

Release 23.05 pilot library memo

Older page(s): [21.11 pilot library memo](#), [22.05 pilot library memo](#), [22.11 pilot library memo](#)

CURRENT 23.05 RELEASE: [Release 23.05 \(19th\) changelogs](#)

dates, plans, steps and progress in JIRA:

PLEASE! Use Slack channel: **ADD HERE**

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?

Something new added?

-Cataloging: Batch item modification: <https://koha-pre-ko.koha.csc.fi/cgi-bin/koha/tools/batchMod.pl> : Possibility to choose in batch item modification that items that check out items can be check in

Asetukset

This option checks in items to remove them from patron accounts.
Items are not marked found, nor do damaged/withdrawn statuses prevent this return, nor are item locations updated. This feature is intended to allow removal of checkouts from patron accounts without affecting fines or other statuses.

Check in items: x ▾

-Circulation: Circulation messages: new possibility to edit previous messages written to customer information (in version 22.11 not possible) https://bugs.koha-community.org/bugzilla3/show_bug.cgi?id=21699

Messages

12.08.2021 Metropolia Karamalmi (Fir91031 Sur91031) "02 Henkilötunnus puuttuu/virheellinen" [✎ Edit](#) [🗑 Delete](#)



Permissions: Check new librarian permissions and one removed permission (Lists ->Edit public lists contents (edit_public_list_contents))

- Edit catalog: Edit any item including items that would otherwise be restricted (edit_any_item)
- Allow staff to change logged in library (loggedinlibrary)

System preferences:

Circulation-Holds-HoldsQueuePrioritizeBranch: The holds queue should prioritize filling a hold by matching the patron's home library with an item having a matching

Database tables:

- Changed datelastseen from date to datetime field (Bug [31212](#))
- Added call number to pay-fines-table and table settings (Bug [33137](#))
- Added Home library to pay-fines-table and table settings (Bug [33137](#))

New for SIP-machines (test if these work as they should when in production)

-Show fines on SIP checkin/checkout (Bug 25812)

-Added specific message for informing about too_soon for renewal (Bug 33150) Does this work on SIP machine? / JM 23.5.2023

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](https://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

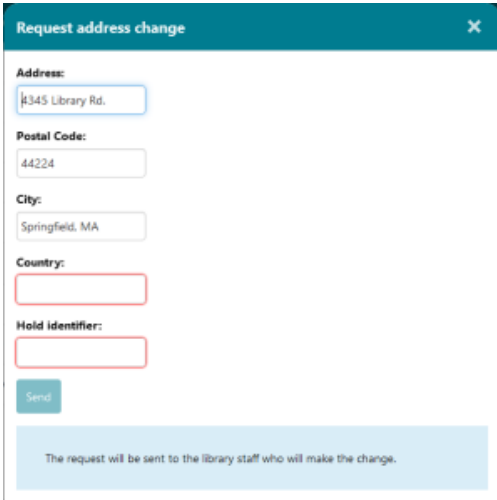
Other resources:

- 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-2023/>
- 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/koha-22-11-upgrade-notes>

Test plan notes by 3AMK, regarding test server

	Function/process to test <ul style="list-style-type: none">• test Finnish and English (and Swedish) interfaces	Koha	Finna
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 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">• 3AMK OK: default values in holdings framework works• 3AMK OK: Bibliographic framework test• 3AMK OK: date picker/calendar comes automatically	-
Cataloging	Making a new holdings (previous version: 500 error) <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">• 3AMK OK: can change tabs in holdings framework	-
Cataloging	Adding and editing an item <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">• 3AMK OK: duplicate a copy	-
Cataloging	Component parts, e.g. music (parent and child records) <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">• 3AMK OK: linking with current parents and child record• 3AMK OK: found both with title	<ul style="list-style-type: none">• 3AMK: component part tab not visible in Finna (Slack 25.5.) - Works in production.• 3AMK OK: found both with title
Cataloging	Merging records	<ul style="list-style-type: none">▪ koha-pre-ko: Not working / JM 23.5. Explained in Slack.▪ koha-kktest, OK / JM 23.5.	

Circulation (borrowing)	Borrow items with different item types to different patron categories (regular, staff, students, ILL, special groups etc.) <ul style="list-style-type: none"> correct due dates print due date slips 	Fikka: OK -tested regular +reading room loans with patrons KOT, LUK and items KL, VL, LS / IH 16.5. 3AMK: OK correct due dates	
Circulation (borrowing, returning)	Renewing an item <ul style="list-style-type: none"> one by one all loans 	Fikka: OK /IH 16.5.	
Circulation (borrowing, returning)	Borrowing items with special status (e.g withdrawn, lost, in process, ordered etc.) <ul style="list-style-type: none"> borrowing renewing returning (popup windows on staff Koha, behaviour with SIP machines) 	Fikka: OK /IH 16.5.	
Circulation (holds)	Placing a request and editing it <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 in Finna (if possible) 	<ul style="list-style-type: none"> 3AMK OK: placing a hold in Koha 3AMK OK: changing in Koha 3AMK OK: deleting in Koha 3AMK OK: make hold for items "in order" (doesn't come to Holds queue list) 	<ul style="list-style-type: none"> 3AMK OK: placing a hold in Finna , visible in Koha 3AMK OK: changing pick-up place of title-level hold in Finna 3AMK OK: deleting title-level hold in Finna <p>Fikka: Correct options for pick-up-places for different materials. OK.</p>
Circulation (holds)	Borrowing with SIP machines, before the request is processed <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)	Holds in transfer <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 	Fikka: not relevant, not tested /IH 16.5. 3AMK: Koha: Cancel request stays in transit, Finna? 3AMK OK: popup messages	
Circulation (holds)	Holds available for pick up <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! 	Fikka OK <ul style="list-style-type: none"> 3AMK OK: no fees calculated when canceling 	
Circulation (holds)	Special cases that might differ in libraries due to different service processes and settings, eg, in 3AMK, check this process: <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) 	<ul style="list-style-type: none"> 3AMK OK: cancel request while in transit (when returned in pickup-place goes back to homelibrary) 	<ul style="list-style-type: none"> 3AMK OK : number of holds is visible 3AMK OK: possible to cancel hold in transit

