required	Upper age limit	Enrollment fee	Overdue	Hold fee	Max holds	Holds block threshold	Circ block threshold	Messaging		
AD	Adult	Adult	48 months	0 years	0 years	0.00	Yes	0.00	75	9.99	9.99	Hold Cancelled : email Hold Filled : email	Edit	Delete
ADS	Adult Staff	Adult	48 months	0 years	0 years	0.00	Yes	0.00	75	9.99	9.99	Hold Cancelled : email Hold Filled : email	Edit	Delete

Figure 2.4 - Max holds, holds block and circ block in Administration > Patron Categories

2.8 Allowing individual patrons to opt out of reading history

A new system preference, NewPatronReadingHistory, allows libraries to select a default value (disabled or enabled) regarding the retention of reading history for new patrons. Assuming reading history is turned on; existing patrons can enable/disable reading history on the My Reading History tab in their account.

2.9 Displaying notes to staff at check-in

An icon has been added to the barcode column in the holdings table for adding check-in notes [See Figure 2.6.1 below]. All staff can add, edit, delete and view check-in notes. When the icon is clicked, a

pop-up window appears where staff can enter and save a free-text note to be displayed when the item is checked in [See Figures 2.6.2 and 2.6.3 below].


Collection	Call Number	Status	Last Seen	Barcode	Spine Label
BOOKS AD NFIC	636.7 Ad16I	Lost+Charge Damaged	03/31/2010	39078034256082	 Print Label

Figure 2.6.1 - Check-in note icon in the holdings table

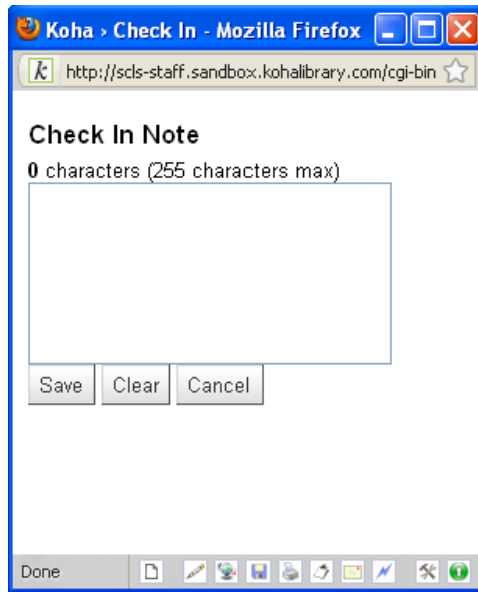


Figure 1.6.2 - Check In Note pop-up box

Check In

Enter item barcode:

Options

- Forgive
- Dropbox
-

Checked-In items

Due Date	Title	Author	Barcode	Type
Not checked out	Dog /	Clutton-Brock, Juliet.	39078058970329	BKJ28 BKJNF

Figure 2.6.3 - Check In Note appears when item in checked in

2.10 Fines and lost-items-found messages

A pop-up box appears when a lost item is checked in. Staff can choose whether or not to remove the item from the patron’s lost items by clicking the appropriate box in the alert. [See Figure 2.7.1 below]



Figure 2.7.1 - Lost items found alert at check-in

2.11 Item detail page modifications

The “Suppress Status” option on the item detail page has been removed, so only users with access to cataloging can suppress items. Also, the alert that says “You are viewing only one item. View All” has been made larger and more prominent on the page so users are less likely to overlook it.

2.12 Setting missing items to “Traced” when processing requests

The Holds Queue Report is now interactive, giving libraries the opportunity to set items to trace or to “pass” them to the next library if they cannot fill the hold [See Figure 2.9.1 below]. If an item on hold cannot be located, staff members can now select the “Trace” option in the holds queue report Action column rather than going to the item detail page to set the item to trace. The “Pass” option allows libraries to “Pass” a hold to the next library if they, for whatever reason, cannot fill the hold. The library that the item would be passed to is listed in the “Passed to” column. Once the item is passed, it will show up on the next library’s Holds Queue Report.

Title	Collection	Location	Call Number	Barcode	Patron	Send To	Date	Passed To	Fill	Action
A new kind of job / Barron, Kirk. Deere & Co., , 1999 : 1 v. (unpaged) : 28 cm.	PBJFI	CH	++BAR	Selected copy: 39078058078206	readinghistory. readinghistory (readinghistory)	SCLS	11/26/2010	scls	Check in at SCLS	<input type="button" value="Pass"/> <input type="button" value="Trace"/>

Figure 2.9.1 - Interactive Holds Queue Report

2.13 Handling credit balances and refunds

A “Refund Charges” tab has been added to the Fines page in the patron account. If a patron’s account balance becomes negative (as in, they are due a refund), Koha allows for library staff to issue the refund and update the account balance appropriately.

Charge & Refund	Description	Title	Amount
Refund	Refund owed for payment (in part or full) on lost item returned	A dog owner's guide to grooming your dog : 39078036182187	-12.00
Subtotal			-12.00
Other Charges			2.00
Account Balance			(credit) -10.00

Refund Balance (10.00) [Cancel](#)

Figure 2.10.1 - Refund Charges tab in patron record

Once the “Refund Balance” button is clicked, the staff member is taken back to the patron’s Account page where the refund is listed as a new line item. Once the refund has been issued, the Refund Charges tab no longer displays.

No. ◆	Date ◆	Description of charges ◆
29	04/13/2011	Refund account total balance credit for payment(s)

Figure 2.10.2 - Refund listed as line item in patron account

2.14 Calculating and refunding lost item and overdue fines for lost items that are returned

If RefundLostReturnedAmount is “on”, and a lost item is returned, the system will:

- Refund the lost item fines that were charged to that patron.
- Credit the patron the amount charged in “Lost Item” charges for the specific item using a “Refund” credit type.

- Charge the patron the maximum overdue fine based on the item's policies. Note: This may raise the patron's balance to be a negative amount meaning the library will owe the patron money.

3 Holds

3.1 New Holds Status/Notice

Three new hold statuses and corresponding notices have been added to the system - hold cancelled because the item becomes unavailable, hold expired after a set number of days and was never filled, and hold available for pickup.

Hold Cancelled notice:

A new notice template called HoldCancelled has been added. The notice will be used to inform patrons that their hold has been cancelled. The notice can be customized by staff to include appropriate language and variables for the patron's Home Library, the Pickup Library, the item's Title, Author and Status. A new system preference for EnableHoldCancelledNotice was added to the system; if ON, patrons will receive notification via the HoldCancelled notice template.

