



Release Notes – Harley

The Harley release is based on the latest 3.01 version that we felt was stable (3.01.00.061) plus over 50 features that PTFS has developed for clients and several bugfixes created by other developers in the Koha community. These features have been tested over several months by PTFS customers and are stable. Some of the PTFS-developed features are already in head or have been sent as patches and are awaiting inclusion; others are now released as individual branches to be integrated into head. The Harley version is designed to make these features available to any site who wants them before the full integration takes place.

This document has notes and screen shots showing how to configure and use the new features. It does not include details on every bugfix included in the release (some were cosmetic or minor), but does include significant ones.

Some of these features have seen parallel work by other developers and will need to be reconciled with the release manager before integration into head.

Installation:

You will need the Aspell package installed for the spelling-suggestion feature to work. For Debian Lenny, the command to install that is:

```
$ sudo apt-get install aspell aspell-en libaspell-dev libaspell15 libtext-aspell-perl
```

When Aspell is installed, after installing/updating Koha with the usual web installer process, run the following script:

```
install_misc/ptfs_update.pl
```

to complete your installation. The script will remind you at completion that you will need to modify your Zebra index files and reindex the data for the item suppression feature to work correctly.

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Release Notes – Harley

Administration

New Granular Permissions (Bug 3500)

PTFS has added new granular permissions for staff access. Set these through patron record display, More, Set Permissions. The syspref GranularPermissions must be turned on for the detailed permissions to take effect. As with other permissions, an account with superlibrarian privileges has all rights and does not need individual permission settings.

Circulate books

- (bookdrop) User can activate bookdrop mode in checkin
- (change_circ_date_and_time) User can change circulation checkin date
- (change_due_date) User can specify a due date other than in the circulation rules
- (change_lost_status) User can set the item lost status
- (circulate_remaining_permissions) Remaining circulation permissions
- (exempt_fines) User can activate exempt fines in checkin
- (fast_add) User can use fast add functionality in checkout
- (override_checkout_max) User can override the checkout maximum (NOTE: user needs to click the override message before entering the barcode or trying to check out material.)
- (override_max_fines) User can override block for patron over max fine limit (NOTE: user needs to click the override message before entering the barcode or trying to check out material.)
- (override_non_circ) User can override the not for loan check
- (override_renewals) Override blocked renewals (NOTE: The override is only activated if the barcode is entered via the Circulation checkout box, not via the patron display's checkout history. There it produces a "renewal failed" message.)
- (renew_expired) User can renew an expired borrower in checkout
- (view_borrower_name_in_checkin) User can see the borrower name in checkin
- (view_checkout) view items checked out to a borrower in checkout tab

Add or modify borrowers

- (add_borrowers) User can add a borrower record
- (delete_borrowers) User can delete borrower record
- (edit_borrower_circnote) User can edit the contents of the borrower circulation note
- (edit_borrower_opacnote) User can edit the contents of the borrower opac note
- (edit_borrowers) User can edit borrower record
- (view_borrowers) Access to borrower screens if no other permissions set

Reserve Books For Patrons

- (add_holds) User can create hold requests

- (delete_holds) User can delete hold requests from circulation
- (delete_waiting_holds) User can delete holds that are waiting for pickup
- (edit_holds) User can edit hold requests (including suspend holds)
- (reorder_holds) User can reorder hold requests (requires edit_holds to be set)
- (view_holds) User can view holds (Added because this ability would otherwise be removed if user had no edit/delete permissions)

Edit Catalogue (Modify bibliographic/holdings data)

- (add_bibliographic) Create a bibliographic record
- (add_items) Create or copy a new item
- (delete_items) Delete an item
- (edit_bibliographic) Edit a bibliographic record
- (edit_items) Edit an item record
- (delete_bibliographic) Delete a bibliographic record
- (view) User may view bibliographic title and item info if other permissions are not set

Update borrower charges

- (accept_payment) User can accept payment (including manual credit) from borrower
- (add_charges) Add a charge to a patron record
- (edit_charges) User can change a fee record (controls the Reverse payment function)
- (writeoff_charges) User can write off a charge
- (view_charges) User can view a borrower's fines and charges

Tools

- (batch_edit_items) Governs access to to batch item edit function.

Reports

Multiple Selections in Report Wizards (Bug 3658)

Under Reports, in either Guided Reports or the various Statistics reports, this feature allows staff users to make multiple search selections for fields such as item type, patron category, etc. The selection will appear in a list and you can then make another selection for the same criterion. If you add one by mistake, there is a Remove link. For Guided Reports, proceed through the various selection steps (Build New, Type of Report, etc.) until you get to a screen where you can choose limiting criteria from a pulldown.

Guided report step 4:

Step 4 of 6: Select Limiting Criteria

<input checked="" type="checkbox"/> Item-level Item Type	<div>Select a Item-level Item Type ▾</div> <div><div>JBK</div><div>remove</div></div> <div><div>JPB</div><div>remove</div></div> <div><div>JHB</div><div>remove</div></div>
<input checked="" type="checkbox"/> Type of Event	<div>Select a Type of Event ▾</div> <div><div>issue</div><div>remove</div></div> <div><div>renew</div><div>remove</div></div>
<input type="checkbox"/> Patron Category	<div>Select a Patron Category ▾</div>
<input type="checkbox"/> Branch Code	<div>Select a Branch Code ▾</div>
<input type="checkbox"/> Publication Date	<div></div>
<input type="checkbox"/> Accession Date	<div></div>

Statistics report:

Patrons statistics

Title	Row	Column	Filter
Patron category	<input type="radio"/>	<input type="radio"/>	<div>Select a Category ▾</div> <div><div>Courtesy</div><div>remove</div></div> <div><div>Library Staff</div><div>remove</div></div>
Patron status			<div></div>
Patron activity	<div>1 ▾ years of activity</div>		<div></div>
Zip Code	<input type="radio"/>	<input type="radio"/>	<div></div>
	<div></div> digits		
Library	<input type="radio"/>	<input type="radio"/>	<div></div>
Date of Birth			From <div></div> To <div></div>
Sex	<input type="radio"/>	<input type="radio"/>	<div></div>

Output

To screen into the browser: ☒

To a file: ☐ Named:

Export

 Into an application:

EXCEL ▾

 ;

Submit

Bugfix to Allow User Specified Limit in SQL

Koha had a hard-coded limit of 10,000 lines maximum for report downloads. This bugfix allows users to specify their own (higher) limits if desired, by adding a LIMIT NNNN to the saved SQL statement (where NNNN is the number of lines).

Back Button in Report Creation

PTFS added a Back button to use during the Guided Reports steps to move back to earlier selection screens. (NOTE: at present it is not possible to preserve database field selections (title, surname, etc.) made on the "Information to Display" screen.



Patrons and Holds

Patron Batch Edit and Batch Delete (Bug 3468)

PTFS developed a feature for patron batch editing and deleting. Under patron search results, you can check entries to be added to the Borrower Cart and then click the Add Selected Borrowers to Cart button.

[Borrower Cart 2](#)

[+](#) New ▾

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Results 1 to 25 of 249 found for 'i'

[Add Selected Borrowers To Cart](#)

	<input type="checkbox"/>	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note		
12312459456	<input checked="" type="checkbox"/>	12312459456	IAER, KEYNAR 12459 MAIN ST ANYTOWN, TX 12345	Resident (A)		06/22/2009	0/0	10.00		Add to Cart	Edit
12332862456	<input type="checkbox"/>	12332862456	IAHER, KEYNAR 32862 MAIN ST ANYTOWN, TX 12345	Resident (A)		11/07/2011	0/0	0.00		Add to Cart	Edit
12312285456	<input checked="" type="checkbox"/>	12312285456	IALMISI, AMASDA 12285 MAIN ST ANYTOWN, TX 12345	Resident (A)		10/13/2010	0/0	0.20		Add to Cart	Edit

Clicking on the Borrower Cart link opens the cart:

[Borrower Cart 2](#)

[+](#) New ▾



Borrower Cart

• [Empty Borrower Cart](#)

[Select All](#) [Clear All](#) | Selected items : [Remove](#)

	Card	Name	Cat	Library	Expires on	Circ note
<input type="checkbox"/>	12312459456	IAER, KEYNAR 12459 MAIN ST ANYTOWN, TX 12345	(A)		2009-06-22	
<input type="checkbox"/>	12312285456	IALMISI, AMASDA 12285 MAIN ST ANYTOWN, TX 12345	(A)		2010-10-13	

[Batch Edit Borrowers](#)

[Batch Delete Borrowers](#)

If the Batch Edit button is clicked, after an “are you sure” prompt a screen opens with edit fields:

Batch Edit Patrons

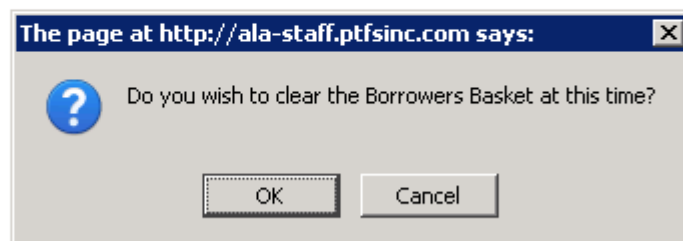
Main address	
Street number:	<input type="text"/>
Address:	<input type="text"/>
Address 2:	<input type="text"/>
City, State:	<input type="text" value="ANYVILLE"/>
Zipcode:	<input type="text"/>
<hr/>	
Contact	
Phone (home):	<input type="text"/>
Phone (work):	<input type="text"/>
Phone (cell):	<input type="text"/>
Email (home):	<input type="text"/>
Email (work):	<input type="text"/>
Fax:	<input type="text"/>
<hr/>	
<input type="checkbox"/> Alternate address	

When the screen is saved, the patrons are edited and the staff user is given the option of emptying the basket:

Batch Edit Patrons

Successfully Updated IAER, KEYNAR (12312459456)

Successfully Updated IALMISI, AMASDA (12312285456)



The process for batch delete is similar; click on the Batch Delete button in the basket. Note that the system will not remove a patron with checkouts. It will remove patrons with holds (and will delete the hold). A new syspref, BatchMemberDeleteFineThreshold, controls deletion of patrons with fines. Set this to a dollar amount; batch delete will remove patrons with fines under that amount but blocks removal of patrons with fines at or over that amount.

After use, a popup appears asking if cart contents should be deleted. With the syspref set to 4.99, two of the deletions in this example are blocked but another with a lower fine amount (\$0.20 -- IALMISI, AMASDA) is allowed:

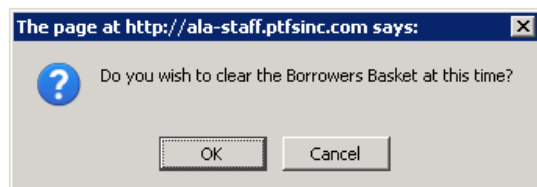
Batch Edit Patrons

Delete Failed: Borrower currently has item issued to his or her account. Borrower currently has fines due on his or her account. BAAH, DASIOL (12331845456)

Delete Failed: Borrower currently has fines due on his or her account. IAER, KEYNAR (12312459456)

Successfully Deleted IAHER, KEYNAR (12332862456)

Successfully Deleted IALMISI, AMASDA (12312285456)



Patron Improved Searching (Bug 3468)

PTFS has added email, phone number, and borrower number to the standard search, and also created an optional SQL patron search to identify patrons meeting specific criteria. There are pulldown options to select searching on email, phone number, or borrower number. Syntax for standard search is unchanged. For email or phone number, use an asterisk (e.g., *555-1212 or *.comcast.net). Note that searching (212) 555-1212 and 212 555 1212 are not equivalent -- you have to search phone numbers as originally created, or truncate to just a part (like *1212*).



