

Release 21.11 pilot library memo

IMPORTANT! This page is now about obsolete release (21.11).

Next release page: [Release 22.05 pilot library memo](#)

Common notes and hints to pre- and test fresh KK-Koha build.



KOHA-44 - Jira project doesn't exist or you don't have permission to view it.



KOHA-40 - Jira project doesn't exist or you don't have permission to view it.

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PLEASE! Use Slack chat which we have for our customers:

Some notes about filling:

1. learn contents of this page,
2. adopt hints and knowledge for your server and use,
3. propagate this among your operators and users if needed,
4. and please feedback and fill here more with some what you found needed to be said or missing.

Notes about contents. Let's combine and note here:

1. how to check if all working well on your Koha.
2. what is not working on your release now
3. what is working differently
4. what is new
5. what missing
6. feel free to combine your knowledge

!!! All below is about **KK-Koha 16.472** (Autumn 2021) vs **KK-Koha v15.311** (Spring 2021)

Something working differently as before?

- Placing a hold to a specific item: the pick-up-location has to be chosen from the table that shows the items: the column at the right-end of the table: *Allowed pick-up locations / Sallitut noutopaikat*.
- Analytical records (music component parts): moved to another place (tab called "components")

- Batch jobs e.g. item deletion: goes to queue (can be seen in a new section called "Background jobs" see: Koha admin->Background jobs)

Something new added?

- Messaging preference "Hold reminder" (see: patron categories - edit- default messaging preferences for this patron category. See also: Tools Notices and slips hold reminder). See cronjobs for your library also.
 - Example of Slip and Cronjob in <https://bywatersolutions.com/education/monday-minutes-sending-hold-reminder-notifications>
 - Background discussion in Bugzilla: https://bugs.koha-community.org/bugzilla3/show_bug.cgi?id=15986
- Reports: when making SQL mistake error message is more informative
- Looking different not new option: HoldsExisting holds: canceling a hold is now button (before: red cross)
- New syspref: AutoRenewalNotices

If you select Send automatic renewal notices: according to patron messaging preferences then the option appears in Koha and in Finna.


In Koha, you can set Autorenewal on/off for different patron categories (cgi-bin/koha/admin/categories.pl)
This change applies only to new patrons.

	Days in advance	Email	Digests only ⓘ
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hold filled	-	<input checked="" type="checkbox"/>	-
Item check-in	-	<input type="checkbox"/>	-
Item checkout	-	<input type="checkbox"/>	-
<u>Auto renewal</u>	-	<input type="checkbox"/>	<input type="checkbox"/>
Hold reminder	-	<input type="checkbox"/>	-

Also, the Automatic renewal option shows in Finna, if you activate the setting.


Something not working in your Koha?


all moved to JIRA:

 **KOHA-206** - Jira project doesn't exist or you don't have permission to view it.

Something wrong with the translation?

all moved to JIRA:

 [KOHA-215](#) - Jira project doesn't exist or you don't have permission to view it.

 [KOHA-139](#) - Jira project doesn't exist or you don't have permission to view it.

Something missing?

DB schema (external link) leads to the community's not yet ready page

(credits to [Saija Pyhtilä](#))

The link leads to https://schema.koha-community.org/21_11, which is not yet ready – the result will appear here: <http://schema.koha-community.org/> (there is older schemes available, incl. 21.05).

How to and what to test to be sure that your Koha works properly

When testing, it is important to check the result of any action in Koha and in Finna views (also Finna.fi).

Some functions may seem like they work fine, but it is a good practice to verify the situation from the staff view and patron's point of view.

Check all functions related to **nightly cronjobs**

- Fines
- Holds expiring
- Hold expire charges
- Autorenewals

Other resources:

- Our [KK-Koha release 16 changelogs](#)
- Also have a look at release notes from the Koha community, e.g. <https://koha-community.org/koha-20-11-11-released/>
- ByWater Solutions pages are a good source to find explanations to some newer and older functions: <https://bywatersolutions.com/education>

Test plan notes by [Johanna Miettunen](#)

	Function/process to test	Koha	Finna
	<ul style="list-style-type: none">▪ test Finnish and English (and Swedish) interfaces		
Cataloging	Create a new bibliographic record, if you do those in your Koha <ul style="list-style-type: none">▪ frameworks are working as they should▪ fields are shown as they used to		
Cataloging	Making a new holdings <ul style="list-style-type: none">▪ holdings templates (bibliographic frameworks) and fields are working as they should▪ <code>cgi-bin/koha/admin/biblio_framework.pl</code>		