Hold Expired notice:

A new notice template called HoldExpired has been added. The notice will be used to inform patrons that their hold has expired. The notice can be customized by staff to include appropriate language and variables for the patron's Home Library, the Pickup Library, the item's Title, Author and Status. A new system preference for EnableHoldExpiredNotice was added to the system; if ON, when a hold is expired without being filled, the patron will receive notification via the HoldExpired notice template.

Hold on Shelf notice:

A new notice template called Hold has been added. The notice will be used to inform the patron that their hold has arrived and is now on the hold shelf. The notice can be customized by staff to include appropriate language and variables for the patron's Home Library, the Pickup Library, the item's Title, Author and Status. A new system preference for EnableHoldOnShelfNotice will be added to the system; if ON, when a hold item is marked Waiting by checking it into the pickup library, the patron will receive notification via the Hold notice template.

Setting these system preferences to ON will make them appear in the Patron Messaging Preferences table in the patron record.

Patron messaging preferences

	Days in advance	Email	Digests only?
Item Checkout	-	<input type="checkbox"/>	-
Item DUE	-	<input type="checkbox"/>	<input type="checkbox"/>
Hold Cancelled	-	<input type="checkbox"/>	-
Hold Filled	-	<input checked="" type="checkbox"/>	-
Item Check-in	-	<input type="checkbox"/>	-
Advance Notice	<input type="text" value="0"/> ▾	<input type="checkbox"/>	<input type="checkbox"/>

[Edit](#)

3.2 Holds History

Expired, filled and cancelled holds are now displayed in the Holds History tab of the patron account in the staff client and the My Holds History tab in the OPAC. Filled, Expired and Cancelled holds each have their own tab across the top of the screen [See Figures 3.2.1 and 3.2.2 below]. Patrons using the OPAC have the option of deleting expired holds from their Expired Holds list, or using a direct link to place another hold on the item. Note: Expired holds cannot be deleted in the staff client.

The display of filled, expired and cancelled holds is controlled by the following new system preferences: StaffShowCancelledHolds, StaffShowCompletedHolds, StaffShowExpiredHolds, OPACShowCancelledHolds, OPACShowCompletedHolds, OPACShowExpiredHolds.

Expired Holds (8 total)				
Title	Placed On	Expired On	Delete From Display?	Another Hold?
Nature.	03/04/2011	04/03/2011	No <input type="checkbox"/>	Place Hold
Rodgers and Hammerstein's The sound of music (DVD)	03/04/2011	04/03/2011	No <input type="checkbox"/>	Place Hold
Battlestar Galactica.	02/25/2011	03/27/2011	No <input type="checkbox"/>	Place Hold
Yeats.	02/04/2011	03/18/2011	No <input type="checkbox"/>	Place Hold
Faulkner:	03/04/2011	03/08/2011	No <input type="checkbox"/>	Place Hold
Minnesota :	11/15/2010	02/11/2011	No <input type="checkbox"/>	Place Hold
The poetry of John Keats.	02/04/2011	02/05/2011	No <input type="checkbox"/>	Place Hold
Poetry:	02/03/2011	02/04/2011	No <input type="checkbox"/>	Place Hold

[Update Expired Holds](#)

Figure 3.2.1 - Hold History in the OPAC (Expired Holds page)

Hold Date	Hold Fill Date	Title	Item Type	Call Number	Barcode
02/04/2011	02/04/2011	The collected plays of W.B. Yeats. , by Yeats, W. B.		821.8 Yea	39078016385917

Figure 3.2.2 - Hold history in the staff client (Filled Holds page)

3.3 Targeting holds using a static list of libraries and pickup location

A new system preference was added which allows multi-library systems to define a particular order of libraries to check when the system tries to fill a hold.

NextLibraryHoldsQueueWeight - Specify a list of library location codes separated by commas -- the list of codes will be traversed and weighted with first values given higher weight for holds fulfillment -- alternatively, if RandomizeHoldsQueueWeight is set, the list will be used in order. It will traverse the list in sequence until finding a library code that has a matching item, wrapping around to the beginning to try to target the hold.

3.4 Reduced Transportation Holds

This feature was designed for libraries who wish to reduce the cost of transporting items throughout a library system. Libraries can set a holds threshold which will determine when the Reduced

Transportation functionality will be triggered, and can also designate that holds should be filled first at the pickup library.

Three new system preferences were added to the system:

- **FillRequestsAtPickupLibrary.** Fill hold requests at your local library if possible before sending an item to another branch to fill a hold request. By default this preference will be off.
- **FillRequestsAtPickupLibraryAge.** Measured in days. If there are any higher-priority active holds that have been waiting longer than the **FillRequestsAtPickupLibraryAge**, then the item will fill the highest priority active hold, even though that will require transportation. Note that the highest-priority hold may not be the one that's been waiting longest. By default this preference will be 30. This preference can be set to blank to turn the policy setting off.
- **HoldsTransportationReductionThreshold.** The number of holds that must be in the queue for the holds transportation reduction to be enabled (assuming **FillRequestsAtPickupLibrary** is enabled). By default this preference will be 0. This preference can be set to blank to turn the policy setting off.

If **FillRequestsAtPickupLibrary** is ON, the system will do the following when an item is checked in that will fill a hold:

1. Check the **HoldsTransportationReductionThreshold** system preference to make sure enough holds are in the queue to trigger Holds Transportation Reduction. If **HoldsTransportationReductionThreshold** is set to 0 it will be triggered no matter how many are in the queue. If it is to be triggered:
 - a. Koha will check the item's holds queue and find the highest-priority active hold that the item will fill whose pickup library is the same as the check-in library. If there is no hold meeting these criteria, then the hold transfer process will continue as usual.
 - b. If the hold for pickup at this library is the highest-priority active hold in the hold queue, then Koha will just fill it—this is the normal situation for the highest-priority hold.
 - c. If there are any higher-priority active holds that have been waiting longer than the **FillRequestsAtPickupLibraryAge**, then the item will fill the highest priority active hold, even though that will require transportation. Note that the highest-priority hold may not be the one that's been waiting longest.
 - d. Otherwise, the item in hand will be used to fill the highest-priority hold that is to be picked up at the check-in library. This hold will jump the queue ahead of the others.

