



LIBRARY OPERATIONS COMMITTEE
AGENDA Wednesday, May 6, 2026– 10:00 a.m.
Lompoc Public Library

- 1) **10:00 A.M. CALL-TO-ORDER** Glynis Fitzgerald, Chair, Presiding
Recorder; Kristina Uvalle, BG.
- 2) **ADOPT AGENDA -**
- 3) ***APPROVE MINUTES** — April 1, 2026, by Kristina Uvalle (BG)
- 4) **TECHNICAL**
 - a) **Koha Upgrade 25.11.02** – Review new enhancements and system settings in the latest Koha upgrade.
 - b) **Envisionware Print Cloud** – Demo at 11:00 a.m. (Tentative)
 - c) **Koha/Aspen Issues** – Discussion. A chance to talk about issues happening in Koha or Aspen.
- 5) **NEW PRODUCT DISCUSSION**
- 6) **ITEMS TO FORWARD**
- 7) **ADJOURNMENT**

Next Meeting: Wednesday, July 8th (Online).

Distribution: Karen Christiansen, PR; Meg Weber, PR; Shannon St. Arnaud, SM; Dominic Keen, LM; Michelle Homsher, LM; Terra Furuta, CC; Kim Crail, GO; Analise McCully, GO; Brenda Goldy, SP; Directors; Matt Duhon, BG; Glynis Fitzgerald, BG; Kristina Uvalle, BG



LIBRARY OPERATIONS COMMITTEE MINUTES

Wednesday, April 1, 2026– 10:00 a.m.

Teams Meeting

Attending: Karen Christiansen, PR; Shannon St. Arnaud, SM; Dominic Keen, LM; Analise McCully, GO; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Kristina Uvalle, BG

- 1) **10:07 A.M. CALL-TO-ORDER** Glynis Fitzgerald, Chair, Presiding
Recorder; Kristina Uvalle, BG.
- 2) **ADOPT AGENDA** – 1 st KC (PR) / 2nd BG (SP). Approved.
- 3) ***APPROVE MINUTES** — March 4, 2026, by Kristina Uvalle (BG) – 1 st SA (SM) / 2nd KC (PR).
Approved.
- 4) **TECHNICAL**
 - a) **Koha/Aspen Issues** – Discussion. A chance to talk about issues happening in Koha or Aspen.
 - Hotspots now cancel after 30 days in suspended status.
 - Aspen was upgraded last night.
 - Syndetics Unbound will be available starting July 1st.
 - GF is developing reports for reviewing Collection codes.
 - Message Bee is still having intermittent issues pop up. Libraries can send any questions about notices to Kristina and Matt.
 - b) ***Review Item Types by Library** – Review list of available item types and designate which need to be removed and/or added to a library’s drop-down lists. Review using Advanced Search to correct items with the incorrect item type listed.

KU (BG) reviewed the list of item types by library and reviewed the Advance Search module.
ACTION ITEM: Libraries are encouraged to use the Advance Search, Report 1173 to review and clean-up items with the incorrect or missing item types.
 - c) **Log Data Retention Time Frame** (SP) - Discuss the length of time that log data is kept.
I had a patron who disputed checking out one of our books at GO, but I couldn’t go back past 6 months to view the checkout transaction. I have had other instances where I needed to look back at logs, but they weren’t available.

ACTION ITEM: Kristina (BG) will check with Bywater to see if an adjustment can be made to the length of time log data is retained. Preferably, two years, one year would be acceptable.
- 5) **NEW PRODUCT DISCUSSION** – N/A
- 6) **ITEMS TO FORWARD** – N/A
- 7) **ADJOURNMENT** 11:12 a.m. 1st KC (PR) / 2nd SA (SM).

Next Meeting: Wednesday, May 6th. Lompoc Library.

Distribution: Karen Christiansen, PR; Meg Weber, PR; Shannon St. Arnaud, SM; Dominic Keen, LM; Michelle Homsher, LM; Terra Furuta, CC; Kim Crail, GO; Analise McCully, GO; Brenda Goldy, SP; Directors; Matt Duhon, BG; Glynis Fitzgerald, BG; Kristina Uvalle, BG

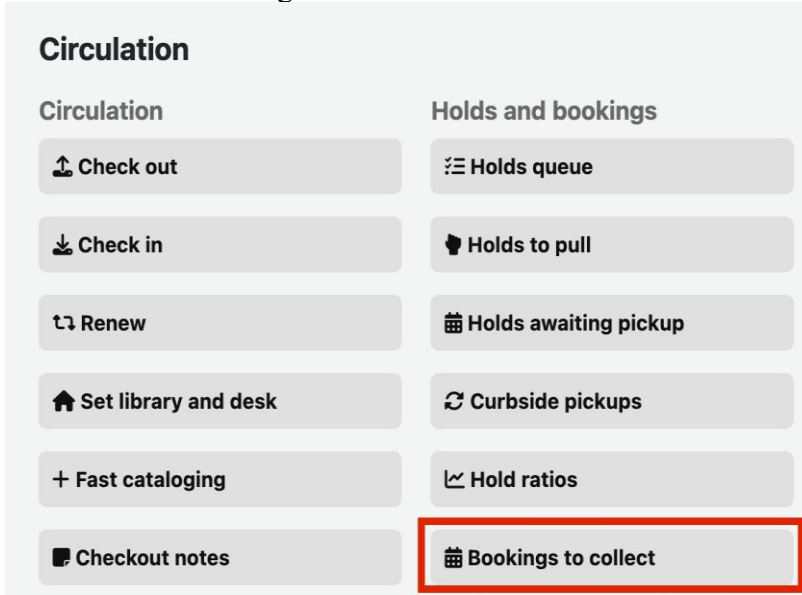
[Bug 37661](#) - Disable/Enable Bookings (Global Setting)

This introduces a new system preference called **EnableBooking**: "[Enable]/[Disable] the booking module". If this is set to [Disable], Koha will automatically hide these bookings-related features:

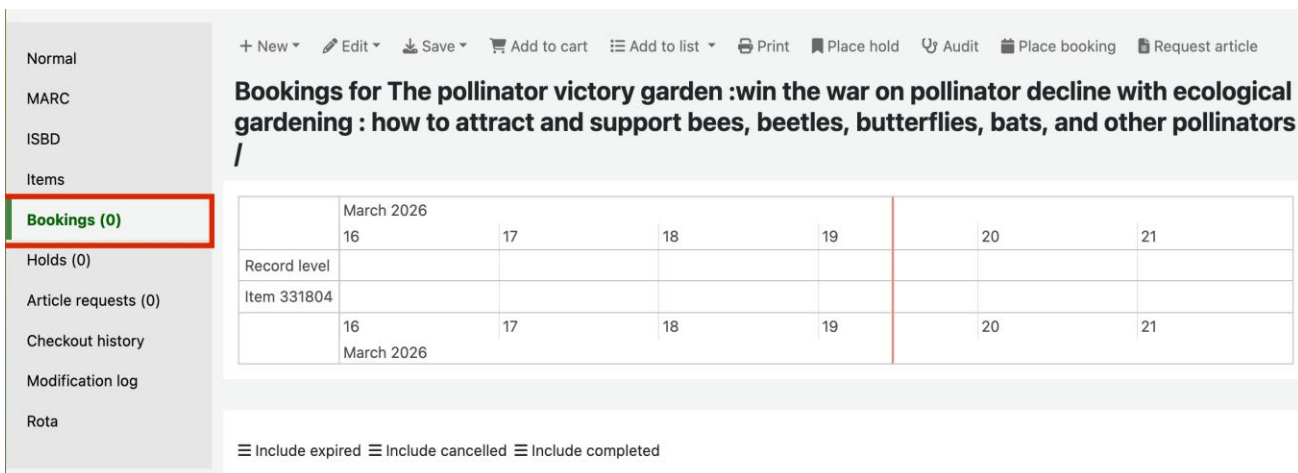
Patron accounts - 'Bookings' tab:



Circulation - 'Bookings to collect' button:



Bib records - 'Bookable' tab:



Items tab in bib records - 'Bookable' option:

▼ Barcode 331804

Item information [Edit item](#)

Home library:

Item type:	Star Books
Collection:	Non-fiction
Item call number:	576.8 EIE
Shelving location:	Adult Non-fiction
Replacement price:	26.99

Statuses

Current library:	North Branch
Checkout status:	Not checked out
Lost status:	<input type="text" value="Choose"/> <input type="button" value="Set status"/>
Damaged status:	<input type="text" value="Choose"/> <input type="button" value="Set status"/>
Withdrawn status:	<input type="text" value="O Available"/> <input type="button" value="Set status"/>

Priority

Exclude from local holds priority:	<input type="text" value="No"/> <input type="button" value="Update"/>
Bookable:	<input type="text" value="Follow item type"/> <input type="button" value="Update"/> Item type bookable: Yes

Note that the 'Bookable' option in Item types settings and the 'Bookings' column in the Item types table will still show when **EnableBooking** is set to [Disable].

[Bug 26993](#) - Allow StoreLastBorrower to retain a locally-defined number of previous borrowers (Global Setting)

The **StoreLastBorrower** system preference now has an option for the number of borrowers to retain in the `items_last_borrower` table: "Store the last [#] patron(s) to return an item. This setting is independent of the `opacreadinghistory` and `AnonymousPatron` system preferences. Leave empty or set to 0 to disable the preference."

The number of borrowers indicated in the system preference will show in the 'Last returned by' entry on the Items tab:

History

Accession date:	07/28/2018
Total checkouts:	30 (View item's checkout history)
Last seen:	03/03/2026 02:23 PM
Last borrowed:	03/03/2026
Last returned by:	111111, 1189998819991197275
Last borrower:	111111
Previous borrower:	1189998819991197275

Since the data is stored in its own table, increasing the number isn't retroactive. The higher number of borrowers will only be stored and thus displayed for returns moving forward.





If the number in **StoreLastBorrower** is reduced, any history beyond the new lower threshold will be automatically deleted. For instance, if it is set to 3 but then changed to 2, record of the oldest borrower's return will be deleted from `items_last_borrower`. If the number is increased back to 3, the oldest borrower's return won't re-appear since the data has been cleared.

[Bug 9762](#) - Log circulation overrides (Enhancement)

When circulation actions take place by override, there are now notes in logs explaining the policy that was overridden:

Log entries

Showing 1 to 8 of 8 entries

Show entries [< Previous](#) [Next >](#) Search:    

Date	Librarian	Module	Action	Object	Info	Interface
03/11/2026 08:27 AM	Catrina B (502)	Circulation	Renew	Erich Berka (801)	Item 302624 N Seen renewal	Staff interface
03/11/2026 08:09 AM	Catrina B (502)	Circulation	Checkout	Erich Berka (801)	Item 302624 N Too many checkouts Max renewals reached	Staff interface

This can help managers troubleshoot circulation questions and track patterns in overrides.

[Bug 22632](#) - Add logging of merged patrons (Enhancement)

Patron account mergers are now included in patron logs under the new *Merge* option under 'Actions'. This is part of standard patron modification logs, so systems with **BorrowersLog** set to "[Log] changes to patron records and patron restrictions" will automatically have access to this history moving forward.

Managers can find merge history for a specific patron from their 'Modification log' tab:
Note that the merged patron is identified by their card number.

Alternatively, a patron's modification log can be filtered to only search for *Merge* in 'Actions':

Modification log

Notices

Statistics

Files

Purchase suggestions

ILL requests history

Borrowernumber:

Info:

Interface: All Staff interface OPAC SIP Command-line REST API Cron job

Display from:

Display to:

Output

To screen in the browser:

To a file: Named:

Log entries

Showing 1 to 1 of 1 entries (filtered from 42 total entries)

Show entries

Search:

Date	Librarian	Module	Action	Object	Info	Interface
02/23/2026 01:05 PM	Sara B. (414)	Patrons	Merge	Nina Brown (703)	Nina Brown (1189998819991197306) has been merged into Nina Brown (111111)	Staff interface

Log viewer

Librarian:

Actions:

All Add Delete Modify Checkout Return
 Renew Create Cancel Fill Suspend Resume
 Add circulation message Modify circulation message Delete circulation message
 Change ILL request status ILL notice sent to patron Change password Reset password
 Run End Merge Edit mappings Reset mappings
 Create an acquisitions basket Modify an acquisitions basket Modify an acquisitions basket header
 Modify an acquisitions basket's users Close an acquisitions basket Approve an acquisitions basket
 Reopen an acquisitions basket Cancel an order Create an order Modify an order
 Create an invoice adjustment Modify an invoice adjustment Delete an invoice adjustment
 Receive an order Modify a budget Modify a fund Create a fund Delete a fund
 Acquisition claim Acquisition order Overdue Expire Create restriction
 Modify restriction Delete restriction Modify cardnumber Reset 2FA

Borrowernumber:

Info:

Old Lady Baby Brown (11111)

23 North Ave.
Baltimore, MD 20000
training@bywatersolutio...
Born: 06/16/2011
No phone stored.
Legal name: Samantha
Category: Youth (CH)
Home library: Main Libr...
Borrowernumber: 703
Updated on: 03/16/202...
Last seen on: 03/16/202...