The display of the SQL search option is controlled by a syspref, ShowPatronSearchBySQL. The first part of the SQL statement (select * from borrowers etc.) is hardcoded and cannot be removed. To do a SQL search, continue the statement using the same syntax as in a report (e.g., where surname = 'Smith'). The feature will strip out any SQL statement after a semicolon, to guard against additional database manipulation.



Enter patron card number or partial name:

search fields: order by:

[Search Patrons](#) [Check Out](#) [Search the Catalog](#)

[Home](#) > [Patrons](#) Enter first and/or last name or card number for standard search. For email or phone, you may enter partial text with a * for truncation (e.g., myemail* or *111-2222).

[Borrower Cart](#)

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Search borrowers by SQL

SELECT * FROM borrowers LEFT JOIN categories ON borrowers.categorycode = categories.categorycode WHERE borrowers.categorycode = 'C'

[Borrower Cart](#)

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Results 1 to 13 of 13 found for 'SELECT * FROM borrowers LEFT JOIN categories ON borrowers.categorycode = categories.categorycode WHERE borrowers.categorycode = 'C''

	<input type="checkbox"/>	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note		
12307384456	<input type="checkbox"/>	12307384456	DUNLANKI, GAIL 7384 MAIN ST ANYTOWN, TX 12345	Courtesy (A)		05/09/2029	0/0	0.00		Add to Cart	Edit
12308378456	<input type="checkbox"/>	12308378456	FINCHAR, NTASLOU 8378 MAIN ST ANYTOWN, TX 12345	Courtesy (A)		10/12/2024	2/2	10.00		Add to Cart	Edit
12312382456	<input type="checkbox"/>	12312382456	IROSN, PAT 12382 MAIN ST ANYTOWN, TX 12345	Courtesy (A)		12/13/2027	12/12	60.00		Add to Cart	Edit
			KERMEAIS, NHAFES								

Patron Hyphenated Name Searching (Bug 4340)

PTFS developed a fix so that searching for “Brown” will also pick up names like “Smith-Brown” or “M’Brown” – previously, the system would only search for the string at the beginning of the last name field.

Lost Card Tracking (Bug 3469)

This feature allows staff to track multiple card numbers for a patron. When a staff person edits a patron record, changes the card number, and saves the change, the old card number will appear in the Previous Cardnumbers box on the display screen along with the date. Old card numbers

are still searchable. If an old card number is scanned for checkout, a warning about using a lost card appears in red on the checkout screen. If a card is found, it may be returned to active use in the patron record by clicking the Restore button in the Previous Cardnumbers section.

CHAENY AA (LOSTTEST)

7453 MAIN ST
ANYTOWN, TX 12345

Middle Initial(s):

Date of birth: 11/01/1963

Sex: M

[Edit](#)

Additional attributes and identifiers

Type	Value
StIntls (Staff Initials)	3/23/07 DW, 06/20/07 DI, 8/22/08AP

[Edit](#)

Library use

Card number: LOSTTEST

Borrowernumber: 7453

Category: Resident (R)

Registration date: 12/31/2003

Expiration date: 10/25/2011

Library: Anytown Public Library

OPAC login: 12307453456

OPAC password: *****

[Edit](#)

Previous Cardnumbers

12307453456 : 03/3/2010	Restore
-------------------------	-------------------------

Override Max Fines (Bug 3496)

This PTFS feature allows selective overrides of checkouts for patrons who are blocked because of amount owed. Use the new system preference AllowOverrideLogin to determine if staff can override a checkout that would be otherwise blocked because of amount owed (defined in the syspref noissuescharge). If on, and the staff person has the granular permission override_max_fines, an Override button will appear on the checkout tab next to the line about how much is owed in fines. If on, and the staff person does not have that granular permission, an Override Login button will appear on the top menu bar of the patron Checkout tab. A supervisor can use that to enter a login which will make the fine override button appear for that checkout only. Staff can then click the fine override button to proceed with the checkout.

Checking out to DASIOL BAAH (12331845456)

Cannot Check Out!

- › **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- › **Fines:** Patron has [Outstanding fines of \\$172.00](#):
 - › **Replacement fees:** \$161.40
 - › **Overdue fines:** \$0.60
 - › **Other fees:** \$10.00

Checkouts are blocked because fine balance is over the limit. Make [Payment](#)

Track Borrower Changes (Bug 3470)

This feature tracks the staff login id or initials on the borrower registration record and also tracks the staff member involved in changes to borrower record (includes date of record creation or change as well). See Revision History tab at bottom of patron Detail page.

[0 Checkout\(s\)](#) [Fines & Charges](#) [0 Holds](#) [Revision History](#)

Revision History

Staff	Action	Date/Time
31761	MODIFY	2010-03-03 09:22:13

Borrower History Retention (Bug 3471)

Under the Circulation History tab, there are now sections for Reserves and Sent Notices history.

NEPHIA AA (12307454456)

7454 MAIN ST
ANYTOWN, TX 12345

No phone stored.

No email stored.

Category: Resident (R)

Home Library: Anytown Public
Library

Check Out

Details

Fines

Clubs & Services

Circulation History

Modification Log

Messaging

Edit

Add child

Change Password

Print

More

Reading Record

Showing Last 50 Items | [Show All Items](#)

Title	Author	Call No.	Barcode	Number of Renewals	Date Due	Return Date
Cats :	Arnold, Caroline.	636.8 ARN	39344004815350		02/18/2010	Checked Out
Mothstorm :	Reeve, Philip.	YA FIC REEVE	39344008698208	1	12/20/2009	Checked Out
Graffiti world :	Ganz, Nicholas.	751.7309 GAN	39344008742238		12/20/2009	Checked Out

Reserves History

Action	Title	Author	Date
reserve	The laugh out loud guide :	Horn, Charles.	07/29/2009
reserve	11 practice tests for the SAT & PSAT.		07/24/2009
reserve	The official SAT study guide :		07/24/2009
reserve	The official SAT study guide :		07/24/2009
reserve	McGraw-Hill's 12 SAT practice tests and PSAT /		07/24/2009
reserve	McGraw-Hill's SAT /		07/24/2009
reserve	Cracking the SAT /	Robinson, Adam.	07/17/2009

Sent Notices History

Notices	Date
Anytown Public Library Notice	01/20/2010
Anytown Public Library Notice	01/10/2010

Limit On-Shelf Holds (Bug 3508)

PTFS added a function to limit the number of on-shelf holds a patron can place in one day. Set the new syspref MaxShelfHoldsPerDay to the desired number; in staff and OPAC modes up to that many on-shelf holds can be placed per patron per day. A message will appear if you try to place more than that number. Staff may override the message and place additional holds for a patron; patrons will be unable to place more holds in the OPAC. (Also see the instructions below for Maximum Fines, Maximum Holds, and Editing of Circulation Rules feature.)

Maximum Fines, Maximum Holds, and Editing of Circulation Rules (Bug 3507)

PTFS added three new system preferences and made changes in circulation rules to allow more control over fines and holds:

- UseGranularMaxFines (if enabled, this allows you to define the maximum fine charged for an item by a combination of itemtype and patroncategory in the circ rule)
- UseGranularMaxHolds (if enabled, this allows you to define the maximum number of holds by a combination of itemtype and patroncategory in the circ rule)
- WarnOnlyOnMaxFine (if UseGranularMaxFines and WarnOnlyOnMaxFine are both enabled, popup fine warnings at checkout will only occur when the fine for an item hits the max fine attribute set in the circ rules).

In circulation rules, click the Edit link -- this will copy the values from that line into the editing line at the bottom. Enter desired values into the new columns Max Accruable Fine Per Issue and Max Number of Holds, and click the Update button to save the changes.

If on-shelf holds are allowed and the MaxShelfHoldsPerDay syspref is set, the number in the max holds setting in the circ rule will override that syspref setting. For example, if MaxShelfHoldsPerDay is five and the circ rule max hold setting is three, the patron will be unable to place more than three on-shelf holds *for that item type*; the patron can place two more on-shelf holds for a different item type. NOTE: If the new suspend holds feature is implemented, and there are suspended holds for the item types with max hold settings, those suspended holds will not be counted in the number of allowable holds.

Patron Category	Item Type	Fine Amount	Fine Grace Period	Fine Charging Interval	Current Checkouts Allowed	Loan Period	Max Accruable Fine Per Issue	Max Number of Holds		
Default	Adult Paperback	0.10		1 day(s)	Unlimited	day(s)	\$3.00	200	Edit	Delete
Default	Computer Software	1.00		1 day(s)	Unlimited	14 day(s)	\$5.00	200	Edit	Delete
Default	Magazine	0.10		1 day(s)	Unlimited	21 day(s)	\$3.00	200	Edit	Delete
Default	Movies/TV Shows	1.00		1 day(s)	Unlimited	14 day(s)	\$5.00	200	Edit	Delete
Default	New Book	0.20		1 day(s)	Unlimited	21 day(s)	\$5.00	200	Edit	Delete
Default	New Childrens Movie	1.00		1 day(s)	Unlimited	14 day(s)	\$5.00		Edit	Delete
Default	New Movie	1.00		1 day(s)	Unlimited	3 day(s)	\$5.00		Edit	Delete
Default	Rental Book	0.30		1 day(s)	Unlimited	21 day(s)	\$10.00		Edit	Delete
Default	Video Game	1.00		1 day(s)	Unlimited	14 day(s)	\$5.00	200	Edit	Delete
Default	Young Adult Paperback	0.10		1 day(s)	Unlimited	21 day(s)	\$3.00	200	Edit	Delete
Default	Youth Services Holiday Paperbacks	0.10		1 day(s)	Unlimited	21 day(s)	\$3.00	200	Edit	Delete
Default	Youth Services Paperbacks	0.10		1 day(s)	Unlimited	21 day(s)	\$3.00	200	Edit	Delete

In staff mode, a warning pops up when staff try to place a hold for a patron:

Cannot Place Hold

- **Too Many Shelf Holds Today:** _____ has placed too many holds in one day for bibs with at least one available item.

In the OPAC, a patron will see a similar warning if the total number of on-shelf holds is reached:

Sorry, you cannot place more than 5 holds on available items in a single day.

Or if a particular item type's max hold setting is reached:

Sorry, you cannot place any more holds on this item type.

Predefined Borrower Notes (Bug 3472)

Instead of using the staff/opac notes field in the patron record, this PTFS feature uses a separate messaging system and table. For predefined notes, create (if necessary) authorized value category BOR_NOTES and add entries (e.g., "You left your umbrella at the library"). On the Checkout tab of patron record, click Add A New Message. Select from the pulldown whether it's intended for patron or library staff. You can either use the pulldown for a canned message or enter a free text message in the field. Save the message. Notes to library staff will show up on the patron record's Checkout tab; notes to patron will show in both the staff Checkout tab and in the patron's OPAC login. When a message has been created, there will be a link next to it to delete it.