4 Cataloging

4.1 Quick Edit of Items

When there is an exact match to a barcode search in cataloging, staff are now taken directly to the Edit Item page for that particular item. For users without the *edit_items* permission, a list of search results will be displayed rather than the Edit Items page. When an exact match for a barcode search is done outside of Cataloging, staff members are taken directly to the item detail page for the matching item. When there is not an exact match, a list of possible matches is still displayed.

4.2 Batch edit of Items

A new system preference, BatchItemEditor, allows libraries to select between the PTFs feature and the Community feature. In the Community Batch Item Editor, the user has the option of uploading a barcode file, an item number file, or scanning barcodes manually.

Batch item modification

Use a file

Barcode file

Item number file

File:

Or scan items one by one

Barcode list (one barcode per line):

[Cancel](#)

Figure 4.2.1 - Batch item modification

4.3 Moving an Item from One Bib to Another

To move an item to a new bib, navigate to the Add Item screen of the bib record where the item is to be moved. Enter the barcode of the moving item in the add item barcode field. **Do not enter any other data.** Click Save. A pop-up window appears [see Figure 4.3.1 below]. Click OK to move that item to the current bib or CANCEL to start over.

Items for The United States of Atlantis / by Turtledove, Harry. (Record #1736)

	Withdrawn status	Lost status	Source of classification or shelving scheme	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Cost, normal purchase price	Suppressed
Edit Delete			ddc									Do not Suppress

Add Item

p - Barcode

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme

3 - Materials specified (bound volume or other part)

4 - Damaged status

5 - Use restrictions

7 - Not for loan

The page at <http://kyle-staff.test.ptfsinc.com> says:

?

This barcode is currently being used by the following item:

Origami model airplanes /

Do you want to move this item from it's current bibliographic record to this one?

'OK' will load the data from the existing item, 'Cancel' will begin the Add Item process over again.

OK Cancel

Dewey Decimal Classification

Figure 4.3.1 - Barcode validation

Upon clicking OK, the item's information is inserted into the form and can be saved. **You must click Save Changes for the item to be moved to the current bib.**

Note: make sure the user has the relink_items permission. Users with this permission may move items from one bibliographic record to another.

If the item:

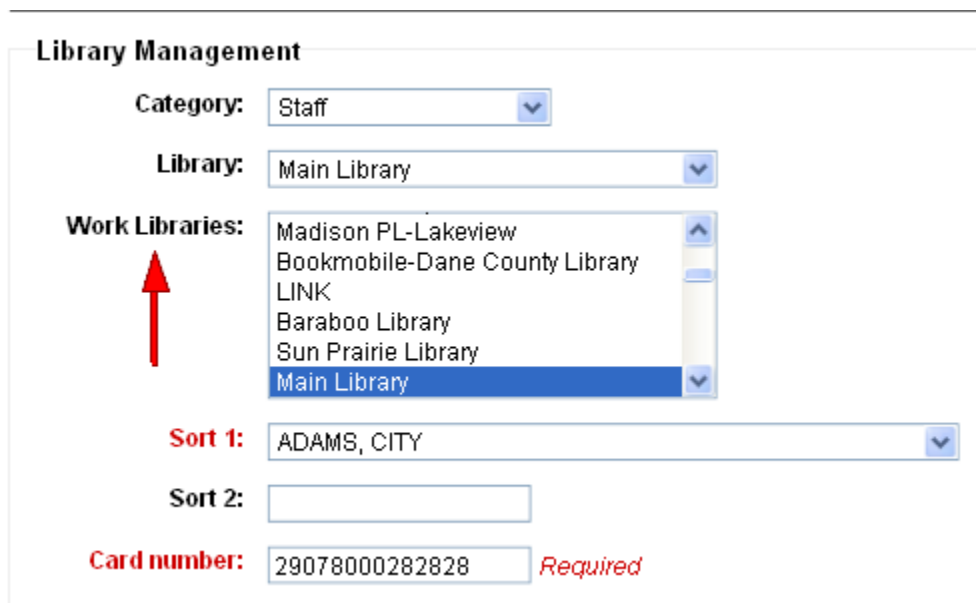
- Is checked out, the checkout will move to the new bibliographic record.
- Has an item-specific hold on it, the hold will move from the old bib to the new one.
- Has a title-level hold on the bib attached to the item that is being moved, the hold will stay with the old bib and the item will move to the new bib.
- Is on order, acquisitions links will follow the item to the new bibliographic record.
- If the item was generated as part of serials check-in, staff will be notified that the item cannot be moved.

4.4 Searching ISBNs using dashes

Whether a user searches for an ISBN with dashes or without, the matching record will be located. The system will remove the dashes prior to submitting an ISBN query to the back-end search service. When a staff member adds a cataloging record that contains an ISBN field with dashes, Koha will normalize the ISBN by removing the dashes prior to indexing that record. This, combined with removing user input dashes in ISBNs, will ensure that matching ISBNs will be found regardless of the presence or absence of dashes in the search.

4.5 Ownership of items by library

Libraries can now restrict access to editing items at the staff account level (note: all libraries can still view all items – this only restricts the “write” privilege). A new field called “Work Libraries” has been added to staff patron records. One library, multiple libraries or all libraries can be selected. The staff member will only have editing rights to the specified library(ies) items (assuming they have item editing permissions).



The screenshot shows a web form titled "Library Management". It contains several fields: "Category" (dropdown menu with "Staff" selected), "Library" (dropdown menu with "Main Library" selected), "Work Libraries" (a multi-select list with options: "Madison PL-Lakeview", "Bookmobile-Dane County Library", "LINK", "Baraboo Library", "Sun Prairie Library", and "Main Library" (which is highlighted in blue). A red arrow points to the "Work Libraries" label. Below this are "Sort 1" (dropdown menu with "ADAMS, CITY" selected) and "Sort 2" (empty text input). At the bottom is "Card number" (text input with "29078000282828" and a red "Required" label).

Figure 4.5.1 - Work Libraries field in patron record

Items for The original dog bible : (Record #166838)

	Withdrawn status	Lost status	Damaged status	Not for loan	Collection code	Permanent location (home library)	Current location (checkout library)
Edit Delete					BOOKS AD NFIC	Madison PL-Central	Madison PL-Central
		Lost+Charge			BOOKS AD NFIC	Adams County Library	Adams County Library
					BOOKS AD NFIC	Madison PL-Pinney	DeForest Library

Figure 4.5.2 - User only has permission to edit certain items

A user who only has rights to edit items from certain libraries will see those libraries' items at the top of the Edit Items listing with Edit and Delete buttons available. Items that cannot be edited will be displayed below with no Edit or Delete buttons.

