

Release 22.11 pilot library memo

Older page(s): [21.11 pilot library memo](#), [22.05 pilot library memo](#)

Last time (installation 22.05) AFTER INSTALLATION [we found just three issues](#) (Slack):

Finna's "purge checkout history", which already Fixed (thanks Ere!)
Melinda updates won't pass through, but that required for another our Melinda's Koha plugin to be updated, this also done
Records after adding (biblios) wasn't indexed by ElasticSearch.

CURRENT 22.11 RELEASE:

dates, plans, steps and progress in JIRA:

PLEASE! Use Slack channel: <https://kansalliskirjasto.slack.com/archives/CRAQWTEKD/p1652088566552069> for most issues and their life cycle support talks
and get back there with notes, which you think should be noted.

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Something working differently as before?

- Marc Bibliographic Framework test: working better than earlier: explanations are better

subfields not in same tabs	Not all subfields for the following tags are in the same tab (or marked 'ignored').			
Code	Description	Tag	Tabs in use	
	Default framework	856	6,8	

Something new added?

Appearance changes:

- Cataloging-menu changed: more options on this page (removed from Tools-menu to Cataloging-menu)

Tietokannasta löytyneet tietueet

8 osuma(a) löydetty luettelosta, 0 osuma(a) säilössä

	Nimeke	P	
<input type="checkbox"/>	Testikirja Nidetyypistä toiseen = From one item type to the next. - Testaustoimisto, - 2021 ; Helsinki : - 118 sivua :	3 Haaga Laina-ai TESTILU Withdra	<div><div>MARC-esikatselu</div><div>MARC-esikatselu</div><div>Muokkaa tietuetta</div><div>Lisää/Muokkaa niteitä</div></div>
<input type="checkbox"/>	Testikirja - Suomen standardisoimisliitto, - 1980 ; Hki : - 118 sivua :	2 Metropolia Karamalmi Laina-aika 28 vrk 100 TESTI Checked out (1),	Toiminnot ▲

- Cataloging -items: possibility to add item template and use it with different titles

Add item

item-template/SP ☐ For session

0 - Withdrawn status

1 - Lost status

4 - Damaged status

5 - Use restrictions

7 - Not for loan

- Holds-Existing holds: cancel button now trashbin

Existing holds

<input type="checkbox"/>	Priority	Patron	Notes	Date	Expiration	Pickup library	Details			Print hold/transfer slip
<input type="checkbox"/>	Waiting			23.11.2022	29.11.2022	Item waiting at Metropolia Karamalmi since 23.11.2022	0199000190		<input type="button" value="Revert waiting status"/>	<input type="button" value="Print slip"/>

- Search results: title view configure : possibility to fix available columns here also (no need to go Sysadmin-Table settings /cgi-bin/koha/admin/columns_settings.pl)

Items (3) **Holdings (1)** **Item groups** **Descriptions (97)** **Components (1)** **Acquisition details**

▼ Activate filters | ✓ Select all | ✕ Clear all

Showing 1 to 3 of 3 entries Search:

Item type	Holdings record	Current library	Home library	Item group	Call number	Status	Last seen	Date accessioned	Date last borrowed	Barcode	Publ note
Laina 28		3AMK: Metropolia	3AMK: Laurea		200 TESTI	In transit from	19.05.2022	19.05.2022		9879	Missi page

Patron-

- Two new fields: 'Middle name' and 'Pronouns' in customer info page (if you want to hide them use syspref *BorrowerUnwantedField*)

Asiakas identity

Sukunimi: *Pakollinen tieto*

Etunimi:

Middle name:

Syntymäaika:

Ikä: 53 vuotta 3 kuukautta

Pronouns:

Muu nimi (Varaustunnus): *Pakollinen tieto*

- New button 'Claims' (suomeksi 'Palautusilmoitukset') in customer info page. Function unclear so far. (Display or hide the column using the column settings options. [cgi-bin/koha/admin/columns_settings.pl](#) more member)