Message for other staff (using predefined note):

Leave a message

Add a message for:

Other Librarians

Predefined notes:

Proof of Address Req

Select Note
Message
Claimed Return Not Found
Email Correction Requested
Exempt from Debt Collection
Force to Debt Collect
Proof of Address Required
Request Pickup Authorization
Used Drivers License

Visible on checkout tab:

Attention:

Messages:

> 03/03/2010 "Proof of Address Required" [Delete]

[Add a new message](#)

Message for patron (using free text entry):

Leave a message

Add a message for:

PTFS

Predefined notes:

Select Note

You left your umbrella in the library

Save

[Cancel](#)

Visible in OPAC:

Messages For You

- **You left your umbrella in the library**





Written on 03/03/2010 by Anytown Public Library

Expired/Cancelled Holds Report and Setting Expiration Dates (Bug 3474)

Koha had no mechanism for removing holds from the table once they had expired or been cancelled, and expiration dates were calculated on the fly based on the value in the ReservesMaxPickUpDelay syspref. PTFS added a field named expirationdate to the reserves and old_reserves tables. When a hold is triggered, the expiration date is calculated based on the syspref and is recorded in the new field. The system will check the library calendar and will not set a hold expiration date on a closed date. We wrote a script (misc/cronjobs/holds/expireholds.pl) which should be run nightly to clear expired holds from the active table based on this expiration date field.



Once holds have expired or been cancelled, library staff need an easy way to know which items to pull from the hold pickup shelf. We wrote two reports, Expired Holds and Cancelled Holds (found under the Reports section). These are identical except for checking naturally expired holds versus actively cancelled ones. (The function had to be split into two reports because of the complicated queries needed to pull the data.)

Expired Holds

Patron Last Name (leave blank for all patrons):	<input type="text"/>
Hold placed after:	<input type="text"/> 
Hold placed before:	<input type="text"/> 
Expiration date:	<input type="text"/> 
Library:	<input type="text" value="Any Library"/> 

Output

To screen into the browser: ☒

To a file: ☐ **Named:** **Into an application:**  

Expired Holds

Title	Last Name	First Name	Date Expired	Library
Cracking the SAT /	AA	NEPHIA	2009-08-02	Anytown Public Library
The official SAT study guide :	AA	NEPHIA	2009-08-02	Anytown Public Library
11 practice tests for the SAT & PSAT.	AA	NEPHIA	2009-08-02	Anytown Public Library
McGraw-Hill's SAT /	AA	NEPHIA	2009-08-09	Anytown Public Library
McGraw-Hill's 12 SAT practice tests and PSAT /	AA	NEPHIA	2009-08-09	Anytown Public Library

We have also made improvements to the holds to pull report, adding author, collection code, and (when item-specific hold) barcode to the output:

Pending holds placed between 02/01/2010 and 02/02/2010

Reported on 02/02/2010

The following holds have not been filled. Please retrieve them and check them in.

Pull This Many Items	Items Available	Patrons with Holds	Title	Author	Collection Code	Barcode	Libraries	Available Call Numbers	Available Itypes
1	1	1	You've been warned.	Patterson, James,	Large Print		PL	L FIC PATTERSON	BK
1	1	1	One thousand white women Subtitle on container: Te journals of May Dodd : a novel. Complete & unabridged. Compact disc.	Fergus, Jim.			PL	813/.54	APB PR
1	2	1	Fire and ice (bk. 2) / Originally published: New York : HarperCollins, c2003.	Hunter, Erin.	Youth Services Animals Paperbacks		PL	RED DOT PAPERBACK (W) BLACK DOT PAPERBACK 6	JPB

Display of Hold Expiration Date (Bug 3474)

When a hold is triggered and the expiration date set as above, PTFS added that date to both staff and OPAC displays.

OPAC display:

Holds (2 total)

Title	Placed On	Expires On	Pick Up Location	Priority	Status	Cancel	Suspend
The Civil War in the words of its greatest commanders.	02/23/2010	03/13/2010	Anytown Public Library		Item waiting at Anytown Public Library	<button>Cancel</button>	Items waiting cannot be suspended.
Scott standard postage stamp catalogue.	03/06/2010		Anytown Public Library	2	Pending	<button>Cancel</button>	<button>Suspend</button> Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)

Allow Multiple Holds on Items for One Title (Bug 4239)

Koha does not normally allow the same patron to place holds on more than one item on the same title. PTFS developed a feature to allow this for specified item types such as serials or multi-volume DVDs. Enter a list of item type codes (like "PER JPER") in the new syspref AllowMultipleHoldsPerBib. The list must be surrounded by double quotes.

Preference ▼	Explanation	Value	Edit	Delete
AllowMultipleHoldsPerBib	This allows multiple items per record to be placed on hold by a single patron. To enable, enter a list of space separated itemtype codes in the field (i.e. "MAG JMAG YMAG"). Useful for magazines, encyclopedias and other bibs where the attached items are not identical.	<input type="text" value="AMD BK-MVOL"/> <input type="button" value="Save"/>	Edit	Delete

Patrons or staff will then be able to place multiple holds on a specific copy of a title matching those item types. Other item types will still block more than one hold per title.

Checked Out

Overdue

Fines

Holds

Holds (2 total)

Title ▾	Placed On ▾	Expires On ▾	Pick Up Location ▾	Priority	Status ▾	Cancel ▾	Suspend ▾
Southwest art.	03/06/2010		Public Library	1	Pending	Cancel	<div>Suspend</div> <div>Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)</div>
Southwest art.	03/06/2010		Public Library	2	Pending	Cancel	<div>Suspend</div> <div>Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)</div>

Suspend and Reactivate Holds (Bug 3488)

Patrons frequently ask to suspend holds while on vacation. This PTFS-developed feature allows either patrons or staff to suspend a hold and either reactivate it manually or on a specified date. To suspend one, click the Suspend link in the list of holds. The suspended holds retain their number in line. An unsuspended hold with a priority of 3 would resume being a priority of 3, unless there are fewer holds than that, in which case it will go to the end of the queue. The feature does not allow holds that are waiting for pickup to be suspended. Staff or patrons may add a date to resume holds; this requires the nightly cronjob of resume_suspended_reserves.pl to reactivate holds.

OPAC display:

Checked Out

Holds

Holds (2 total)

Title ▾	Placed On ▾	Expires On ▾	Pick Up Location ▾	Priority	Status ▾	Cancel ▾	Suspend ▾
The Civil War in the words of its greatest commanders.	02/23/2010		Anytown Public Library	1	Pending	<div>Cancel</div>	<div>Suspend</div> <div>Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)</div>
Scott standard postage stamp catalogue.	03/06/2010		Anytown Public Library	2	Pending	<div>Cancel</div>	<div>Suspend</div> <div>Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)</div>

Suspended Holds (2 total)

Title	Placed On	Pick Up Location	Priority	Resume On	Resume Now
Tales from a darker state:	02/23/2010	Anytown Public Library	1		<div>Resume</div>
Architectural digest.	03/06/2010	Anytown Public Library	1	03/15/2010	<div>Resume</div>

Hold Display Status (Bug 4243)

In response to concerns about on-hold items showing as available, PTFS modified both staff and OPAC displays. When a hold is triggered both staff and OPAC will show the status as Unavailable in the results list. In the record detail page, the item will show as on hold if it's an

item-specific hold, or the page will say how many holds there are if they are next-available-copy holds.


Staff results list display:

1. [The lost symbol](#) /


[Brown, Dan](#) Doubleday, Description: ; New York : , 2009 : 509 p. ; ; 25 cm. ISBN: 0385504225 New Book

27 items, None available

20 on loan:

 Anytown Public Library [\[FIC BROWN\]](#) (1) date due: 12/05/2009

7 unavailable:

 Anytown Public Library Shelving Cart [\[FIC BROWN\]](#) (On hold) (, , , ,) (5)

[Holds](#)

Staff title display:

New Book	Anytown Public Library In Processing	New Fiction (adult)	FIC BROWN	Checked out to : due 12/16/2009	11/25/2009	39344008748144
New Book	Anytown Public Library In Processing	New Fiction (adult)	FIC BROWN	Checked out to : due 11/06/2009 Lost	10/16/2009	39344008747658
Rental Book	Anytown Public Library In Processing	Rental Book	FIC BROWN	Checked out to : due 11/10/2009 Lost	11/09/2009	39344008747724
Rental Book	Anytown Public Library In Processing	Rental Book	FIC BROWN	Checked out to : due 11/27/2009	11/25/2009	39344008747732


Total holds: 211

Items with "On hold" status are item specific holds.

OPAC results list display:

[The lost symbol](#)

by Brown, Dan .


Type:  Book; Format: print ; Literary form: novel

Publisher: Doubleday, 2009.

Availability: No copies available **Checked out (20). Lost (2). On hold (5).**

Actions:  [Place Hold](#) [Save to Lists](#)  [Add to Cart](#)

OPAC title display:

 New Book	In Processing	New Fiction (adult)	FIC BROWN (Browse Shelf)	Checked out	11/06/2009
Rental Book	In Processing	Rental Book	FIC BROWN (Browse Shelf)	Checked out	11/10/2009
Rental Book	In Processing	Rental Book	FIC BROWN (Browse Shelf)	Checked out	11/27/2009

Total holds: 211

Items with "On hold" status are item specific holds.

Place Hold Option on Checkout Tab (Bug 3659)

On the checkout tab of a patron record, PTFS has added a Search to Hold section with a Search link, to make placing holds for that patron easier. Click that link and a popup window allows you to do a search.


Clear Screen

Checking out to LIAT MISTA
(12318893456)

Enter item barcode:

Check Out

Specify Due Date:


 Remember for Session: ☐

Clear

Search To Hold

Popup search screen:

Search To Hold

 Close

Advanced Search

Search For:

Keyword

state

Scan Indexes

and

Keyword








and

Keyword

[+]

Search [\[Fewer Options\]](#) [\[New search\]](#)

Limit to any of the following:

 Paperback <input type="checkbox"/> Adult	 Audiobook <input type="checkbox"/> Audiobook	 Book <input type="checkbox"/> Book	<input type="checkbox"/> Book- Multiple volumes
 Audiobook <input type="checkbox"/> CD	 Software <input type="checkbox"/> Computer	 ESL <input type="checkbox"/> ESL	 music CD <input type="checkbox"/> Holiday

The results list for that search has a "place hold for patronname" link; if you select a particular title, the "place hold" link is there as well. Clicking that button will bring up the hold screen for that title, with the patron's name filled in. Click Place Hold to complete the hold, then close the popup window. If desired, refresh the patron display to update the hold list.

Results list:

1. **Tales from a darker state:** Stories of terror and suspense from The Garden State Horror Writers.

Garden State Horror Writers, Description: ; New Jersey: , 2003 : 192 p.; 21 cm. ISBN: 1930997221

Hold for LIAT MISTA

1 item, None available
1 on loan:
 Anytown Public Library [\[FIC TAL\]](#)
 (1) date due: 02/25/2010

[Holds](#)

Title display:

Tales from a darker state: Stories of terror and suspense from The Garden State Horror Writers.

- **Published by:** [Garden State Horror Writers.](#) (New Jersey:)
- **Description:** 192 p.; 21 cm.

