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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Contents

Administration 5

New Granular Permissions (Bug 3500) 5

Reports 6

Multiple Selections in Report Wizards (Bug 3658) 6

Bugfix to Allow User Specified Limit in SQL 8

Back Button in Report Creation 8

Patrons and Holds 8

Patron Batch Edit and Batch Delete (Bug 3468) 8

Patron Improved Searching (Bug 3468) 11

Patron Hyphenated Name Searching (Bug 4340) 12

Lost Card Tracking (Bug 3469) 12

Override Max Fines (Bug 3496) 13

Track Borrower Changes (Bug 3470) 14

Borrower History Retention (Bug 3471) 14

Limit On-Shelf Holds (Bug 3508) 15

Maximum Fines, Maximum Holds, and Editing of Circulation Rules (Bug 3507) 15

Predefined Borrower Notes (Bug 3472) 17

Expired/Cancelled Holds Report and Setting Expiration Dates (Bug 3474) 18

Display of Hold Expiration Date (Bug 3474) 20

Allow Multiple Holds on Items for One Title (Bug 4239) 21

Suspend and Reactivate Holds (Bug 3488) 22

Hold Display Status (Bug 4243) 22

Place Hold Option on Checkout Tab (Bug 3659) 24

Hold Policies by Patron Category (Bug 3491) 25

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Fees for Holds (Bug 3492) 26
Turn Off Various Hold Trigger Buttons if Desired (Bug 3693) 26
Block OPAC Renewals for Excessive Fines (Bug 3493) 27
Copy Patron Record (Bug 3475) 28
Display Patron Middle Initial (Bug 3478) 29
Prompt to Save Patron Edits (Bug 3479) 30
Lost, Claims Returned Displays on Patron Record (Bug 4241) 30
Fines 31
Partial Fine Payment (Bug 3498) 31
Billing Notice and Debt Collection (Bug 3490) 32
Calculate Fines on Claims Returned Items (Bug 4236) 33
Pre-Defined Fee Types (Bug 3476) 34
List Fines by Type on Checkout Tab (Bug 3484) 36
Block Payment of Outstanding Fines (Bug 3487) 36
Circulation 37
Block Checkout of Items on Hold (Bug 3506) 37
Backdate Due Dates (Bug 3499) 38
Change Checkin Date (Bug 3510) 38
Print Option for Hold and Overdue Notices (Bug 3482) 39
Item Type Trigger for Hold Notices (Bug 3489) 40
Renewal Source (Bug 3483) 40
Fast Adds at Circulation (Bug 3495) 41
Check In Damaged (Bug 4242) 42
Clear Borrower Record After Checkout (Bugs 3485 and 3486) 43
Turn Off Returns Column in Patron Record Display (Bug 3514) 44
Cataloging 45

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Batch Item Edit (Bug 3509) 45
Other Item Statuses (Bug 4237) 45
Adding Additional Items Copies Item Data (Bug 3480) 48
In Processing/Shelving Cart (Bug 3481) 48
Save Import Profiles (Bug 4247) 49
OPAC 52
Bestseller's Club and Email Notifications (Bug 4245) 52
OPAC Inactivity Timeout (Bug 4238) 55
Clear Reading History (Bug 3531) 56
OPAC "Did You Mean" Feature (Bug 4240) 56
Turn Off My Messaging Tab in OPAC (Bug 3535) 56
OPAC and Staff Advanced Search Changes (Bug 3665) 57
Sorting of Item Holdings in Staff and OPAC (Bug 3702) 57
Rename OPAC Cart Feature as Desired (Bug 3719) 57
Set Off Shelving Location in OPAC display (Bug 3789) 58
Turn Off Place Holds Link at Top of OPAC Results List (Bug 3093) 58
Allow OPAC and Staff to Use Different Settings for Advanced Search (Bug 3799) 59
Display 866 Summary Holdings Note in OPAC Main Detail Section (Bug 4300) 59
Control Display of ISBD Tab in OPAC (Bug 3788) 59
Search by Shelving Location (Bug 4329) 60
Flag for SSL Enabled to fix 3rd Party Enhanced Content in OPAC (Bug 4314) 60
Turn off Fines Display in OPAC Account (Bug 2576) 61
Web-Based Self-Check System 61
Automated Staff Login (Bug 3738) 61

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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

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- (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:

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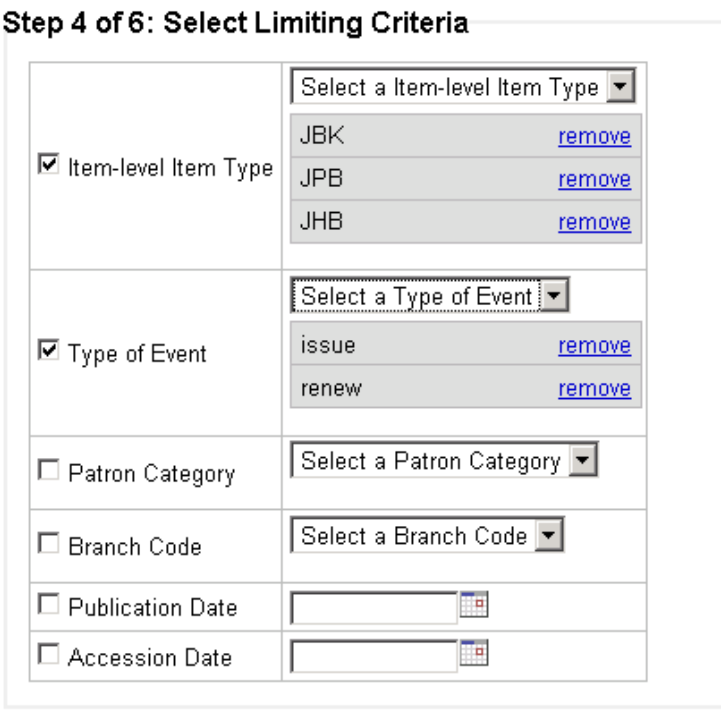
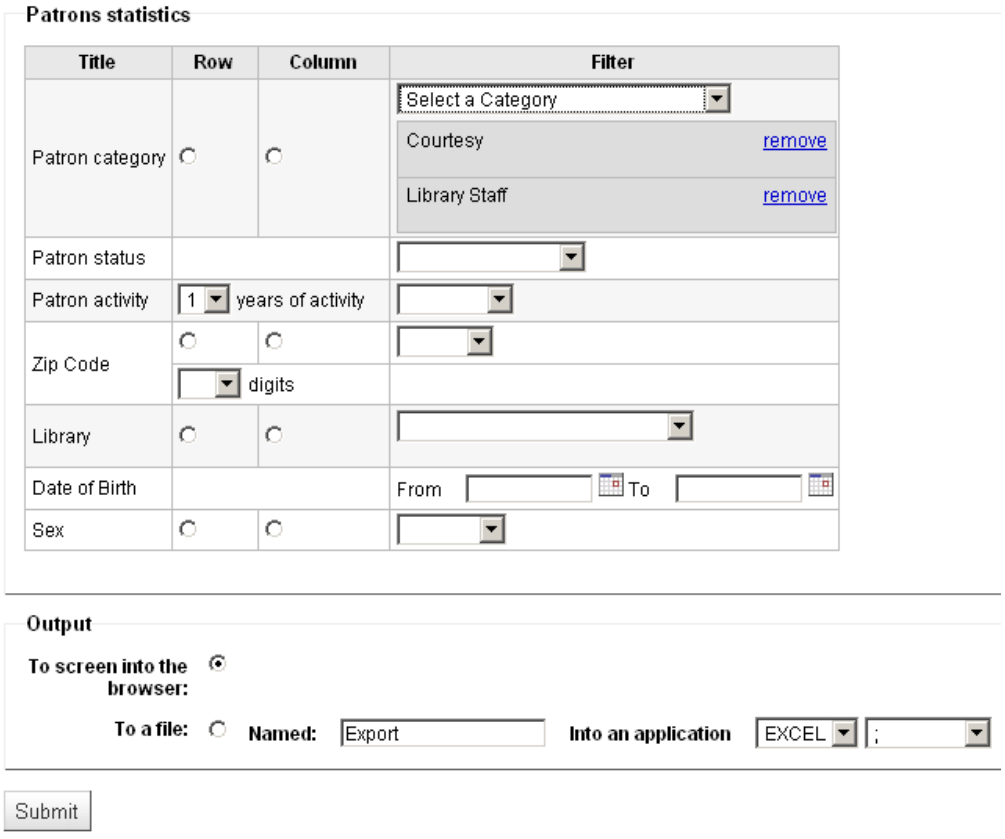


Statistics report:



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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.

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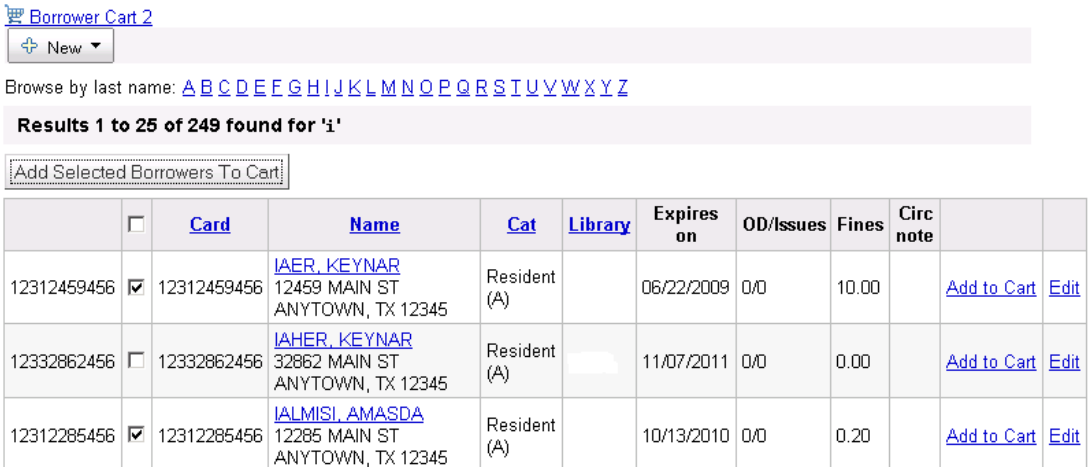
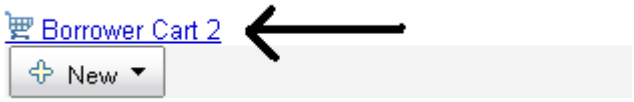
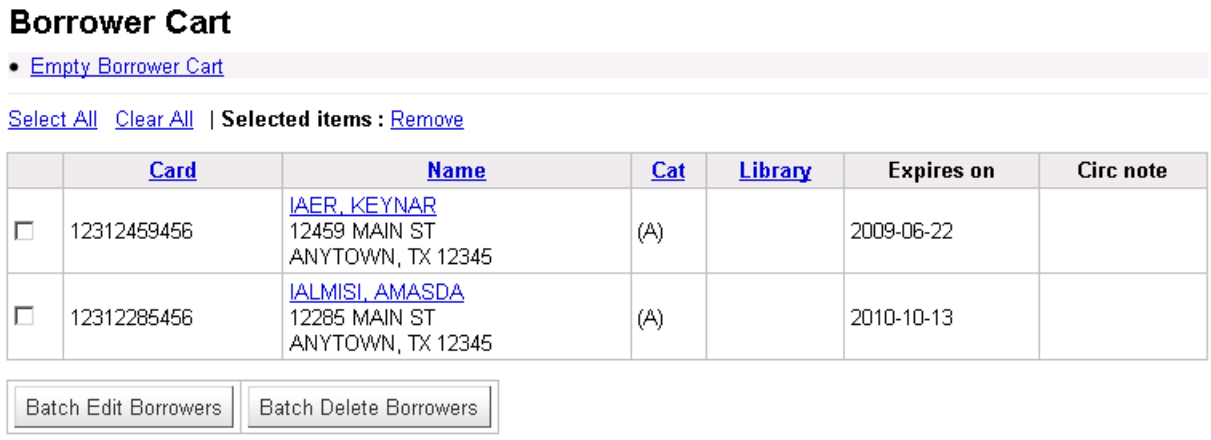


Clicking on the Borrower Cart link opens the cart:





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

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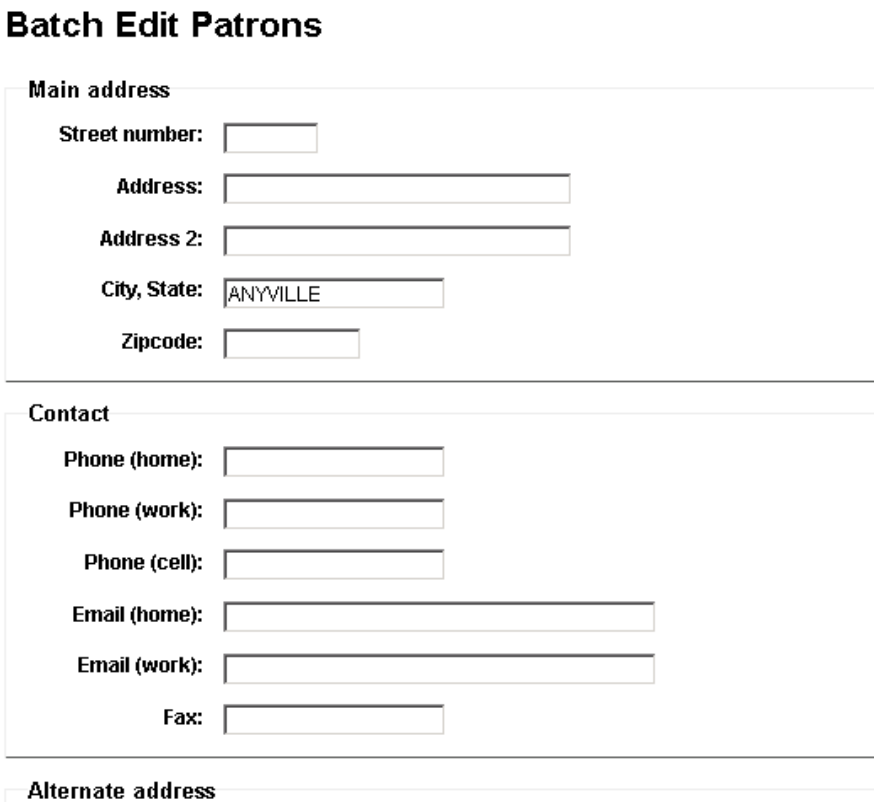
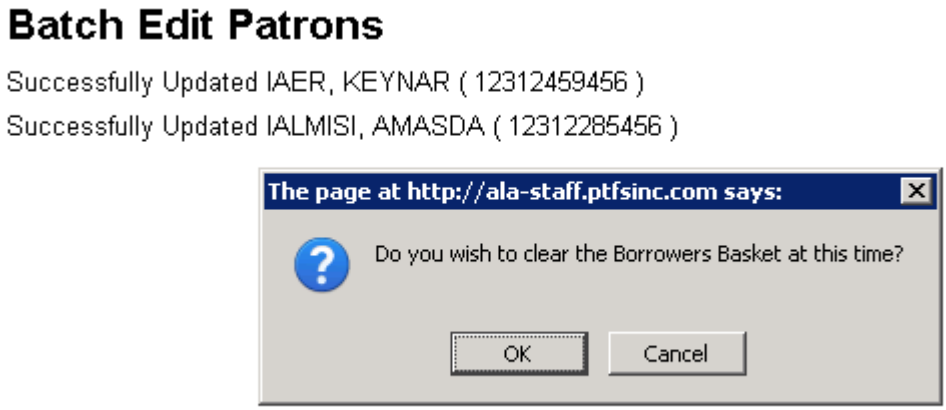


When the screen is saved, the patrons are edited and the staff user is given the option of emptying the basket:



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, BatchMemberDeleteFineThreshhold, 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.