Check out

Batch check out

Details

Accounting

Circulation history

Holds history

Modification log

Notices

Managers can also search for all patron account merges over a time period from Tools > Logs by selecting the *Patrons* in 'Modules' and *Merge* in 'Actions':

Log viewer

Librarian:

Modules: All Authentication ▲ Cataloging Authorities Patrons Acquisitions ▲
 Serials Holds Interlibrary loans ▲ Circulation Claims Fines
 System preferences Cron jobs Reports Search engine Notices Additional content ▲
 Recalls Suggestions ▲ Transfers

Actions: All Add Delete Modify Checkout Return Renew
 Create Cancel Fill Suspend Resume Add circulation message
 Modify circulation message Delete circulation message Change ILL request status ILL notice sent to patron
 Change password Reset password Run End Merge Edit mappings
 Reset mappings Create an acquisitions basket Modify an acquisitions basket Modify an acquisitions basket header
 Modify an acquisitions basket's users Close an acquisitions basket Approve an acquisitions basket
 Reopen an acquisitions basket Cancel an order Create an order Modify an order Create an invoice adjustment
 Modify an invoice adjustment Delete an invoice adjustment Receive an order Modify a budget Modify a fund
 Create a fund Delete a fund Acquisition claim Acquisition order Overdue Expire
 Create restriction Modify restriction Delete restriction Modify cardnumber Reset 2FA

Object:

Info:

Interface: All Staff interface OPAC SIP Command-line REST API Cron job

Display from: X
(MM/DD/YYYY)

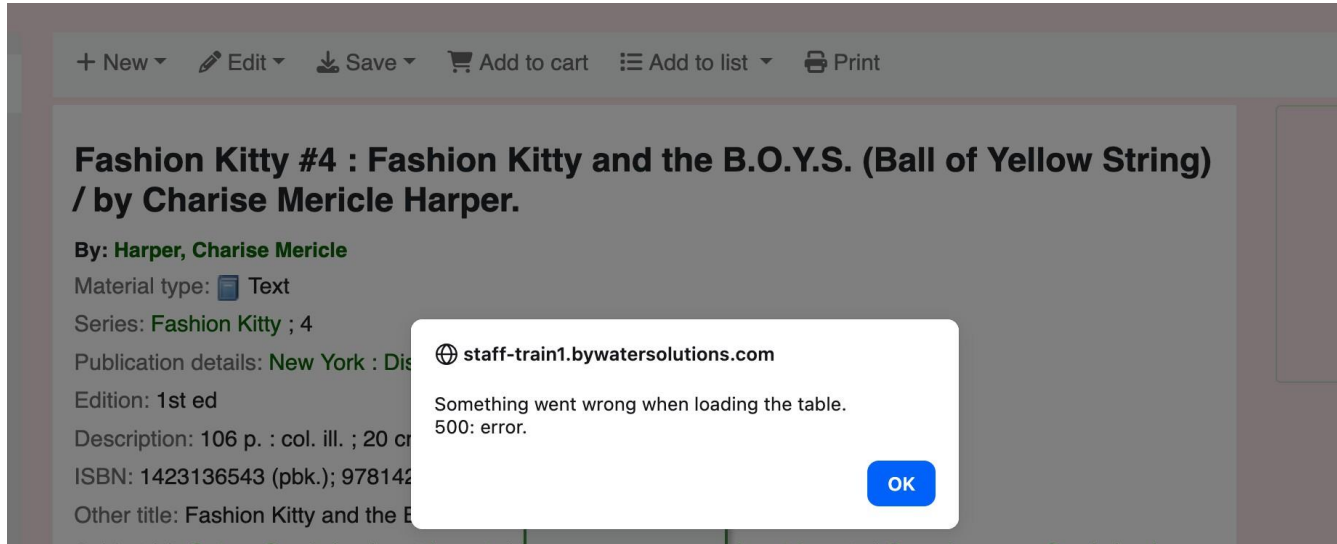
Display to: X

Since merged borrowers are considered deleted, managers can use the card number from this log to find details about the merged account in the deletedborrowers table. For instance, a simple report could be:

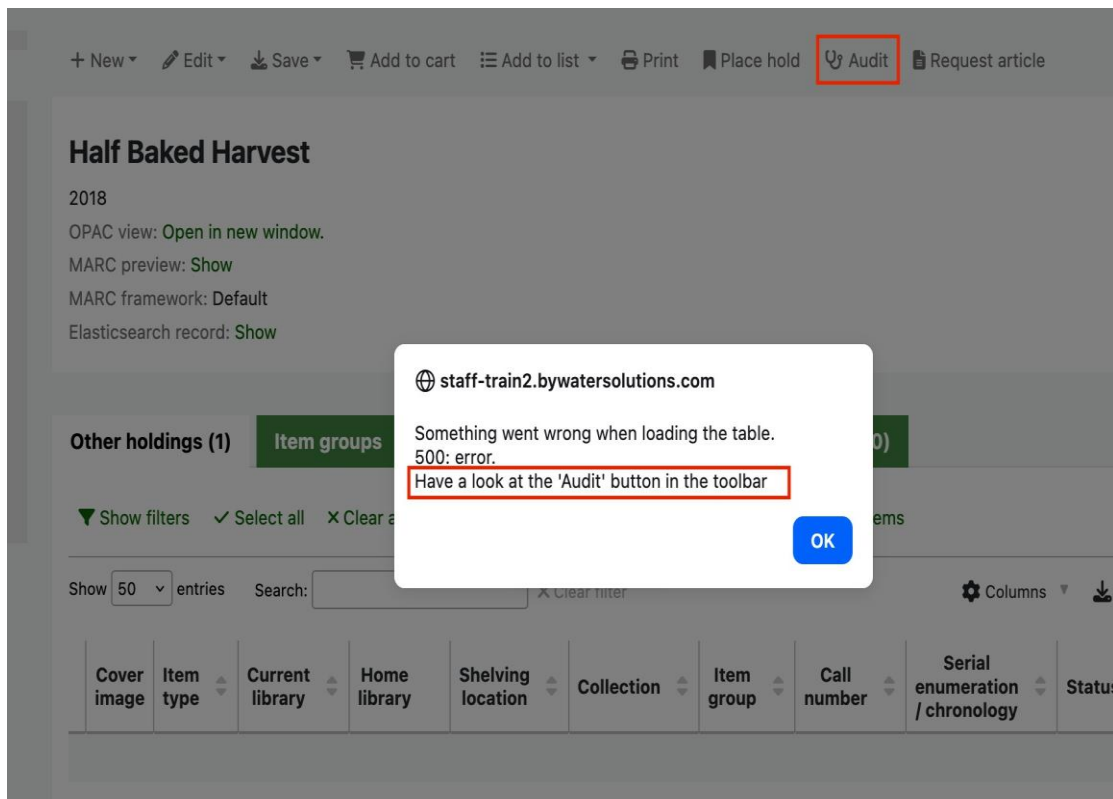
```
SELECT db.borrowernumber, db.surname, db.firstname, db.preferred_name, db.email, db.branchcode,
db.dateenrolled
FROM deletedborrowers db
WHERE db.cardnumber = <<Deleted patron's card number>>
```

