NEW FEATURES FOR LBPD

7.8.15 – 7.8.26

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Agenda

- KLAS Core
- Patron
- Serials
- Circ & Catalog
- Scribe
- Coming Soon

KLAS CORE

- Full System Backup temp storage improvement
- Code File Maintenance
  - Character limit for Codes increased to 15
- Blocks Maintenance
  - Blocks now sort by Block ID Number
  - System Blocks can no longer be Copied
  - IDs lower than 1000 can no longer be manually entered

Backup – The weekly full system backup temp location can now be mounted to a separate drive, allowing just that drive's storage space to be increased if needed to allow for the backup without affecting the full system. Once backup is complete, the temp file is compressed and saved to backup location. - KLAS-3390
Codes – new limit supports ParentalAck codes from NLS - KLAS-3362
Blocks – System Blocks cannot be deleted by users; changes ensure they cannot be created by users - KLAS-3329

PATRON ACKNOWLEDGEMENTS

- NLS Parental / Legal Acknowledgement
  - Main tab Prompt for Juvenile patrons
  - New *ParentalAck, LegalAck* Properties
  - *Parent/Guardian, Legal* Alt Contact Types, Contact Preferences
  - PIMMS sync updates, PIMMS Transfer update
  - Blank birth dates synced as 01/01/1900
  - System blocks based on AltContact & Property

Parental Acknowledgement: https://klasusers.com/klas-news/parental-acknowledgement-support
Parental Acknowledgement FAQ: https://klasusers.com/knowledgebase/nls-parental-acknowledgement-faq
Institutional Acknowledgement: https://klasusers.com/klas-news/nls-institutional-acknowledgement

Not blocking relevant accounts without the Acknowledgement yet? Get in touch!

NLS Acknowledgements

PATRON MAINTENANCE

- Add Date bug fix
- Merge Patron fixes:
  - Was not setting desired new status
  - Service Queue titles going into wrong queue
- Patrons with pending Dup Orders can't be deleted
  - Pending Dup Orders are now cancelled when the patron is made inactive
- Restore Deleted patrons bug fix & improvement

Add Date: KLAS-3286
Merged Patron Status: KLAS-3250
Merging Service Queues: KLAS-3208
Cancel pending dup orders: KLAS-3214
KLAS Deleted: Barcode search now "begins" not "equals" - KLAS-3255
  Tool was briefly not returning any results, fixed in KLAS-3218

PATRON SERVICE

- Support for Addresses outside of USA
- Keyboard Shortcut for *Add To Service Queue* from Book Search Results (Alt-s)
- Various Series Fixes
  - Restart – HasNow check fix, Medium check fix
  - Next Title logic excludes Withdrawn titles
  - HasHad check for linked titles
  - Shuffle Queue fix for titles in multiple series

Keyboard shortcut: KLAS-3258
Series: restart tries to reserve title in wrong medium - KLAS-3343; error in HasNow check for restart - KLAS-3405; Next title logic now excludes Withdrawn titles - KLAS-3302; HasHad problem with compilations linked to single-sequence titles - KLAS-3403; Shuffle queue now correctly handles titles in multiple series - KLAS-3304

PATRON QUERIES

- Import Query sorts by Patron ID again
- PDQ bug fixes:
  - New Patrons
  - AutoSelect w/ No Subjects
  - Patrons Not Using BARD
  - Patrons w/ Assigned Orders
- Merge Queries performance fix

New Patrons PDQ: was displaying all patrons, not just new - KLAS-3241
AutoSelect PDQ: was displaying all patrons, not just those without subjects - KLAS-3243
Not Using BARD PDQ: was displaying NO patrons - KLAS-3242
  and cutoff date was hard-coded, now only looks at past year for downloads - KLAS-3245
Assigned Orders PDQ: displaying all patrons - KLAS-3244
Merge queries: KLAS-3393

PATRON EXPORT

- New Patron Query Results fields for Export:
  - Primary Language, Primary Reading Level, Disability, Referral Source, Service Code, Last Served Date
  - Export All Fields, or request customization of Visible

- Patron Find Exports fixed to only Export currently listed patrons

Query Results Export: in "All Fields" export; can be added to Visible Fields upon request - KLAS-2807
Find Export - KLAS-3237