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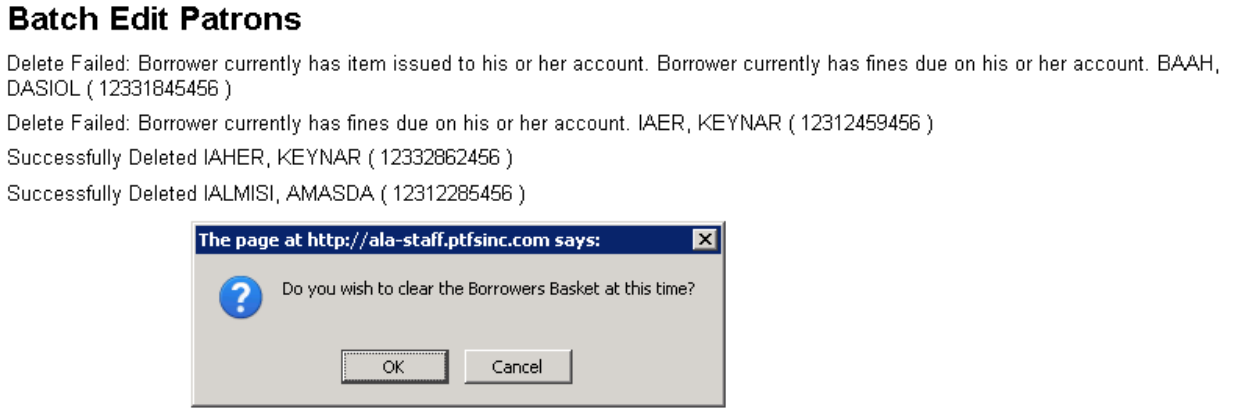
After use, a popup appears asking if cart contents should be deleted. With the syspref set to 4.99, two of the deletions in this example are blocked but another with a lower fine amount ($0.20 -- IALMISI, AMASDA) is allowed:



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.

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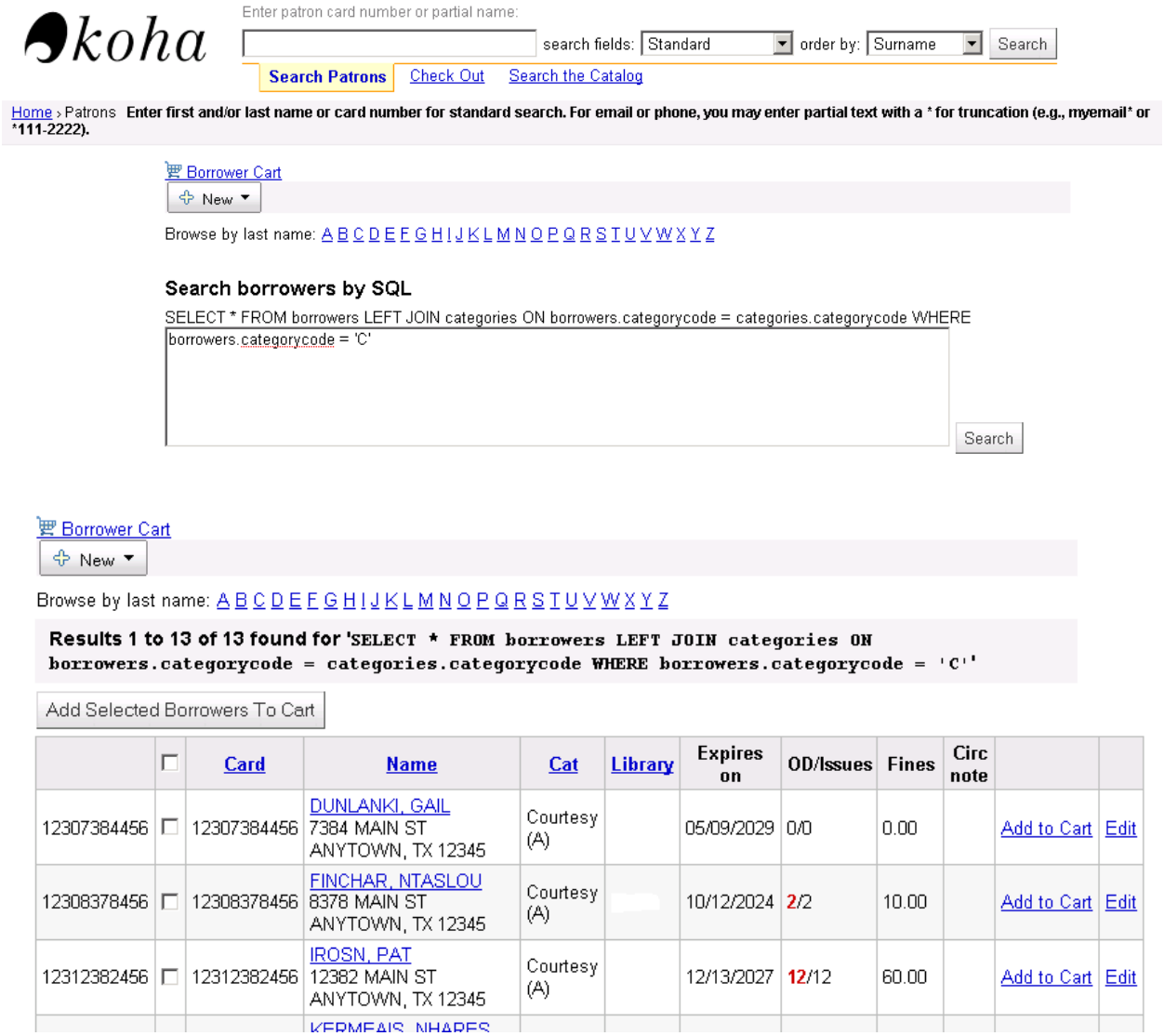

Patron Hyphenated Name Searching (Bug 4340)

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

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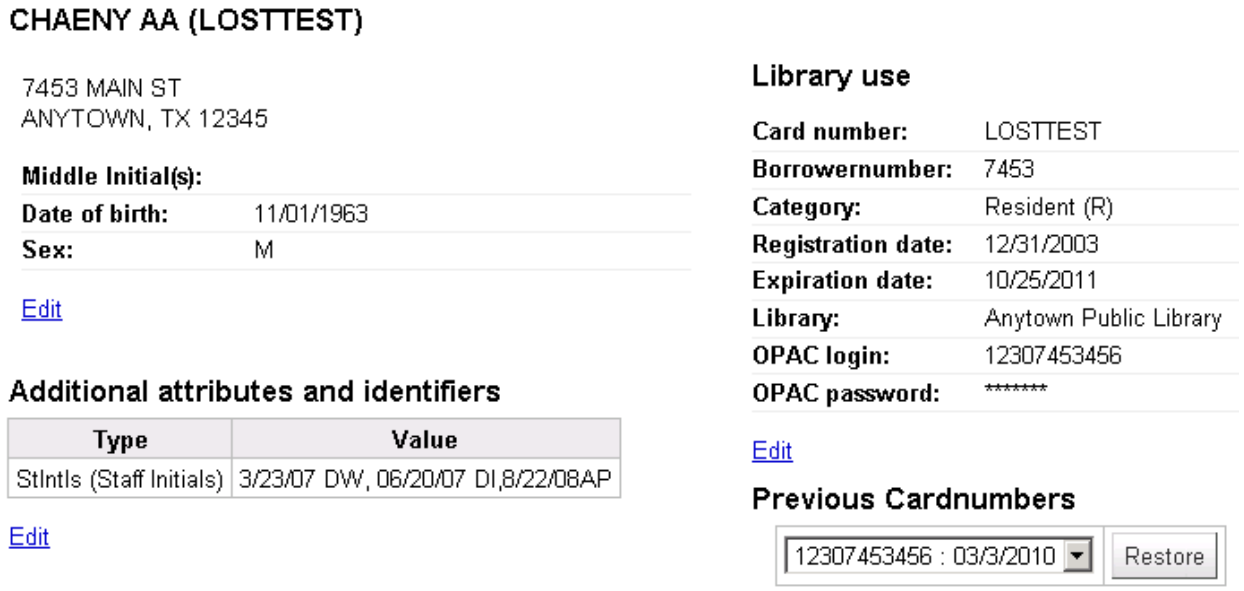
are still searchable. If an old card number is scanned for checkout, a warning about using a lost card appears in red on the checkout screen. If a card is found, it may be returned to active use in the patron record by clicking the Restore button in the Previous Cardnumbers section.



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.

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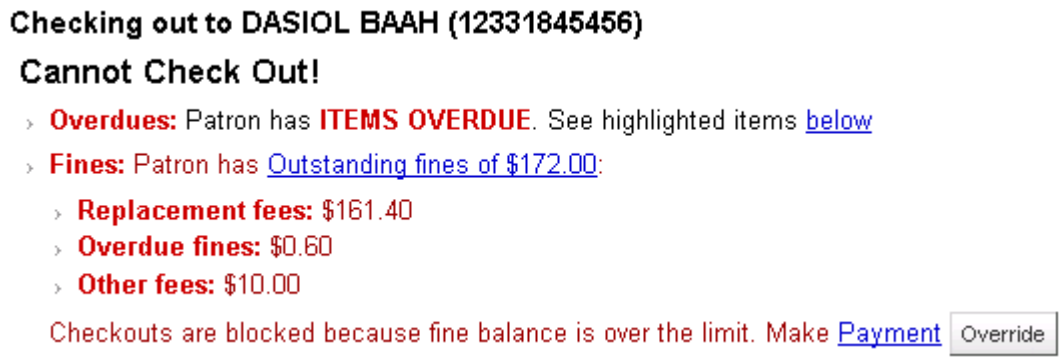

Track Borrower Changes (Bug 3470)

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.

Borrower History Retention (Bug 3471)

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

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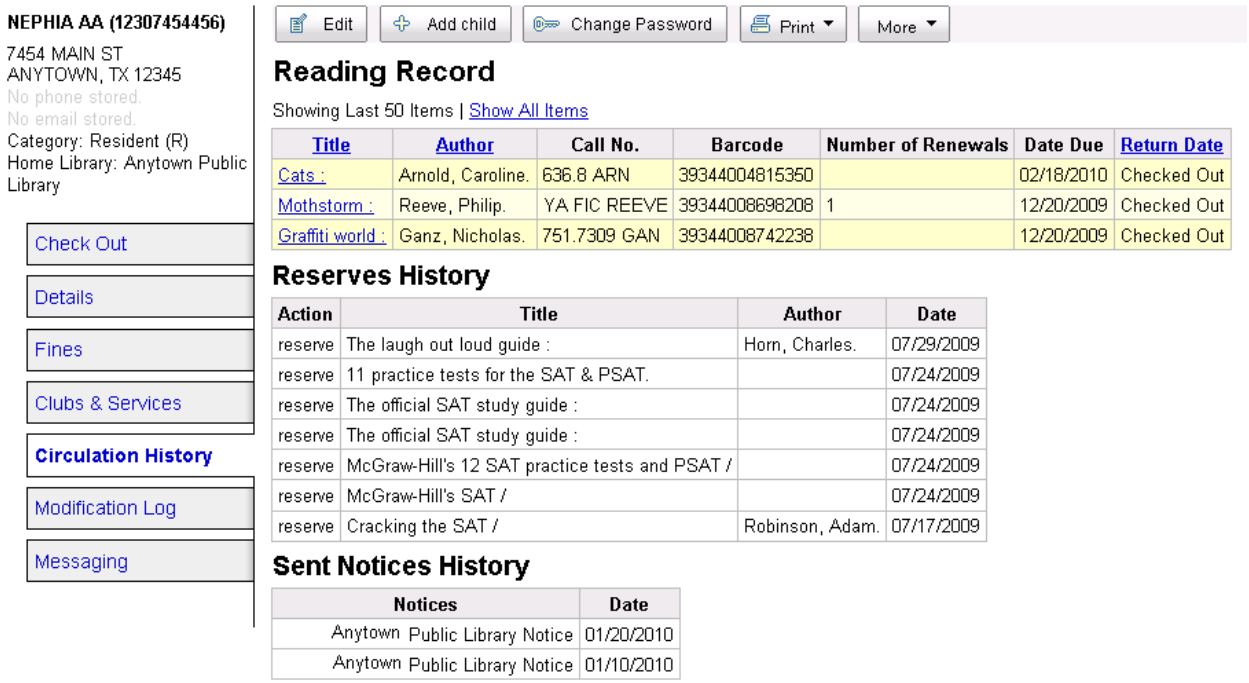

Limit On-Shelf Holds (Bug 3508)

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).

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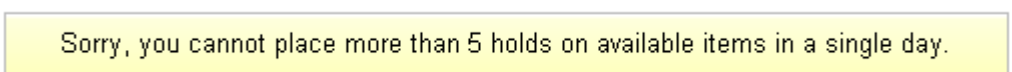
In circulation rules, click the Edit link -- this will copy the values from that line into the editing line at the bottom. Enter desired values into the new columns Max Accruable Fine Per Issue and Max Number of Holds, and click the Update button to save the changes.

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:

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



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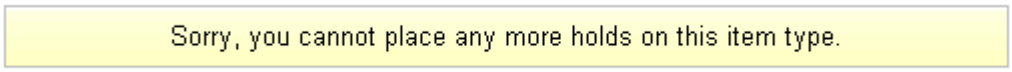
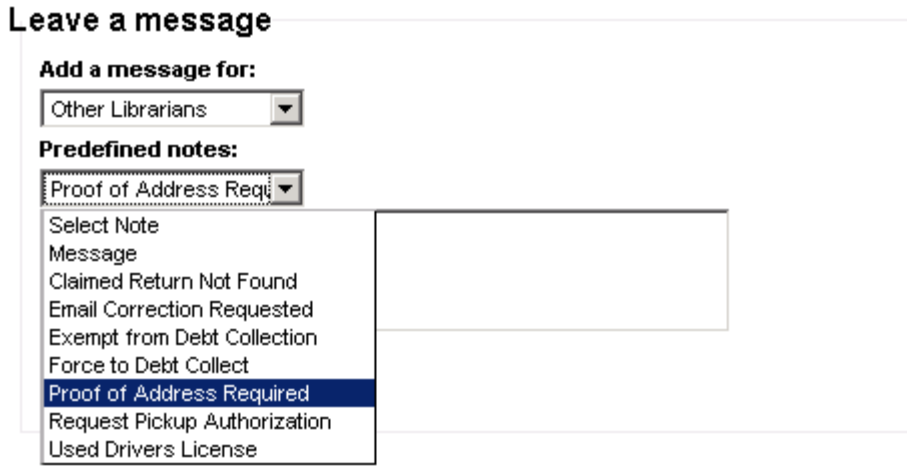
Or if a particular item type's max hold setting is reached:



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):



Visible on checkout tab:

Message for patron (using free text entry):

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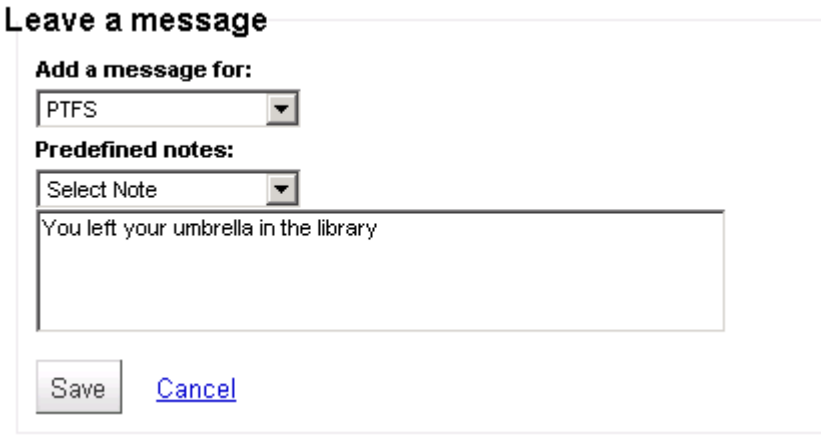

Visible in OPAC:

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.)

