



## PTFS-Master 1.1 Release Notes

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# **PTFS-Master 1.1 Release Notes**

This document reviews new/enhanced features and bugfixes added into the PTFS master codebase since the original Harley release.

## **New or Enhanced Features**

### **OPAC Description for Authorized Values**

The configuration for authorized values (including Collection Code and Shelving Location) now has the ability to have a separate description for OPAC display as well as the original (now staff) description. If there is no entry in the OPAC description field, the OPAC will use the staff description.

### **Turn Off Item Type/Collection Code Search Section in Advanced Search**

The `AdvancedSearchTypes` and `OPACAdvancedSearchTypes` system preferences control whether the advanced search page has a section for searching by item type or collection code. A third option (“none”) has been added into the pulldowns for these sysprefs. If “none” is selected, the advanced search screen will not display that section at all.

### **Add XSLT Support for Staff Search Results and Record Details**

This version incorporates XSLT display support for staff results and title detail screen, including the 245 subfields h, b, n, and p. The existing system preferences `XSLTResultsDisplay` and `XSLTDetailsDisplay` now turn on XSLT support for the staff interface. The new system preferences `OPACXSLTResultsDisplay` and `OPACXSLTDetailsDisplay` control support for the OPAC.

Another new system preference (DisplayStafficonsXSLT) turns on or off the display of the format and material type icons in staff mode; this is similar to the earlier DisplayOPACiconsXSLT syspref which controls that in the OPAC.

## Course Reserves

We've ported over the course reserves module from LLEK, and added sorting, display, and navigation enhancements. Turn this on with the system preference CourseReserves under Administration, System Preferences, Local Use. Under Administration, Authorized Values, add a shelving location for Reserve (LOC category), and create department and term values under the new categories DEPARTMENT and TERM. There are new granular permissions as well, "View, Create, Edit and Delete Courses", "Basic Course Reserves access" for viewing and putting items on reserve, and "Take items off course reserve". For staff without superlibrarian access, set those permissions in the patron record under More, Set Permissions:

- (superlibrarian) Access to all librarian functions
- (circulate) Circulate books
  - (bookdrop) User can activate bookdrop mode in Check In
  - (change\_circ\_date\_and\_time) User can change circulation date and time
  - (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
  - (checkout\_via\_proxy) Checkout via Proxy
  - (circulate\_remaining\_permissions) Remaining circulation permissions
  - (exempt\_fines) User can activate exempt fines in Check In
  - (fast\_add) User can use fast add functionality in checkout
  - (manage\_courses) View, Create, Edit and Delete Courses
  - (override\_checkout\_max) User can override the checkout maximum
  - (override\_max\_fines) User can override block for patron over max fine limit
  - (override\_non\_circ) User can override the not for loan check
  - (override\_renewals) Override blocked renewals
  - (put\_coursereserves) Basic Course Reserves access, user can put items on course reserve
  - (remove\_coursereserves) Take items off course reserve
  - (renew\_expired) User can renew an expired borrower in checkout
  - (view\_borrower\_name\_in\_checkin) User can see the borrower name in Check In
  - (view\_checkout) view items checked out to a borrower in checkin/checkout

Then, under Circulation, Course Reserves, you can create new courses. The Department and Term pulldowns are linked to the authorized values in the previous step. Fill out the Course Number, Section, and Course Name fields.

[Home](#) > [Circulation](#) > [Courses](#) > Add Course

**Add a Course**

**Department**

**Course Number**

**Section**

**Course Name**

**Term**

**Instructors** Click submit to add this course, then you can add one or more instructors

**Staff Note**

**Public Note**

You may also enter staff and public notes, and a student count. Then click the Submit button at the bottom. Once the course is saved, in the middle of the screen you will have a lookup box for instructor names (**there must be patron records for all instructors**). Start typing a name and you should get a dropdown list of possible matches:

### Add an instructor

- AA, CHAENY B. (12307453456) -- 7453 MAIN ST, ANYTOWN, TX
- AAID-MES, HEWARD (12331380456) -- 31380 MAIN ST, ANYTO
- AAITMES, RITA (12331390456) -- 31390 MAIN ST, ANYTOWN, TX
- AALANSU, RACHOL (12331400456) -- 31400 MAIN ST, ANYTOW
- AALMESOVE, UYLIUA (12331410456) -- 31410 MAIN ST, ANYTO
- AAME, MICHAOL (12331946456) -- 31946 MAIN ST, ANYTOWN, T
- AASG, NY (12331420456) -- 31420 MAIN ST, ANYTOWN, TX

(If you don't get a dropdown list, check to see if the CircAutoCompl syspref is on.) Select the name you want, and click the Add Instructor button:

### Add an instructor

  

You can add multiple instructors; a Remove link next to an instructor name on the screen allows you to remove an instructor if needed. When finished, click the Submit button at the bottom again to save the record.

Courses can be viewed, edited, disabled, or deleted under Circulation, Course Reserves:

#### Courses

Click on the course name to view items on reserve.  
You can create new Departments, Terms, Collection Codes and Shelving Locations from the [Authorized Values](#) administration area.

| Course Name                 | Department       | Course Number | Section | Term             | Instructors        | Staff Note     | Public Note | Students Count | Course Status |  |
|-----------------------------|------------------|---------------|---------|------------------|--------------------|----------------|-------------|----------------|---------------|--|
| <a href="#">Testing 101</a> | Test course dept | T101          | 2       | Test course term | HEWARD<br>AAID-MES |                |             | 15             | enabled       | <a href="#">Edit</a><br><a href="#">Delete</a> |
| <a href="#">Testing 102</a> | Test course dept | T102          | 1       | Test course term | RITA AAITMES       | followup class |             |                | enabled       | <a href="#">Edit</a><br><a href="#">Delete</a> |

Courses are also visible in the OPAC by clicking on the Course Reserves link in the masthead; a search box there gives the option to search by name, department, course number, term, notes or instructor name:



Search course reserves by name, department, course number, term, notes or instructor name:

 

### Courses

Click on the course name to view items on reserve

| Course Name                 | Department       | Course Number | Section | Term             | Instructors     | Notes |
|-----------------------------|------------------|---------------|---------|------------------|-----------------|-------|
| <a href="#">Testing 101</a> | Test course dept | T101          | 2       | Test course term | HEWARD AAID-MES |       |
| <a href="#">Testing 102</a> | Test course dept | T102          | 1       | Test course term | RITA AAITMES    |       |

To add titles/items to a course, in staff mode click on the name of the course in the list, then click Put Items on Reserve:

Courses List
New Course
Edit Course
Put Items On Reserve

**Course Name**  
Testing 101

**Term**  
TEST

**Department**  
TEST

**Course Number**  
T101

**Section**  
2

**Instructors**  
HEWARD AAID-MES; .

**Staff Note**

**Public Note**

**Students Count**  
15

**Course Status**  
enabled

| Title | Call Number | Item Type | Collection Code | Shelving Location | Library | Staff Note | Public Note |
|-------|-------------|-----------|-----------------|-------------------|---------|------------|-------------|
|-------|-------------|-----------|-----------------|-------------------|---------|------------|-------------|

On the following screen, scan barcodes for each item to be added (all items/titles must have a record in the system including temporary and instructor copies):

**Add a Course Reserve**

**Item Barcode**

**Item Type**

**Collection Code**

**Shelving Location**

**Library**

**Staff Note**

**Public Note**

[Cancel](#)

You can leave the item type, collection code, shelving location, and library as they are, or change them for the duration of the reserve. Click Submit to add an item. You will then see the title on the course-specific page in either staff or OPAC:

OPAC:


 Search

[Advanced Search](#) | [Tag Cloud](#) | [Course Reserves](#)

- **Course Name:** Testing 101
- **Department:** TEST
- **Term:** TEST
- **Instructors:** HEWARD AAID-MES; .
- **Course Number:** T101
- **Section:** 2
- **Notes:**

| Title  | Collection Code     | Library                | Shelving Location | Notes |
|--|---------------------|------------------------|-------------------|-------|
| <a href="#">State by state : a panoramic portrait of America /</a> | Non Fiction (adult) | Anytown Public Library |                   |       |

