

Release notes & customizations for 1.4.0.7

Pines Specific Bugs / Customizations

- Bill-related slowness: Bill-related slowness; should be drastically improved for patrons with large paid or forgiven fine histories. EG no longer checks the entire history - just open transactions.
 - **Details:** New billing summary data set -- billings are no longer calculated on the fly (in the moment) -- works on one database row that is updated nightly -- freezes -- bills are retrieved from that static table and then updated with transactions that night -- no longer going to history -- only searching open transactions.

- Need to add Canadian addresses to patron records - Zip code flexibility for postal codes: put into trunk, back-ported for the 1.4.0.7 release and patched on 1.4.0.6 test cluster.

- Context Menus – when you right click and context menus appear, you should have the option to cut/copy/paste.

- Copy bucket management and item status tabs

- Evergreen importer (import of authority files)

- Evergreen times out when paying a bill – see above – “bill-related slowness” (unless a patron has 2 years of current unpaid bills - that will still cause problems; working on that still)

- Patron bill different on the summary screen than on the Bills screen

General Bugs Fixed

- SlimPAC: Under rare circumstances, searches could ignore the requested search type (such as title or author) and instead perform a keyword search.
- Closed Dates Editor (Staff Client, Local Admin): Dates did not always display, or displayed incorrectly.
- Hold Shelf display (Staff Client, Circulation): If only one hold was on the hold shelf, it would not display.
- Force This Action override (Staff Client, Circulation): Previously, multiple events tied to one item could not be overridden in one step.

- ❑ Offline/Standalone Client: Transaction list would not clear unless the transactions were printed.
- ❑ Hold Targeter: Enhancement to the holds targeter to make it more efficient and reduce load.
- ❑ Spine Labels (Staff Client, Cataloging): The top margin of the first label was misaligned by a small amount.
- ❑ Spine Labels (Staff Client, Cataloging): When adding items, there was database lag time affecting label printing.
- ❑ Authority Record Import (Staff Client, Z39.50 Importer): Authority record import not functioning correctly.
- ❑ Patron Holds (Staff Client, Circulation): Display for patron's holds showed all the holds the patrons had ever placed, whether active or not.
- ❑ Renewing Checkouts (Staff Client, Circulation): Critical fix for issues surrounding staff renewing multiple items for a patron.

New Features

- ❑ MARC Editor (Staff Client, Cataloging): Copy/Cut/Paste context menus are now available for all editable fields. Right-click in an editable field, and the menus pop up.
- ❑ MARC Editor (Staff Client, Cataloging): Authority validation made even more strict, to avoid failing validation on floating subdivisions within a MARC field.
- ❑ Item Attribute Editor, Volume-Copy Editor (Staff Client): Templates now sort alphabetically. Note: templates in lower case will precede templates in upper case.
- ❑ Holdings Maintenance (Staff Client, Local Administration): Allows a choice between "alert on last copy" and "delete with last copy" for bibliographic records.
- ❑ Billing interface (Staff Client, Circulation): Billing retrieval now much faster due to new API (programming).
- ❑ Patron Search (Staff Client): Improved autofocus, which controls how and where the cursor defaults for data entry.
- ❑ Z39.50 Client (Staff Client): PQN search feature restored. PQN (for Prefix Query Notation) is a powerful search tool used by some catalogers for direct querying

of Z39.50 servers. To see it in action, try **@mosher beer** (the equivalent of the keyword search, **mosher and beer**) or try this more complex search: **@or papazian @attr 1=21 beer** (a search for **papazian or beer** except that the first term can be anywhere, while the second term must be in the subject field). Note: found under label, **Raw Text**.

General Cleanup

- User names used in the example configuration files simplified
- Various translation cleanups
- Avoid entirely empty searches (database performance issue)
- Apache example configuration tidying