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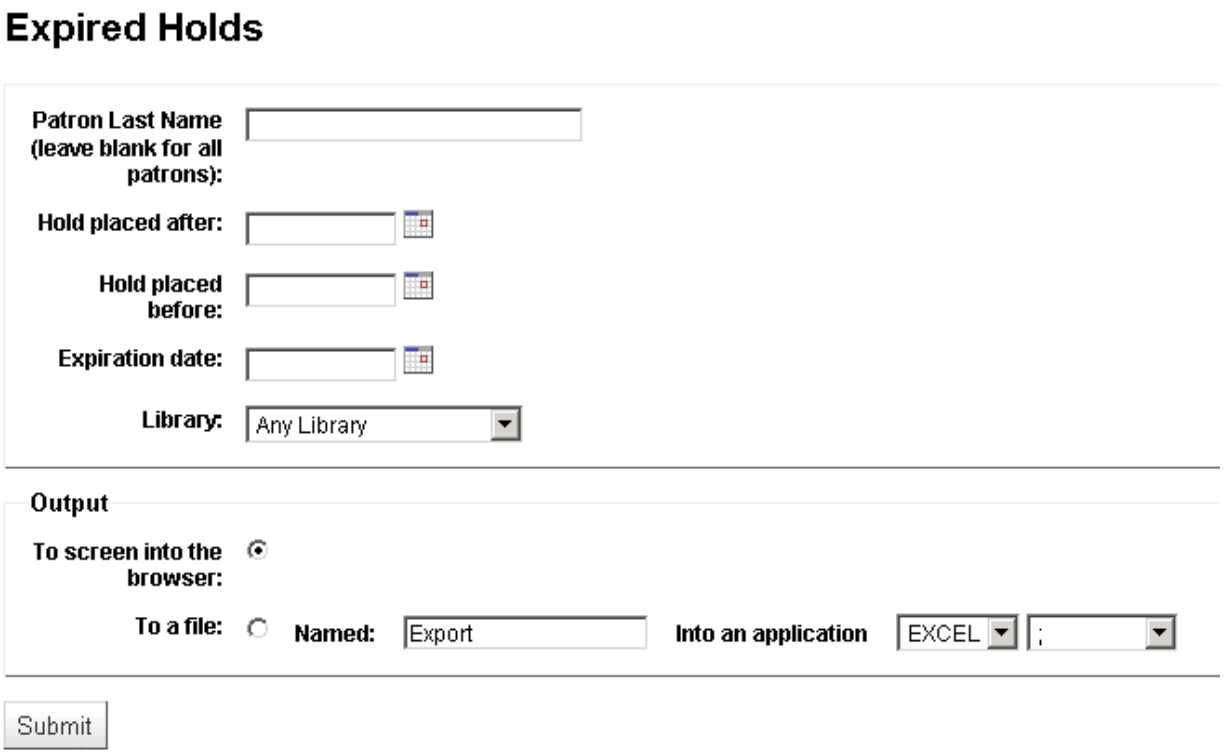

Expired Holds

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:

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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**	Cancel	Items waiting cannot be suspended.
Scott standard postage stamp catalogue.	03/06/2010		Anytown Public Library	2	Pending	Cancel	Suspend Resume on: (Optional, use format MM-DD-YYYY)

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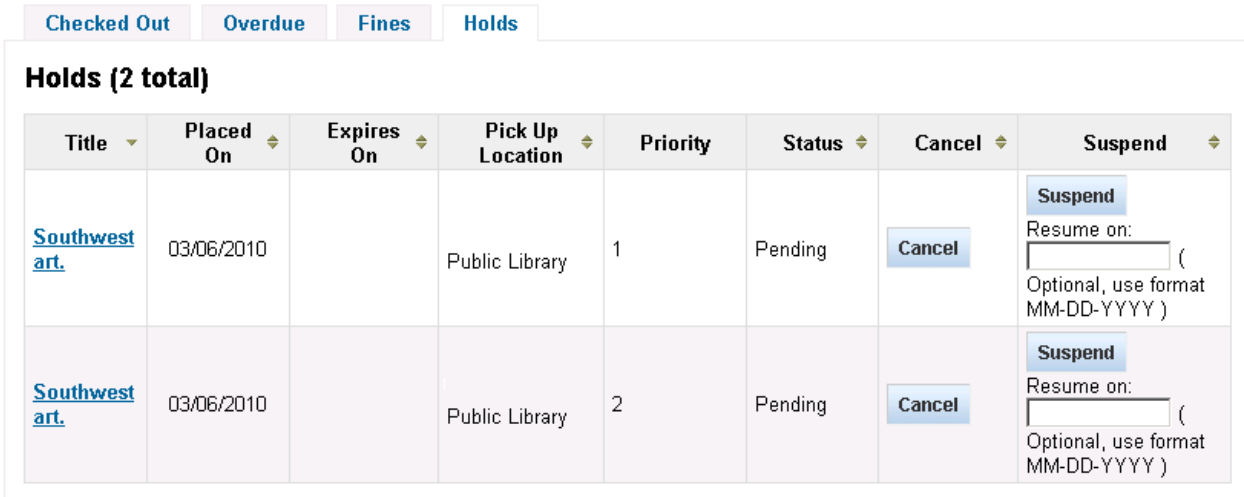
Allow Multiple Holds on Items for One Title (Bug 4239)

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 be 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.	"AMD BK-MVOL" 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.



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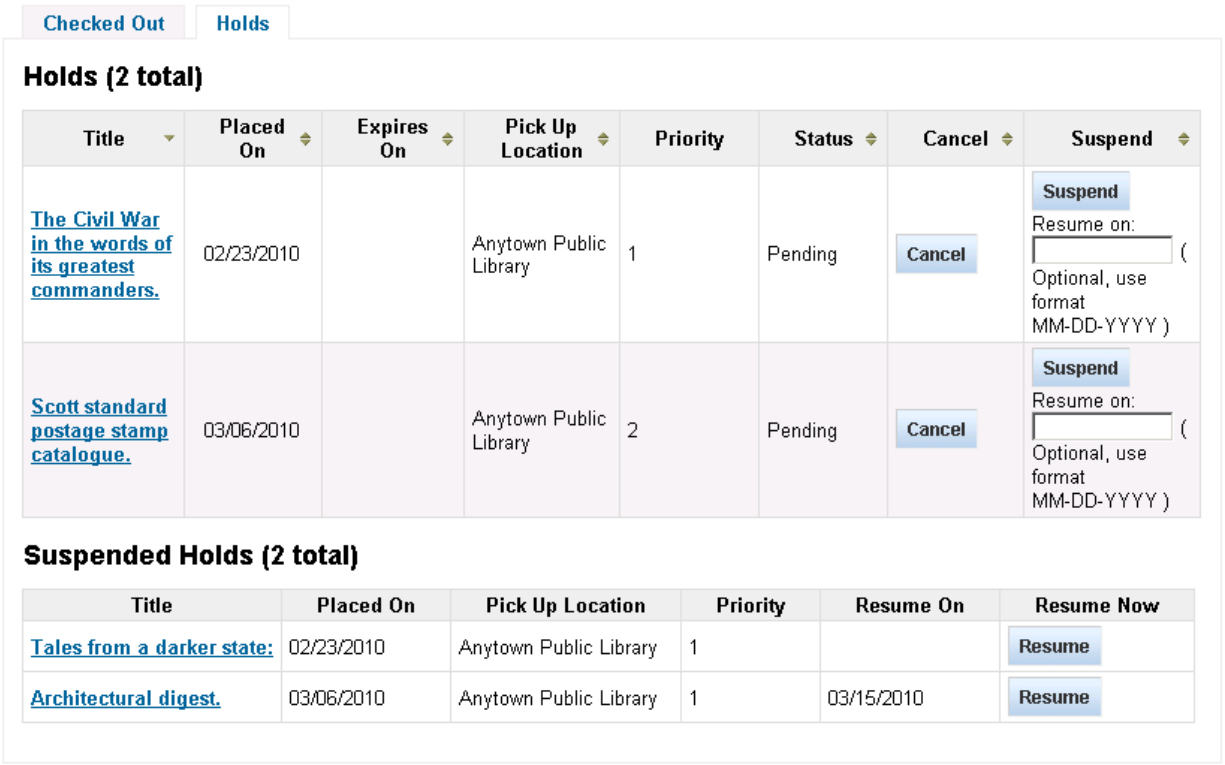
Suspend and Reactivate Holds (Bug 3488)

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:



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

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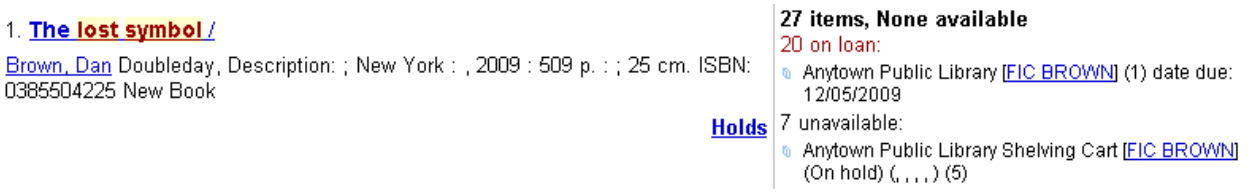
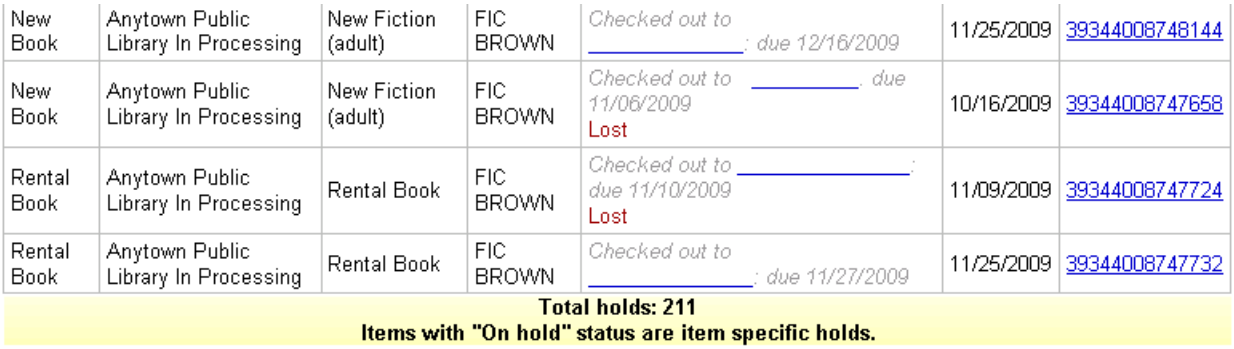
item-specific hold, or the page will say how many holds there are if they are next-available-copy holds.

Staff results list display:



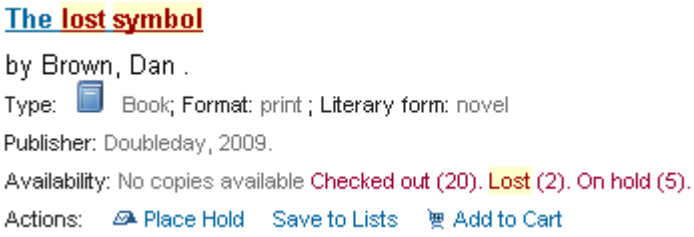
Staff title display:



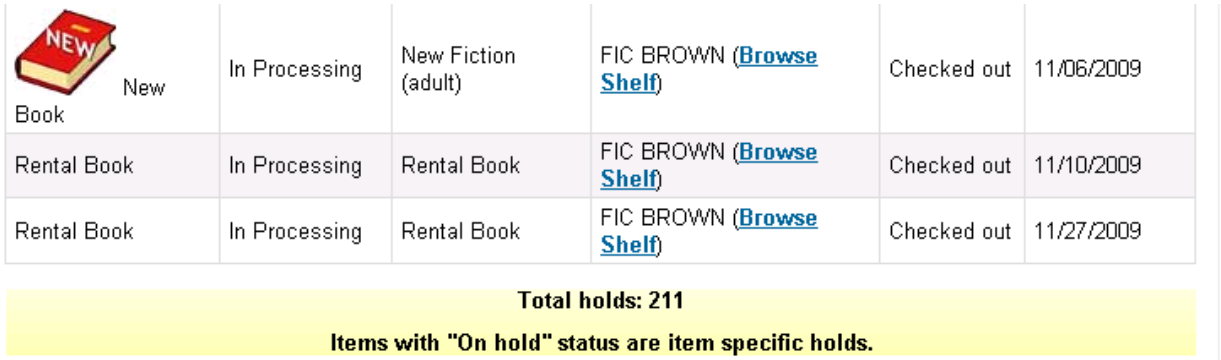
New Book	Anytown Public Library In Processing	New Fiction (adult)	FIC BROWN	*Checked out to _____: due 12/16/2009*	11/25/2009	39344008748144
New Book	Anytown Public Library In Processing	New Fiction (adult)	FIC BROWN	*Checked out to _____. due 11/06/2009* Lost	10/16/2009	39344008747658
Rental Book	Anytown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



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.

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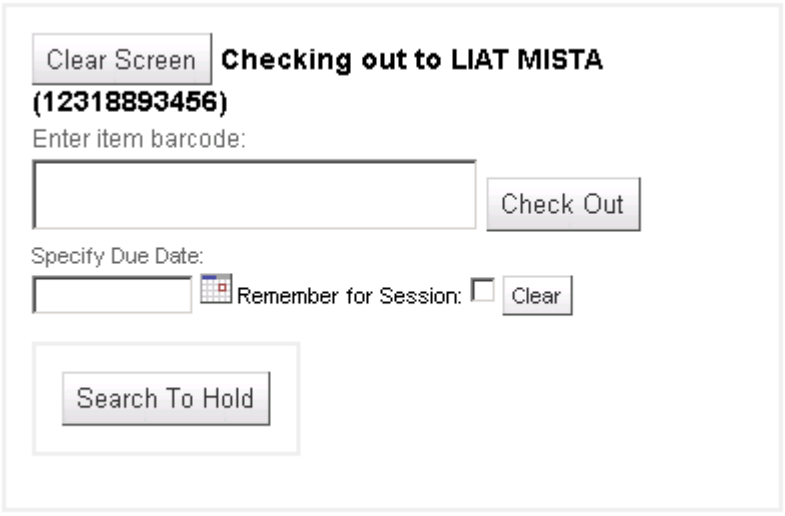
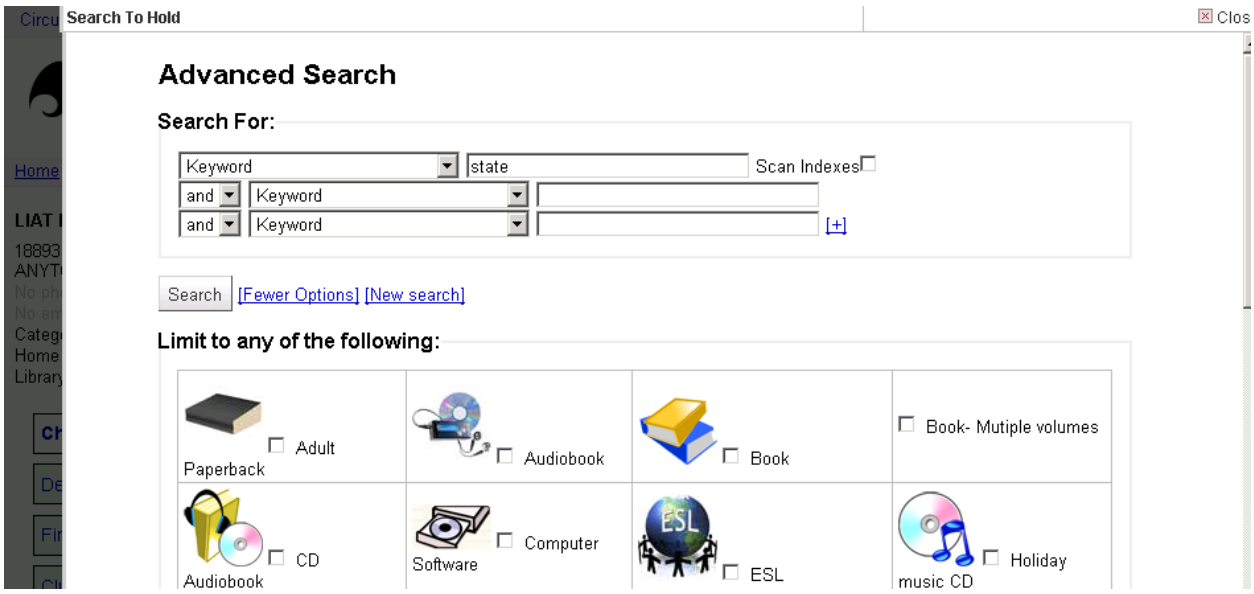
Place Hold Option on Checkout Tab (Bug 3659)

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.