4.6 Setting session-level defaults for creating item records

When staff add or edit an item record, they may save the contents of the add/edit item form as the session default [See Figure 4.6.1 below]. When session defaults are set for new items, the new/edit items form is labeled indicating that defaults are in effect and fields in the add/edit item form are populated with the default values [See Figure 4.6.2 below]. When a staff member saves defaults with a name, they will be saved for the library the staff member is logged in to. If the staff member is not logged in to any library, they will not be able to save the defaults.

The menu of session defaults contains only the defaults for the active library. Only users with Superlibrarian privileges will be able to see the list of session defaults for all libraries. If a staff member chooses a name that is already taken, they will be warned that the defaults already exist. If the staff member confirms that they wish to continue, the set of defaults will be replaced with the active set. Note that if staff chooses a name that belongs to another library's defaults, they will not be able to replace the defaults and will have to choose a different name.

When staff leave the add/edit items form, the defaults will still be in effect, but the label will not be visible until they return to the add/edit items form. The defaults will stay in effect until the staff member clears them or they log out of the staff interface.

The following new sub-permissions of cataloging will be added:

1. Save_item_defaults, Staff must have this permission to save a new set of item defaults.
2. Update_item_defaults. Staff must have this permission to change an existing set of item defaults.
3. Delete_item_defaults. Staff must have this permission to delete a set of item defaults.

Note that staff does not need a specific permission to set the item defaults for a single session.

Session Defaults



Figure 4.6.1 - Session defaults menu in the Add/Edit item form

Add Item

Item Defaults **LAVBKAFI** are in effect.



Figure 4.6.2 - Label indicating that session defaults are in effect.

4.7 Spine Labels

The Label Creator and Quick Spine Label Creator were both enhanced in this release. In the Label Creator, a new tool was created to allow libraries to split call numbers in various ways and test that split on a specific call number from within the Layouts page [See figure below]. In the Manage Batch Labels tool, libraries can now scan barcodes to add to the label batch. Various known bugs were also fixed, including text wrapping and using guide boxes when printing a label and errors when saving templates and profiles.

Create Label Layout

Layout ID

Layout Name

Choose Barcode Type (encoding)

Choose Layout Type

Bibliographic Data to Print

Choose Order Of Text Fields to Print

1 title 2 author 3 isbn 4 issn 5 itemtype
6 barcode 7 itemcallnumber

List Fields

Spilt Call Numbers

Type	From	To
<input checked="" type="radio"/> None	LB2395.C65 1991 c.1	LB2395.C65 1991 c.1
<input type="radio"/> LCCN	LB2395.C65 1991 c.1	LB 2395 .C65 1991 c.1
<input type="radio"/> DDCN	573.8 H255.3h 1991 c.1	573.8 H255.3h 1991 c.1
<input type="radio"/> Custom Supply a regular expression to the right. Below, test your Call Number:	<input type="text"/> <input type="button" value="Test"/>	

Draw Guide Boxes

Text Justification

Font

Font Size

[Cancel](#)


Figure 4.7.1 - Spine label layout

In the Quick Spine Label Creator, a drop-down box to select a prefix for collection code or shelving location was added. This required the addition of a new “Prefix” column in the authorized value table where libraries can define prefixes for labels [See figure below]. A community feature which added a “Spine Label” column to the holdings table in the bibliographic record in the Staff Client for quicker label printing was also integrated.

Authorized values

The information in authorized values can be linked to subfield definitions in your MARC frameworks. You can define as many authorized value categories as you want in each category.

When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user adds or edits a record, the subfield is not authorized values

Show Category: 

Category	Authorized value	OPAC Description (optional, OPAC defaults to Description)	Description	Spine Label Prefix	Icon	Edit	Delete
LOC	1F	1st Floor	1ST FLOOR	FLR1		Edit	Delete
LOC	2C	2nd Chance Collection	2ND CHANCE COLLECTION			Edit	Delete
LOC	2F	2nd Floor	2ND FLOOR			Edit	Delete
LOC	AD	Adult	ADULT			Edit	Delete
LOC	AD1F	Adult, 1st Floor	ADULT, 1ST FLOOR			Edit	Delete
LOC	AD2F	Adult, 2nd Floor	ADULT, 2ND FLOOR			Edit	Delete

Figure 4.7.2 - Authorized value table with Spine Label Prefixes

5 Periodicals

UsePeriodicals, a new system preference, has been added to give libraries the choice of using the existing Serials module or the newer Periodicals module. The Periodicals module gives libraries greater control and flexibility. The module is broken up into two main sections – Periodicals and Subscriptions. Periodicals are abstract, similar to the way that bibs are abstract. Each Periodical represents a specific publication (for example, “Newsweek”). Periodicals contain a Record of Issues. These issues are abstract, representing the existence of the issue rather than the possession of it. Periodicals can be centrally managed for an entire library system, while individual libraries are responsible only for their subscription(s). The subscription contains physical items owned by libraries.

New Periodical

Periodical description for "Dogwear:"

Periodical Information

- Periodical ID: 14 ([Edit](#)) ([Subscribe](#))
- Biblio: (1256) [Dogwear](#).

Sequence Prediction

Iteration formula: 1,1,9999:1,1,12:0,0,0
Sequence format: Vol. {Xn}, No. {Yn}
Chronology format: %m/%d/%Y
Frequency: 1m

Record of Issues

Issue	Publication Date	Expected	Arrived	Action
Vol. 3, No. 12	12/01/2010	0	0	(Edit) (Delete)
Vol. 4, No. 1 - 01/01/2011	01/01/2011	0	1	(Edit) (Delete)
Vol. 4, No. 2 - 02/01/2011	02/01/2011	0	1	(Edit) (Delete)
Vol. 4, No. 3 - 03/01/2011	03/01/2011	0	1	(Edit) (Delete)
Holiday Issue	03/15/2011	1	0	(Edit) (Delete)
Vol. 4, No. 4 - 04/01/2011	04/01/2011	0	0	(Edit) (Delete) (Combine)

[Generate Next Issue Record](#)

Active Subscriptions

ID	Branch	Expires	Action
15	SCLS	12/02/2011	Edit Delete

Figure 5.1 - A Periodical record and associated subscriptions

Each periodical must be linked to a bibliographic record and only one periodical can be linked to any bibliographic record. There are various options to select the serials planning information (initial publication date, frequency, chronology and sequence format, etc); a new layout and drop-down boxes make this process simple, with the ability to use Advanced Options to customize further.