Staff:

**Course Name**  
Testing 101

**Term**  
TEST

**Department**  
TEST

**Course Number**  
T101

**Section**  
2

**Instructors**  
HEWARD AAID-MES; .

**Staff Note**

**Public Note**

**Students Count**  
15

**Course Status**  
enabled

| Title  | Call Number | Item Type | Collection Code     | Shelving Location | Library                | Staff Note | Public Note |                        |
|--|-------------|-----------|---------------------|-------------------|------------------------|------------|-------------|------------------------|
| <a href="#">State by state : a panoramic portrait of America /</a> | 973 STA     |           | Non Fiction (adult) |                   | Anytown Public Library |            |             | <a href="#">Remove</a> |

In both staff and OPAC, the record display for a title will show if it is on reserve for one or more courses:

## State by state : a panoramic portrait of America /

by [Weiland, Matt](#); [Wilsey, Sean](#).

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

Type:  Book

Publisher: Ecco, c2008.

Edition: 1st ed.

Description: xxxi, 572 p., [16] p. of plates : ill. (some col.), maps ; 24 cm.

ISBN: 9780061470905; 0061470902.

Other Title: Panoramic portrait of America.

Related Subjects: [U.S. states](#) | [U.S. states -- Description and travel](#) | [U.S. states -- History](#) | [United States](#) | [United States -- Description and travel](#) | [United States -- History](#)

Contents: Preface / by Matt Weiland -- Introduction / by Sean Wilsey -- Alabama / by George Packer -- Alaska / by Paul Greenberg -- Arizona / Lydia Millet -- Arkansas / by Kevin Brockmeier -- California / by William T. Vollmann -- Colorado / by Benjamin Kunkel -- Connecticut / by Rick Moody -- Delaware / by Craig Taylor -- Florida / by Joshua Ferris -- Georgia / by Ha Jin -- Hawaii / by Tara Bray Smith -- Idaho / by Anthony Doerr -- Illinois / by Dave Eggers -- Indiana / by Susan Choi -- Iowa / by Dagoberto Gilb -- Kansas / by Jim Lewis -- Kentucky / by John Jeremiah Sullivan -- Louisiana / by Joshua Clark -- Maine / by Heidi Julavits -- Maryland / by Myla Goldberg -- Massachusetts / by John Hodgman -- Michigan / by Mohammed Naseehu Ali -- Minnesota / by Philip Connors -- Mississippi / by Barry Hannah -- Missouri / by Jacki Lyden -- Montana / by Sarah Vowell -- Nebraska / by Alexander Payne -- Nevada / by Charles Bock -- New Hampshire / by Will Blythe -- New Jersey / by Anthony Bourdain -- New Mexico / by Elery Washington -- New York / by Jonathan Franzen -- North Carolina / by Randall Kenan -- North Dakota / by Louise Erdrich -- Ohio / by Susan Orlean -- Oklahoma / by S. E. Hinton -- Oregon / by Joe Sacco -- Pennsylvania / by Andrea Lee -- Rhode Island / by Jhumpa Lahiri -- South Carolina / by Jack Hitt -- South Dakota / by Said Sayrafiezadeh -- Tennessee / by Ann Patchett -- Texas / by Christina Henriquez -- Utah / by David Rakoff -- Vermont / by Alison Bechdel -- Virginia / by Tony Horwitz -- Washington / by Carrie Brownstein -- West Virginia / by Jayne Anne Phillips -- Wisconsin / by Daphne Beal -- Wyoming / by Alexandra Fuller -- Afterword: Washington, D.C. / a conversation with Edward P. Jones -- The 50 states in numbers.

Course Reserves:

[Testing 101](#); Department: Test course dept; Course Number: T101; Section: 2; Term: Test course term; Notes: ; Instructors: HEWARD AAID-MES.

Tags from this library:

No tags from this library for this title.

Log in to add tags.



## Use Slave Database for Reports

The system can be configured to run Koha reports against a backup database rather than the primary database. This is useful for sites which routinely need to run large reports; such reports can slow performance on the primary system and affect daily operations such as circulation. PTFS must configure and enable this option; open a support center ticket if you are interested.