Popup search screen:



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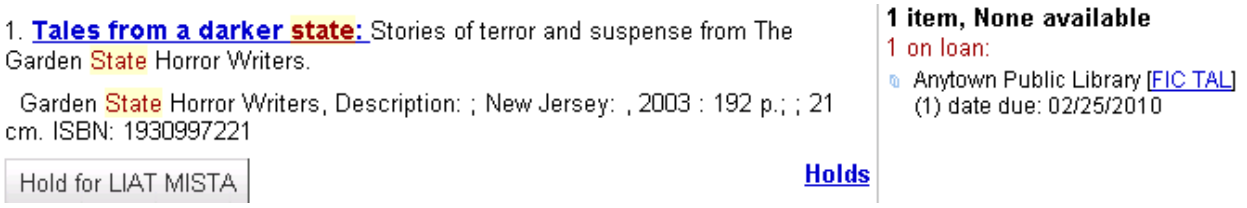
The results list for that search has a "place hold for patronname" link; if you select a particular title, the “place hold” link is there as well. Clicking that button will bring up the hold screen for that title, with the patron's name filled in. Click Place Hold to complete the hold, then close the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

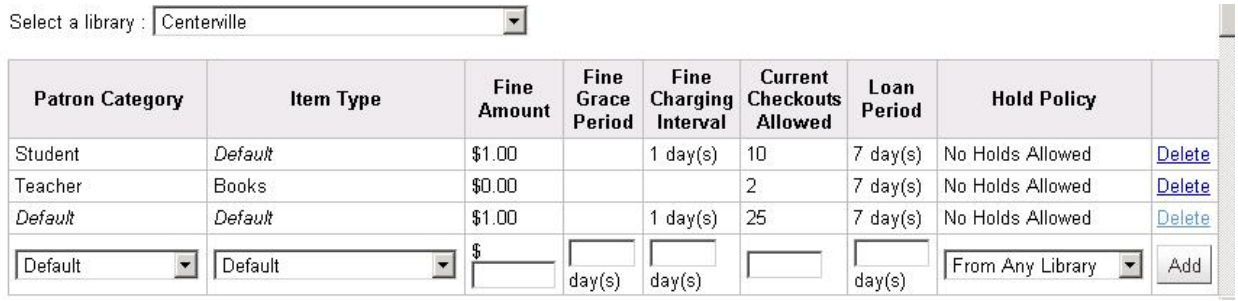
Results list:



Title display:

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.



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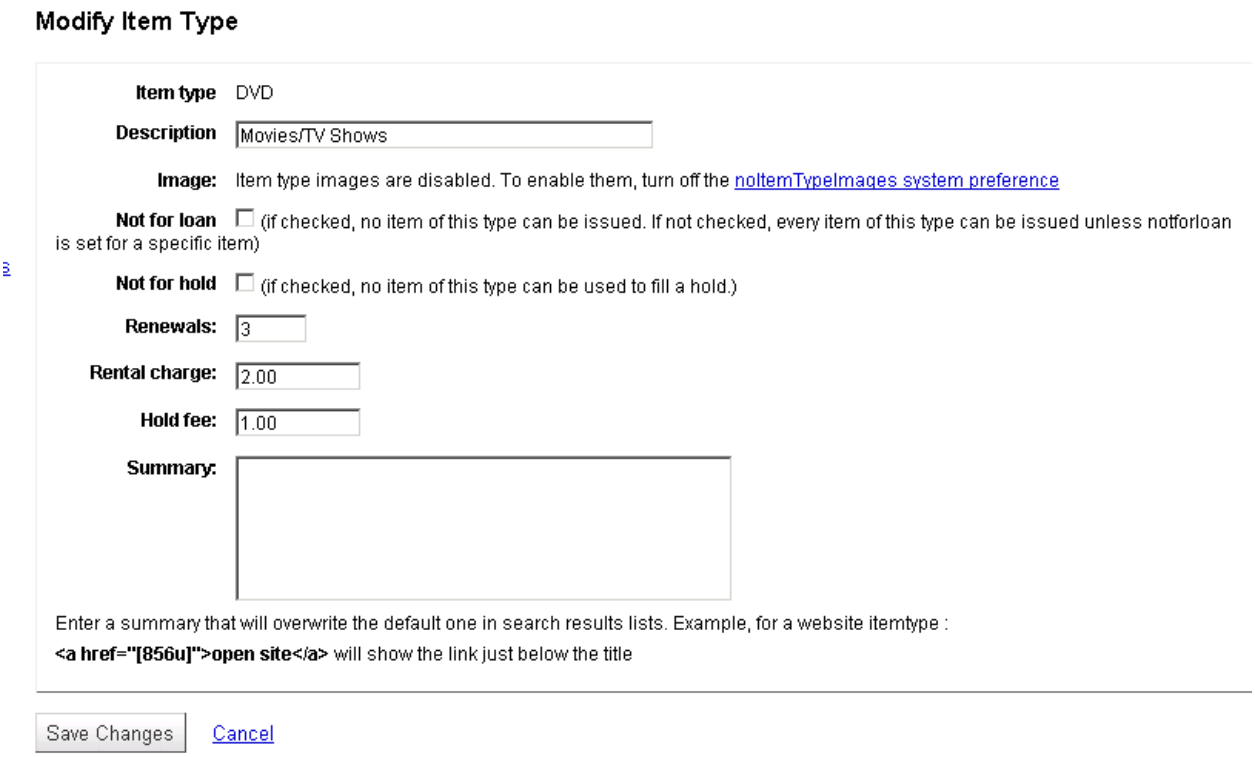
Fees for Holds (Bug 3492)

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



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

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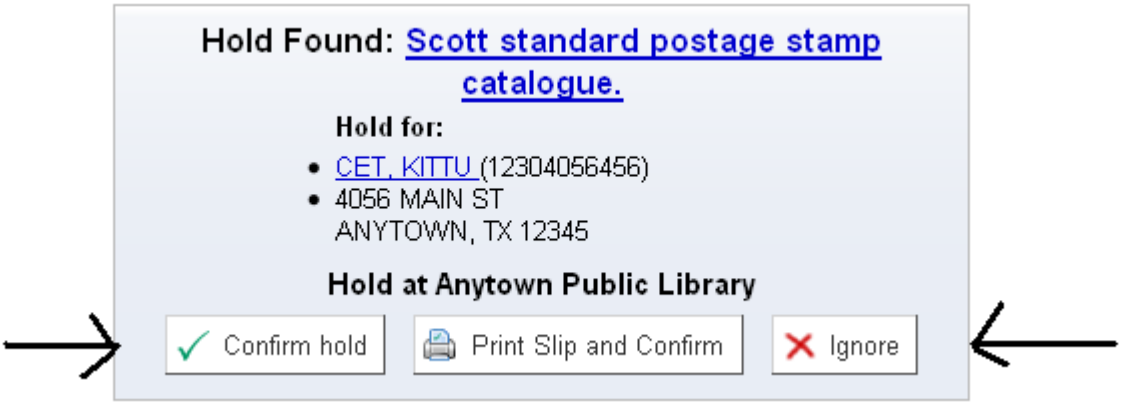
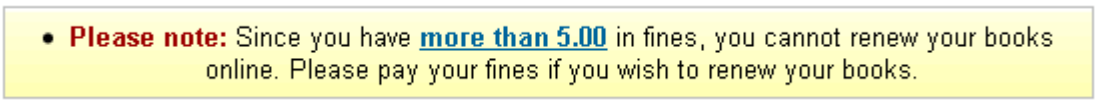
Print Slip and Confirm rather than just Confirm. This PTFS-developed feature adds new sysprefs HoldButtonConfirm, HoldButtonPrintConfirm, and HoldButtonIgnore to toggle on or off the display of the buttons Confirm Hold, Print Slip and Confirm, and Ignore when a hold is triggered.

HoldButtonConfirm	Display Confirm button when hold triggered. Leave either this setting or HoldButtonPrintConfirm on.	ON OFF Save
HoldButtonIgnore	Display Ignore button when hold triggered.	ON OFF Save
HoldButtonPrintConfirm	Display Confirm and Print Slip button when hold triggered. Leave either this setting or HoldButtonConfirm on.	ON OFF Save



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.



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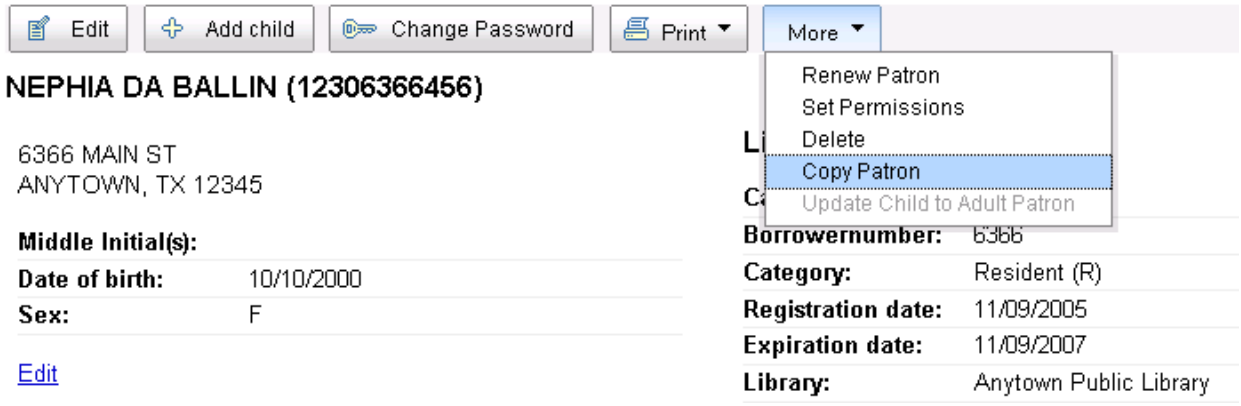
Copy Patron Record (Bug 3475)

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.



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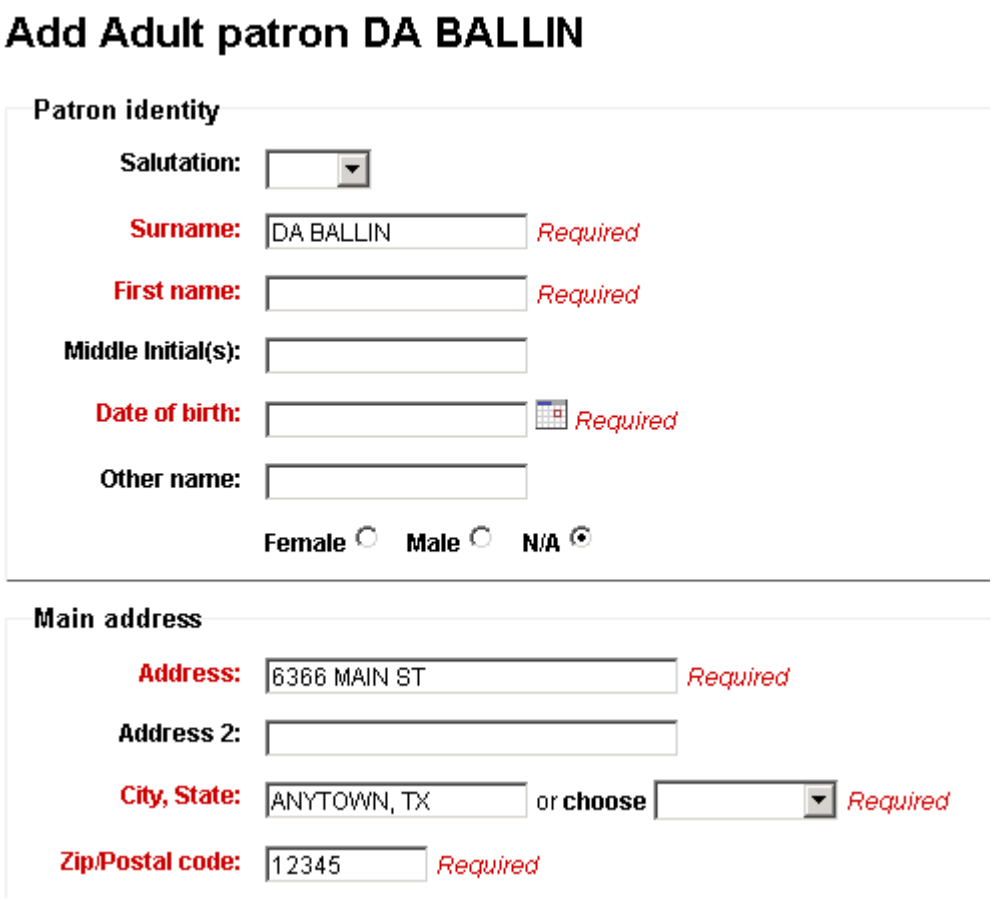
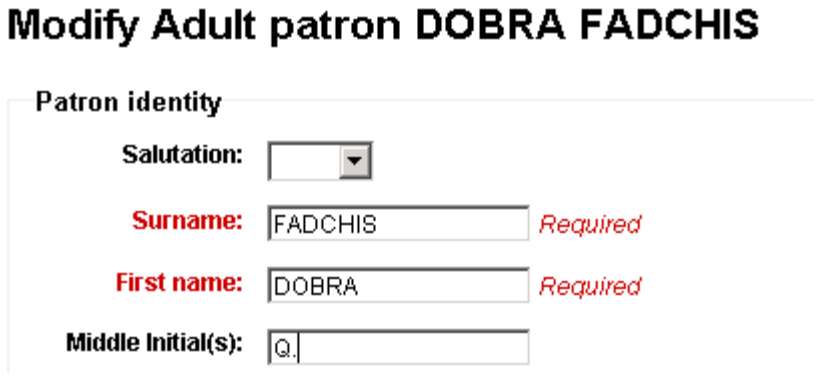


Display Patron Middle Initial (Bug 3478)

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.



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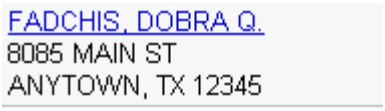
Patron search results:



Circulation, Checkout search results:

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)

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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

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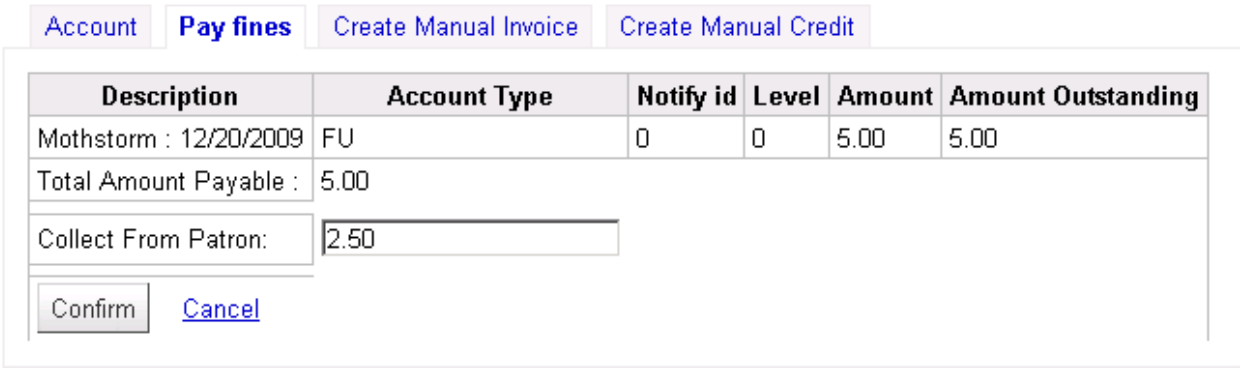
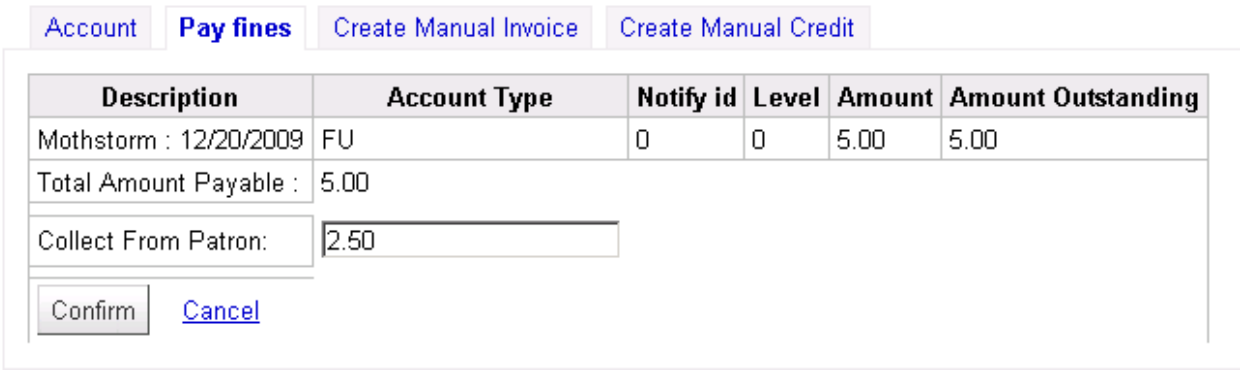
Clicking Pay next to a specific entry:



Clicking Pay Amount:



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.