Checkouts (94)

Holds (0)

Claims (0 0)

Restrictions (0)

- Check out settings (Lainausasetukset) löytyvät uudella tavalla

Vanha Koha:

Lainataan asiakkaalle Nestori (testi) Testi (1122334455)

Syötä niteen viivakoodi:

Lainaus

Lainausasetukset

Uusi Koha:

Checkouts

Checking out to Fir134843 (Sur134843, Fir134843) Sur134843 (1122334455)

Enter item barcode

Check out

New functions

Patrons More Export today's checked in barcodes : makes an txt-file of barcodes

Duplicate

Print

Search to hold

Add message

More

2)

Renew patron

Set permissions

Manage API keys

Send welcome email

Send password reset

Delete

Update child to adult patron

Export today's checked in barcodes

Check in - Checkin settings
Old:

Check in

Enter item barcode:

▼ Checkin settings

Specify return date (DD.MM.YYYY) :

✗

☐ Remember return date for next check in
☐ Forgive overdue charges
☐ Book drop mode
☐ Forgive fees for manually expired holds

New: Checkin settings revealed using sliders

Check in

Enter item barcode

Specify return date (DD.MM.YYYY) :

☐ Remember return date for next check in
☐ Forgive overdue charges
☐ Book drop mode
☐ Forgive fees for manually expired holds

New Notices and Slips

Patrons- ACCOUNT SUMMARY - Account balance slip

Patrons- 2FA_OTP_TOKEN: two-authentication step token

Holds- HOLD_CHANGED: Canceled hold available for different patron

Holds-NEW_CURBSIDE_PICKUP: New curbside pickup

Patrons-OPAC_REG: New OPAC self-registration submitted

Circulation-OVERDUE_FINE_DESC: Overdue item fine description

Patrons-PASSWORD_CHAGE: Notification of password change

Patrons-STAFF_PASSWOR_RESET: Online password reset

System preferences: (Check these preferences if they are "valuable" for your library)

Cataloging - ApplyFrameworkDefaults : apply framework defaults when (e.g.. when cataloging a new, when changing the framework while editing the existing record)

Circulation- AutomaticConfirmTransfer: Do/Don't automatically confirm a transfer when the modal is dismissed without clicking 'Yes'. ??

Circulation- Holds- DefaultHoldPickuplocation: When placing a hold via the *staff* interface default the pickup location to the item's hold library/logged in library/items holdings library

Circulation - Holds- EnableItemGroupHolds: Enable/Don't enable the ability to place holds on item groups.

Circulation - Holds- EnableItemGroups: Enable/Don't enable the item groups feature to allow collecting groups of items on a record together.

Circulation-Holds - ExpireReservesAutoFill: + ExpireReservesAutoFillEmail: Do /Don't automatically fill the next hold using the item. Send email notification of the new hold filled with a canceled item to ... (=if hold is automatically expired the hold can be transferred to next patron on queue and email send e.g. to library)

Circulation-Item bundles - BundleLostValue and BundleNotLoanValue:

Circulation - Checkoutpolicy: CircControlReturnsBranch: To determine whether an item is transferred or remains in the library after checkin, use the circulation rules

Circulation - Patron restrictions: PatronRestrictionTypes. Allow determining local restriction types. If allowed determine local restriction types at [Koha administration](#) [Patron restriction](#)

Other preferences

- Circulation and fines rules: new rule to allow canceling waiting holds (can be made by patron type, item type): probably working with Koha-Opac? test it

Default waiting hold cancellation policy

Specify if waiting holds can be cancelled for a given patron category.

Asiakastyyppi	Aineistolaji	Cancellation allowed	
Kaikki	Kaikki	Ei	<input type="button" value="Poista"/>
<input type="text" value="Kaikki"/>	<input type="text" value="Kaikki"/>	<input type="text" value="Ei"/>	<input type="button" value="+ Lisää"/>

Oletussääntö maksun hyvitykselle, kun palautetaan kadonnut nide

Specify the default policy for lost item fees on return.