Bug 40777 - 500 Error: Something went wrong when loading the table Should Exit Cleanly (Enhancement)

Previously, if the Holdings table failed to load properly due to missing item types, home libraries, or holding libraries, staff had no way other than reports or opening each individual item for editing to see which item(s) were at fault and what problem(s) needed to be addressed:



This enhancement adds an 'Audit' button in the bib toolbar to diagnose issues loading the Holdings table, as well as a hint in the error modal for missing item types:



Items that are missing an item type will display the error modal as shown above. If items are missing a home or holding branch, the modal won't show, but the Holdings table won't load properly:

Summer fun / Jeanne Thornton.

By: **Thornton, Jeanne** [author.]

Material type: Text

Publisher: New York, NY : Soho, [2021]

Description: pages cm

Content type: text Media type: unmediated Carrier type: volume

ISBN: 1641292385; 9781641292382

Summary: "Gala, a young trans woman, works at a hostel in Truth or Consequences, New Mexico. She is obsessed with the Get Happies, the quintessential 1960s Californian band, helmed by its resident genius, B----. Why did the band stop making music? Why did they never release their rumored album, Summer Fun? Gala writes letters to B---- that shed light not only on the Get Happies, but paint an extraordinary portrait of Gala. The parallel narratives of B---- and Gala form a dialogue about creation-of music, identity,self, culture, and counterculture. Summer Fun is an epic and magical work of trans literature that marks Thornton as one of our most exciting and original novelists"-- Provided by publisher.

OPAC view: [Open in new window.](#)

MARC preview: [Show](#)

MARC framework: Default

Elasticsearch record: [Show](#)



Coce image from Amazon.com

Item exists, but table isn't loading properly

North Branch holdings (1) | **Item groups** | **Descriptions (1)** | **Acquisition details** | **Concerns (0)** | **Images (0)**

Show filters Select all Clear all

No entries to show (filtered from 1 total entries)

Show entries <<First < Previous Next > Last >>

Search: Clear filter Columns Export Copy shareable link Configure

Item type	Current library	Shelving location	Shelving location	Call number	Status	Last seen	Local uses	Date accessioned	Barcode	Spine label
No matching records found										

Staff can click the 'Audit' button to diagnose the issue(s):

Errors found

Item with itemnumber=35897 does not have home and holding library defined

Summer fun / Jeanne Thornton.

By: **Thornton, Jeanne** [author.]

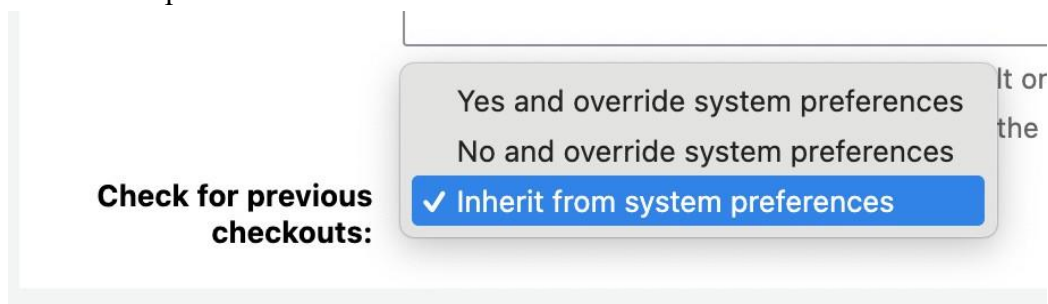
From here, they can go to Edit > Manage items and then open the applicable item(s) for editing.

[Bug 20644](#) - Per itemtype setting for CheckPrevCheckout (Global Setting)

With this enhancement, the **CheckPrevCheckout** system preference can now be overridden based on item type in addition to patron category.

Previously, the options for this system preference were [Do], [Do not], [Unless overridden by patron category, do], and [Unless overridden by patron category, do not]. The latter two are now [Unless overridden by patron category or by item type, do] and [Unless overridden by patron category or by item type, do not].

If the system preference is set to [Unless overridden...], every item type will have a 'Check for previous checkouts' option:



This setting will work for item type overrides the same way that it does for patron category overrides. If the system preference is set to [Unless overridden by patron category, **do**] and an item type is set to 'No and override system preferences', Koha will not check for previous checkouts for that item type. Likewise, if the system preference is set to [Unless overridden by patron category, **do not**] and an item is set to 'Yes and override system preferences', Koha will check for previous checkouts for that item type.

Since Koha now looks at both item type and patron category overrides, there may be instances where they conflict:

- If the system preference is set to [Unless overridden by patron category, **do**] and either the item type *or* the patron category is set to **No**, Koha will not check for previous checkouts.
- If the system preference is set to [Unless overridden by patron category, **do not**] and either the item type *or* the patron category is set to **Yes**, Koha will check for previous checkouts.

If **CheckPrevCheckout** is set to [Do] or [Do not], the 'Check for previous checkouts' option won't show in item type (or patron category) settings. However, if **CheckPrevCheckout** is set to [Unless overridden...], then changed to [Do] or [Do not], and then is later changed to one of the [Unless overridden...] options, any previous setting for a given item type in 'Check for previous checkouts' will be retained and reinstated.