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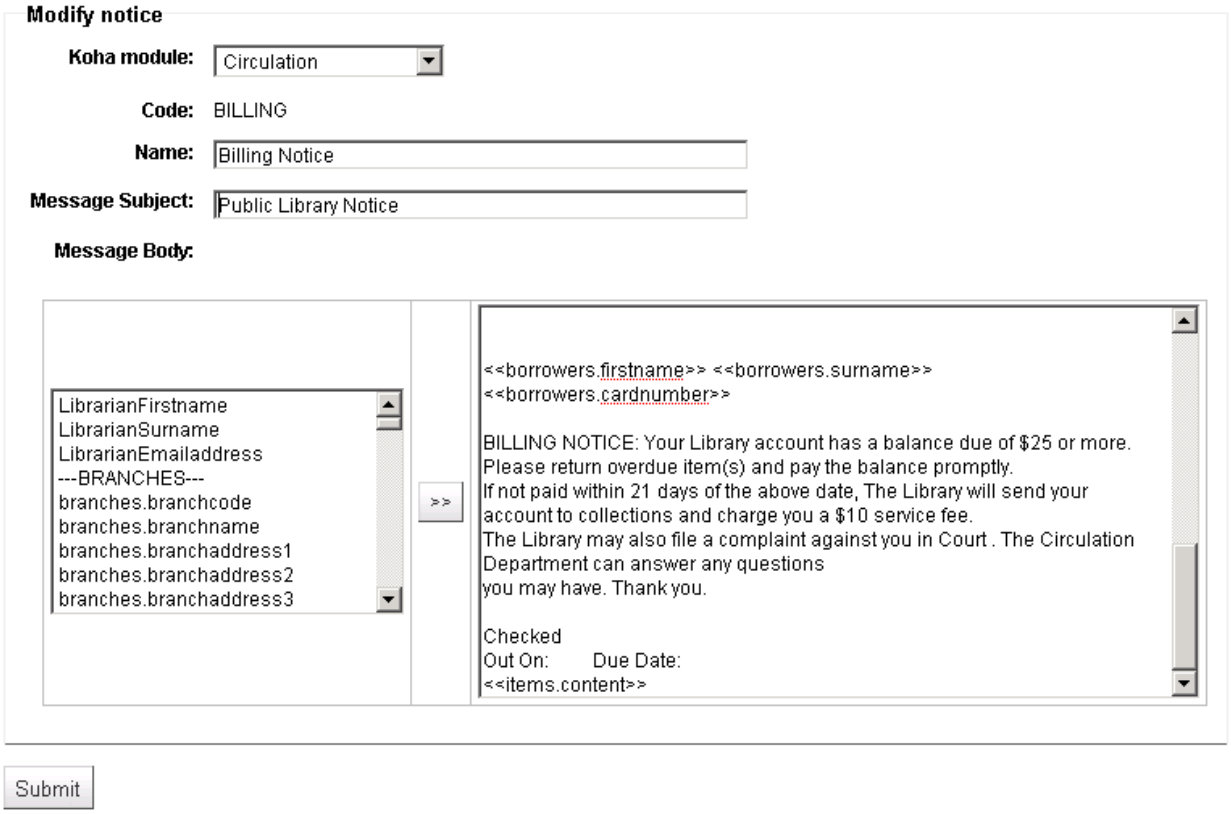

The debt collection piece is a script that checks for patrons who received the billing notice but haven't yet paid. The output is in the format specified by Unique Management Inc.; it could be adapted to other collection agencies. Options are configured via command line to the script. As well as the 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.

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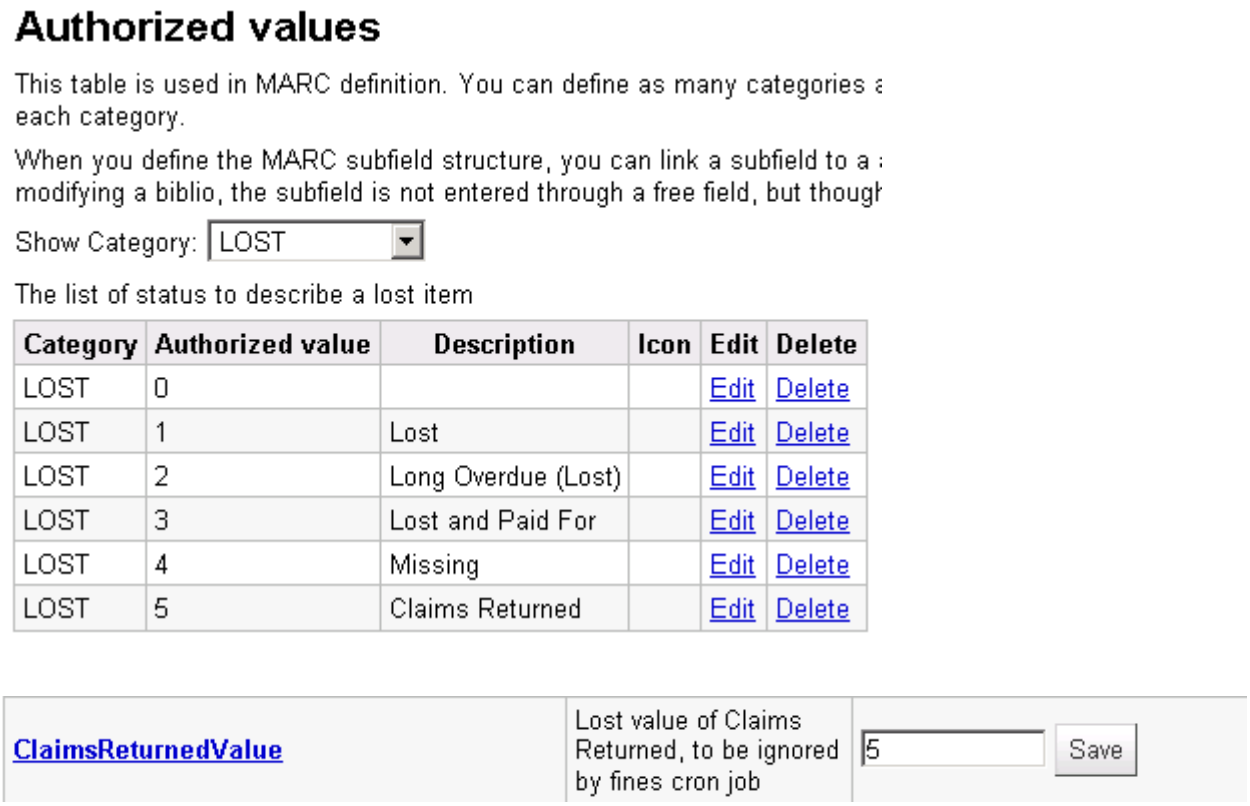

Authorized values

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

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

Show Category: LOST

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	5 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.

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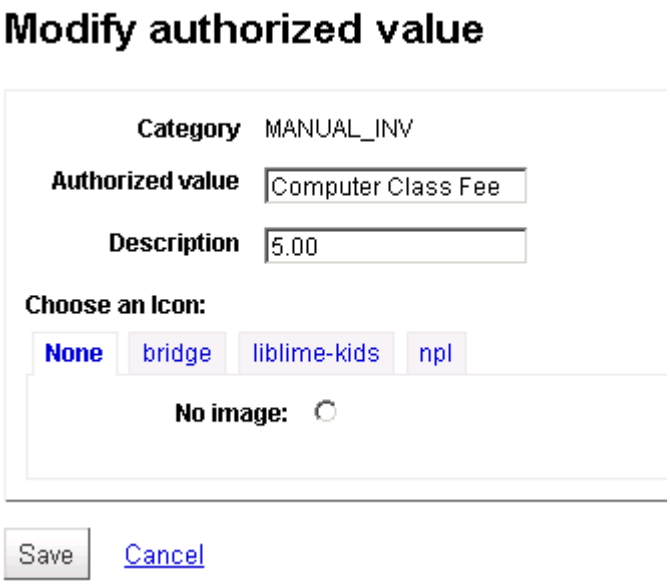
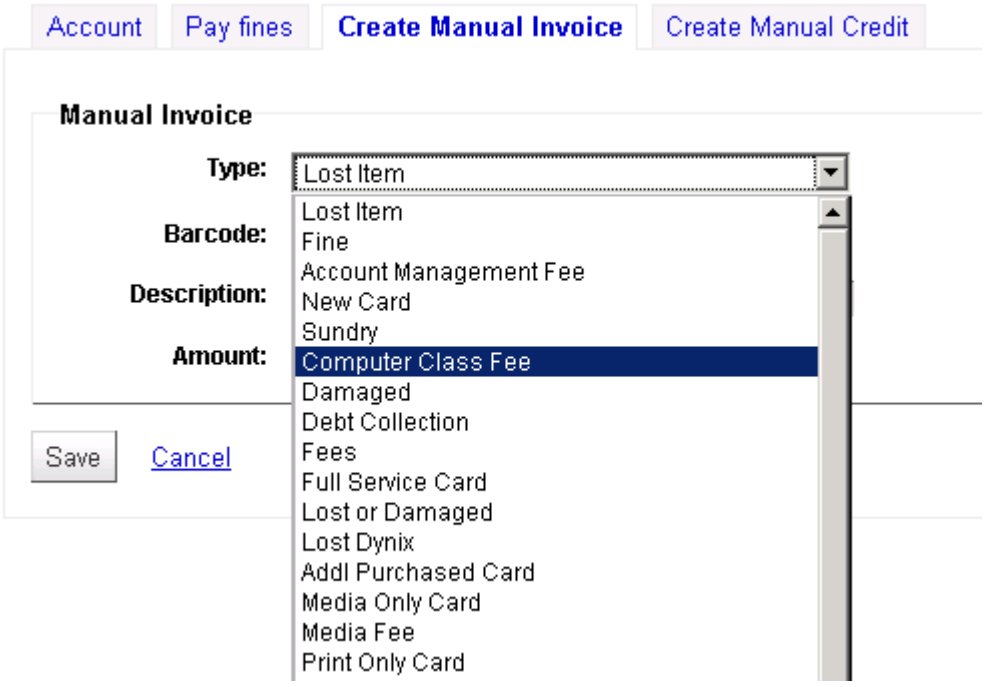


To use, go into a patron record and create a manual invoice (on the Fines tab), using that fee type.



Fines display:

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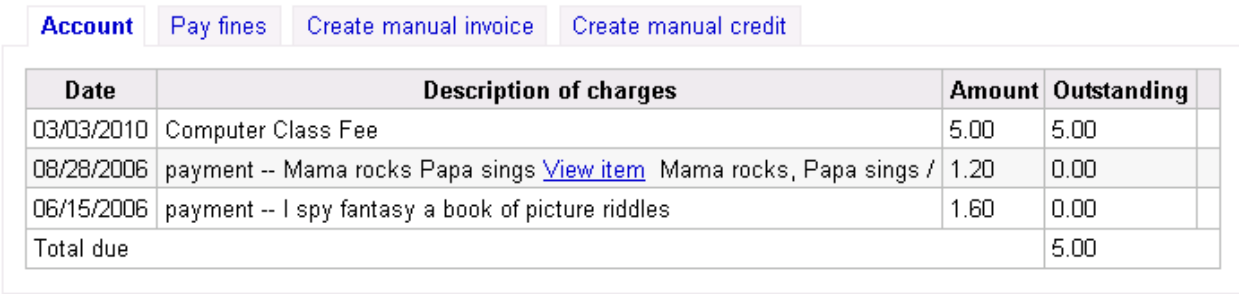

Account | Pay fines | Create manual invoice | Create manual credit

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.

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.

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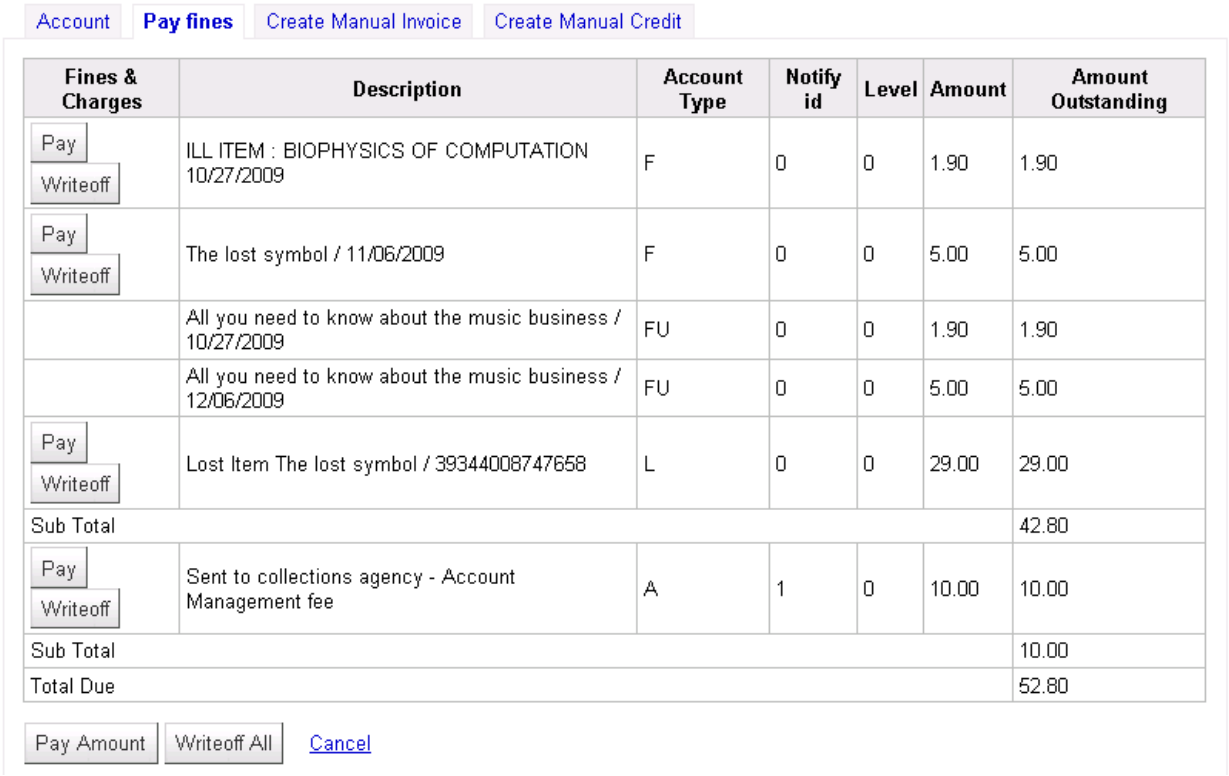

Account | **Pay fines** | Create Manual Invoice | Create Manual Credit

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.