Once created, individual libraries may subscribe to the periodical by clicking the Subscribe button in the Periodical record. In the subscription, libraries can choose whether to create item records when receiving, set item defaults, define a subscription end date, and choose the first issue. Libraries can create multiple subscriptions to the same periodical if desired.

New Periodical

Subscription for Dogwear:

Subscription information

- Subscription ID: 15 ([Edit](#))
- Periodical ID: [14](#)
- Biblio: (1256) [Dogwear](#):
- Library: SCLS
- Issue receipt creates item record: Yes

Planning

Expiration date: 12/02/2011

Serial issues

Issue	Published on	Expected on	Received on	Status	Action
Vol. 4, No. 1 - 01/01/2011	01/01/2011		12/31/2010	Arrived	Edit Delete
Vol. 4, No. 2 - 02/01/2011	02/01/2011		01/06/2011	Arrived	Edit Delete
Vol. 4, No. 3 - 03/01/2011	03/01/2011		12/21/2010	Arrived	Edit Delete
Holiday Issue	03/15/2011			Expected	Edit Delete

Figure 5.2 - Subscription to a Periodical

The following new permissions have been added:

- periodical_create* - Create a new periodical definition
- periodical_delete* - Delete a periodical definition
- periodical_edit* - Modify a periodical definition
- periodical_view* - Basic periodicals permissions

Since the Periodicals module is centrally managed, any special issues, combining of issues or changing of the enumeration and chronology must be done through the Periodical itself rather than through a library subscription. This means that any changes made will affect all the subscriptions to that serial. Issue, publication date and sequence can be edited for each predicted issue in the Periodical record. To create a special issue or supplement, remove the sequence and re-name the issue (for example, "Holiday Issue 2011"). When the next issue record is generated, it will follow the pattern of the previous regular issues, not including the special issue.

A "Combine" button exists next to the last issue record in the table. This button is used to combine issues either permanently or on a one-time only basis. Staff can select how many issues to combine and whether or not the change is permanent. If the "Make this change permanent" box is checked, all future issues will be combined. If it is not selected, only the number of issues indicated will be combined. After that, issues will be predicted using the enumeration and chronology pattern in the Periodical record.

When libraries begin receiving physical copies of their serials, they can be checked in by going to the library's subscription page in the Periodicals module. From there, click Edit next to the issue that has been received (usually this will be the issue at the bottom of the list with a status of "Expected"). Change the status of the issue to "Arrived", enter the appropriate date in the "Received On" box and Submit. If item records are to be created, an item record will appear populated with the default values from the Subscription record. Make any necessary changes or additions and save the item record. Other status options for an issue are: Future, Expected, Late, Not Available, and Claimed.

Editing serial receipt status for "Dogwear:"

Issue	Publication Date	Expected On	Received On	Status
Holiday Issue	03/15/2011	<input type="text"/>	<input type="text" value="04/07/2011"/>	Arrived <input type="button" value="v"/>
				<input type="button" value="Submit Query"/>

Figure 5.3 - Editing a serial issue in a subscription

6 OPAC

6.1 Adding format as a search refinement

A Format section was added to the search refinements located on the left-hand side of the search results display in the OPAC. The refinements apply to the search results being displayed on the current page and will change as the results on the page change.

The MARC fields to be used to populate the format facet are:

From 007/00 (007\$a) and 007/04 (007\$e)

007/00=v, 007/04=b = Videocassettes

007/00=v, 007/04=v = DVDs

007/00=v, 007/04=s = Blu-ray DVDs

From 008/23 (Form)

d=Large print books

blank=Regular print books

f=Braille books

From 007/00 and 007/01 (007 \$a and \$b)

sd=Compact discs

sz=Digital audio players

ss=Cassettes

co=Software

cr=Websites and downloadables

From 008/24-27 (Cont)

6=Graphic novels

007/00=c and 008/26=g = Video games

6.2 Item record display: Split library and shelf location display into two fields

Library and Shelving location used to be displayed together in the “Location” column in the holdings table of a bibliographic record. This feature moves the library information into a new “Library” column. Shelving location is still displayed in the “Location” column.

Library	Location	Collection	Call Number	Status	Date Due
Madison PL-Central			(Browse Shelf)	Checked out	03/25/2011
Madison PL-Central			(Browse Shelf)	Available	
Madison PL-Central	1st Floor	Non-Fiction	704.94329772 Z12d (Browse Shelf)	Available	

Figure 6.2.1 - Holdings table in a bibliographic record

6.3 Item record display: Display Permanent location instead of Current Location

The ItemLocation system preference has been added so libraries can choose what to display in the “Library” column in the holdings table. The choices are: home description, home code, current description, current code, or none.

6.4 Advanced Search display: Limiting based on bib, not ITYPE, collection code, etc.

The subtype limits available on the Advanced Search page in the OPAC have been modified using the following fields in the MARC record.

Subtype limits

Any audience ▼ Any Content ▼ Any Format ▼

Audience

From 008/33 (Audn)

a=Preschool

b=Primary

c=Pre-teen

d=Teen

a or b or c or j = Children's

d or f or e or g or 'blank' = Adult

Content

From 008/33 (LitF)

l or f or c or j = Fiction

0 or e or i or s or m or h or d = Non-fiction

j=Short stories

p=Poetry

From 008/34 (Biog)

a = Autobiographies

b or c or d = Biographies

Format

007/00 (007\$a) and 007/04 (007\$e)

007/00=v, 007/04=b = Videocassettes

007/00=v, 007/04=v = DVDs

007/00=v, 007/04=s = Blu-ray DVDs

From 007/00 and 007/01 (007 \$a and \$b)

sd=Compact discs

sz=Digital audio players

ss=Cassettes

co=Software

cr=Websites and downloadables

From 008/23 (Form)

d=Large print books

blank=Regular print books

f=Braille books

From 008/24-27 (Cont)

6=Graphic novels

007/00=c and 008/26=g = Video games

6.5 OPAC Search Groups

Search domain groups have been added to the Libraries and Groups page in the Administration section. Staff members can add groups, and then assign their libraries to particular groups. The groups function as searching mechanisms in the OPAC. For example, if your consortium consisted of three independent libraries and one library system, you could set up a group for the library system so patrons would have the option of searching all of the branches in the system.