This is the warning screen that will appear if a transaction triggers the check (based on the system preference, item type, and patron category settings):

Check out

Please confirm checkout

- Patron has previously checked out this title: **The Sibley guide to birds / by Sibley, David,**. Check out anyway?

Remember for the session for this patron

✓ Yes, check out (Y)

✗ No, don't check out (N)

Staff should continue to be mindful of checking the 'Remember for the session for this patron' option since this confirmation box is used for multiple types of overrides. For instance, if the confirmation alert shows for a patron because they have overdue items or fines and staff select the 'Remember for the session for this patron' box, and then the staff member scans an item that normally would trigger the confirmation for a previous checkout, they will *not* get a warning about the previously checked out item. Similarly, if someone is checking out multiple previously-checked out items and staff check the 'Remember for the session for this patron' box for the first previously checked-out item, the confirmation screen will *not* show for any additional item types that would otherwise trigger the confirmation screen.

The item type setting for **CheckPrevCheckout** works with batch checkout feature. If staff try to check out a previously-checked out item using batch checkouts, they will see this warning screen:

Batch check out

Batch checkout confirmation

	Barcode	Title	Information
<input checked="" type="checkbox"/>	34569300295926	Batman : mad love and other stories / , by Dini, Paul. 34569300295926	This item has previously been checked out to this patron.
	N26036045	The Sibley guide to birds / , by Sibley, David, N26036045	• Due on 04/02/2026

Please confirm checkout

Checkout or renew

Bug 23010 - If an item is checked out or in transit it should not be able to be marked withdrawn (Enhancement)

This enhancement introduces the system preference **PreventWithdrawingItemsStatus**: "Prevent the ability to withdraw items with the following statuses [options: Select all, Checked out, In-transit]." By default, no options are selected.

This feature works when attempting to withdraw items either from the 'Items' tab or from the full item editing screen, and if an item can't be withdrawn, the error message will note the reason:

- If a staff member tries to withdraw a blocked item from the 'Items' tab, the error message will be *Cannot withdraw an item in transit* or *Cannot withdrawn checked out item*.
- From the full item editing screen, the error messages are *Error saving item: In transit item cannot be withdrawn* and *Error saving item: Onloan item cannot be withdrawn*.

If staff use batch item modification, items that can't be withdrawn due to the system preference will be skipped, but other items will still be processed normally. However, per [Bug 41884](#) - Job report for batch item modifications that fail due to **PreventWithdrawingItemsStatus** has no details on failed items, note that the error message on results screen doesn't provide details on which items couldn't be withdrawn:

Details of job #97597

Job ID: 97597
Status: Finished
Progress: 2 / 2
Type: Batch item record modification
Queued: 02/18/2026 10:41 AM
Started: 02/18/2026 10:41 AM
Ended: 02/18/2026 10:41 AM

Report

1 item(s) modified (with 1 field(s) modified). **New batch item modification**

1 item(s) could not be modified.


[Bug 36135](#) - Add tool to batch modify holds (Enhancement)


Previously, batch modifications of holds could only be performed from the database, which meant submitting a ticket to ByWater Solutions' Data team for assistance. With this enhancement, staff with the new 'Perform batch modification of holds (*batch_modify_holds*)' permission (under 'Use all tools (expand for granular tools permissions) (*tools*)') can perform batch modifications on holds in Koha directly from the staff interface.

This feature is available in Tools > Batch modify holds:

Batch modify holds

Hold search criteria:


Expiration date from:  ✘


Expiration date to:  ✘

Libraries:

Found status:

Suspended:

Suspended until from:  ✘

Suspended until to:  ✘

Hold note:

Search

To start, staff will search for holds to modify based on expiration dates, pickup library, status, and more. The available criteria are:

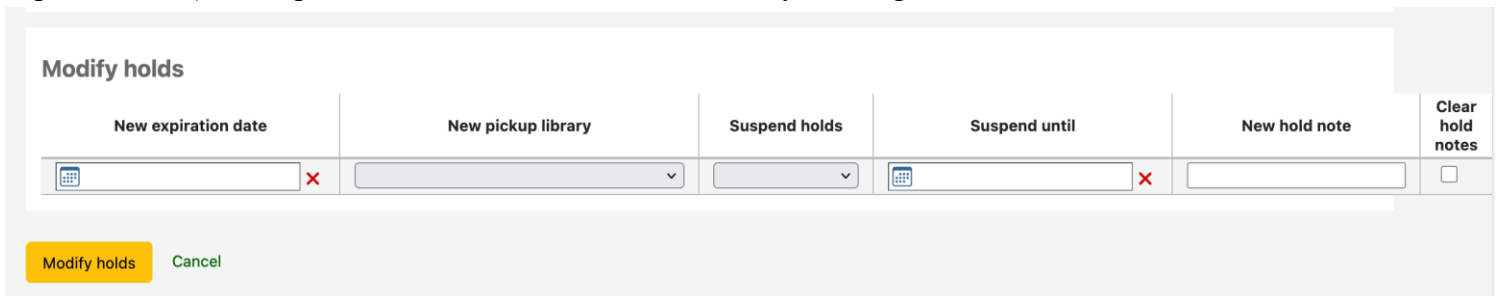
- Expiration date from and Expiration date to: Holds expiring starting on a date ('from'), ending on a date ('to'), or use both for a range. Expiration dates include system-set (per **DefaultHoldExpirationdate**, if applicable) and patron-set expiration dates for unfilled holds, as well as filled hold expiration dates (as set by **ReservesMaxPickUpDelay**).
- Libraries: Holds' pickup library. If left blank, Koha will look for holds set for pickup at all locations. Multiple selections are allowed.

- Found status: This also allows multiple selection^{15 of 40}. The options are:
 - 'No status' excludes holds with any found status (in transit, in processing, and waiting).
 - 'In transit' means holds that have triggered to fill and are currently in transit to their pickup library.
 - 'In processing' means holds that need processing per **HoldsNeedProcessingSIP**.
 - 'Waiting' means holds that have been filled and are waiting on the holds shelf for patron pickup.

❗ **'No status' is not the same as leaving this field blank.** If this field is left blank, Koha will look for holds with any of the found statuses above *and* for those without a found status.