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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.

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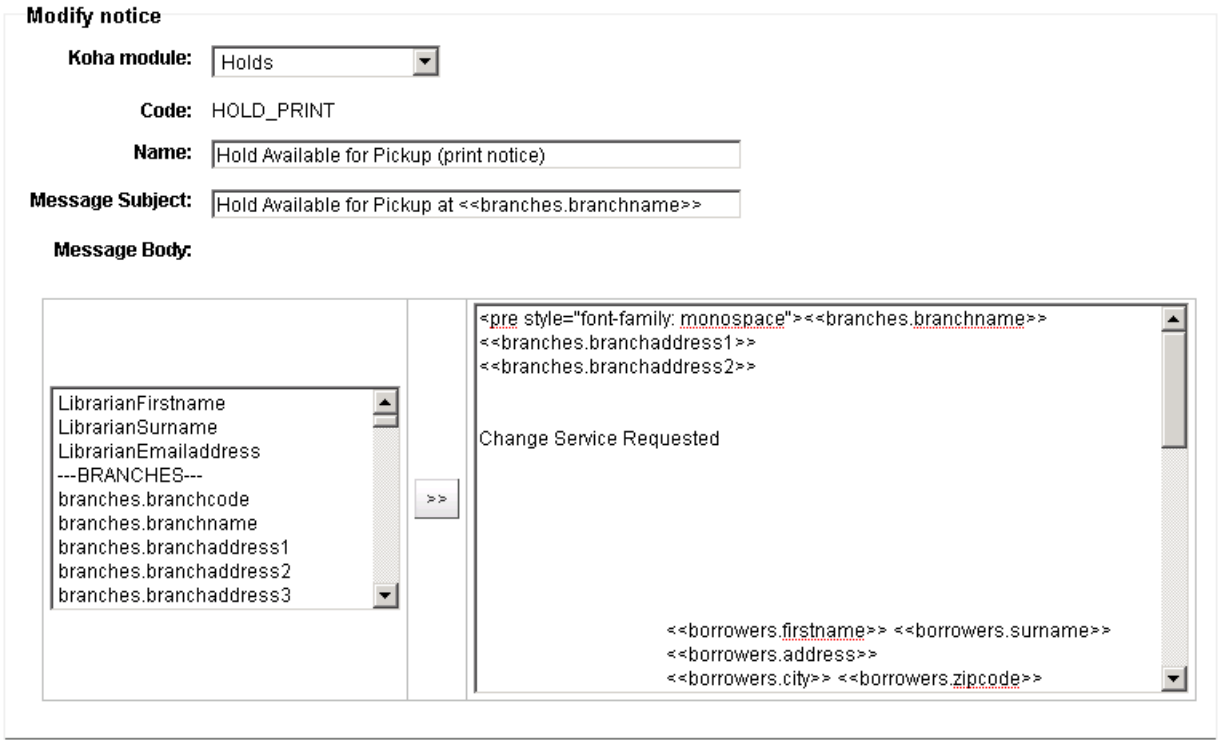
Print Option for Hold and Overdue Notices (Bug 3482)

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.



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.

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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		No notice	☐
Senior Outreach		No notice	☐
Student		No notice	☐
Taxpayer		No notice	☐
Volunteer		No notice	☐
Video/Media Only Purchased Card		No notice	☐
Work in Town		No notice	☐

By item type:

	Delay	First Letter	Debar
Magazine	21	First Overdue Notice	☐
Adult Paperback	21	First Overdue Notice	☐
Book	1	First Overdue Notice	☐
Book- Mutiple volumes		No notice	☐
Music CD	1	First Overdue Notice	☐
Holiday music CD	21	First Overdue Notice	☐
New Childrens Movie	7	First Overdue Notice	☐
Audiobook	21	First Overdue Notice	☐

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.

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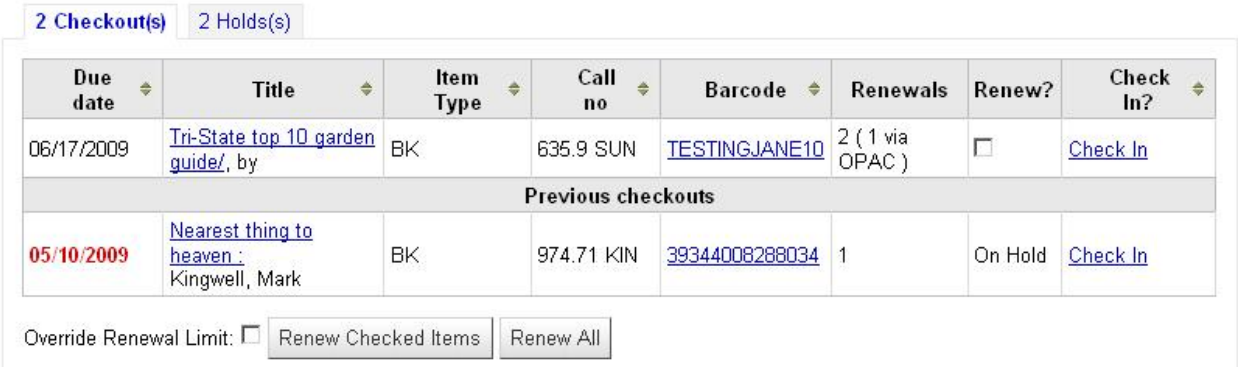
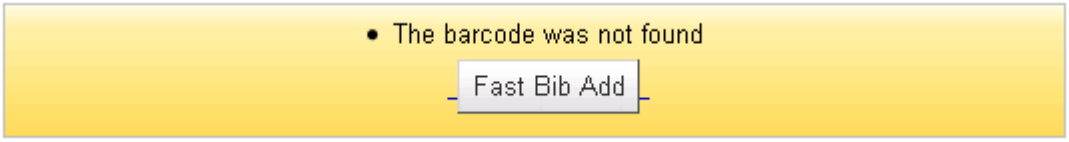


Fast Adds at Circulation (Bug 3495)

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:

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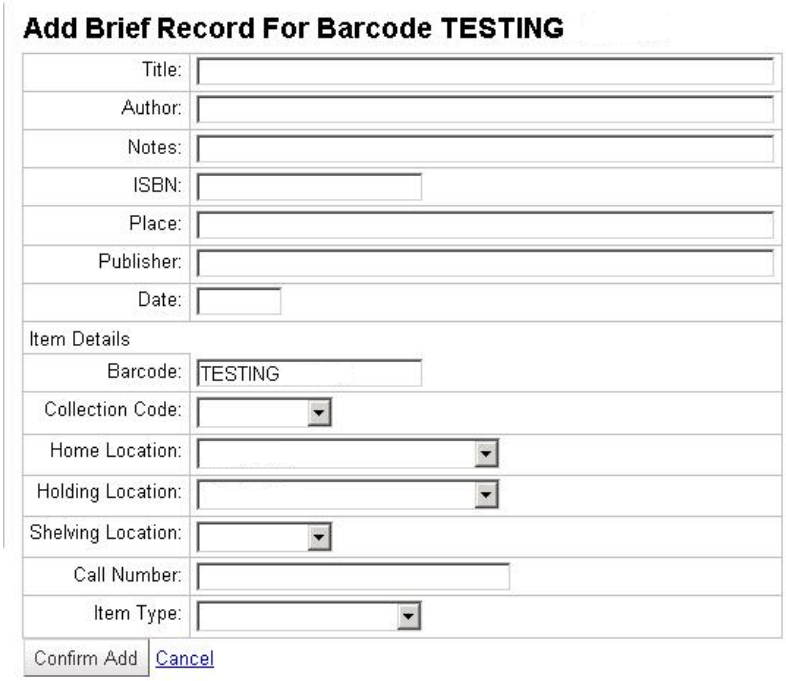

When the item is checked back in, the system should alert the staff member to send the item and brief record to Cataloging for full MARC record creation.

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:

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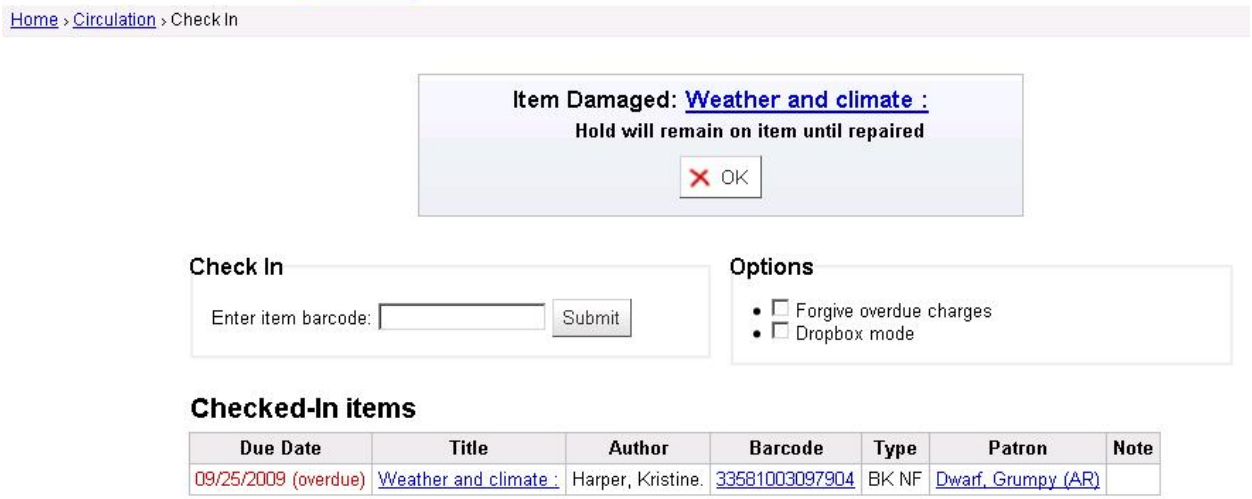

If other items are available:

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.

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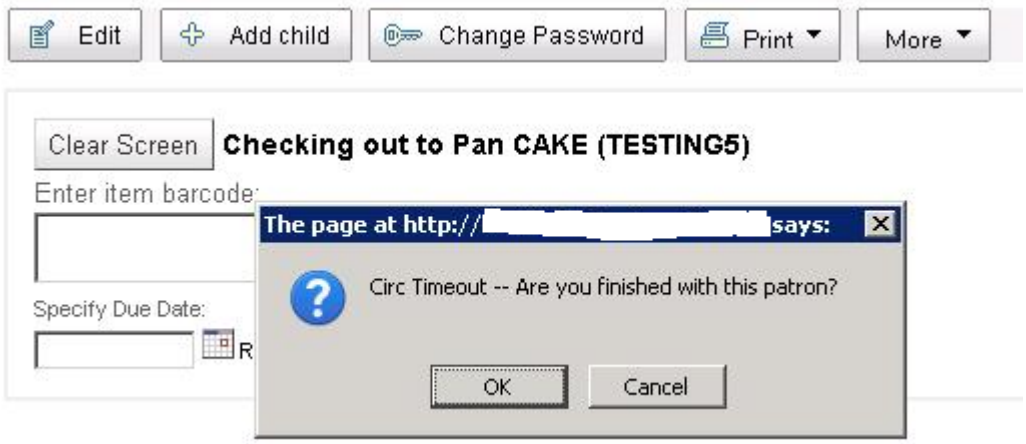
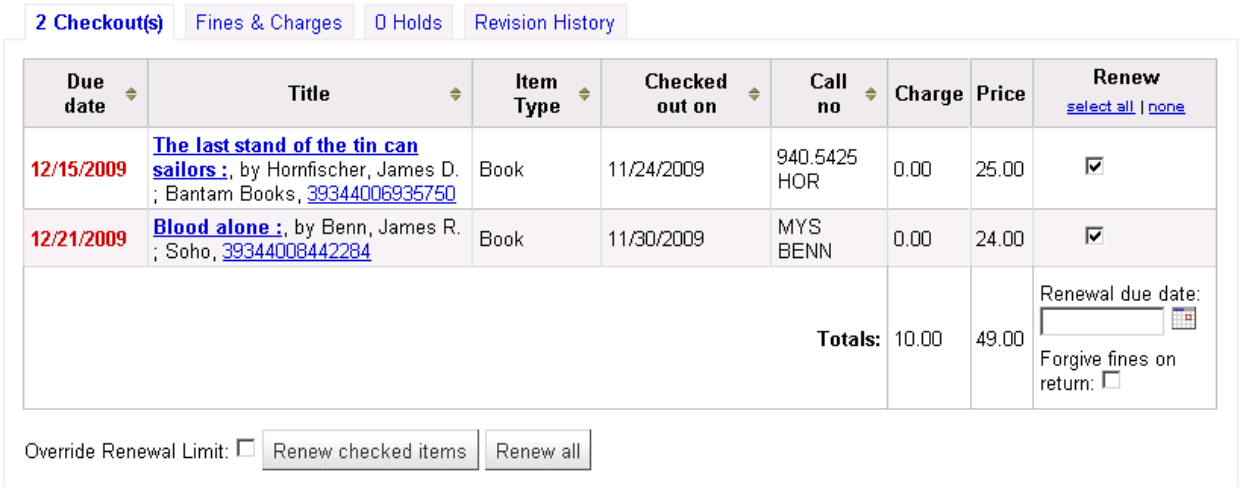


Turn Off Returns Column in Patron Record Display (Bug 3514)

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:



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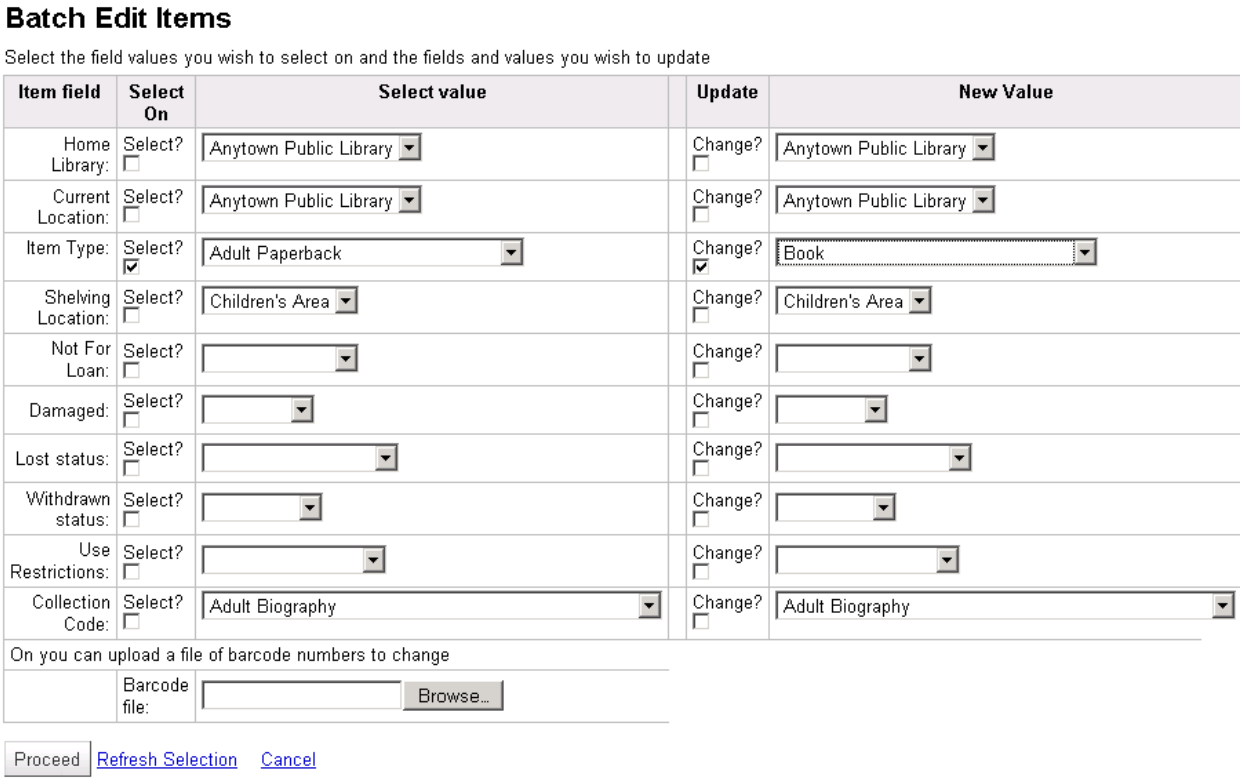
Cataloging