Refund lost item replacement fee	Refund lost item processing fee	
<input type="text" value="Jätä kadonneen aineiston korvausmaksu"/>	<input type="text" value="Refund lost item processing charge"/>	<input type="button" value="Tallenna"/>

- 11 new authorized values concerning ERM

Tools

- Rotating collections: Manage rotating collections
- Manage electronic resources module

Removed preferences

New Permissions (virkailija käyttöoikeudet)

Check out and check in items:

- Manage curbside pickups (*manage_curbside_pickups*)

Edit catalog

- Create, update and delete item editor templates owned by others (*manage_item_editor_templates*)
- Create, update and delete item groups, add or remove items from an item group (*manage_item_groups*)

Manage patrons fines and fees

- add manual credits to a patron account
- add manual invoices to a patron account

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**

- Autorenewals
- Fines
- Holds expiring
- Hold expire charges

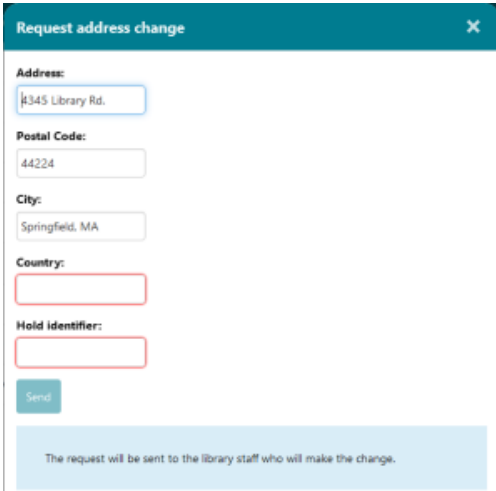
Other resources:

- Our [KK-Koha release changelogs](#)

- Also have a look at release notes from the Koha community, e.g. <https://koha-community.org/koha-community-newsletter-april-2022/#koha2205releasedates>
- ByWater Solutions pages are a good source to find explanations to some newer and older functions: <https://bywatersolutions.com/education>
e.g. previous version: <https://bywatersolutions.com/education/2111-release-notes>

Test plan notes by 3AMK, regarding test server

	Function/process to test	Koha	Finna
	<ul style="list-style-type: none"> • test Finnish and English (and Swedish) interfaces 		
Cataloging	<p>Create a new bibliographic record, if you do those in your Koha</p> <ul style="list-style-type: none"> • frameworks are working as they should • fields are shown as they used to be • MARC bibliographic framework test, cgi-bin/koha/admin/checkmarc.pl • item date picker should work when adding item) (see Jira KOHA-278 - Getting issue details... STATUS) 	<ul style="list-style-type: none"> • ok (22.06.00) • ok (22.06.00) 	
Cataloging	<p>Making a new holdings (previous version: 500 error)</p> <ul style="list-style-type: none"> • holdings templates (bibliographic frameworks) and fields are working as they should (previous version: couldn't change the tab in holdings framework) • cgi-bin/koha/admin/biblio_framework.pl 	<ul style="list-style-type: none"> • ok (22.06.00) • ok (22.06.00) 	
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. 	<ul style="list-style-type: none"> • ok (22.06.00) 	
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 	<ul style="list-style-type: none"> • ok (22.06.00) • ok (22.06.00) 	
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 	<ul style="list-style-type: none"> • duedates ok (22.06.00) 	
Circulation (borrowing, returning)	<p>Renewing an item</p> <ul style="list-style-type: none"> • one by one • all loans 	<ul style="list-style-type: none"> • ok (22.06.00) • ok (22.06.00) 	
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) 	<ul style="list-style-type: none"> • ok (22.06.00) (behaviour in Koha) • SIP not tested yet 	
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) • canceling waiting hold (new feature in 20.11. with Koha-Opac maybe) 	<ul style="list-style-type: none"> • ok (22.06.00) • ok (22.06.00) 	