- Suspended: Choose not suspended, suspended, or leave blank for both.
- Suspended until from and Suspended until to: Date range for suspended holds.
- Hold note: Searches the contents of the 'Notes' field if a note exists on the hold.

Once holds are identified, staff can change their expiration date or library, suspend (with or without a suspension expiration date), unsuspend, add a new hold note, or clear any existing hold notes:



For example, North Branch needs to close for a building emergency from 3/1 to 3/7, so their manager wants to extend the expiration date for all filled holds set to expire during that time to allow patrons extra days to pick up their items. To find these holds, they would use the following criteria:

Batch modify holds

Hold search criteria:

Expiration date from: ❌

Expiration date to: ❌

Libraries: ❌

Found status: ❌

Suspended:

Suspended until from: ❌

Suspended until to: ❌

Hold note:

Search

Koha will find holds matching the criteria above. Staff then select the holds they want to modify (individually, or by using 'Select all visible rows'), select their modification(s), and then click 'Modify holds'. In this example, they would change these holds' expiration date to 3/10:

Batch modify holds

[Edit search](#)

Select all visible rows |
 Clear selections |
 Holds selected: 3 Clear

Holds found for: expiration date between 2026-03-01 and 2026-03-07 from libraries North Branch found status in Waiting

Showing 1 to 3 of 3 entries (filtered from 1,157 total entries)

Show entries <<First < Previous 1 Next > Last >>

Search: Clear filter

Columns |
 Export |
 Copy shareable link |
 Configure

	Hold date	Expiration date	Title	Barcode	Patron	Status	Hold pickup library	Suspended	Suspended until	Notes
<input checked="" type="checkbox"/>	02/27/2026	03/02/2026	Avengers	34569300295968	Sara B. (8787)	Waiting	North Branch	No		
<input checked="" type="checkbox"/>	02/27/2026	03/02/2026	Hilda and the Bird Parade /	309140	Sara B. (8787)	Waiting	North Branch	No		
<input checked="" type="checkbox"/>	02/27/2026	03/02/2026	The cactus league : a novel /	334340	Sara B. (8787)	Waiting	North Branch	No		

Showing 1 to 3 of 3 entries (filtered from 1,157 total entries) <<First < Previous 1 Next > Last >>

Modify holds

New expiration date	New pickup library	Suspend holds	Suspend until	New hold note	Clear hold notes
<input type="text" value="03/10/2026"/> <input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

The results screen will show modified holds, including links to bibs and patrons:

Modified holds

Showing 1 to 3 of 3 entries

Show entries <<First < Previous Next > Last >> Search: Clear filter

Export |
 Copy shareable link |
 Configure

Title	Patron	Pickup location	Priority	Expiration date	Status	Suspended	Suspended until	Notes
Avengers	B., Sara (8787)	North Branch	0	03/10/2026	Waiting	No	-	
Hilda and the Bird Parade /	B., Sara (8787)	North Branch	0	03/10/2026	Waiting	No	-	
The cactus league : a novel /	B., Sara (8787)	North Branch	0	03/10/2026	Waiting	No	-	

Showing 1 to 3 of 3 entries <<First < Previous Next > Last >>

[Return to batch hold modification](#)

Note that the tool cannot update the pickup library for holds with any found status (in transit, waiting, or in processing):

The screenshot displays a web application interface for managing library holds. An error dialog box is overlaid on the interface, indicating that one or more holds have a 'found' status, which prevents their pickup location from being updated. The background shows a table with columns for 'Hold date', 'Expiration date', 'Suspended', and 'Suspended until'. Below the table, there is a 'Modify holds' section with input fields for 'New expiration date', 'New pickup library' (set to 'Main Library'), 'Suspend holds', and 'Suspend until'.

There are a few caveats to using this tool:

- It will not prevent staff from updating pickup locations to disallowed libraries (see [Bug 41882](#) - Batch hold modification tool updates pickup locations to disallowed libraries).
- If a note is added to a hold that already had a note, the new note will replace, not be appended to, the prior one.
- Patrons are not automatically notified about changes to pickup location, suspension status, or expiration date, so libraries should communicate that separately as needed. (Changes will be reflected in their OPAC/Aspen accounts, but no new notice is sent.)
- At this time, changes using the batch hold modification tool aren't logged (see [Bug 41883](#) - Modifications using batch hold modification tool aren't logged).

This is a powerful tool to help libraries manage holds, especially when unforeseen circumstances like unexpected closures arise!

[Bug 15516](#) - Allow to place a hold on first available item from a group of titles, [Bug 40529](#) - Update how hold groups work, [Bug 40517](#) - Allow grouping existing holds, [Bug 40613](#) - Allow ungrouping holds, and [Bug 40552](#) - Allow selecting all holds from a group

This new feature allows staff and patrons to place a hold on the first available item from a user-defined group. For instance, if a patron wants any format of a title for their book club, they could create a hold group with holds on the book on CD, standard print, and large print versions of the title. Or if they want a Canadian travel guide but don't have a preference between Lonely Planet, Fodor's, and Rick Steves, they could create a hold group from those three bibs.

Note that this section will provide an overview of this feature, and that a forthcoming Help Center article will discuss it in more depth.

This feature is optional with the new system preference **DisplayAddHoldGroups**: "[Enable/Don't enable] the ability to create hold groups which are fulfilled by one item." Set it to [Enable] to begin using hold groups.

In the database schema, hold groups are identified by the column `hold_group_id` in the [hold_groups](#) table. The `hold_group_id` column links to the [reserves](#), [old_reserves](#), and [hold_groups_target_holds](#) tables.

Placing/modifying: staff interface

In the staff interface, hold groups can be created at the time holds are placed or after the fact from already-placed holds.

- ❗ To create hold groups directly from search results, the system preference **DisplayMultiPlaceHold** must be set to "[Enable] the ability to place holds on multiple bibliographic records from the search results". If your library allows item-level holds, **DisplayMultiItemHolds** must be set to "[Enable] the ability to place holds on different items at the same time in staff interface and OPAC."

