Bibliovation 7.00.15 Release Notes for Library Staff
January 10, 2022

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General Notes

This upgrade includes enhancements and fixes that have been tested by SCLS staff and staff at some libraries. To the best of everyone's assessment, the fixes are working well and any bugs identified during testing have been fixed. However, as we learned with past upgrades and patches, we may experience unexpected results following the upgrade. We may also discover new problems. We will use the Known Problems page to document any post upgrade problems. **After the upgrade, please clear your browser's cache before using Bibliovation.**

Cataloging

New! Select Multiple Fields in Cataloging Editor for Copying and Deleting: You can now either use Select Field or ctrl+click to select multiple fields on a MARC record in the Cataloging Editor. A menu will appear at the bottom of the page to give the option to either copy or delete the selected fields. (Note that you shouldn't delete multiple fields in a MARC record unless you have a reason for it, but the functionality is there.) (No SCLS Support Ticket Number)

Migrated items re-indexing lag time: When an item is migrated (moved) from one bib record to another, there is a lag time for re-indexing the item. For more than an hour, when searching for the migrated item barcode, the old bib record may be found instead of the new bib record, or you may get a "no results found" message when searching for the item. However, the item correctly displays on the new bib record and is available for checkin and checkout. The item eventually re-indexes, and is correctly searchable again, but the re-indexing should not take so long. This has been fixed, and searching for the migrated item's barcode brings back the correct record within a couple minutes now. (SCLS Support Ticket Number 21309)

Circulation

UPDATE: We will not enable the new **Patron Group** functionality until after the 7.0 upgrade.

UPDATE: CircAutoComplete setting: We are turning the CircAutoComplete setting back on for the 7.0 upgrade. This means that:

- When searching for patron names, you will see an active list appear under the search box. The more characters you enter the more precise the search results will become.
- LibLime has added additional information to this active list, including patron's middle initial/name field and the patron's "Home" library.

New! Holds Queue report – limit requests by holds policy: If a patron or staff person places an "Any copy" hold on a BIB record that includes item types that have the "From Home Library" hold policy, only hold requests with the same "Home Library" of the Owning library will display on the Owning library's Holds Queue report.

- For example, when a patron with a VER Home library places a hold on a BIB record that contains a Kit owned by VER, that patron's hold request will display on the VER HQ report and can be pulled and checked in to fulfill that hold.
- If a patron with a BAR Home library places a hold on that same BIB record, that patron's hold request will not display on the VER HQ report, even if it is the only item on the record with an "Available" status.

The "From Home library" hold policy means that only a patron with the same "home Library" as the owning library can have a hold fulfilled via that library's Holds Queue report. Home Library Hold policy is applied to a specific set of Item Types. The Shared Collections policy and the Item Type Guidelines provide information about the use of these item types. (SCLS Support Ticket Number 23682)

New! Delete Patron functionality moved: Delete Patron functionality used to be located in the "More" button located on many of the Patron record screens. In Bibliovation this functionality was moved to the left screen menu list and an internal permission was added to designate which staff had the ability to delete patron records. The Circulation Services Subcommittee (CSS) expressed concerns that making this a more noticeable option could increase the numbers of patron records deleted in error.

- There is a problem with the granular permissions not functioning properly so the "Patron Delete" link has been hidden from the left sidebar.
- If you find a patron record that should be deleted, this is the recommended workflow:
    - Change the patron's Expiration date to a date in the past;
    - Mark the card as "Lost" and
    - Add a Patron Note to the Checkout screen saying "Delete patron".
- These will help us locate the records once the permission are corrected.

Borrower Cart problems: Access to the scrollbar has been restored. (SCLS Support Ticket Number 21707)

Clear screen button: LibLime provided a fix for the Clear Screen button in the patron's Check Out screen. Clicking the button causes the screen to refresh to a blank "Check Out" screen. (SCLS Support Ticket Number 20217)

Reduced Transportation Holds algorithm fixed: When items are returned to your library and checked in, the system will retain this item for an active hold at your location if the Hold Placed date is within 60 days (current setting) of the date of the first active hold in the holds queue. If there are no holds for the item at your location, or the Hold Placed date for a hold at your location is greater than 60 days, the item will be trapped for the oldest active hold request in the Holds queue. (SCLS Support Ticket Number 21156)

Pager for BIB list of Holds - Existing Holds Search box only searching "first page": In 7.0, LibLime has removed the "Show All" button. Using that feature, especially in BIB records with many pages of holds, was causing "degradation of processing", resulting in immensely slow response times.

- **Instead of the Show All button, LibLime has enhanced the "Existing holds" Search box**: Staff can search by a library name or a patron name and the results will search and produce results from ALL of the pages of holds, in order of Priority. The search results can also be sorted by any sortable column. (SCLS Support Ticket Number 24631)

Staff login unable to check out to patron with Patron Alert about pending record expiration: A structural change modified the setting that produces the Patron Alert (notifying staff that the record will expire within 30 days) and changed it to a block. Patron Alerts warning of impending record expiration no longer require an Override to check out to the patron. (SCLS Support Ticket Number 25028)

Canceling holds from the holds shelf: Staff are now able to cancel waiting holds from the patron's list of items On Hold. The actions required are the same as when a waiting hold is cancelled from the BIB list of holds. If the hold/item canceled has other, active holds, staff must respond to the pop-up on the screen to determine the next action. Read the updated directions in the Circulation Manual, Section IX Placing and Managing Holds, Part C Managing Holds. (SCLS Support Ticket Numbers 21089; 24738)