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



Other Item Statuses (Bug 4237)

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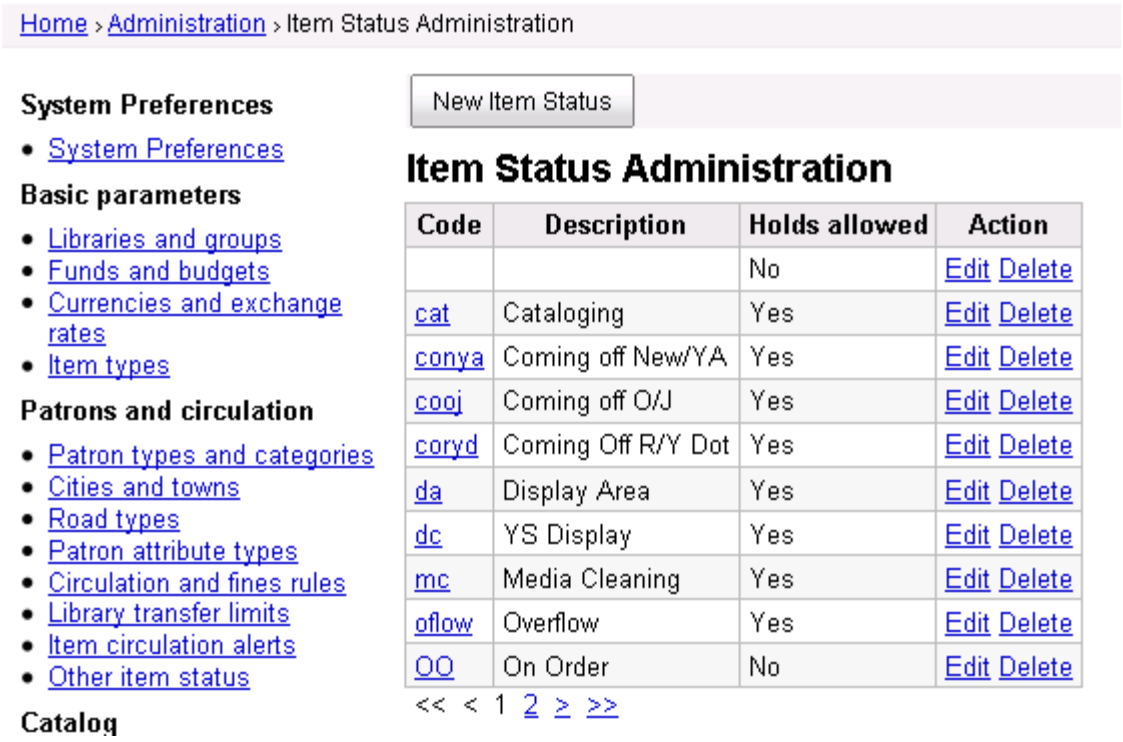
This PTFS-developed feature allows a library to define local statuses for items, and to control whether or not items with those statuses can have holds placed. We identified an unused subfield (subfield k) in the 952 and used it for this purpose and, also created a new field named otherstatus in the 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.)



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.

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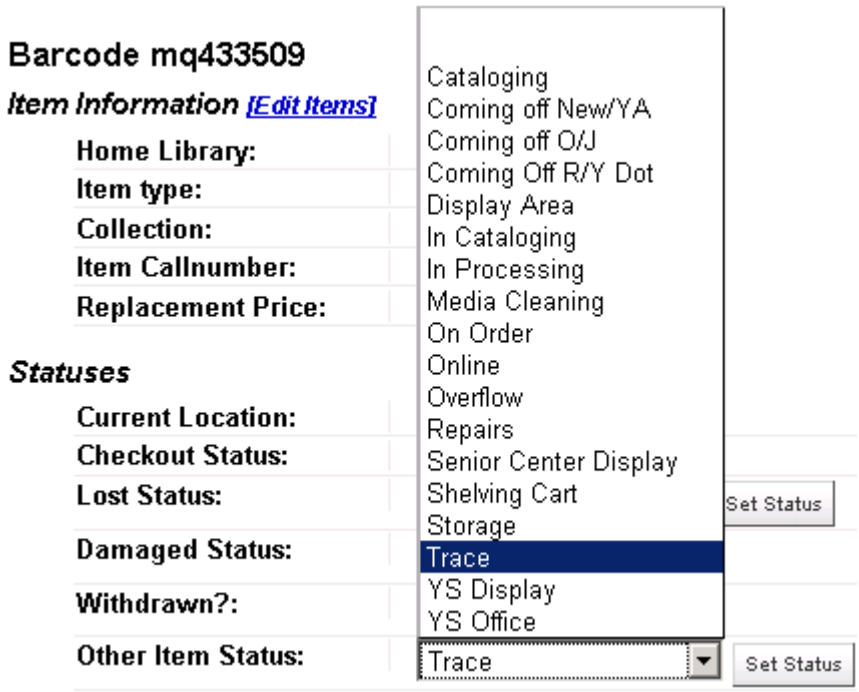
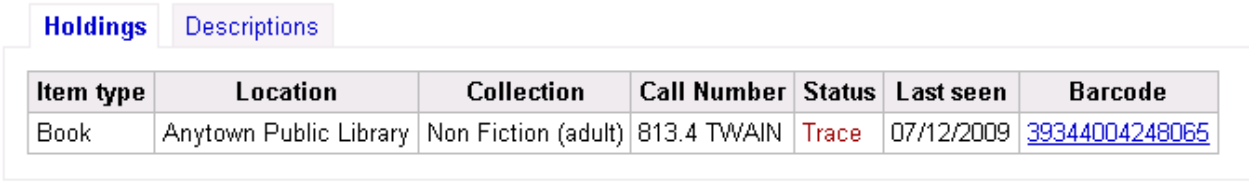
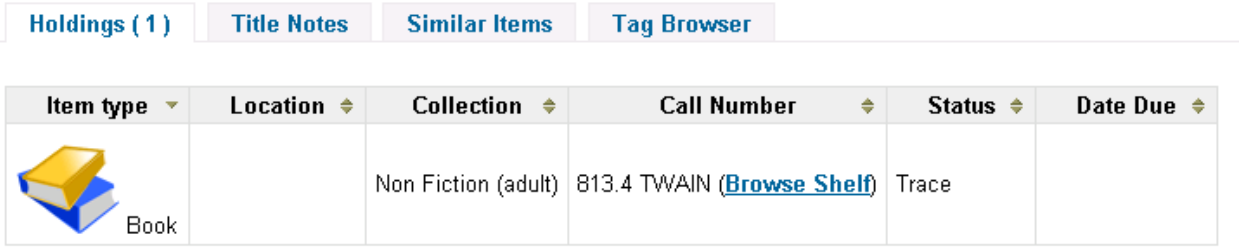


These statuses show in both staff and OPAC item listings. The status is cleared when an item is checked in, or by editing the status as above.

Staff display:



OPAC display:



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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 categorie 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 tho

Show Category: LOC

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

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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.

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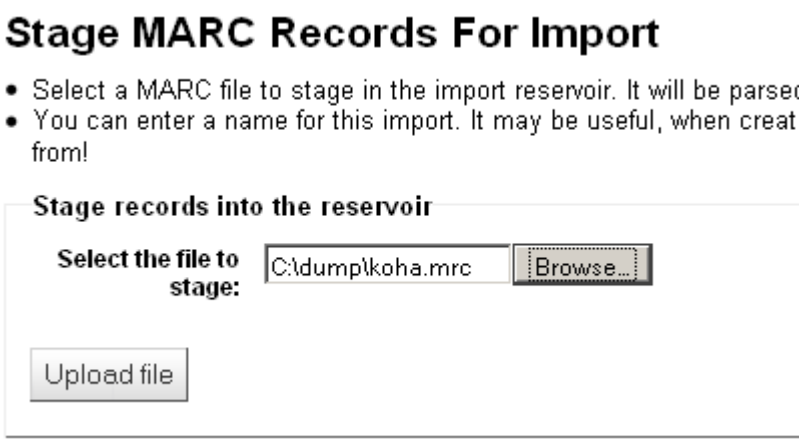
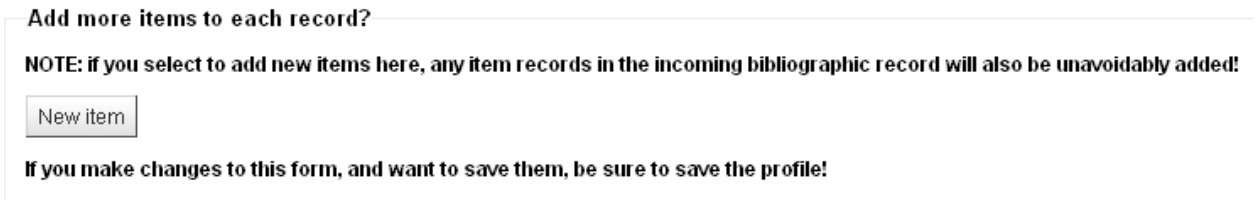


You will then see an option in mid-screen to either apply a saved profile or save your current settings as a profile.

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:



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

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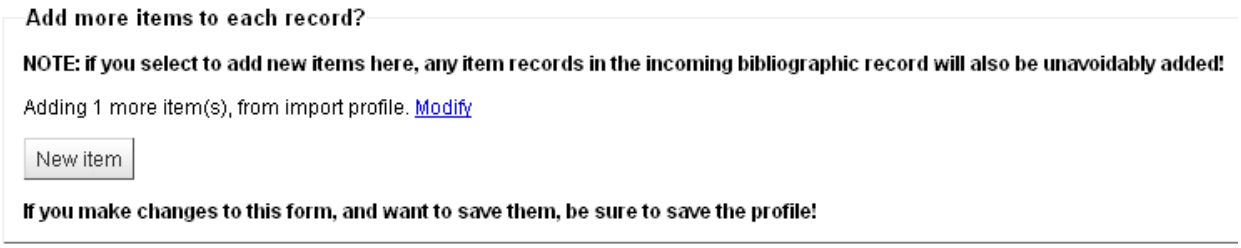
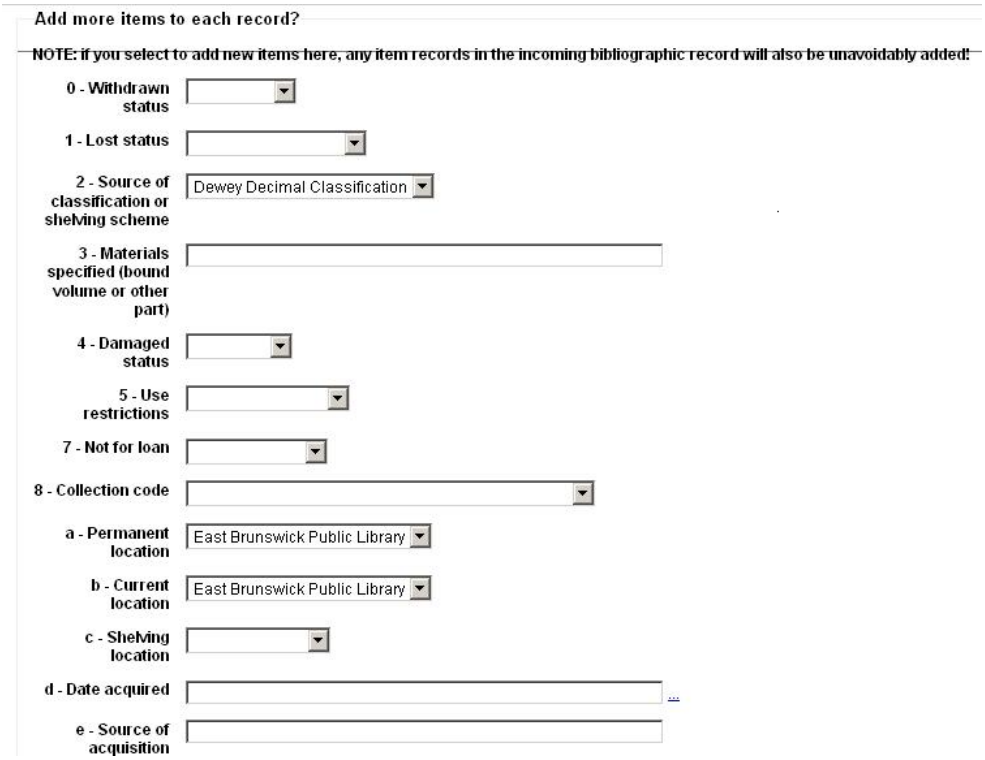


In either case, an item edit screen will expand out and you can specify the settings for items to be added when the title is loaded.



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

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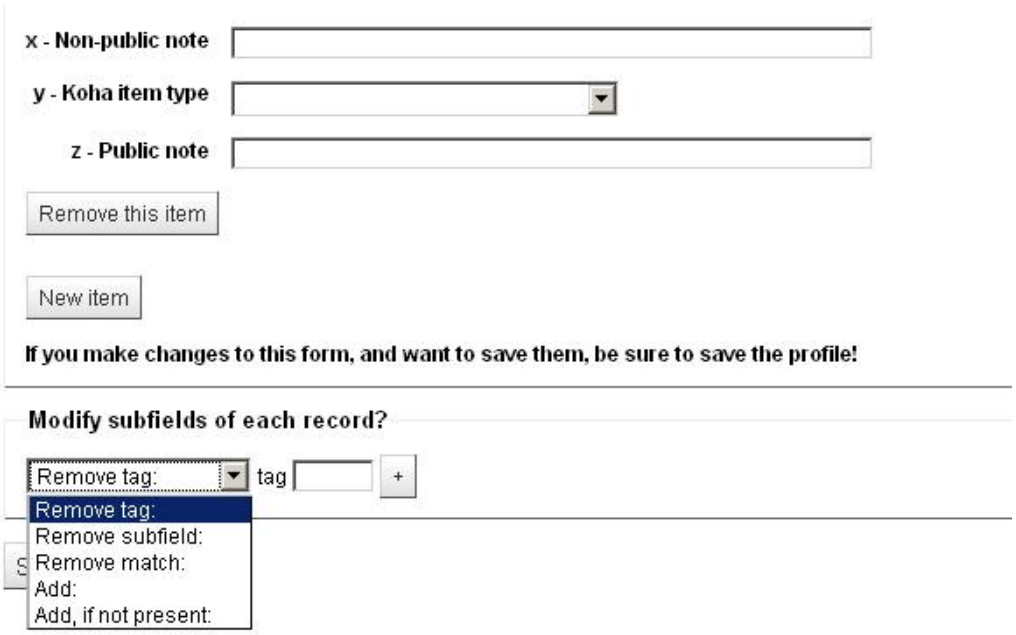

OPAC

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).