Cataloging	<p>Adding and editing an item</p> <ul style="list-style-type: none"> ■ editing via Action button: Duplicate a copy ■ add multiple copies using Add & duplicate, Add multiple copies of this item ■ change item's Not for loan -status eg. from Ordered to In Process etc. Check that status changes correctly in Finna too. 		
Cataloging	<p>Component parts, e.g. music (parent and child records)</p> <ul style="list-style-type: none"> ■ linking with parents and child record ■ child and parents can be found with title 		
Circulation (borrowing)	<p>Borrow items with different item types to different patron categories (regular, staff, students, ILL, special groups etc.)</p> <ul style="list-style-type: none"> ■ correct due dates ■ print due date slips 		
Circulation (borrowing, returning)	<p>Renewing an item</p> <ul style="list-style-type: none"> ■ one by one ■ all loans 		
Circulation (borrowing, returning)	<p>Borrowing items with special status (e.g withdrawn, lost, in process, ordered etc.)</p> <ul style="list-style-type: none"> ■ borrowing ■ renewing ■ returning (popup windows on staff Koha, behaviour with SIP machines) 		
Circulation (holds)	<p>Placing a request and editing it</p> <ul style="list-style-type: none"> ■ change pick-up place for title-level holds ■ delete title-level hold ■ make hold for title where some of items are "in order"-status ■ revert a hold and print a new slip ■ place multiple item-level and title-level holds for same patron (check that functions and blocks according to your processes) 		
Circulation (holds)	<p>Borrowing with SIP machines, before the request is processed</p> <ul style="list-style-type: none"> ■ another patron should be able to borrow ■ does the request trap correctly when some item (from same bib) is returned ■ can item be renewed before trapping (if enough copies available on shelf) 		
Circulation (holds)	<p>Holds in transfer</p> <ul style="list-style-type: none"> ■ cancel request while in transit (status should remain in transit) ■ check popup messages when returning in staff desk ■ check behaviour carefully, so that no old bug is reappearing, like: https://bugs.koha-community.org/bugzilla3/show_bug.cgi?id=28520 		
Circulation (holds)	<p>Holds available for pick up</p> <ul style="list-style-type: none"> ■ try to borrow item for someone else ■ cancel request (from patron page and from holds page). See that no fees are calculated either way! 		
Circulation (holds)	<p>Special cases that might differ in libraries due to different service processes and settings, eg. in 3AMK, check this process:</p> <ul style="list-style-type: none"> ■ all items are available, place a request ■ request is trapped in different branch from pickup location ■ cancel the request while in transit ■ record the behaviour when item arrives to original pickup location (popup messages, statuses in Koha and in Finna) 		
Circulation (holds)	<p>Check that new holds appear on Holds queue (Varausjono) & Holds to pull (Hyllyvaraukset) -reports</p> <ul style="list-style-type: none"> ■ Transport cost matrix 		
Customer information	<p>Adding a patron</p> <ul style="list-style-type: none"> ■ automatic fill of other names (surname, lastname) ■ hold identifier automatically filled by name or by other means ■ automatic filling of card number <ul style="list-style-type: none"> ■ check IntranetUserJS if some/none is not working, help from: https://tiketti.koha-suomi.fi/projects/koha-suomen-dokumentaatio/wiki/IntranetUserJS 		
Customer information	<p>Making address change in Finna: request comes to Koha for approval and is changed when approved</p>		

Customer information	Patron messaging preferences <ul style="list-style-type: none"> ▪ check in Koha that there are no surprises with settings, for different patron groups ▪ check that they work in Finna (if you have allowed patrons to modify them) ▪ test new messaging settings and slips: eg. Autorenewal, Hold reminder (can't be tested really because no cronjobs at Koha3) 		
Customer information (login in Finna)	Test ability to login and operating in Finna as a patron, who <ul style="list-style-type: none"> ▪ has more fines than Overdue fines cap (amount), like 15 euros etc. ▪ has material onloan with Lost -statuses ▪ is debarred ▪ account is expired ▪ wants to change his/her PIN code (password) 		
Customer information	Accounting (Money-related) issues are extremely important <ul style="list-style-type: none"> ▪ overdue charges accumulating correctly ▪ fines and fees showing correctly ▪ buttons and functions: Pay amount, Pay selected, Write off all, Write off selected <ul style="list-style-type: none"> ▪ if unwanted buttons re-appear, check your IntranetUserCSS 		
Searching (patrons)	<ul style="list-style-type: none"> ▪ search patrons with special characters (ä, å, é etc.) 		
Searching (bibliographic data and items)	<ul style="list-style-type: none"> ▪ search with item barcode 		
Plugins	Make sure necessary plugins are installed/updated and enabled, e.g. Finna plugin, Tuudo plugin, Label Maker plugin <ul style="list-style-type: none"> ▪ test processes related to plugins, e.g. for spine labels 3-letters printing ▪ /cgi-bin/koha/plugins/plugins-home.pl 		
Tools	Batch item modification <ul style="list-style-type: none"> ▪ change items full call number, or something similar ▪ is job queued and operated as it should, logs afterwards, any error messages 		
Reports	Testing your often used reports (daily, weekly, montly reports) <ul style="list-style-type: none"> ▪ document changes ▪ report error messages 		
CSS	Prefence: IntranetUserCSS <ul style="list-style-type: none"> ▪ see that all CSS-changes you made are still working (e.g. suppressed/hidden fields in intranet) 		

Things that can't be tested beforehand

-Tuudo app: making a new card, renewals

-self-service machines: item in transit, item in transit with a hold, items with "special" status (e.g. withdrawn etc.)

-automatic renewal (or is it possible?)

-expire reserve charge

-overduecharges (can be tested, but the truth reveals itself in production)

-messages are not delivered

To-do in Finna after update:

-Translation texts for Hold_Reminder (Library Card Settings - Notification settings)

Library Card Settings

Preferred pick up location:

Centerville



Notification settings

Due date reminders:

by email, digest in use, 4 days before due date

Automatic renewal:

not in use, digest not in use

Pickup notices:

by email

Hold Reminder:

by email

Checkin receipts:


by email

Checkout receipts:

by email

Due date notifications:

not in use, digest not in use

 [Notification Settings Change Request](#)