PATRON – EMPTY MODULE BUG

- Where did my patrons go?!
  - KLAS needs 1 blank PatSearchResults record to display and move between records in the module
  - A minor change unexpectedly caused adding or deleting a patron to also add/delete this record
  - KLAS now auto-restores this record if needed
  - Logging added to catch anything that removes it

F5 or Ctrl-F to restore PatSearchResults record

PIMMS

- PIMMS now uses an authentication token
- Properties' Notes now transfer
- Institution accounts with an Email now sync First & Last Name from the contact note
- When looking up the PIMMS Circ ID to transfer a patron, KLAS now compares the statuses
- The re-sync now checks whether a patron is a Repair Agency

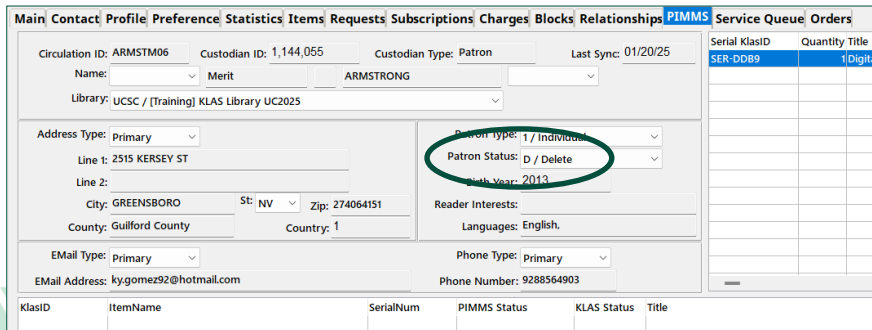Auth token - KLAS-3294

Property Note transfer - KLAS-3256

Institution names – for BARD access; last word of the contact note is interpreted as Last Name, the rest is sent as the First Name. OR if a comma is present, everything before the comma is the Last Name, and everything after it is the First Name - KLAS-3210

PIMMS Circ ID lookup - The PIMMS CircID Lookup now only returns records that are consistent with the Merge/Delete status of the KLAS Patron. ex. if adding or accepting a transfer for a Patron with an ID or Barcode that has been recycled, treat this record as an active record and do not accept matches from PIMMS that are Deleted or Merged. - KLAS-3216

Resync – For machine transactions, regular patrons and Repair Agencies are treated differently; the re-sync now handles this appropriately - KLAS-3366

PIMMS Status

- PIMMS Deleted status can now be updated!

PIMMS Deleted: sync no longer ignores patrons with a PIMMS status of Deleted; if the KLAS status does not map to Deleted, they will now be updated accordingly - KLAS-3406 (Note – if their PIMMS ID has been reused in the meantime, this will return an error; contact Customer Support for the fix.)

Should your PIMMS status mapping be updating accordingly? Just want to know what your PIMMS status mapping is? Get in touch!

SERIALS – MOC DUPLICATION EFFECTS

- NLS Circ Statistics Report updated accordingly
- MoC eDoc Sync now ignores deleted Serials
- MoC Sync no longer re-creates deleted Issues
- CallNum character limit & display expanded

Circ Stats - KLAS-3357
eDoc Sync - KLAS-3248
Issue Sync - KLAS-3269
CallNum - KLAS-3249

SERIALS – IMPROVEMENTS

- Pub / Publication Serial Type excluded from updating Last Served date
- Service Subscription/Seed Serial no longer delete manually-added Reserves
- Batch Cancel/Substitute Subscription program
- When a Subscription is deleted, Reserves for issues of that serial are deleted with it

Pub Serials – NLS serials should be updating the patrons' Last Served dates, but prevents your Newsletter or similar local serials from making a patron look like they are being served when they really aren't. - KLAS-3281
Manual Reserves - KLAS-3263
Batch Cancel – Cancels all subscriptions for a given serial, with option of adding a new substitute for all subscribers; contact us if this is needed - KLAS-3228
Delete Reserves – Seed Serial doesn't clean up reserves for a patron once they are no longer a subscriber, so this prevents orphaned reserves - KLAS-3268

SERIALS – BUG FIXES

- Batch Seed Serials fixes
- Service Subscription uses Serving library's limits
- eDocs tab can display more than 50 rows
- No longer Reserves all Issues if KLAS can't calculate Retention
- Fill Queue fixes

Batch Seed - No longer skips whole serial if 1 Subscriber has an error - KLAS-3285; No longer crashes if there are too many errors - KLAS-3240; Only runs for subscribers served by the Run As Branch – KLAS-3284
Service Subscription - KLAS-2779
eDocs tab - KLAS-3342
Retention – Usually, this would be due to the patron not having a Service Queue - KLAS-3261
Fill Queue – was ignoring Issue on Reserves and just pulling the first eDoc - KLAS-3317; HasHad and Medium checking descrepencies addressed later.