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 	<p>Fikka: OK /IH 16.5.</p> <p>3AMK: OK (one item available/item available in pickup location and other campuses)</p>	
Circulation (renewing)	Automatic renewing	<p>Fikka: not relevant</p> <p>3AMK: OK (two test cases)</p>	-
Circulation (renewing)	Renewing in Finna		<ul style="list-style-type: none"> 3AMK OK Fikka OK
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 	<p>FIKKA: ok. Some patron fields are visible that are not visible in production, but easy to hide afterwards (seems we had something worth fixing in production, as well.) /IH 16.5.</p> <ul style="list-style-type: none"> 3AMK OK: Automatic fill of other names 3AMK OK: Hold identifier automatically filled 3AMK OK: Automatic filling of card number 	-
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> 		Fikka ok.
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. 		<p>Fikka ok. The phone number seems to have same odd circulation as it has in production, but we can live with that.</p> <ul style="list-style-type: none"> 3AMK OK: e-mail changed 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) 	<ul style="list-style-type: none"> 3AMK OK: new customer: patron messaging preferences (tested with three customer types) 	<p>Fikka ok.</p> <ul style="list-style-type: none"> 3AMK: not relevant: not allowed to change messaging preferences in Finna

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) • needs new PIN-code (has forgotten it) • lost card • gone no address 		<ul style="list-style-type: none"> • 3AMK +Fikka OK: fines over limit can log in, can't make holds • 3AMK +Fikka OK: is debarred can log in, sees the debarring reason, can't reserve • 3AMK +Fikka OK: account is expired can log in, sees reason, can't reserve • 3AMK +Fikka OK: can change PIN-code • 3AMK +Fikka OK: forgot PIN-code get's new one • 3AMK + Fikka OK: card marked lost cannot login • Fikka OK: gone no address can login, sees reason, cannot renew or make new holds.
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 • adding payment manually • 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 	<p>Fikka OK</p> <ul style="list-style-type: none"> • 3AMK OK: fees accumulating for regular customer and staff 	<ul style="list-style-type: none"> • 3AMK: Fees showing correctly • 3AMK: Online paying ok • Fikka Ok.
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: • Fikka: searching with "ää" also finds "aa", and searching with "aa" also finds "ää", so works both ways. OK. 	

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: <ul style="list-style-type: none"> 3AMK OK with ISBN, ISMN, 028, ISSN, standardnumber : <ul style="list-style-type: none"> 3AMK OK: ISBN, ISMN, 028, ISSN with é, ä, ö, å: <ul style="list-style-type: none"> 3AMK OK: all 	<ul style="list-style-type: none"> Fikka/EPK: OK: ISBN, ISSN, ISMN don't work consistently but this is not a show stopper. I don't even know what to expect... <ul style="list-style-type: none"> ISBN <ul style="list-style-type: none"> Simple search with ISBN OK: works with and without hyphens. ISNB Advanced search ISBN with 'tunniste': works only without hyphens. If 'kaikki osuat' selected, works without hyphens, too. ISMN <ul style="list-style-type: none"> simple search does not work without hyphens advanced search with 'tunniste' does not work at all advanced search with 'kaikki osumat' works with hyphens, not without. ISSN <ul style="list-style-type: none"> Simple search works with and without hyphen. <ul style="list-style-type: none"> Side note: With hyphen, the journal record is buried somewhere among Arto references, without hyphen it comes up top. Advanced search with 'kaikki osumat' works with and without hyphen Advanced search with 'tunniste' works with and without hyphen. OK? with é. ü: "hypén" and "hyphen" both return both hypen and hypén. Same for Müller/muller OK? with ä, å, ö: "ähman" returns only ähman, not ahman; and vice versa. Same for ä and ö.
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"> 3AMK OK: print-slip 3AMK OK: print quick slip 3AMK OK: transferslip with/without reservation Fikka & 3AMK OK: holdslip 	
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	Batch item modification <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. 3AMK OK: changed item types for several items FIKKA: OK, tested "import patrons" 	
Reports	Testing your often used reports (daily, weekly, montly reports) <ul style="list-style-type: none"> document changes report error messages be prepared to edit your reports if database structure has changed 😊 	Fikka: OK	
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) 	<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. <p>Fikka: Seems that initials are not hidden from the borrower view. More precisely, this is not working:</p> <pre>/* Piilota nimikirjaimet asiakastietonäytöltä */ .initials {display:none;}</pre> <p><i>It is not critical, though, but just a note. /IH 17.5.</i></p>	
Acquisitions	(different things tested)	Fikka OK.	

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 possiblby 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

	ISBN	ISSN	ISMN	
Simple with -	OK	OK	OK	
Simple without -	OK	OK	NO	
Advanced, all fields, with -	OK	OK	OK	
Advanced, all files, without -	OK	OK	OK	
Advanced, identifier, with -	OK	OK	NO	
Advanced, identifier, without -	NO	OK	NO	