## Curriculum Indexing and Search

We have added a specialized index named “curriculum” for the 658 subfields a, b, and c. The 658 includes index terms denoting curriculum or course-of-study objectives applicable to the content of the described materials. This index is now searchable through staff or OPAC advanced search, with More Options clicked:

Search for:

|                        |  |
|------------------------|--|
| Keyword                | <input type="text"/>                   |
| Title                  | <input type="text"/>                   |
| Title Phrase           | <input type="text"/>                   |
| Series Title           | <input type="text"/> <a href="#">+</a> |
| Call Number            |  |
| Subject                |  |
| Subject Phrase         |  |
| Author                 |  |
| Author Phrase          |  |
| Corporate Name         |  |
| Conference Name        |  |
| Conference Name Phrase |  |
| Personal Name          |  |
| Personal Name Phrase   |  |
| Language               |  |
| Notes/Comments         |  |
| Curriculum             |  |
| Publisher              |  |

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

Should also use "-1987" for everything published before 1987 or "2008-" for everything published after 2008.

Audiobook
  Book
  Book- Multiple volumes

### Store Stylesheets on Remote Servers

Koha has had the ability to use an auxiliary stylesheet to override default settings for colors, fonts, etc. This is specified in the misleadingly-named syspref opaccolorstylesheet. However, until now this secondary stylesheet has had to be stored on the same server, which limits librarian access for changes. This feature allows sites to enter a full URL in this syspref for a stylesheet stored on another server.

### Site-Controlled Counts for Did You Mean

PTFS previously delivered a Did You Mean feature for the OPAC, to offer alternative spelling suggestions. This enhancement extends the feature to staff mode and creates two new system preferences, OPACSearchSuggestionsCount and StaffSearchSuggestionsCount. If set to zero, these sysprefs turn off the Did You Mean feature. Otherwise, sites can specify the number of suggestions offered. The default for both staff and OPAC is five.

## Ability to Edit Permanent Shelving Location for In Processing/Shelving Cart Feature

PTFS previously delivered a feature which records the intended permanent shelving location at item creation and stores it in a separate field, then temporarily uses the regular shelving location field for In Processing or Shelving Cart values. In certain situations, this has caused problems if a site mistakenly entered In Processing as the regular shelving location, or later wanted to change the permanent location (such as from New Book Shelf to Stacks). If the permanent location field had an undesirable entry, the item would revert to that location after every checkin.

We have added the ability to edit the permanent shelving location field in the item edit screen. Staff should not fill this field in as part of regular cataloging, but may use it to correct bad entries:

|  |   |
|--|---|
| <b>7 - Not for loan</b>                | <input type="text"/>                        |
| <b>8 - Collection code</b>             | Comedy DVD <input type="text"/>             |
| <b>C - Permanent shelving location</b> | In Processing <input type="text"/> ←        |
| <b>a - Permanent location</b>          | Anytown Public Library <input type="text"/> |
| <b>b - Current location</b>            | Anytown Public Library <input type="text"/> |
| <b>c - Shelving location</b>           | New Books <input type="text"/>              |
| <b>d - Date acquired</b>               | 2010-07-13 <input type="text"/>             |

## ISBN-13 Indexing

This feature adds index support for ISBN-13 entries.