- **ISBN:** 1930997221
- **Subjects:**
 - [Horror tales, American](#)
 - [New Jersey horror short stories.](#)
- **Copyright:** 2003

Hold for LIAT MISTA

Hold Policies by Patron Category (Bug 3491)

Previous changes to the circ rules allowed an overall setting; PTFS added a field to specify whether holds are allowed from any library, from the user's home library, or not allowed at all for any patron category/item type combination.

Select a library :

Patron Category	Item Type	Fine Amount	Fine Grace Period	Fine Charging Interval	Current Checkouts Allowed	Loan Period	Hold Policy	
Student	Default	\$1.00		1 day(s)	10	7 day(s)	No Holds Allowed	Delete
Teacher	Books	\$0.00			2	7 day(s)	No Holds Allowed	Delete
Default	Default	\$1.00		1 day(s)	25	7 day(s)	No Holds Allowed	Delete
<input type="text" value="Default"/>	<input type="text" value="Default"/>	\$ <input type="text"/>	<input type="text"/> day(s)	<input type="text"/> day(s)	<input type="text"/>	<input type="text"/> day(s)	<input type="text" value="From Any Library"/>	<input type="button" value="Add"/>

Fees for Holds (Bug 3492)

This PTFS-developed feature allows charging a hold fee by item type, not just patron category. Set the hold fee in the item type.

Modify Item Type

Item type

DVD

Description

Movies/TV Shows

Image:

Item type images are disabled. To enable them, turn off the [noItemTypelImages system preference](#)

Not for loan

☐ (if checked, no item of this type can be issued. If not checked, every item of this type can be issued unless notforloan is set for a specific item)

Not for hold

☐ (if checked, no item of this type can be used to fill a hold.)

Renewals:

3

Rental charge:

2.00

Hold fee:

1.00

Summary:

Enter a summary that will overwrite the default one in search results lists. Example, for a website itemtype :
open site will show the link just below the title

Save Changes

[Cancel](#)

When a hold is triggered for a patron, the charge should show immediately on the patron record.
NOTE: If both the item type and the patron category have hold fees, the fees will be combined into one total (e.g., 1.00 on item type and .50 on patron category will result in a hold fee of 1.50). If the item type also has a rental charge, that will be charged at checkout.

Fine list entry:

03/04/2010	Reserve Charge - Boogeyman	1.00	0.00
03/04/2010	Rental View item Daughters of the sun	2.00	0.00

Turn Off Various Hold Trigger Buttons if Desired (Bug 3693)

Some libraries do not want staff to have the option of one or more of the buttons that normally display when a hold is triggered. For example, the site may want to force staff to always use

Print Slip and Confirm rather than just Confirm. This PTFS-developed feature adds new sysprefs HoldButtonConfirm, HoldButtonPrintConfirm, and HoldButtonIgnore to toggle on or off the display of the buttons Confirm Hold, Print Slip and Confirm, and Ignore when a hold is triggered.


HoldButtonConfirm	Display Confirm button when hold triggered. Leave either this setting or HoldButtonPrintConfirm on.	<input checked="" type="radio"/> ON <input type="radio"/> OFF <input type="button" value="Save"/>
HoldButtonIgnore	Display Ignore button when hold triggered.	<input checked="" type="radio"/> ON <input type="radio"/> OFF <input type="button" value="Save"/>
HoldButtonPrintConfirm	Display Confirm and Print Slip button when hold triggered. Leave either this setting or HoldButtonConfirm on.	<input checked="" type="radio"/> ON <input type="radio"/> OFF <input type="button" value="Save"/>


Hold Found: [Scott standard postage stamp catalogue.](#)


Hold for:

- [CET, KITTU](#) (12304056456)
- 4056 MAIN ST
ANYTOWN, TX 12345

Hold at Anytown Public Library

 Confirm hold

 Print Slip and Confirm

 Ignore

Block OPAC Renewals for Excessive Fines (Bug 3493)

This PTFS-developed feature allows libraries to block OPAC renewals if the total owed in fines exceeds a certain level. Set the syspref OPACFineNoRenewals to the desired threshold. With fines below or at that number, patrons can renew through OPAC; above the number, renewals aren't allowed and patron gets a message to that effect.

- **Please note:** Since you have [more than 5.00](#) in fines, you cannot renew your books online. Please pay your fines if you wish to renew your books.

Copy Patron Record (Bug 3475)

This PTFS-developed feature allows staff to take an existing patron record and use it as a template to create a new patron record, copying most information but not the first name or barcode. This is intended to help in adding multiple family members but differs from the existing Add Child function in that it does not assume the new patron is a child, or set guarantor information. With the add_borrower granular permission on, view a patron record and go under More, Copy Patron. The edit screen will display with most information already filled in.

EditAdd childChange PasswordPrintMore

NEPHIA DA BALLIN (12306366456)

6366 MAIN ST
ANYTOWN, TX 12345


Middle Initial(s):
Date of birth: 10/10/2000
Sex: F

Edit

Renew Patron
Set Permissions
Delete
Copy Patron
Update Child to Adult Patron

Borrowernumber: 6366
Category: Resident (R)
Registration date: 11/09/2005
Expiration date: 11/09/2007
Library: Anytown Public Library

Add Adult patron DA BALLIN

Patron identity	
Salutation:	<input type="text" value=""/>
Surname:	<input type="text" value="DA BALLIN"/> <i>Required</i>
First name:	<input type="text" value=""/> <i>Required</i>
Middle Initial(s):	<input type="text" value=""/>
Date of birth:	<input type="text" value=""/>  <i>Required</i>
Other name:	<input type="text" value=""/>
Female <input type="radio"/> Male <input type="radio"/> N/A <input checked="" type="radio"/>	

Main address	
Address:	<input type="text" value="6366 MAIN ST"/> <i>Required</i>
Address 2:	<input type="text" value=""/>
City, State:	<input type="text" value="ANYTOWN, TX"/> or choose <input type="text" value=""/> <i>Required</i>
Zip/Postal code:	<input type="text" value="12345"/> <i>Required</i>

Display Patron Middle Initial (Bug 3478)

This PTFS-developed feature relabels the old Initial field in the patron record to Middle Initial, and displays the middle initial in search results and on the patron display. Display is controlled with the syspref DisplayInitials.

Modify Adult patron DOBRA FADCHIS

Patron identity	
Salutation:	<input type="text" value=""/>
Surname:	<input type="text" value="FADCHIS"/> <i>Required</i>
First name:	<input type="text" value="DOBRA"/> <i>Required</i>
Middle Initial(s):	<input type="text" value="Q."/> <input type="text" value=""/>

Patron search results:

[FADCHIS, DOBRA Q.](#)
8085 MAIN ST
ANYTOWN, TX 12345

Circulation, Checkout search results:

[Home](#) > [Circulation](#) > **Checkouts**

 New ▼

Patron selection

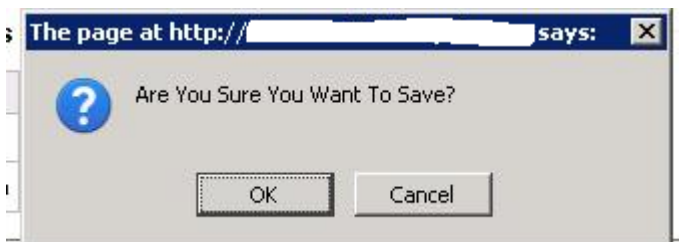
Select a patron:

- FADAR, BARBARA N ...
- FADARICO, ASTHESU ..
- FADARICO, KRINTIS ... (
- FADARICO, RENALIO ...
- FADCHIS, DOBRA Q. ...
- FADONH, JOSSA ... (123
- FADONH, RUAS ... (123C
- FADONH, RUAS ... (123C



Prompt to Save Patron Edits (Bug 3479)

This PTFS-developed feature prompts a staff person to confirm changes when a patron record is edited.



Lost, Claims Returned Displays on Patron Record (Bug 4241)

For this PTFS feature, if the syspref MarkLostItemsReturned is on, lost items will be discharged from the patron. Otherwise, lost items will remain checked out to the patron. Both lost and claims returned items will show on the patron Details tab in a brief display, with the replacement cost and barcode links to the title record(s).

Lost: [581003557279](#) (total: \$25.95)

Claims Returned: [581003734209](#) (total: \$23.95)

Fines

Partial Fine Payment (Bug 3498)

This PTFS-developed feature allows patrons to make partial payments of outstanding charges, rather than paying all or nothing. With the accept_payment granular permission on, go to a patron record's Fines tab, Pay Fines. You can click Pay next to a particular fine; this will take you to another screen where you can enter (if desired) a partial amount to be paid against that fine. Click Confirm to make the payment.

Alternatively, on the Pay Fines tab, click Pay Amount at the bottom of the screen. This will take you to another screen where you can enter a partial payment to be deducted from the total amount owed. If this approach is used, the payment will be applied in order (from the top down) to the entries in the fine list.

For Writeoff, with the writeoff_charges granular permission set, on the Pay Fines tab there will be a Writeoff button next to each fine. Clicking it takes you to another screen where you can confirm the writeoff.

[Account](#)
[Pay fines](#)
[Create Manual Invoice](#)
[Create Manual Credit](#)

Fines & Charges	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Pay Writeoff	Mothstorm : 12/20/2009	FU	0	0	5.00	5.00
Pay Writeoff	Graffiti world : 12/20/2009	FU	0	0	5.00	5.00
Pay Writeoff	Cats : 02/18/2010	FU	0	0	1.30	1.30
Sub Total						11.30
Total Due						11.30

[Pay Amount](#)
[Writeoff All](#)
[Cancel](#)

Clicking Pay next to a specific entry:

[Account](#) [Pay fines](#) [Create Manual Invoice](#) [Create Manual Credit](#)

Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Mothstorm : 12/20/2009	FU	0	0	5.00	5.00
Total Amount Payable :		5.00			
Collect From Patron:	<input type="text" value="2.50"/>				
<input type="button" value="Confirm"/> Cancel					

Clicking Pay Amount:

[Account](#) [Pay fines](#) [Create Manual Invoice](#) [Create Manual Credit](#)

Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Mothstorm : 12/20/2009	FU	0	0	5.00	5.00
Total Amount Payable :		5.00			
Collect From Patron:	<input type="text" value="2.50"/>				
<input type="button" value="Confirm"/> Cancel					

Billing Notice and Debt Collection (Bug 3490)

PTFS wrote a feature to send patrons billing notices and then refer them to a debt collection agency if fines are not paid. For the billing notice, create a circulation notice file named BILLING with appropriate text. Turn on the syspref EnableOwedNotification and set the syspref OwedNotificationValue to the desired threshold value (i.e., any total amount owed at or above this level will generate a billing notice). The script amountdue_notices.pl will need to be scheduled to run nightly; it will generate email notices to patrons. 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.

Modify notice

Koha module:

Code: BILLING

Name:

Message Subject:

Message Body:

LibrarianFirstname
 LibrarianSurname
 LibrarianEmailaddress
 ---BRANCHES---
 branches.branchcode
 branches.branchname
 branches.branchaddress1
 branches.branchaddress2
 branches.branchaddress3

>>

```

<<borrowers.firstname>> <<borrowers.surname>>
<<borrowers.cardnumber>>

BILLING NOTICE: Your Library account has a balance due of $25 or more.
Please return overdue item(s) and pay the balance promptly.
If not paid within 21 days of the above date, The Library will send your
account to collections and charge you a $10 service fee.
The Library may also file a complaint against you in Court . The Circulation
Department can answer any questions
you may have. Thank you.

Checked
Out On:      Due Date:
<<items.content>>

```

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. There is a command line option to exclude patrons with notify dates older than a specified number of days. Sample command line options: perl debt_collect.pl --w 21 --to email1,email2 --confirm --ignore LS,SO,ILL --verbose --max-wait 180 The --w option is number of days after billing notice, the --max-wait option says to not notify anyone with a notify date older than number of days specified, and the --ignore option specifies patron categories not to be sent to debt collect (such as library staff).