To create a hold group *at the time holds are placed*, start the same way as placing 'normal' holds: search for titles, select the titles that should be grouped, and click 'Place hold'. On the 'Hold details' screen, check the 'Treat as hold group' box to make this a hold group (rather than separate holds on each of the selected bibs), then click 'Place holds':

Hold details

Patron: Scamp Headley (562345)

Notes:

Pickup at: North Branch

Hold starts on date:

Hold expires on date:

Treat as hold group: Place a hold on the next available title from this group

	Pickup location	Title	Priority	Information
<input checked="" type="checkbox"/>	North Branch <input type="button" value="x"/> <input type="button" value="v"/>	A man called Ove by Backman, Fredrik,	3	
<input checked="" type="checkbox"/>	North Branch <input type="button" value="x"/> <input type="button" value="v"/>	A man called Ove by Backman, Fredrik,	3	

On the bib's 'Holds' tab, holds that are part of a group will have a link to the hold group in the Details column:

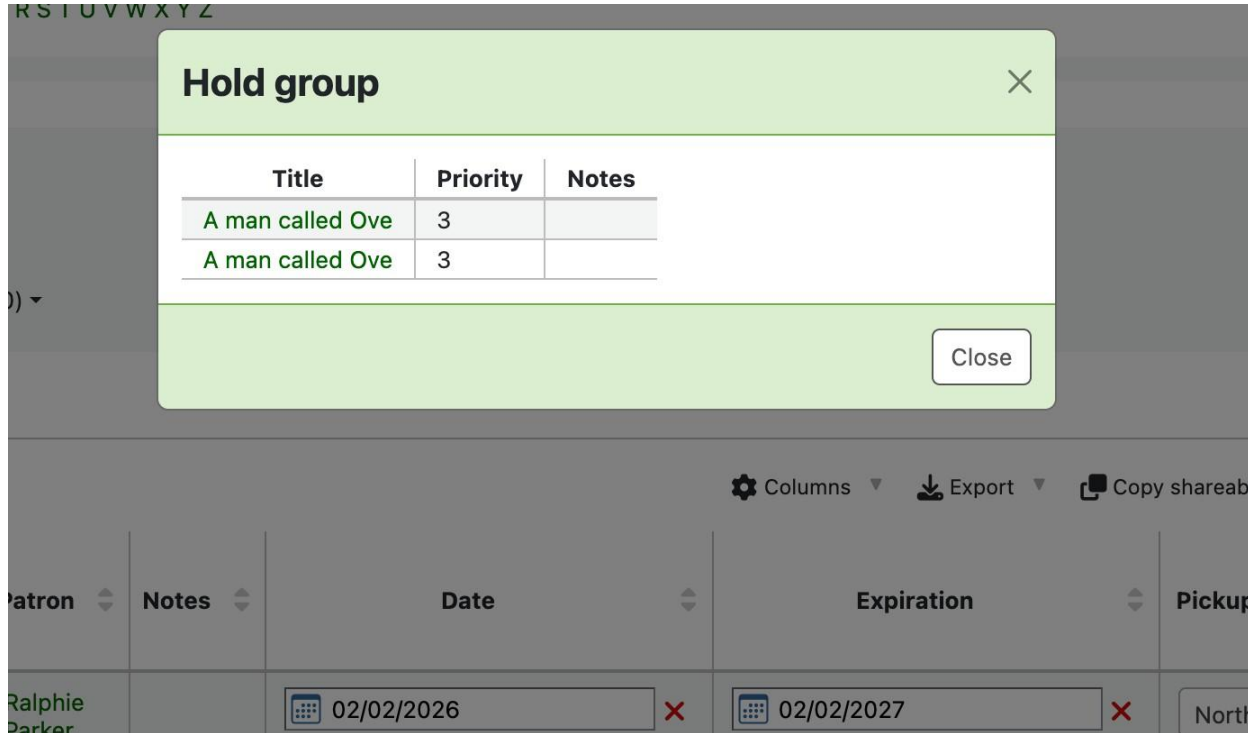
Existing holds

Showing 1 to 3 of 3 entries

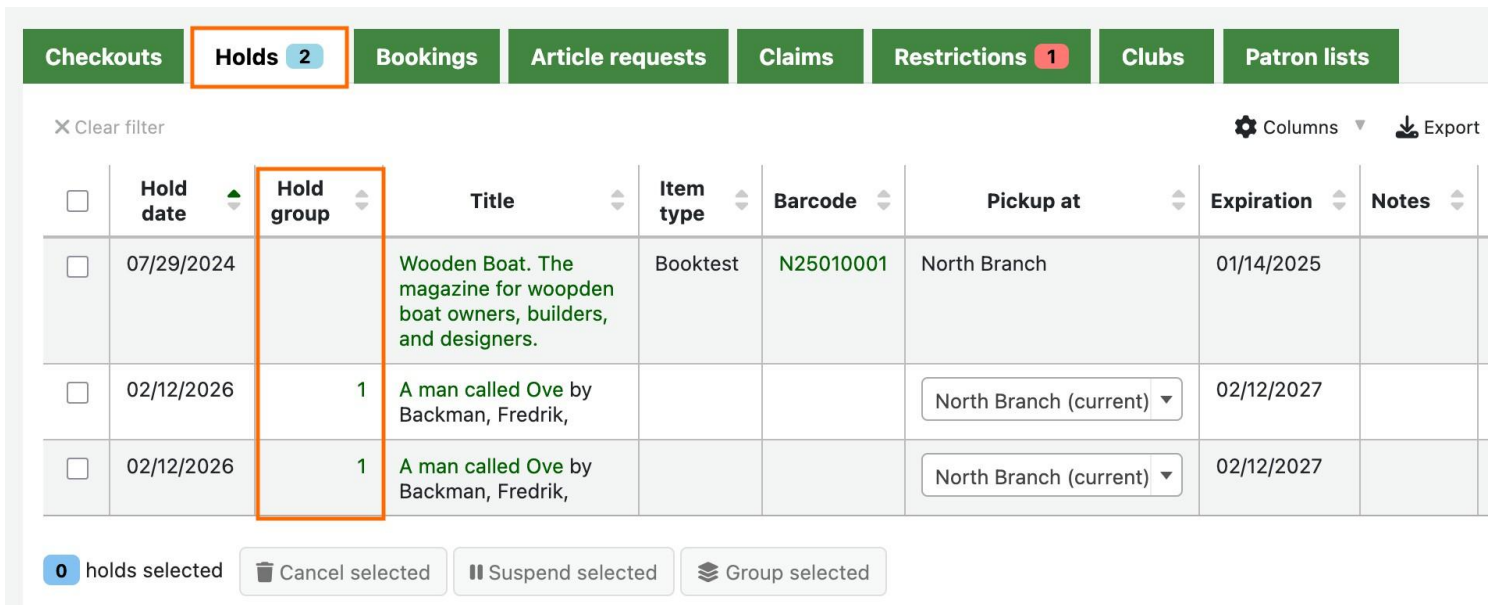
Search: Clear filter

<input type="checkbox"/>	Priority	Change priority	Patron	Notes	Date	Expiration	Pickup library	Details	<input type="button" value="v"/>	Delete	<input type="button" value="Suspend"/>
<input type="checkbox"/>	Change priority to: <input type="text" value="1"/> Current priority: 1	<input type="button" value="up"/> <input type="button" value="down"/>	Ralphie Parker (82)		<input type="text" value="02/02/2026"/> <input type="button" value="x"/>	<input type="text" value="02/02/2027"/> <input type="button" value="x"/>	North Branch <input type="button" value="v"/>	Next available	<input type="button" value="v"/>	<input type="button" value="trash"/>	<input type="button" value="Suspend"/>
<input type="checkbox"/>	Change priority to: <input type="text" value="2"/> Current priority: 2	<input type="button" value="up"/> <input type="button" value="down"/>	Hebah A (hebaha)		<input type="text" value="08/15/2024"/> <input type="button" value="x"/>	<input type="text" value="08/15/2025"/> <input type="button" value="x"/>	North Branch <input type="button" value="v"/>	Next available	<input type="button" value="v"/>	<input type="button" value="trash"/>	<input type="button" value="Suspend"/>
<input type="checkbox"/>	Change priority to: <input type="text" value="3"/> Current priority: 3	<input type="button" value="up"/> <input type="button" value="down"/>	Scamp Headley (562345)		<input type="text" value="02/12/2026"/> <input type="button" value="x"/>	<input type="text" value="02/12/2027"/> <input type="button" value="x"/>	North Branch <input type="button" value="v"/>	Next available (part of a hold group)	<input type="button" value="v"/>	<input type="button" value="trash"/>	<input type="button" value="Suspend"/>

Clicking on 'hold group' in the holds table brings up a modal with links to all of the bibs in the hold group:



In patron accounts, the Holds table now has a 'Hold group' column. The number in that column indicates holds that are part of a group. Holds with no value in that column are standard, non-grouped holds:



Hold groups can also be created from existing 'standard' holds. This is the same process staff will use to add a separate hold to an existing hold group. Starting at the patron's Holds tab, select the holds that should be grouped, then click 'Group selected':

<input type="checkbox"/>	Hold date	Hold group	Title	Item type	Barcode	Pickup at	Expiration	Notes
<input type="checkbox"/>	07/29/2024		Wooden Boat. The magazine for woodpen boat owners, builders, and designers.	Booktest	N25010001	North Branch	01/14/2025	