The groups, called Search Domain Groups in Koha, are defined on the Libraries and Groups page in the Administration module. Create a new group. "Category code" is the internal handle that Koha uses to reference the group. "Name" is the human-readable name to use, and "Description" is the descriptive narrative of your choice. Choose the category type "searchdomain" and click "Update" to save the group. Then edit the individual library branches to add them to the group.

Add Group

Category code:	<input type="text"/>
Name:	<input type="text"/>
Description:	<input type="text"/>
Category Type:	searchdomain <input type="button" value="v"/>

Group(s): Search Domain

Name	Code	Description		
Lincoln City	LC-LIBS	Lincoln City Libraries	Edit	Delete

This feature only comes into play if there exists at least one branch category of the 'searchdomain' type. If that type is populated, OPAC searches can be constrained to return results that have at least one item in one of the member branches of that branch category.

The default category is chosen by the <default_search_category> tag for that branch's definition in \$KOHA_CONF, if such a configuration is provided. The value supplied must be the

branchcategories.categorycode.

6.6 Ability to specify OPAC customizations in KOHA_CONF

This feature adds the ability to specify default search limits, OPAC CSS, etc. via a new config section in \$KOHA_CONF, called "opachosts."

The default search group for a given URL is defined in the koha-conf.xml file. For example, if the koha-conf.xml has the opachosts section as follows:

```
<opachosts>
  <opac hostname="branch1.mylibrary.kohalibrary.com">
    <default_search_limit override="1">branch:BRANCH1</default_search_limit>
    <default_search_category>MAIN_BRANCH_GROUP</default_search_category>
    <activebranch>BRANCH1</activebranch>
    <stylesheet>http://cdn.liblime.com/mylibrary/branch1-opac.css</stylesheet>;
  </opac>
  <opac hostname="branch2.mylibrary.kohalibrary.com">
    <default_search_limit override="1">branch:BRANCH2</default_search_limit>
    <activebranch>BRANCH2</activebranch>
    <stylesheet>http://cdn.liblime.com/mylibrary/branch2-opac.css</stylesheet>;
  </opac>
  <opac hostname="*.mylibrary.kohalibrary.com">
    <stylesheet>http://cdn.liblime.com/mylibrary/other-opac.css</stylesheet>;
  </opac>
  <opac hostname="">
    <stylesheet>http://cdn.liblime.com/mylibrary/default-opac.css</stylesheet>;
  </opac>
</opachosts>
```

Patrons who navigate to branch1.mylibrary.kohalibrary.com will by default search for matching items only within branches who are members of the MAIN_BRANCH_GROUP search category.

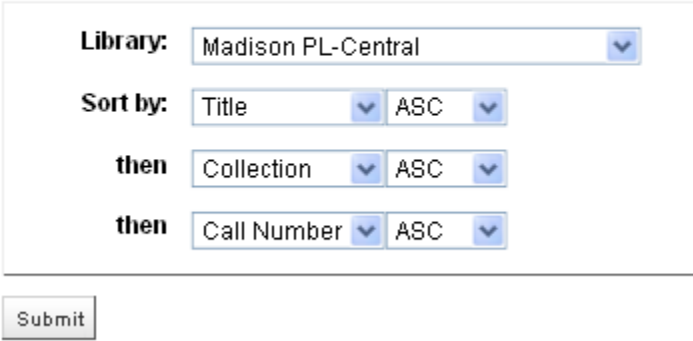
If there's no default defined for the URL, Koha will search without regard to this constraint, defaulting to the "Any Library" option.

7 Reports

7.1 Ability to sort Holds Queue report

The Holds Queue report now features tiered sorting. Users can select up to three fields to sort by (ascending or descending) before submitting the report. The possible sort fields are: title, collection, location, call number, barcode, patron, and date [See Figure 7.1.1 below]. Once the report has been run, users can click the blue X's in each column heading to delete the column from view. When the report is run again, any deleted columns will reappear [See Figure 7.1.2 below].

Holds Queue



Library: Madison PL-Central

Sort by: Title ASC

then Collection ASC

then Call Number ASC

Submit

Figure 7.1.1 - Holds Queue report sorting

Holds Queue

Showing 347 items found for Baraboo Library (BAR)

Title 	Collection 	Location 	Call Number 	Barcode 
1001 great ideas for teaching and raising children with autism or Asperger's / Notbohm, Ellen. Future Horizons, Inc., , 2010 : xxiv, 364 p. ; 23 cm. ISBN: 9781935274063 (pbk.) 1935274	BKANF	AD	618.9 NOT	<i>Selected copy:</i> 39078068427617

Figure 7.1.2 - X's in column headers of Holds Queue report to delete columns

8 Fixes and Functionality Enhancements

8.1 Administration

- 8.1.1** Changes not being saved to Libraries and Groups data
Some fields in the branch editing screen on the Libraries and Groups page were not being saved to the database. This patch adds the additional table columns to the SQL update.
- 8.1.2** ISBN-13 Support for Amazon book covers
Amazon book covers were not displaying if the first ISBN was an ISBN-13. This patch adds support for ISBN-13 with Amazon book covers.
- 8.1.3** Receipt Templates fixes
This fix adds the ability to use the borrower fields outside for issue loops and to correct the truncation feature. The truncation feature had a bug causing all truncated fields to be replaced with the truncated text of the first field.
- 8.1.4** SIP2 Fixes
Various fixes to SIP2 were included in this release. The fixes include allowing patrons to make payments to their accounts via a self-check machine, providing appropriate barcode information for unfilled title-level holds for Talking Tech, and adding timeouts to the SIP2 server and third party equipment if it's been idle for a predetermined amount of time.
- 8.1.5** Various cleanups related to Plack support.
- 8.1.6** Show code version in about.pl.
- 8.1.7** 13265921 Non-disruptive setting of 008 field in batch import -- fixes problem of being unable to stage records that do not have a tag 008.
- 8.1.8** Fix for bug in library set up (administration) where data was not being saved.
- 8.1.9** 13339445 Fix to database update scripts.
- 8.1.10** 13337055 Add Trace to LOST authorized values as mandatory install.
- 8.1.11** 13590281 Comment out broken syspref ReservesNeedReturns.