Using Search to Hold causes system to hang up in certain situations: This has been fixed in 7.0. (SCLS Support Ticket Number 25051)

Updating Calendar - new "legacy application" message: Staff can make changes and, after saving those changes, they remain on the page. (SCLS Support Ticket Number 24600)

Items with a "Not for Loan" status, like Current Issue/No CKO, are not blocked at Checkout: The system was not blocking the checkout of items with Not For Loan statuses. This has been fixed; check out is blocked but staff can override if necessary. (SCLS Support Ticket Number 21120)

Account/Payment Receipt is incomplete: This has been fixed. Instead of only displaying payment amount(s) made and a balance, the Account receipt now displays/prints the following fields per action: title, fine type, amount paid or written off, timestamp, type of credit (payment, writeoff) and also the Total paid and the Balance due (remaining owed). (SCLS Support Ticket Number 20503)

Some Holds Checked In not Completing Full Actions: Fixed the problem that, under certain conditions, when a hold was triggered at Check in, the process did not complete. A message was generated for the patron, but the system did not show a waiting hold message on the patron's Check Out screen and the item's status remained "available" This "available" status would make the item eligible to appear on the Holds Queue report. This has been reported as fixed in 7.0. (SCLS Support Ticket Number 24978)

Item on hold shelf displaying on Holds Queue report: Sporadic instances of items on the hold shelf subsequently displaying on the library's Holds Queue report; sometimes for the same patron, sometimes for a patron at another library. We think this was a consequence of the problem reports for 24978 (above issue). This has been reported as fixed in 7.0. (SCLS Support Ticket Number 25282)

Creating Fast BIB Add record – Odd Message: After creating and saving a Fast BIB Add record on a patron's Check Out screen, Bibliovation was producing a pop-up that implied that the item was already checked out to the patron and that staff did not have permission to override. This has been fixed. (SCLS Support Ticket Number 20724)

Self-check: Can't checkout items with hold request(s): Self-check units were blocking walk-up checkouts if there was a title-level hold request on the Holds Queue report – even if there were other items available to fill the hold. Policy has always been to give precedence for walk-in checkouts; software was ignoring the code. This has been fixed in 7.0. (SCLS Support Ticket Number 21080)

Problem with Birthdate field when adding new patron record: When adding a new patron record, if staff entered the birthdate in any other format other than mm/dd/yyy, the system would not report an error and, when staff clicked the Save" button, the system cleared the form. This has been fixed to produce (up to 3) pop-ups directing the staff person in the correct formatting for the field. (SCLS Support Ticket Numbers 24666 (sandbox), 25486 (production))

Discovery Layer

Advanced search option "Only items currently available for loan or reference" includes items not available for loan: The option in the Advanced search "Only items currently available for loan or reference" was returning results for items that were not actually available for loan, such as checked out items. This problem has been fixed. (SCLS Support Ticket Number 21206)

"Adult" audience limit not working: The "Adult" audience limiter in the Advanced search was not working for both the patron Discovery Layer and the staff views. This problem has been fixed. (SCLS Support Ticket Number 26442)

Any format label missing from Format drop-down menus: The "Any format" label was disappearing from the format drop-down box in the Discovery Layer masthead and it was missing from the Format drop-down box in the Advanced Search. This problem has been fixed. (SCLS Support Ticket Number 23387)

Hold History display to patron doesn't display all holds filled, cancelled, or expired in past 30 days: The Holds History Display in the Discovery Layer was only showing holds that were placed in the last 30 days, even if those holds had been cancelled, filled, or expired. This problem has been fixed. The Holds History is now showing all holds that were either cancelled, filled, or expired within the last 30 days. (SCLS Support Ticket Number 21884)

In transit holds not counted as "active" holds on Patron Dashboard page: Holds that are "in transit" were not counted as "active" holds in the display on the Patron Dashboard in the Discovery Layer. This problem has been fixed. (SCLS Support Ticket Number 21580)

Navigation through search results pages only displays 4 pages at a time: The search results pages were only displaying 4 pages at a time in the navigation at the bottom of the pages. We are now able to customize the number of pages that display as part of the page navigation, so we can display 10 pages of navigation, in addition to "first" and "last" navigation buttons. (SCLS Support Ticket 16916)

New! Sort options now customizable: We now have the ability to customize the sort options that are displayed on the search results page. The sort options are the same for both the staff view and the patron Discovery Layer view. After consulting with the Discovery Interface Subcommittee, we have removed the following sort options: Popularity (unclear as to what parameters were used for this sort), Call number (based on the call number field in the bib record, not the item record, and call numbers in bib records are inconsistently applied and may not match the call numbers that libraries are using), and Last Modified date. The following sort options are still in the sandbox: Relevance, Author A-Z and Z-A, Publication/Copyright Date Newest and Oldest, Acquisition Date Newest and Oldest, Title A-Z and Z-A. (No SCLS Support Ticket Number)

GetIt Acquisitions

Update Item on Receipt pop-up contains fields hidden from Item record: The Update Item on Receipt pop-up form had contained extra fields, such as 5-ZUse Restrictions, q-Checked out, and ZUnused. (This pop-up appears when you are receiving an item and you have GetIt set up to update on order item records when receiving.) This problem has been fixed. (SCLS Support Ticket Number 26801)