Calculate Fines on Claims Returned Items (Bug 4236)

PTFS wrote a feature to stop fine accrual on claims returned items. Create an authorized value of type LOST named "Claims Returned". Enter the integer value of that entry into the syspref ClaimsReturnedValue. The fines cron will not accrue fines on items marked claims returned from the date they are so marked until they are checked in.

Authorized values

This table is used in MARC definition. You can define as many categories as you want, and each category.

When you define the MARC subfield structure, you can link a subfield to a category. When modifying a biblio, the subfield is not entered through a free field, but through a category.

Show Category: 

The list of status to describe a lost item

Category	Authorized value	Description	Icon	Edit	Delete
LOST	0			Edit	Delete
LOST	1	Lost		Edit	Delete
LOST	2	Long Overdue (Lost)		Edit	Delete
LOST	3	Lost and Paid For		Edit	Delete
LOST	4	Missing		Edit	Delete
LOST	5	Claims Returned		Edit	Delete

ClaimsReturnedValue	Lost value of Claims Returned, to be ignored by fines cron job	<input type="text" value="5"/> <input type="button" value="Save"/>
-------------------------------------	--	--

Pre-Defined Fee Types (Bug 3476)

This PTFS-developed feature gives staff the ability to define certain standard fees and to use those fees when creating a manual invoice on a patron record. If necessary, create the authorized value category MANUAL_INV (under Administration, Authorized values). Then select MANUAL_INV from the pulldown. Click the new Authorized Value for MANUAL_INV button, and create a new fee type. The authorized values table will not allow identical values even with different descriptions. Enter the fee DESCRIPTION in the value field, and the VALUE in the description field -- the script will switch them into the appropriate place when creating a manual invoice.

Modify authorized value

Category MANUAL_INV

Authorized value

Description

Choose an icon:

[None](#) [bridge](#) [liblime-kids](#) [npl](#)

No image: ☐

[Cancel](#)

To use, go into a patron record and create a manual invoice (on the Fines tab), using that fee type.

[Account](#) [Pay fines](#) [Create Manual Invoice](#) [Create Manual Credit](#)

Manual Invoice

Type:

Barcode:

Description:

Amount:

[Cancel](#)

- Lost Item
- Fine
- Account Management Fee
- New Card
- Sundry
- Computer Class Fee**
- Damaged
- Debt Collection
- Fees
- Full Service Card
- Lost or Damaged
- Lost Dynix
- Addl Purchased Card
- Media Only Card
- Media Fee
- Print Only Card

Fines display:

Account	Pay fines	Create manual invoice	Create manual credit
-------------------------	---------------------------	---------------------------------------	--------------------------------------

Date	Description of charges	Amount	Outstanding
03/03/2010	Computer Class Fee	5.00	5.00
08/28/2006	payment -- Mama rocks Papa sings View item Mama rocks, Papa sings /	1.20	0.00
06/15/2006	payment -- I spy fantasy a book of picture riddles	1.60	0.00
Total due			5.00

List Fines by Type on Checkout Tab (Bug 3484)

If the new syspref CircFinesBreakdown is turned on, this PTFS feature will break down fines by type (Overdue fees, Replacement fees, Reserve Fees, Other, Credit, etc.) on the patron Checkout tab. Otherwise the screen just shows the total amount owed.

Attention:

- › **Overdues:** Patron has **ITEMS OVERDUE**. See highlighted items [below](#)
- › **Fines:** Patron has [Outstanding fines of \\$172.30](#):
 - › **Replacement fees:** \$161.40
 - › **Overdue fines:** \$0.90
 - › **Other fees:** \$10.00

Make [Payment](#)

Messages:

[Add a new message](#)

Block Payment of Outstanding Fines (Bug 3487)

Some libraries want to prevent patrons from paying accruing fines until the overdue item is returned; PTFS developed a feature for this. With the syspref EnableOverdueAccruedAmount on, overdue fines accrue on items checked out but are not payable until the item is returned. Overdue items show on the fines list, but the Pay/Writeoff buttons are unavailable. Payment of accrued fines is allowed when an item is returned or is marked Lost.

Account
Pay fines
Create Manual Invoice
Create Manual Credit

Fines & Charges	Description	Account Type	Notify id	Level	Amount	Amount Outstanding
Pay Writeoff	ILL ITEM : BIOPHYSICS OF COMPUTATION 10/27/2009	F	0	0	1.90	1.90
Pay Writeoff	The lost symbol / 11/06/2009	F	0	0	5.00	5.00
	All you need to know about the music business / 10/27/2009	FU	0	0	1.90	1.90
	All you need to know about the music business / 12/06/2009	FU	0	0	5.00	5.00
Pay Writeoff	Lost Item The lost symbol / 39344008747658	L	0	0	29.00	29.00
Sub Total						42.80
Pay Writeoff	Sent to collections agency - Account Management fee	A	1	0	10.00	10.00
Sub Total						10.00
Total Due						52.80

Pay Amount
Writeoff All
[Cancel](#)

Circulation

Block Checkout of Items on Hold (Bug 3506)

PTFS added a layer of staff control with a feature requiring an override for held items checkout. With the new syspref `DisableHoldsIssueOverrideUnlessAuthorised` turned on, if a staff person tries checking something with a confirmed hold for one patron out to a different patron, a screen will come up asking for an override. The override requires a superlibrarian ID and password. Without the syspref turned on, any staff can override the warning and check the item out to a different patron.

Please Confirm Checkout

- Item is on reserve for 2009-05-13 : Cup CAKE (29344001915072)
- Item (Capitalism and freedom /) checked out to : Peanut Butter CUP (29344001925402). Check in and check out?

Superlibrarian Authorization Required

Username: Password:

☐ Cancel Reserve

Backdate Due Dates (Bug 3499)

Sites occasionally want to set a due date in the past for testing purposes. With this PTFS feature, if the `change_due_date` granular permission is on, set the syspref `AllowDueDateInPast`, then check out an item and use the calendar to set a date in the past.

Change Checkin Date (Bug 3510)

Sites may want to change the checkin date in unusual circumstances (separate from bookdrop checkin). For this PTFS feature, with the `change_circ_date_and_time` granular permission set and the new syspref `AllowCheckInDateChange` turned on, go to the Checkin screen. There will be an option to override check in date; click the calendar gadget and select a new date. Note that this does NOT forgive fines that have accrued.

<p>Check In</p> <p>Enter item barcode: <input style="width: 150px;" type="text"/> <input type="button" value="Submit"/></p>	<p>Options</p> <ul style="list-style-type: none"> • <input type="checkbox"/> Forgive overdue charges • <input type="checkbox"/> Dropbox mode • <input type="text"/> Override Check In Date
--	---

Print Option for Hold and Overdue Notices (Bug 3482)

PTFS has added an option to print hold and overdue notices for patrons who have no email addresses in their records. Any patron with an email address will get an email notice as usually; this feature only applies when no address is present. The overdue notices are an adaptation of the existing overdues cron job; the hold notices require running a new script nightly to gather notices which could not be emailed. For overdues, the same notice text file is used; for holds, a new notice named HOLD_PRINT is needed. In both cases, lay out the notice file to match the format of your mailer (Z-mailer or other), including blank lines and spacing over to an address window. The notice text is wrapped in `<pre>` `</pre>` tags by the script (to preserve formatting) and the output sent to an html file in a web-accessible directory. Staff can then open the file in a browser and send it to print; a page break code forces each notice to print on a new page.

Modify notice

Koha module:

Code: HOLD_PRINT

Name:

Message Subject:

Message Body:

LibrarianFirstname
LibrarianSurname
LibrarianEmailaddress
---BRANCHES---
branches.branchcode
branches.branchname
branches.branchaddress1
branches.branchaddress2
branches.branchaddress3

>>

```
<pre style="font-family: monospace"><<branches.branchname>>
<<branches.branchaddress1>>
<<branches.branchaddress2>>

Change Service Requested

<<borrowers.firstname>> <<borrowers.surname>>
<<borrowers.address>>
<<borrowers.city>> <<borrowers.zipcode>>
```

Since automated mailer forms usually cannot cope with text that runs longer than one page, a new syspref PrintNoticesMaxLines will only print the number of items in that syspref and truncate the list of items at that point, with a note that the patron should check the full list of overdues in the OPAC. Calculate that figure by counting number of lines in your notice text. Then decide how many lines/items can print and still stay within the page length. This setting only affects print notices; emailed notices will contain the full list.

Item Type Trigger for Hold Notices (Bug 3489)

Koha only allowed setting notice triggers by patron category; this PTFS feature adds a separate table for setting triggers by item type. If using both original notice triggers and item type triggers (not recommended), we suggest using different notice files for each so it's easier to check (different notice names/text recorded in logs). NOTE: Patrons may receive multiple overdue notices if they have items of different types overdue, because the script processes one item type at a time.

Resident	<input type="text"/>	No notice	<input type="checkbox"/>
Senior Outreach	<input type="text"/>	No notice	<input type="checkbox"/>
Student	<input type="text"/>	No notice	<input type="checkbox"/>
Taxpayer	<input type="text"/>	No notice	<input type="checkbox"/>
Volunteer	<input type="text"/>	No notice	<input type="checkbox"/>
Video/Media Only Purchased Card	<input type="text"/>	No notice	<input type="checkbox"/>
Work in Town	<input type="text"/>	No notice	<input type="checkbox"/>

By item type:

	Delay	First Letter	Debar
Magazine	21	First Overdue Notice	<input type="checkbox"/>
Adult Paperback	21	First Overdue Notice	<input type="checkbox"/>
Book	1	First Overdue Notice	<input type="checkbox"/>
Book- Mutiple volumes		No notice	<input type="checkbox"/>
Music CD	1	First Overdue Notice	<input type="checkbox"/>
Holiday music CD	21	First Overdue Notice	<input type="checkbox"/>
New Childrens Movie	7	First Overdue Notice	<input type="checkbox"/>
Audiobook	21	First Overdue Notice	<input type="checkbox"/>

Renewal Source (Bug 3483)

This PTFS feature shows in the patron Checkout tab how many renewals have been made total, and how many of those were done through the OPAC.

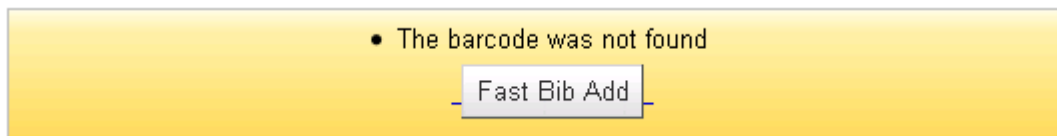
2 Checkout(s)
2 Holds(s)

Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
06/17/2009	Tri-State top 10 garden guide/ , by	BK	635.9 SUN	TESTINGJANE10	2 (1 via OPAC)	<input type="checkbox"/>	Check In
Previous checkouts							
05/10/2009	Nearest thing to heaven : Kingwell, Mark	BK	974.71 KIN	39344008288034	1	On Hold	Check In

Override Renewal Limit: ☐

Fast Adds at Circulation (Bug 3495)

This PTFS feature allows circ staff to create a brief record at checkout. With the fast_add granular permission set, if a staff person tries to check out a barcode that doesn't exist in the system, the system will give an alert that the item doesn't exist. There will be an option to create a brief record with the “Fast Bib Add” button.