8.1.12 15409175 Fixes problem of receipt template permissions. Staff users with the receipt template permissions who did not have the top-level “Tools” permission were not able to access the Receipt Template Manager.

8.2 Circulation

8.2.1 Barcode scanning bug on main check in screen

The “Enter Item Barcode” field on the Check In page was not submitting scanned barcodes appropriately (when the scanner is programmed to force Enter at the end of the barcode). This fix ensures that scanned barcodes are submitted without having to click the “Submit” button.

8.2.2 Advanced patron search

Searches in the Advanced Patron Search were restricted to the user’s active branch by default. This has been fixed and it now defaults to a more reasonable expectation of only limiting the search by the explicitly chosen criteria.

8.2.3 Work libraries field for item ownership

The work libraries field (in relation to the item ownership feature) was looking at the Current Location field to determine rights to edit items. It now looks at the Permanent Location field (which is the owning library), so libraries can edit their items even when the Current Location of the item is different.

8.2.4 Permissions to access the Lost tab in patron record

Previously, users needed all permissions in the “borrowers” permissions category to access the Lost tab in the patron record. This has been relaxed so that users only need the *edit_borrowers* sub-permission.

8.2.5 12895645 Fix for patrons being charged a duplicate maximum fine when items formerly lost are returned.

8.2.6 12950597 Adjustment to messaging so that when an item on hold is checked out to another patron - a canceled hold does not deliver a canceled hold notice.

8.2.7 Additional tweaks to the TalkingTech MESSAGE file creation.

- 8.2.8** Various fixes related to using the Receipt Templates feature including adding a delay for hold receipts, fixing truncation and adding the ability to use borrower fields outside of Issues Loops.
- 8.2.9** SIP2 modification to Patron Information Response.
- 8.2.10** 12915673 Add scripts to SIP2 to account for idle timeouts.
- 8.2.11** 14884079 SIP2 service crashing on bad items.
- 8.2.12** 9461153 Adjust debt collect script to send desired subject message/ line.
- 8.2.13** 13106067 Pioneer creating child patron doesn't follow user's branchcode.
- 8.2.14** 14125571 Adjust patron display at checkout screen to optimize performance by reducing information displayed.
- 8.2.15** Adjustment to holds rules so that patrons in library can place hold on issues of a serial.
- 8.2.16** 12032171 Adjustment to permissions settings so more circulation reports visible to more staff.
- 8.2.17** 12662367 Change to code so that when changing an item's status to lost - all holds on corresponding bib were not canceled.
- 8.2.18** 12341631 Display adjustment to patron pages to show lost items as desired.
- 8.2.19** 9702831 Fix for barcode format validation.
- 8.2.20** 12666751 Fix for bug causing fatal error when changing an items status from lost to trace.
- 8.2.21** 13051737 Fix for debt collect scripts to ignore old debts.
- 8.2.22** 13369467 Fix for fatal error received when paying a fine.
- 8.2.23** 12421573 Fix for payment button.
- 8.2.24** 14292015, 9049487 Fix for specify date due not working as desired.
- 8.2.25** 12610261 Fix so that when an item status was set to "parts missing" item is not treated as lost.
- 8.2.26** 11938607 Fix to accommodate scanning of barcode in check in screens.
- 8.2.27** 12478283 Fix to an offline circulation error -- related to handling exceptions.
- 8.2.28** 12004237 Fix to correct a blank patron screen when checking in an item.

- 8.2.29** 15121665 Trillium fix for checking in items. When using a barcode scanner or hitting <enter> to check in an item in IE 7, the item is checked in twice.
- 8.2.30** 12516155 Remove restriction in patron search default restricting the search to the user's active branch. Adjust so it defaults to a more reasonable expectation of only limiting the search by the explicitly chosen criteria.
- 8.2.31** 11178737 Fix for patron search timing out when selecting a letter from the search page.
- 8.2.32** 13318645 Fix to resolve overdue fines being charged twice upon renewal of items.
- 8.2.33** 15484033 Refunds were not charged when a lost item was checked in. This patch corrects the problem.
- 8.2.34** 15169665 Fixes the issue of fines appearing twice in the account tab of the patron record (one with US and one with Canadian dates).
- 8.2.35** 14668229 This patch fixes Pioneer's search group feature. When using the Advanced search in the staff client, the parenthesis were missing from the branches in the search string.
- 8.2.36** 15466993 Debt collect script was updated to work with new fines verbiage.

8.3 Holds

8.3.1 Allowing on-shelf holds requests

This patch should allow a patron to place an in-library hold on a serial item that is checked out if that particular library does not allow on-shelf holds. In addition, a patron could place a serial hold on items that are not held by their particular library branch.

This patch fixes the final bugs in the various available hold (as they pertain to an in-house OPAC determined via IP address) issues. The main bug resulted from not accounting for a specific reserve among a group of reserves on the same bib number. In addition, transfers that were forced were not previously being accounted for. Finally, a data anomaly that resulted in two 999\$c fields being contained in the MARC record is handled via the code in this patch.

8.3.2 Confirm cancelation of waiting holds

When a hold that is "waiting" is canceled a message will now pop-up to confirm that the hold should be canceled. The message is worded as follows: "This is currently on the

hold shelf. Are you sure you want to cancel this hold? Yes No". These messages appear in both the staff client and the OPAC.

8.3.3 Prompt for canceling holds when setting item to damaged

Previously, when the AllowHoldsonDamagedItems system preference was OFF, the system canceled holds silently when an item with holds on it was set to damaged. This patch adds two prompts for staff in varying situations:

If an item that has an item-specific hold on it is set to damaged, when the staff member saves the status change, they will see the following message: "This item has holds. Setting this item to Damaged cancels current item-level holds." The staff member can click "Cancel Hold(s) and Set Status" to continue, or they can cancel the action and retain the holds.

If the last item on a bibliographic record is set to damaged, the staff member will receive the following message upon saving the status change: "This item has holds. Setting this item to Damaged cancels current item-level holds. This is the only item in this bibliographic record. Setting this item to Damaged also cancels any title-level holds."

8.3.4 Holds queue report

A bug allowing checked out, in-transit and waiting items to appear on the Holds Queue Report has been fixed.

8.3.5 12173157 Adjustment to hold queue report so that items on hold are not listed.