SERIALS MAINTENANCE

- Medium cannot change if title is already in Orders and/or Service Queues

No medium change – This was causing too many problems with cutoffs etc; better to just create a new title/serial record when switching medium KLAS-3315 (Also applies to Catalog / monograph records)

CATALOG

- Chasing performance issues at certain libraries
  - Some small adjustments behind-the-screen have already been made, more in progress.
  - Is your catalog crashing? Slower than molasses? Please tell us!

SDO Config - KLAS-3394

CIRCULATION

- Batch Check-in directory fix
- Mail Card improvements
  - support for addresses outside of USA
  - Issue Name prints appropriately

Batch Check-in - KLAS-3246
International Mailcards – Country Code previously only USA - KLAS-3252
Issue Name – Serial name is repeated in the MOC Issue Name format; KLAS will now print only the part of the Issue Name after a dash - KLAS-3227

Patron Service Queues & Orders

- HasNow/HasHad checking
  - Fixed a HasNow check against Pending Orders
  - Completed Orders excluded from HasNow check
  - Checks are now all Issue-level, not Serial-level
- Order Medium checks fixed to ignore Initial Titles
  - At Assignment, Checkout
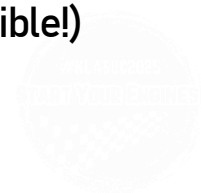
Pending Orders - KLAS-3358
Completed Orders - KLAS-3346
Issue-level checks - KLAS-3389
Order medium check – Assign: KLAS-3305; Checkout: KLAS-3314

SCRIBE

- New Cache
  - Will recognize and refresh updated files
- New Advanced Barcodes
  - Reset Service, Fix Ports, Firmware Start/Stop
  - Reboot / Shut Down
  (Note: Please leave Scribes ON as much as possible!)

Coming Now

- 7.8.26 – in Early Release
  - Accessibility fixes – Mail Cards screen, Show Item History in the Catalog
  - Send Again will Pause when needed
  - Add Item on the Catalog Items tab defaults to selected Holding & Copy

AT Fixes – Tab order of Mail Cards screen - KLAS-3327; Show Item History added to Catalog Functions menu - KLAS-3184
Send Again - KLAS-3337
Add Item - KLAS-3415

7.8.26

- Alt Length added to catalog Find export
- Deleted Acquisition Method codes no longer added back by updates
- Fix for cartridge SN barcode swapping error
- More corner-case Series fixes

Alt Length – in All Fields export; can be added to Find screen's visible fields on request - #KLAS-3429
Acq Method codes - #KLAS-3401
Cartridge serial number – cartridge SNs are used as their Item Barcode in KLAS, and barcodes must be unique. When a cartridge changes medium, the old item record gets a prefix on the barcode to free it up for use in the new medium. Now, if the new item record still can't be added, KLAS will append a suffix to the barcode to ensure the cartridge can check out - KLAS-3198
Series fixes – Add Series HasHad message no longer repeats info when that sequence is linked to multiple titles - KLAS-3421; HasHad messaging fix for titles with a manual HasHad - KLAS-3422; Series processing will no longer pick a 'next' title in a language the patron can't receive - KLAS-3423

COMING SOON

- Better handling of missing files for Duplication
- Automatic creation of SQs for select Media
- Keycloak SSO integration
- New Scribe WebMonitor

Missing files handling: updates will allow for disappearing/reappearing files. details coming soon to KLASusers.com. First changes will be in 7.8.27, handling the Mono side; Serial changes will follow if they don't make that release.

Automatic SQs: A setting will be added to the AddNewPatMedium xRef to define which Media should automatically create a Service Queue when added to a Patron record. The medium profile needs to be added as 'Active' for the queue to be created. Setting will also apply to Transfer-In patrons. Will be in 7.8.27

Keycloak: Will allow for Single Sign-on and two-factor authentication. High priority development. This will also allow release of the new WebMonitor, as that requires user authentication.

QUESTIONS & ANSWERS