Adding a record:

Add Brief Record For Barcode TESTING

Title:	<input type="text"/>
Author:	<input type="text"/>
Notes:	<input type="text"/>
ISBN:	<input type="text"/>
Place:	<input type="text"/>
Publisher:	<input type="text"/>
Date:	<input type="text"/>
Item Details	
Barcode:	TESTING
Collection Code:	<input type="text"/>
Home Location:	<input type="text"/>
Holding Location:	<input type="text"/>
Shelving Location:	<input type="text"/>
Call Number:	<input type="text"/>
Item Type:	<input type="text"/>
Confirm Add	Cancel

When the item is checked back in, the system should alert the staff member to send the item and brief record to Cataloging for full MARC record creation.

1 Checkout(s)		2 Holds(s)					
Due date	Title	Item Type	Call no	Barcode	Renewals	Renew?	Check In?
06/02/2009	Test Fast Add , by Wagner, Jane- ROUTE TO CATALOGUING - FASTADD RECORD	BK	TESTJANE	testing		<input type="checkbox"/>	Check In

Check In Damaged (Bug 4242)

If an item's status is set to damaged while it is checked out, and there are existing holds on the item, checking the item in will not trigger the next hold in this PTFS-developed feature. Instead, a screen message will advise that there are holds waiting but the item is damaged. If there are multiple items and others are available, a screen message says so; staff should retrieve one of the other items to trigger and fill holds.

If no other items available:

Item Damaged: [Weather and climate :](#)
Hold will remain on item until repaired

 OK

Check In

Enter item barcode:

Options

- ☐ Forgive overdue charges
- ☐ Dropbox mode

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note
09/25/2009 (overdue)	Weather and climate :	Harper, Kristine.	33581003097904	BK NF	Dwarf, Grumpy (AR)	

If other items are available:

Item Damaged: [Glory in death /.](#)
Other items are available to be checked out

 OK

Check In

Enter item barcode:

Options

- ☐ Forgive overdue charges
- ☐ Dropbox mode

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note
10/16/2009	Glory in death /.	Robb, J. D.,	33581003131737	PB PBK	Bunny, Benjamin (JR)	

Clear Borrower Record After Checkout (Bugs 3485 and 3486)

PTFS has written two features to clear the screen after a patron checkout, a button for manual use and a timeout for a prompt. To clear manually, turn on the syspref DisplayClearScreenButton. On Checkout screen, click Clear Screen button to clear.

For the timeout, set the syspref CheckoutTimeout to some value (in seconds). When on the patron Checkout tab, after the specified period of inactivity, a "Circ Timeout – Are you finished with this patron?" prompt appears.

Edit

Add child

Change Password

Print

More

Clear Screen

Checking out to Pan CAKE (TESTING5)

Enter item barcode:

Specify Due Date:

The page at http:// says:

?

Circ Timeout -- Are you finished with this patron?

OK

Cancel

Turn Off Returns Column in Patron Record Display (Bug 3514)

If the new syspref PatronDisplayReturn is off, the Return column does not display in the list of checkouts on the patron Details or Checkout tab. Returning items from these pages can skip some or all of the standard circulation functions that returning through Circulation, Checkin checks (including triggering holds). PTFS wrote this patch to give libraries the ability to turn off the return option on the patron tabs. This forces staff to use the proper workflow for checking in items.

With the column turned off, renew is the only option:

2 Checkout(s)

Fines & Charges

0 Holds

Revision History

Due date	Title	Item Type	Checked out on	Call no	Charge	Price	Renew select all none
12/15/2009	The last stand of the tin can sailors ; by Hornfischer, James D. ; Bantam Books, 39344006935750	Book	11/24/2009	940.5425 HOR	0.00	25.00	<input checked="" type="checkbox"/>
12/21/2009	Blood alone ; by Benn, James R. ; Soho, 39344008442284	Book	11/30/2009	MYS BENN	0.00	24.00	<input checked="" type="checkbox"/>
Totals:					10.00	49.00	Renewal due date: <input type="text"/> Forgive fines on return: <input type="checkbox"/>

Override Renewal Limit: ☐

Renew checked items
 Renew all

Cataloging

Batch Item Edit (Bug 3509)

PTFS has added batch item editing capability. With the `batch_item_edit` granular permission on, go to Tools, Batch Edit Items. You can select and edit Library, Item Type, Location, Permanent Location, Not For Loan, Damaged, Lost status, Withdrawn status, Use Restrictions, Holding Branch, and Collection Code. In the left-hand column check the box next to the field(s) you want to search on, then use the pulldowns to identify your search criteria. For batch editing, in the right-hand column check the box next to the setting(s) you want to change, and use the pulldowns to select the new value(s). Then click Proceed.

There is an option on the initial screen to upload a file of barcodes to edit instead of using the first column's search options. You would select the file name to upload, then make your edit selections in the second column of field

Batch Edit Items

Select the field values you wish to select on and the fields and values you wish to update

Item field	Select On	Select value	Update	New Value
Home Library:	Select? <input type="checkbox"/>	Anytown Public Library ▾	Change? <input type="checkbox"/>	Anytown Public Library ▾
Current Location:	Select? <input type="checkbox"/>	Anytown Public Library ▾	Change? <input type="checkbox"/>	Anytown Public Library ▾
Item Type:	Select? <input checked="" type="checkbox"/>	Adult Paperback ▾	Change? <input checked="" type="checkbox"/>	Book ▾
Shelving Location:	Select? <input type="checkbox"/>	Children's Area ▾	Change? <input type="checkbox"/>	Children's Area ▾
Not For Loan:	Select? <input type="checkbox"/>	▾	Change? <input type="checkbox"/>	▾
Damaged:	Select? <input type="checkbox"/>	▾	Change? <input type="checkbox"/>	▾
Lost status:	Select? <input type="checkbox"/>	▾	Change? <input type="checkbox"/>	▾
Withdrawn status:	Select? <input type="checkbox"/>	▾	Change? <input type="checkbox"/>	▾
Use Restrictions:	Select? <input type="checkbox"/>	▾	Change? <input type="checkbox"/>	▾
Collection Code:	Select? <input type="checkbox"/>	Adult Biography ▾	Change? <input type="checkbox"/>	Adult Biography ▾

On you can upload a file of barcode numbers to change

Barcode file:	<input type="text"/>	<input type="button" value="Browse..."/>
---------------	----------------------	--

[Refresh Selection](#) [Cancel](#)

Other Item Statuses (Bug 4237)

This PTFS-developed feature allows a library to define local statuses for items, and to control whether or not items with those statuses can have holds placed. We identified an unused subfield (subfield k) in the 952 and used it for this purpose and, also created a new field named otherstatus in the items table. Under Administration, Other Item Status, the library can define new statuses (e.g., Cataloging, Trace, Storage) and mark them holdable or not. (This feature also requires some configuration changes to the MARC frameworks.)

[Home](#) > [Administration](#) > Item Status Administration

System Preferences

- [System Preferences](#)

Basic parameters

- [Libraries and groups](#)
- [Funds and budgets](#)
- [Currencies and exchange rates](#)
- [Item types](#)

Patrons and circulation

- [Patron types and categories](#)
- [Cities and towns](#)
- [Road types](#)
- [Patron attribute types](#)
- [Circulation and fines rules](#)
- [Library transfer limits](#)
- [Item circulation alerts](#)
- [Other item status](#)

Catalog

New Item Status

Item Status Administration

Code	Description	Holds allowed	Action
		No	Edit Delete
cat	Cataloging	Yes	Edit Delete
conya	Coming off New/YA	Yes	Edit Delete
cooj	Coming off O/J	Yes	Edit Delete
coryd	Coming Off R/Y Dot	Yes	Edit Delete
da	Display Area	Yes	Edit Delete
dc	YS Display	Yes	Edit Delete
mc	Media Cleaning	Yes	Edit Delete
oflow	Overflow	Yes	Edit Delete
OO	On Order	No	Edit Delete

<< < 1 **2** > >>

The status is set either by editing the full item record, or by going to the Items tab in the title record and using the pulldown.

Barcode mq433509

Item Information [\[Edit Items\]](#)

Home Library:
Item type:
Collection:
Item Callnumber:
Replacement Price:

Statuses

Current Location:
Checkout Status:
Lost Status:
Damaged Status:
Withdrawn?:
Other Item Status:

Cataloging
Coming off New/YA
Coming off O/J
Coming Off R/Y Dot
Display Area
In Cataloging
In Processing
Media Cleaning
On Order
Online
Overflow
Repairs
Senior Center Display
Shelving Cart
Storage
Trace
YS Display
YS Office

Set Status


Set Status

These statuses show in both staff and OPAC item listings. The status is cleared when an item is checked in, or by editing the status as above.

Staff display:

Holdings		Descriptions				
Item type	Location	Collection	Call Number	Status	Last seen	Barcode
Book	Anytown Public Library	Non Fiction (adult)	813.4 TWAIN	Trace	07/12/2009	39344004248065

OPAC display:

Holdings (1)		Title Notes	Similar Items	Tag Browser		
Item type ▾	Location ◆	Collection ◆	Call Number ◆	Status ◆	Date Due ◆	
 Book		Non Fiction (adult)	813.4 TWAIN (Browse Shelf)	Trace		

Adding Additional Items Copies Item Data (Bug 3480)

Library staff asked PTFS to develop a feature to make creating additional items easier. Search for an existing title in staff mode, and display it. Clicking New, New Item on the title display page will open a new item screen with data (except barcode and other fields such as number of checkouts) copied from the first item attached to the record. The acquisition date will be today (rather than date from first record).

In Processing/Shelving Cart (Bug 3481)

This PTFS feature allows both newly-created items and newly returned items to display as In Processing or Shelving Cart. To configure, create authorized values of type LOC for In Processing and Shelving Cart (named PROC and CART, with whatever descriptions you want).

Authorized values

This table is used in MARC definition. You can define as many categories as you want for each category.

When you define the MARC subfield structure, you can link a subfield to modifying a biblio, the subfield is not entered through a free field, but through a dropdown menu.

Show Category:

Category	Authorized value	Description	Icon	Edit	Delete
LOC	CART	Shelving Cart		Edit	Delete
LOC	CHILD	Children's Area		Edit	Delete
LOC	DISPLAY	On Display		Edit	Delete
LOC	FIC	Fiction		Edit	Delete
LOC	NEW	New Books		Edit	Delete
LOC	PROC	In Processing		Edit	Delete
LOC	REF	Reference		Edit	Delete

Set the syspref NewItemsDefaultLocation to the processing code (PROC), and when cataloging create items with their desired final shelving location. All newly catalogued items will be temporarily set to the location in this preference. The original location code entered at item creation is stored in the new items table column 'permanent_location', for future use. With the system pref InProcessingToShelvingCart also turned on, check in new items with a location code for PROC. They will be modified to have a new location code of CART and will display with that location's description (usually Shelving Cart). A cron job script runs at specified intervals to move items from CART to the permanent shelving location. (For example, an hourly cron entry of cart_to_shelf.pl --hours 3 where --hours is the amount of time an item should spend on the cart.)