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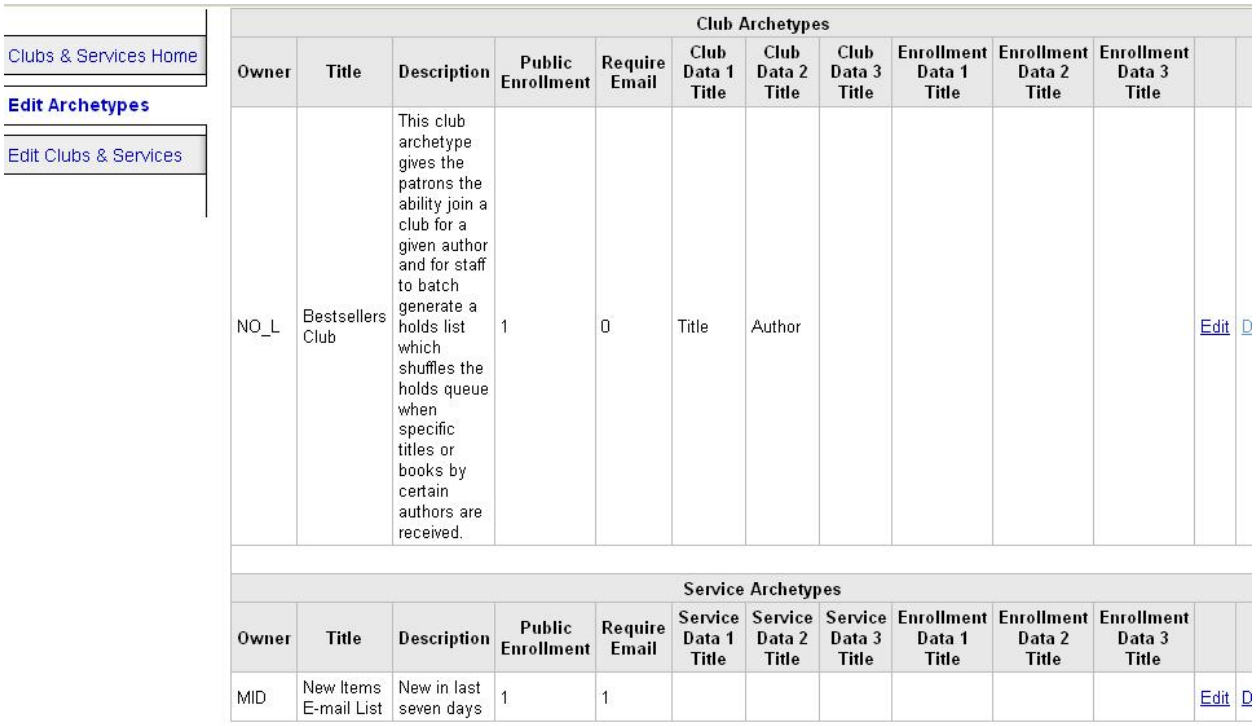

Create a new club, and fill out the data required. You can set the club by Title and/or Author; probably most of the time it will be author. The author field here has to match the author field of the items exactly. For example, to make a Larry Niven bestseller's club, fill in the author field with 'Niven, 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.

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	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:	Bestsellers Club	
Title:	Archer, Jeffrey	
Description:	Jeffrey Archer New Book Club	
Title:		*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.*
Author:	Archer, Jeffrey%	*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.*
Item Types:	BK	*Put a list of space separated Item Types here for that this club should work for. Leave it blank for all item types.*
Date format is : YYYY-MM-DD		
Start Date:	2009-10-09	*Optional: Leave blank for start date of today.*
End Date:		*Optional: Leave blank for no end date.*
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/mailinglist directory; this template can be customized for each library. The script is also found in misc/cronjobs/mailinglist 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

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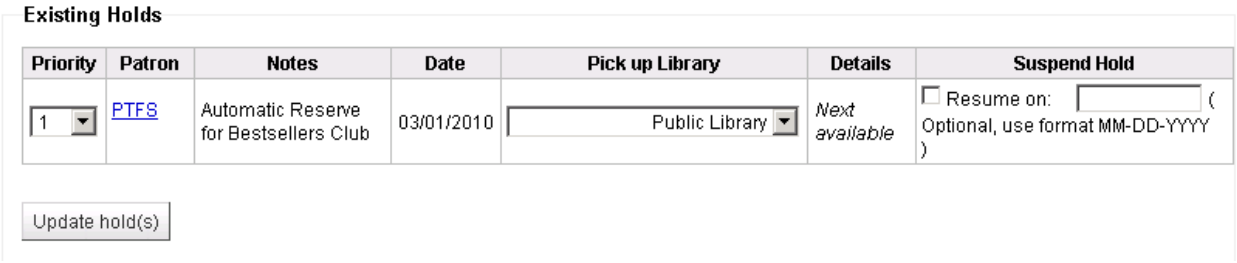
gets an automatic hold placed on the item (the priority order is randomized each time). Patrons who've joined an email list get a regular (probably weekly) email of any new titles matching the list criteria.

Enrolling through the OPAC:

When a new title is added a hold is placed automatically:



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.

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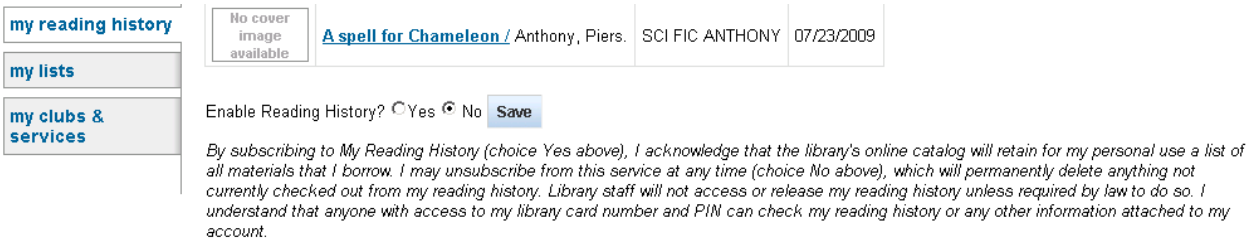
Clear Reading History (Bug 3531)

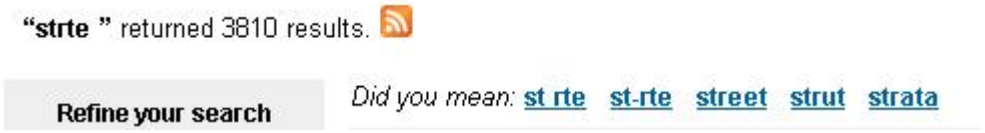
Patrons with concerns about privacy can opt to clear their reading history if the library allows it. Turn this PTFS feature on with the syspref AllowReadingHistoryAnonymizing. Then the option to clear will be in OPAC under Reading History tab and in staff mode at bottom of patron edit screen. (OPAC display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



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.



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 opacmsgtab 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.

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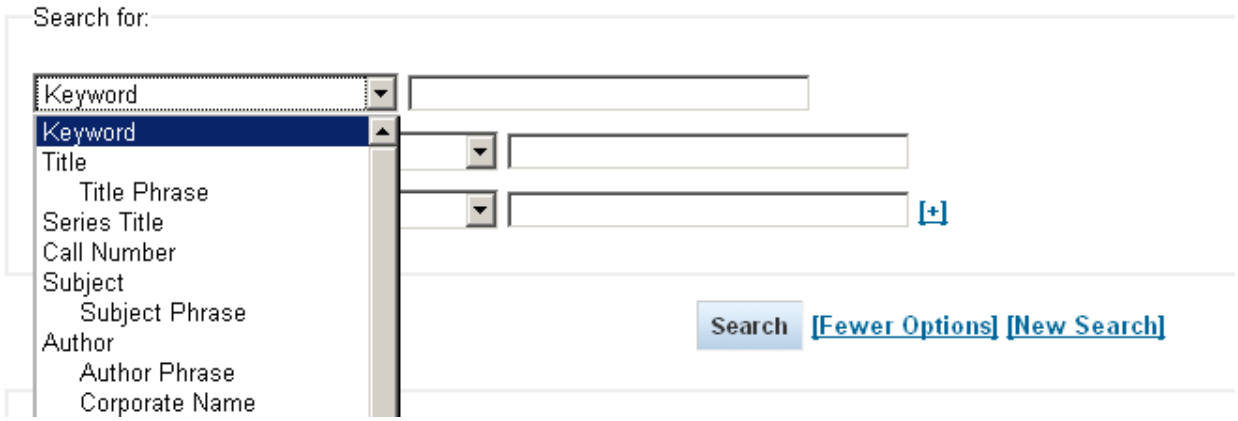
OPAC and Staff Advanced Search Changes (Bug 3665)

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:



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.

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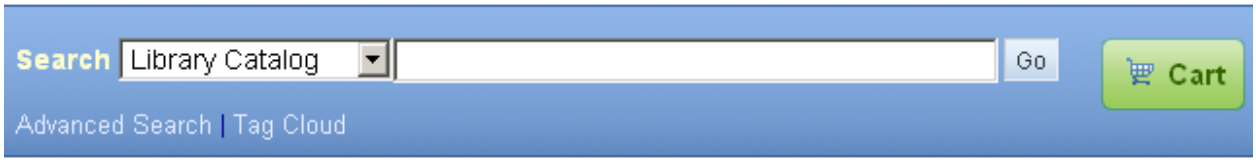
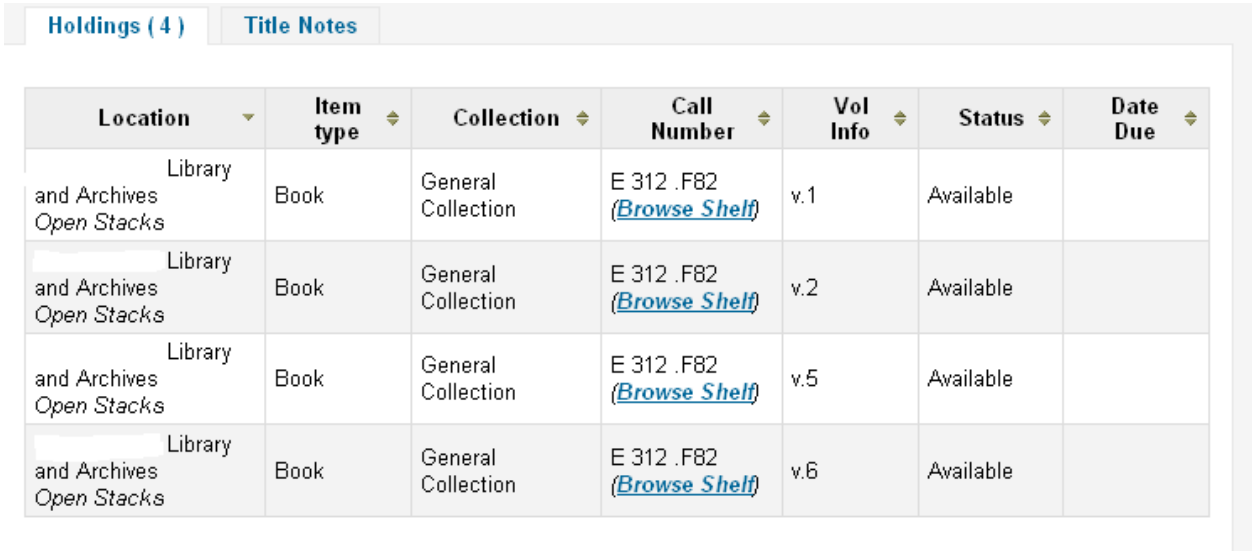


Set Off Shelving Location in OPAC display (Bug 3789)

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.



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.

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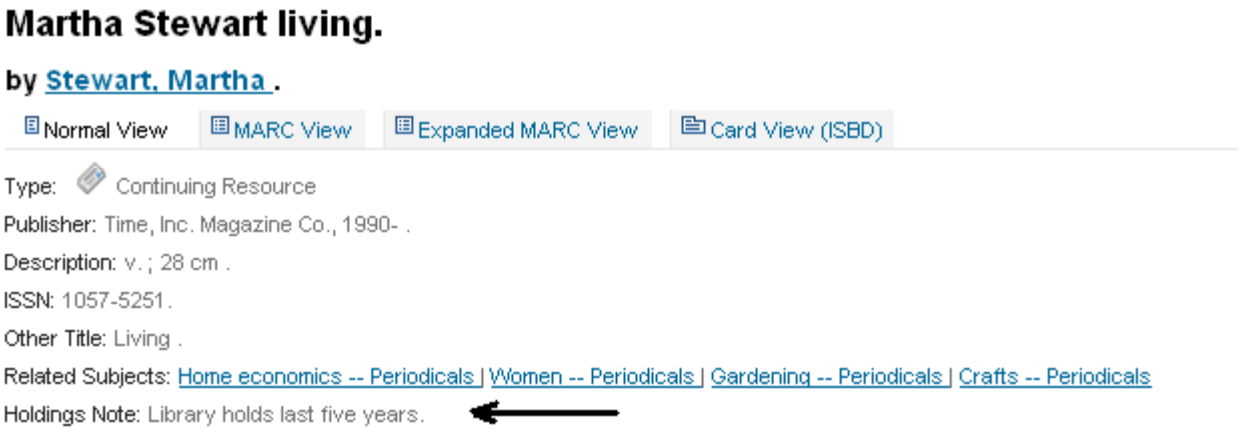
Allow OPAC and Staff to Use Different Settings for Advanced Search (Bug 3799)

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.



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 syspreff is off, this tab will not be visible.

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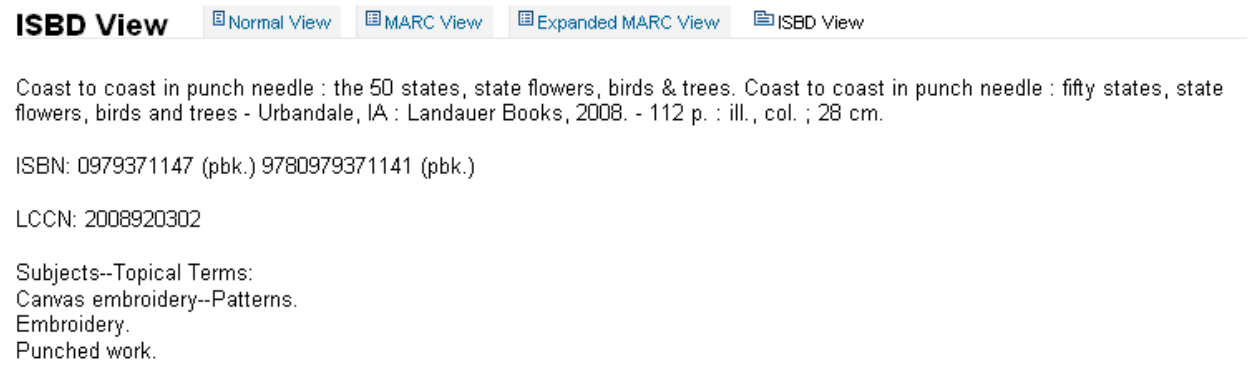
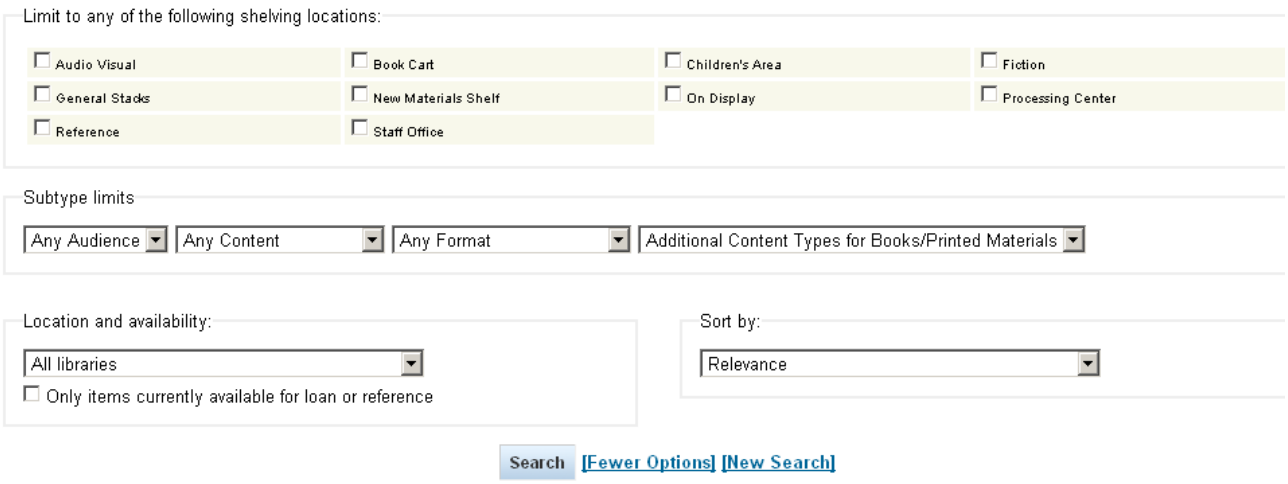


Search by Shelving Location (Bug 4329)

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



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.

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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.

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