8.3.6 13229501 Adjust messages displayed when an item on hold is checked in. Previously, when a Lost Item was checked in and the item was trapped for a hold, two pop-up messages appeared on the screen. The top message asked if you want to remove the lost item from <Patron 1> record; the second pop-up was the Hold Found pop-up and asked you to Confirm, Print Slip and Confirm or Ignore the hold. When you clicked Yes to answer the Lost item pop-up, BOTH messages disappeared from the screen and the hold was not trapped for <Patron 2>.

8.3.7 8315135 Response time work related to searching items with many holds.

8.3.8 13635531 Adjustment to holds queue so that Waiting and In Transit items don't appear on the holds queue report.

8.3.9 14224529 Adjust holds queue and rules so that an item placed on hold THEN made not for loan does not display on holds queue report.

- 8.3.10** 13171283 Removes suspended holds from Holds Queue, and also removes item from Holds Queue upon checkout.
- 8.3.11** 12657687 Adjust holds queue so that items in transit are not displayed.
- 8.3.12** 12383855 Adjust holds queue so that items that are issued are not displayed.
- 8.3.13** 13264053 Hold status display problem. Fixes problem of: On a title's Holds tab, after you search your patron, if you select an item-specific hold and place it, the status display in the items table on the holds tab immediately changes to On hold for [patron] expected at [pickup branch] since [current date]. Also makes other tweaks:
- don't display cancel confirm popup for normal priority holds
 - tweak popup for waiting and intransit holds upon wanting to requeue or cancel hold
 - for intransit item, don't display empty waitingdate, display branch needing to pull
 - allow cancelling of intransit hold
 - upon requeueing intransit hold, pass pickup branch info"
- 8.3.14** 12375049 Adjust OPAC display so that a suspended hold appears only in the suspended hold tab and not on the main hold tab.
- 8.3.15** 12519363 Hold Shelf Action report still tied to permissions instead of circulate -- staff can now run this if they have the reserveforothers permissions, even if they don't otherwise have report permissions.
- 8.3.16** 11076077 Change code so that when an item is marked damaged holds on said item are removed.
- 8.3.17** 13282075 Enhancements to the hold shelf action display - enhance Hold Shelf Action display - get rid of some columns; - show title parts 245 \$a, b, h, n, p; add barcode, ccode, itemcallnumber.
- 8.3.18** 13450759 Implement itemstatus.holdsfilled -- allow setting in Other Item Status admin for whether an item in this status can be selected to fill a hold. If not, exclude it from the Holds Queue.
- 8.3.19** 13906693 Fix for bug that caused all items on a bib to show as "on hold" if one item on bib was on hold.
- 8.3.20** 13906693 Fix for bug that caused all items on a bib to show as "on hold" if one item on bib was on hold.
- 8.3.21** 11926695 Fix for duplicate entries on holds queue report.

- 8.3.22** 12261467 Fix for fatal error received when working with hold queue report.
- 8.3.23** 12228287 Fix so that title level holds display on bibliographic record display.
- 8.3.24** 11076475 Fix to make suspended holds visible in the staff client.
- 8.3.25** 13283683 Fix to display the hold shelf expiration date on the hold available for pick up notice.
- 8.3.26** 12657687 Fix to remove holds that are in transit from holds queue report.
- 8.3.27** 13859777 Picking up hold item at different location -- fix for problem of: customer has placed a Hold on an item and then goes to a different branch than the designated pick-up location and finds a copy of the same item -- Cancel Reserve check box not always working.
- 8.3.28** 10457101 When a hold that is “waiting” is canceled from the patron record details and check out screens, as well as the list of items and the existing holds list on the bib record holds screen, a message should pop-up to confirm that the hold should be canceled. It should be worded as follows: “This is currently on the hold shelf. Are you sure you want to cancel this hold? Yes No” This message in the OPAC should also use this wording.
- 8.3.29** 14997333 Fix a problem in re-queuing holds after unexpected checkin message. Holds were re-queued as item-level holds rather than bib-level.

8.4 Cataloging

8.4.1 Move items duplication

The move items feature was duplicating items instead of moving them. Error checking has been built into the process to strip out leading and trailing spaces/tabs before checking to see if the item is a duplicate barcode.

8.4.2 Spine labels splitting

Spine labels were not splitting call numbers at the appropriate place - they were appearing all on one line. A fix has been added which lets users select from several options (LCCN, DDCN, Custom and None) for call number splitting.

- 8.4.3** 13461471 Batch export bibliographic records by call number range -- fixes problem with exporting records by call number range.

- 8.4.4** 13963729 Change code so that an item checked out cannot be deleted.

- 8.4.5** 12157225 Adjustment so that when an item is moved from one bib to another, it is moved not copied.
- 8.4.6** 12147553 Adjustment to logs so that moving an item from one bib to another is recorded.
- 8.4.7** 13104137 Creating then deleting an item doesn't remove from zebra index on current title -- forces index update to get rid of the item in the index.
- 8.4.8** 5928993 Fix for date ranges when printing spine label batches.
- 8.4.9** 11980907 Fix for batch edit item (basis community version).
- 8.4.10** 12466205 Fix for editing an item so that permission for libraries to edit their own materials based on Permanent Location, not Current Location of item.
- 8.4.11** 10319253 Fix to marc import profile.
- 8.4.12** 13091533 Fixes the auto-barcode functionality so that when you Add + Duplicate, a barcode is not generated when the system preference is off.

8.5 OPAC

- 8.5.1** Include external CSS sheets in OPAC even if not logged in
External stylesheets were not applying correctly on the patron login screen. This patch includes external style sheets even when the patron is not logged in.
- 8.5.2** [search performance] Eliminate duplicate item details collection in OPAC.
- 8.5.3** Fix XSLT linkage to title detail view item icons.
- 8.5.4** 12473159 OPAC and staff availability doesn't show items if 856 present -- if a title had both an 856 URL and a physical item attached, the results list only showed the URL. Fixes the display to show both.
- 8.5.5** 12095407 Tag Cloud Issue manifested in tags not displaying in OPAC -- fixes problem of records not displaying when tag is searched.
- 8.5.6** 11499589 Adds support for ISBN13 with Amazon book covers.
- 8.5.7** 12094305 Fix so multi-URLs apply style sheets to all pages.

8.5.8 15351769 Fixes a problem where SCLS was unable to suspend holds with a resume date in November.