If the syspref ReturnToShelvingCart is turned on, any newly-checked-in item is also automatically put into the shelving cart, to be covered by the same script run. Checkins with

confirmed holds will not go into the shelving cart. If items on the shelving cart are checked out, the location will be cleared.

Staff display:

Holdings		Descriptions				
Item type	Location	Collection	Call Number	Status	Last seen	Barcode
Youth Services Media	Anytown Public Library In Processing	Youth Services Audiobooks	JAB ROWLING	Available	03/04/2010	TESTDEMO3
Youth Services Media	Anytown Public Library Shelving Cart	Youth Services Audiobooks	JAB ROWLING	Available	03/04/2010	39344005854325

OPAC display:

Holdings (2)		Title Notes	Reviews	Similar Items	Tag Browser	
Item type ▼	Location ◆	Collection ◆	Call Number ◆	Status ◆	Date Due ◆	
Youth Services Media	In Processing	Youth Services Audiobooks	JAB ROWLING (Browse Shelf)	Available		
Youth Services Media	Shelving Cart	Youth Services Audiobooks	JAB ROWLING (Browse Shelf)	Available		

Save Import Profiles (Bug 4247)

This PTFS-developed feature expands Koha's MARC import function to allow creation of items with pre-defined fields and adding or stripping specified MARC tags. Under Tools, Stage MARC Records for Import, upload a file.

Stage MARC Records For Import

- Select a MARC file to stage in the import reservoir. It will be parsed
- You can enter a name for this import. It may be useful, when created from!

Stage records into the reservoir

Select the file to stage:

You will then see an option in mid-screen to either apply a saved profile or save your current settings as a profile.

Import profiles

Use import profile:

Save these settings as an import profile named:

If you click the New Item button on the profile screen, you have the option to create one or more items with settings for item type, call number, etc.

After clicking New Item:

Add more items to each record?

NOTE: if you select to add new items here, any item records in the incoming bibliographic record will also be unavoidably added!

If you make changes to this form, and want to save them, be sure to save the profile!

If you have added an item already, or are working from a saved profile, you can modify the item settings.

Add more items to each record?

NOTE: if you select to add new items here, any item records in the incoming bibliographic record will also be unavoidably added!

Adding 1 more item(s), from import profile. [Modify](#)

New item

If you make changes to this form, and want to save them, be sure to save the profile!

In either case, an item edit screen will expand out and you can specify the settings for items to be added when the title is loaded.

Add more items to each record?

NOTE: if you select to add new items here, any item records in the incoming bibliographic record will also be unavoidably added!

0 - Withdrawn status	<input type="text"/>
1 - Lost status	<input type="text"/>
2 - Source of classification or shelving scheme	<input type="text" value="Dewey Decimal Classification"/>
3 - Materials specified (bound volume or other part)	<input type="text"/>
4 - Damaged status	<input type="text"/>
5 - Use restrictions	<input type="text"/>
7 - Not for loan	<input type="text"/>
8 - Collection code	<input type="text"/>
a - Permanent location	<input type="text" value="East Brunswick Public Library"/>
b - Current location	<input type="text" value="East Brunswick Public Library"/>
c - Shelving location	<input type="text"/>
d - Date acquired	<input type="text"/>
e - Source of acquisition	<input type="text"/>

You can also use the Modify Subfields section to add or remove a MARC field or subfield from your incoming data file.

x - Non-public note

y - Koha item type

z - Public note

Remove this item

New item

If you make changes to this form, and want to save them, be sure to save the profile!

Modify subfields of each record?

Remove tag:

tag

+

Remove tag:

Remove subfield:

Remove match:

Add:

Add, if not present:

OPAC

Bestseller's Club and Email Notifications (Bug 4245)

PTFS expanded on Kyle Hall's earlier Clubs & Services feature. The customer library wanted a way for patrons to join a bestseller's club and have holds automatically placed on any matching new title. They also (separately) wanted emails to go to patrons when new titles matching certain criteria were added to the collection. This feature is under Tools, Clubs and Services. There must first be at least one archetype for each type before a club or service can be created. Multiple clubs/services can be created based on the archetype.

There is also the option in the archetype setup to allow patron self-enrollment or require an email address in the patron record before a patron can join a club (a necessity for an email service).

Clubs & Services Home Edit Archetypes Edit Clubs & Services		Club Archetypes										
Owner	Title	Description	Public Enrollment	Require Email	Club Data 1 Title	Club Data 2 Title	Club Data 3 Title	Enrollment Data 1 Title	Enrollment Data 2 Title	Enrollment Data 3 Title		
NO_L	Bestsellers Club	This club archetype gives the patrons the ability join a club for a given author and for staff to batch generate a holds list which shuffles the holds queue when specific titles or books by certain authors are received.	1	0	Title	Author					Edit	D
Service Archetypes												
Owner	Title	Description	Public Enrollment	Require Email	Service Data 1 Title	Service Data 2 Title	Service Data 3 Title	Enrollment Data 1 Title	Enrollment Data 2 Title	Enrollment Data 3 Title		
MID	New Items E-mail List	New in last seven days	1	1							Edit	D

Create a new club, and fill out the data required. You can set the club by Title and/or Author; probably most of the time it will be author. The author field here has to match the author field of the items exactly. For example, to make a Larry Niven bestseller's club, fill in the author field with 'Niven, Larry.' (Don't enter the quote marks, but note the period after the name). After that, a batch hold is placed on any newly catalogued item where the author field is 'Niven, Larry.'. (NOTE: Only applies to new titles, not to new items added to existing titles.) You can use % for truncation, like Personal memoir% or Niven, Lar% (for anything starting with that string). Under Clubs & Services Home, you can enroll new users, or click details to see current list and remove users. You can also add/delete users from the patron record in staff or OPAC. If the list is created to allow public enrollment, patrons can join through their OPAC account.

You can restrict the clubs to certain item type codes, so that for example a hold would only be triggered on a book, not a DVD of the same title/author. However, because a title can be added without items attached, the underlying club software must rely on the biblioitems.itemtype field, not the actual item record's setting. When a record is imported, Koha sets this field from the first item type in the list of possible item types on your system, which may not be appropriate. To be sure the title will be included or excluded from a club, before saving the title edit the 942 subfield c to the appropriate item type. This is the field the club software uses; it does not look at the 952 subfield y.

	Woods, Stuart	Stuart Woods New Book Club	2009-10-09		Edit	Delete
	Connelly, Michael	Michael Connelly New Book Club	2009-10-13		Edit	Delete
	Saul, John	John Saul New Book Group	2009-10-14		Edit	Delete

Services						
Owner	Title	Description	Start Date	End Date		
	New Items E-mail List	New in last seven days	2009-09-26		Edit	Delete

Edit a Club or Service		
Archetype:	<input type="text" value="Bestsellers Club"/>	
Title:	<input type="text" value="Archer, Jeffrey"/>	
Description:	<input type="text" value="Jeffrey Archer New Book Club"/>	
Title:	<input type="text"/>	<i>If filled in, the the club will only apply to books where the title matches this field. Must be identical to the MARC field mapped to title.</i>
Author:	<input type="text" value="Archer, Jeffrey%"/>	<i>If filled in, the the club will only apply to books where the author matches this field. Must be identical to the MARC field mapped to author.</i>
Item Types:	<input type="text" value="BK"/>	<i>Put a list of space separated Item Types here for that this club should work for. Leave it blank for all item types.</i>
<i>Date format is : YYYY-MM-DD</i>		
Start Date:	<input type="text" value="2009-10-09"/>	<i>Optional: Leave blank for start date of today.</i>
End Date:	<input type="text"/>	<i>Optional: Leave blank for no end date.</i>
<input type="button" value="Update"/>		

The mailing lists are based on two criteria, the itemtype and the callnumber. For example, if you want a list for new science fiction novels, and your sf books all begin with the call number 'SF author', then you would fill in the callnumber field with 'SF %'. To limit to only the book itemtype, put 'BK' in the itemtype field (assuming that is what you set the book itemtypes code to). (As above, this is looking at the 942c field, not the item-level item type.) To make it work for all itemtypes, just put '%' in the itemtype field. For an inverse example, such as a new DVD list, just fill in the itemtype with 'DVD', and the author field with '%'. For email notifications, the mailinglist.pl script will send out a weekly e-mail based on an Email List archetype. The e-mail text is based on the template file found in the misc/cronjobs/maillinglist directory; this template can be customized for each library. The script is also found in misc/cronjobs/maillinglist and should be cronned to run probably at least weekly. The script looks for items created less than a specified number of days ago (command line parameter) matching the other parameters; if no date range is specified, it defaults to the last seven days. Example: perl mailinglist.pl --start 14 --end 0 --name "NewItems" will produce a list of everything in the last 14 days based on the NewItems email service. The --name parameter MUST match the policy name (not description) of an existing email service. If no name is specified, the script will run for all existing services. NOTE: The delivered template file uses the syspref OPACBaseURL to create a direct link to the title record in the message text. Make sure that syspref has the correct setting. Also note that the AutoEmailPrimaryAddress syspref must be actively set to the proper patron email field.

Patrons can join clubs or email lists through the OPAC if it is set up for public enrollment, or staff can enroll patrons. If a title and item matching a club setup is added, everyone in the club

gets an automatic hold placed on the item (the priority order is randomized each time). Patrons who've joined an email list get a regular (probably weekly) email of any new titles matching the list criteria.

Enrolling through the OPAC:

my summary	<table border="1"> <thead> <tr> <th colspan="5">Enroll In Clubs & Services</th> </tr> <tr> <th>Title</th> <th>Description</th> <th>Library</th> <th>Type</th> <th></th> </tr> </thead> <tbody> <tr> <td>Archer, Jeffrey</td> <td>Jeffrey Archer New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Baldacci, David</td> <td>David Baldacci New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Bradford, Barbara Taylor</td> <td>Barbara Taylor Bradford New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Brown, Sandra</td> <td>Sandra Brown New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Clark, Carol Higgins</td> <td>Carol Higgins Clark New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Clark, Mary Higgins</td> <td>Mary Higgins Clark New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Connelly, Michael</td> <td>Michael Connelly New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Cornwell, Bernard</td> <td>Bernard Cornwell's New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Cornwell, Patricia</td> <td>Patricia Cornwell New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Deaver, Jeffrey</td> <td>Jeffrey Deaver New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>DeMille, Nelson</td> <td>Nelson DeMille New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Evanovich, Janet</td> <td>Janet Evanovich New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> <tr> <td>Fielding, Joy</td> <td>Joy Fielding New Book Club</td> <td></td> <td>club</td> <td>Enroll</td> </tr> </tbody> </table>	Enroll In Clubs & Services					Title	Description	Library	Type		Archer, Jeffrey	Jeffrey Archer New Book Club		club	Enroll	Baldacci, David	David Baldacci New Book Club		club	Enroll	Bradford, Barbara Taylor	Barbara Taylor Bradford New Book Club		club	Enroll	Brown, Sandra	Sandra Brown New Book Club		club	Enroll	Clark, Carol Higgins	Carol Higgins Clark New Book Club		club	Enroll	Clark, Mary Higgins	Mary Higgins Clark New Book Club		club	Enroll	Connelly, Michael	Michael Connelly New Book Club		club	Enroll	Cornwell, Bernard	Bernard Cornwell's New Book Club		club	Enroll	Cornwell, Patricia	Patricia Cornwell New Book Club		club	Enroll	Deaver, Jeffrey	Jeffrey Deaver New Book Club		club	Enroll	DeMille, Nelson	Nelson DeMille New Book Club		club	Enroll	Evanovich, Janet	Janet Evanovich New Book Club		club	Enroll	Fielding, Joy	Joy Fielding New Book Club		club	Enroll
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When a new title is added a hold is placed automatically:

Priority	Patron	Notes	Date	Pick up Library	Details	Suspend Hold
1	PTFS	Automatic Reserve for Bestsellers Club	03/01/2010	Public Library	Next available	<input type="checkbox"/> Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)

OPAC Inactivity Timeout (Bug 4238)

This PTFS feature allows a library to set a timeout for OPAC sessions in the new syspref `ResetOpacInactivityTimeout`. After no inactivity for the specified time (in seconds), the browser will force a logout of the current user and return to the main OPAC page. This is especially meant for public workstations in the library but will affect home users as well; a warning about the inactivity timeout should be added to the OPAC's main page.