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! 	<ul style="list-style-type: none"> • ok not possible without confirmation (22.06) • ok, no fees calculated (22.06) 	
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 (Hylyvaraukset) -reports</p> <ul style="list-style-type: none"> • Transport cost matrix 		
Circulation (renewing)	Automatic renewing	<ul style="list-style-type: none"> • ok (22.06) without holds 	
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 	<ul style="list-style-type: none"> • ok automatic fill (22.06) • ok (22.06) • ok (22.06) 	
Customer information	<p>Making address change in Finna: request comes to Koha for approval and is changed when approved.</p> <p>Check that correct fields are included in the form, and that everything works! These have variations in different libraries (example on test-Finna)</p> 		

Customer information	<p>Making changes in Finna regarding (patron can do this without library approval)</p> <ul style="list-style-type: none"> SMS number (Koha's Primary phone) NB! Not used in 3AMK. email address change in Finna: is changed successfully when patron clicks Save Patron information in Finna. 		
Customer information	<p>Patron messaging preferences</p> <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 latest messaging settings and slips: eg. Autorenewal, Hold reminder (if you are using those) 		
Customer information (login in Finna)	<p>Test ability to login and operating in Finna as a patron, who</p> <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) 	<ul style="list-style-type: none"> changing PIN in Finna - 	
Customer information	<p>Accounting (Money-related) issues are extremely important</p> <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 	<ul style="list-style-type: none"> accumulating shows adding payment manually paying 	<ul style="list-style-type: none"> accumulating fines and fees show
Searching (patrons)	<ul style="list-style-type: none"> search patrons with special characters (ä, å, é etc.) 	<ul style="list-style-type: none"> scandinavian characters: ok (22.06) 	
Searching (bibliographic data and items)	<ul style="list-style-type: none"> search with item barcode search with ISBN and ISSN, other standard numbers if you are using them search with special characters (ä, å, é etc.) 	<ul style="list-style-type: none"> with item barcode: ok (22.06) with ISBN, ISMN, 028, ISSN, standardnumber : ok (22.06) with é, ä, ö, å: ok (22.06) 	
Slips/prints	<p>Patron slips</p> <ul style="list-style-type: none"> issueslip (Patron -print slip -tulosta kuitti) issueqslip (Patron-print quick slip -tulosta tänään lainatut) <p>Returning slips</p> <ul style="list-style-type: none"> transferslip (Returning item - transfer to other library) holdslip (varauskuitti) 	<ul style="list-style-type: none"> ok print-slip (22.06) ok print quick slip (22.06) ok transferslip with/without reservation (22.06) ok holdslip (22.06) 	
Plugins	<p>Make sure necessary plugins are installed/updated and enabled, e.g. Finna plugin, Tuudo plugin, Label Maker plugin</p> <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 	<ul style="list-style-type: none"> Label Maker, Tuudo plugin, 	
Tools	<p>Batch item modification</p> <ul style="list-style-type: none"> change items full call number, or something similar remove batch of biblios is job queued and operated as it should, logs afterwards, any error messages 	<ul style="list-style-type: none"> changed full call number for several item barcodes. Background job finished. 	
Reports	<p>Testing your often used reports (daily, weekly, montly reports)</p> <ul style="list-style-type: none"> document changes report error messages be prepared to edit your reports if database structure has changed 😊 		
CSS	<p>Prefence: IntranetUserCSS</p> <ul style="list-style-type: none"> see that all CSS-changes you made are still working (e.g. suppressed/hidden fields in intranet) 	<ul style="list-style-type: none"> Necessary "must" CSS code added to test server, and those work. These are library-specific, so we can't pre-test all. 	

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.)
- expire reserve charge
- overduecharges (can be tested, but the truth reveals itself in production)
- messages which are possibly not delivered (bounce messages)
- Melinda replication

Things that should be saved from old version before update?

Just in case? Not sure?

- own holdings frameworks
 - 3AMK: done (21.11./SP)