## Automated Patron Import Script

This feature allows for a patron record dump to be exported from another system (HR, school registrar, etc.) on a regular basis and placed on the Koha server. A new script in kohaclone/misc named `import_borrowers-cli.pl` can run as a regular cron job to load that patron record file; it can also use a file that sets some default entries such as circ notes or patron category. Entries in the default file will override entries in the patron `.csv` file. The patron record dump must be formatted in the normal Koha patron `.csv` style, with dates formatted as YYYY-MM-DD:

```
borrowernumber,cardnumber,surname,firstname,title,othernames,initials,streetnumber,streettype,address,address2,city,zipcode,country,email,phone,mobile,fax,emailpro,phonepro,B_streetnumber,B_streettype,B_address,B_address2,B_city,B_zipcode,B_country,B_email,B_phone,dateofbirth,branchcode,categorycode,dateenrolled,dateexpiry,gonenoaddress,lost,debarred,contactname,contactfirstname,contacttitle,guarantorid,borrowernotes,relationship,ethnicity,ethnotes,sex,password,flags,userid,opacnote,contactnote,sort1,sort2,altcontactfirstname,altcontactsurname,altcontactaddress1,altcontactaddress2,altcontactaddress3,altcontactzipcode,altcontactcountry,altcontactphone,smsalertnumber

,22300009456,EBEDIR,CAHRINTISA,,,A,,,,9          Second          Street,, "ANYTOWN, TX",12345,,,,,,,,,,,,,,,,,1987-03-20,BRANCH1,STUDENT,1999-01-23,2010-10-15,,0,,,,,,,,,,,,F,12345,,12300009456,,,,,,,,,,,,

,22300019456,EBBEN,AARWA,,,B,,,,19          Second          Street,, "ANYTOWN, TX",12345,,,,,,,,,,,,,,,,,1990-05-07,BRANCH1,TEACHER,1998-08-24,2011-03-20,,0,,,,,,,,,,,,F,12345,,12300019456,,,,,,,,,,,,
```

The defaults file is formatted as variable/value pairs, one per line, separated by an '=' sign. For example:

```
zipcode=97211
dateexpiry=2010-12-31
```

The `import_borrowers-cli.pl` script usage is:

```
import_borrowers-cli.pl [options]
Options:
  --infile=<filename>      : read data from filename instead of stdin
  --defaultsfile=<filename> : read defaults from filename
```

```
--matchpoint=<string>      : match for collisions on this field
--overwrite                : overwrite collisions with new values
--verbose                  : be noisier
--help                     : show this message
```

A sample manual script run would look like:

```
perl import_borrowers-cli.pl --infile=newpatrons.csv --defaultsfile=patrons-
defaults.csv --matchpoint=cardnumber --overwrite --verbose
```

This would tell the system to load the file newpatrons.csv, matching on cardnumber, overwriting any existing patron records, and applying any default values in the file patrons-default.csv.

Sample output from the script run might look like:

Successful imports: 0

Record overwrites: 2

Not overwritten: 0

Bogus entries: 0

## Fixes and Functionality Enhancements

We wrote or cherrypicked from other Koha codelines various fixes for problems or minor extensions to functionality. Bug number references are to the Koha bugzilla database at <http://bugs.koha-community.org> (search by the bug number for complete history of the problem and solution).

Bug 3863 Amazon content not working – fixes problems with certain Amazon content not displaying.

Translate ampersand in XSLT title display – In OPAC XSLT results and title display, a title with an ampersand in it would show the character as &amp; instead of as &. This patch fixes the problem for OPAC display; it will later be extended to staff XSLT display.

Added instructional wording on OPAC Reading History screen.

Bug 3344 Hold priority list needs additional status for items assigned but not working – adds assigned/in transit statuses to holds priority list.

Bug 4224 Holds queue report includes items already allocated – removes the extraneous entries.

Bug 4372 Transferring an item does not update date last seen – adds a date update.

Bug 4214 "Your Cart is Currently Empty" popup displays underneath News header – fixes a display problem.

Bug 3299 Sticky calendar renew date doesn't work – fixes calendar gadget in patron checkout/renewals column.

Bug 3203 Some Letters template variables are not available to certain notice types – PTFS-developed fix allows for use of some specific item fields in advance notices, such as <<items.date\_due>>, <<items.itemcallnumber>>. It also allows use of date due or issue date in the checkin/checkout/item due notices.

Miscellaneous OPAC XSLT fixes for various display problems.

Bug 4869 Non-staff patrons logging into the OPAC don't have option to place holds from Public Lists – adds the Place Hold option into lists.

Bug 4821 With multiple 5XX fields, the font display gets progressively smaller – fixes this XSLT display problem.

Bug 2434 Remove unimplemented upcoming events message – this messaging option was never implemented and caused much confusion for staff and patrons.