Clear Reading History (Bug 3531)

Patrons with concerns about privacy can opt to clear their reading history if the library allows it. Turn this PTFS feature on with the syspref AllowReadingHistoryAnonymizing. Then the option to clear will be in OPAC under Reading History tab and in staff mode at bottom of patron edit screen. (OPAC display requires having existing syspref opacreadinghistory turned on.)

my reading history	No cover image available	A spell for Chameleon / Anthony, Piers.	SCI FIC ANTHONY	07/23/2009
my lists				
my clubs & services				


Enable Reading History? ☐ Yes ☒ No [Save](#)

By subscribing to My Reading History (choice Yes above), I acknowledge that the library's online catalog will retain for my personal use a list of all materials that I borrow. I may unsubscribe from this service at any time (choice No above), which will permanently delete anything not currently checked out from my reading history. Library staff will not access or release my reading history unless required by law to do so. I understand that anyone with access to my library card number and PIN can check my reading history or any other information attached to my account.

This will delete anything that is not currently checked out from the patron's reading history. Staff can also anonymize the reading history by editing the patron record and selecting the option under the Disable Borrower Reading History section.

OPAC “Did You Mean” Feature (Bug 4240)

This PTFS-developed feature uses an open source dictionary to suggest five terms if an OPAC search term is misspelled or not found. Clicking on one of the suggestions will do a new search based on that term.

“strte ” returned 3810 results. 

Refine your search	Did you mean: st rte st-rte street strut strata
--------------------	---

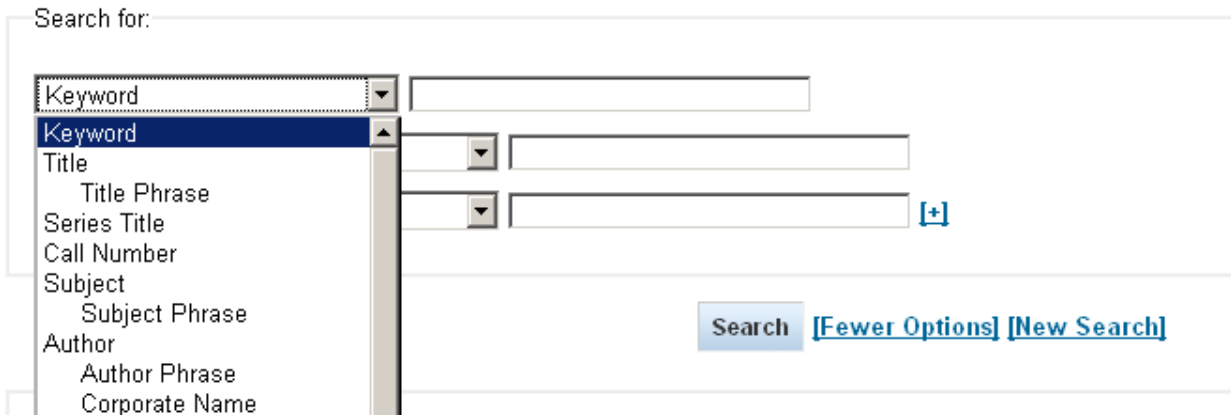
Turn Off My Messaging Tab in OPAC (Bug 3535)

By default, newer versions of Koha allow patrons to set their own messaging settings for holds, advance notices, etc. This PTFS feature lets a library turn off display of that tab in the OPAC if desired. Use the new syspref opacmsgstab to turn on or off the OPAC My Messaging tab; this also controls display of the email/text message settings in the OPAC My Personal Details tab.

OPAC and Staff Advanced Search Changes (Bug 3665)

For both OPAC and Staff advanced search screens, this PTFS-developed feature moves subject, title, and call number search options higher in the pulldown list, and adds a Search button near the top of the screen so that users don't have to scroll down to the bottom.

OPAC advanced search:



Search for:

Keyword

Keyword

Title

Title Phrase

Series Title

Call Number

Subject

Subject Phrase

Author

Author Phrase

Corporate Name

Search [Fewer Options] [New Search]

Sorting of Item Holdings in Staff and OPAC (Bug 3702)

The default sort order for items attached to a title in staff mode is the accession date in the item record (the date the item was created). In the OPAC, it's the (previous) first column in the items table (item type). Thus, a particular library's holdings will be scattered through the list instead of grouped by library -- a real problem especially for serial issues. This PTFS feature forces the primary sort in both staff and OPAC to be by branch library description, so that a library's holdings display together.

Rename OPAC Cart Feature as Desired (Bug 3719)

Many sites do not like the name Cart for the OPAC feature; they would prefer something like Bookbag or Personal Shelf. This PTFS-developed feature creates a new syspref opacbookbagName to rename the OPAC Cart feature if desired. The syspref defaults to Cart, and if no text is entered, the code will also default to Cart.

Search

Advanced Search | Tag Cloud

Search

Advanced Search | Browse by Subject | Tag Cloud

Set Off Shelving Location in OPAC display (Bug 3789)

As delivered, Koha's OPAC item display runs the library branch description and the shelving location together in one line. This PTFS feature forces a line break, and puts the shelving location in italics for better clarity.

Holdings (4)		Title Notes				
Location ▼	Item type ◆	Collection ◆	Call Number ◆	Vol Info ◆	Status ◆	Date Due ◆
Library and Archives <i>Open Stacks</i>	Book	General Collection	E 312 .F82 (Browse Shelf)	v.1	Available	
Library and Archives <i>Open Stacks</i>	Book	General Collection	E 312 .F82 (Browse Shelf)	v.2	Available	
Library and Archives <i>Open Stacks</i>	Book	General Collection	E 312 .F82 (Browse Shelf)	v.5	Available	
Library and Archives <i>Open Stacks</i>	Book	General Collection	E 312 .F82 (Browse Shelf)	v.6	Available	

Turn Off Place Holds Link at Top of OPAC Results List (Bug 3093)

As delivered, the OPAC results list has a Place Hold link by each entry, but also allows users to check multiple entries and use a Place Hold link at the top of the screen. This has caused problems for some sites with tight holds policies, so PTFS wrote a fix. The new syspref DisplayMultiPlaceHold allows those sites to turn off the button if desired.



Allow OPAC and Staff to Use Different Settings for Advanced Search (Bug 3799)

The existing syspref `AdvancedSearchTypes` controlled whether the Advanced Search screen in both staff and OPAC would use either item types or collection codes as a type limit. Certain libraries have specialized searching needs, and want to have one option for staff and another for patrons. This PTFS-developed feature adds a new syspref, `OPACAdvancedSearchTypes`, to control the OPAC display. The original syspref continues to control the staff display.

Display 866 Summary Holdings Note in OPAC Main Detail Section (Bug 4300)

PTFS wrote a feature to display the 866 subfield `z` holdings note in the OPAC title screen's main display area, so the information is visible to patrons.

Martha Stewart living.

by [Stewart, Martha.](#)

[Normal View](#) [MARC View](#) [Expanded MARC View](#) [Card View \(ISBD\)](#)

Type: Continuing Resource
Publisher: Time, Inc. Magazine Co., 1990- .
Description: v. ; 28 cm .
ISSN: 1057-5251 .
Other Title: Living .
Related Subjects: [Home economics -- Periodicals](#) | [Women -- Periodicals](#) | [Gardening -- Periodicals](#) | [Crafts -- Periodicals](#)
Holdings Note: Library holds last five years.

Control Display of ISBD Tab in OPAC (Bug 3788)

The OPAC was not obeying the `viewISBD` syspref; PTFS wrote a patch to extend that functionality to the OPAC. If that syspref is off, this tab will not be visible.

ISBD View[Normal View](#)[MARC View](#)[Expanded MARC View](#)[ISBD View](#)

Coast to coast in punch needle : the 50 states, state flowers, birds & trees. Coast to coast in punch needle : fifty states, state flowers, birds and trees - Urbandale, IA : Landauer Books, 2008. - 112 p. : ill., col. ; 28 cm.

ISBN: 0979371147 (pbk.) 9780979371141 (pbk.)

LCCN: 2008920302

Subjects--Topical Terms:

Canvas embroidery--Patterns.

Embroidery.

Punched work.

Search by Shelving Location (Bug 4329)

In the OPAC advanced Search, if More Options is active, PTFS added a section to search by shelving location:

Limit to any of the following shelving locations:

<input type="checkbox"/> Audio Visual	<input type="checkbox"/> Book Cart	<input type="checkbox"/> Children's Area	<input type="checkbox"/> Fiction
<input type="checkbox"/> General Stacks	<input type="checkbox"/> New Materials Shelf	<input type="checkbox"/> On Display	<input type="checkbox"/> Processing Center
<input type="checkbox"/> Reference	<input type="checkbox"/> Staff Office		

Subtype limits

Location and availability:

☐ Only items currently available for loan or reference

Sort by:

[Search](#) [\[Fewer Options\]](#) [\[New Search\]](#)

Flag for SSL Enabled to fix 3rd Party Enhanced Content in OPAC (Bug 4314)

PTFS added a check for SSL in the OPAC for Syndetics and LibraryThing. If a site has SSL enabled, this feature automatically uses the appropriate https form of the URL rather than the http version.

Turn off Fines Display in OPAC Account (Bug 2576)

PTFS contributed to a feature that turns off both the Fines tab and the fines column in the patron's OPAC account if the library does not use fines. If the OPACFinesTab syspref is off, this information is hidden.

Web-Based Self-Check System

Automated Staff Login (Bug 3738)

Koha has a web-based self-check page, where staff users can log in to activate the page and then patrons can check out their own materials. Certain small libraries asked for this feature to be automated, so that no manual staff login was required. This PTFS-developed feature adds three new sysprefs, AutoSelfCheckAllowed, AutoSelfCheckID, AutoSelfCheckPass. The library should create a self-check staff user with Circ privileges. Then, to use this feature, turn on the AutoSelfCheckAllowed syspref and enter the ID and password of the self-check staff user. The self-check script will look for these sysprefs and if present and activated, do an automatic login to the self-check page and come up ready for patron use.