<input checked="" type="checkbox"/>	02/12/2026	1	A man called Ove by Backman, Fredrik,			North Branch (current)	02/12/2027	
<input checked="" type="checkbox"/>	02/12/2026	1	A man called Ove by Backman, Fredrik,			North Branch (current)	02/12/2027	
<input checked="" type="checkbox"/>	02/12/2026		En man som heter Ove = a man called Ove /			North Branch (current)	02/12/2027	

3 holds selected

Staff will see a confirmation screen, including a warning that already-grouped holds will be moved. Click 'Group' to proceed:

Group selected holds ✕

Already grouped holds will be moved to the new group

Are you sure you want to group the selected holds?

When holds grouped this way were already part of a group, this process technically creates an entirely new hold group rather than updating the existing one. This means that they will get a new hold_group_id. After grouping, the Holds table will be:

Checkouts	Holds 3	Bookings	Article requests	Claims	Restrictions 1	Clubs	Patron lists
X Clear filter Columns ▼							
<input type="checkbox"/>	Hold date	Hold group	Title	Item type	Barcode	Pickup at	Expiration
<input type="checkbox"/>	07/29/2024		Wooden Boat. The magazine for woodpen boat owners, builders, and designers.	Booktest	N25010001	North Branch	01/14/2025
<input type="checkbox"/>	02/12/2026	2	A man called Ove by Backman, Fredrik,			North Branch (current) ▼	02/12/2027
<input type="checkbox"/>	02/12/2026	2	A man called Ove by Backman, Fredrik,			North Branch (current) ▼	02/12/2027
<input type="checkbox"/>	02/12/2026	2	En man som heter Ove = a man called Ove /			North Branch (current) ▼	02/12/2027
0 holds selected Cancel selected Suspend selected Group selected							

Here is the corresponding staff interface view for that patron:

Checkouts 2	Relatives' checkouts 3	Holds 3	Bookings	Article requests	Claims	Restrictions
X Clear filter Columns ▼						
<input type="checkbox"/>	Hold date	Hold group	Title	Barcode	Pickup at	Expiration
<input type="checkbox"/>	02/02/2026		Garfield snack pack. Volume two / by Davis, Jim,		North Branch (current) ▼	02/02/2027
<input type="checkbox"/>	02/12/2026	1	The Sibley guide to birds / by Sibley, David,		North Branch (current) ▼	02/12/2027
<input type="checkbox"/>	02/12/2026	1	National Wildlife Federation® : attracting birds, butterflies and other backyard wildlife / by Mizejewski, David,		North Branch (current) ▼	02/12/2027
<input type="checkbox"/>	02/12/2026	1	National Geographic field guide to the birds of North America /		North Branch (current) ▼	02/12/2027
<input type="checkbox"/>	02/12/2026	2	Lionboy : the truth / by Corder, Zizou.		North Branch (current) ▼	02/12/2027
<input type="checkbox"/>	02/12/2026	2	Lion boy : the chase / by Corder, Zizou.		North Branch (current) ▼	02/12/2027

In the staff interface, clicking on the number in the 'Hold group' column will bring up a modal with options to select all holds in the group, or ungroup the holds:

The screenshot shows a staff interface with a 'Hold group' modal and a holds queue table. The modal is titled 'Hold group' and contains a table with the following data:

Title	Priority	Notes
The Sibley guide to birds /	1	
Other birds /	1	

Below the table are three buttons: 'Ungroup holds' (highlighted in red), 'Select group holds' (highlighted in yellow), and 'Close'.

The background shows a holds queue table with the following columns: Hold date, Hold group, Title, Barcode, Pickup at, Expiration, and Notes. The 'Hold group' column contains the number '1' for both rows, which is highlighted with a red box. The rows are:

Hold date	Hold group	Title	Barcode	Pickup at	Expiration	Notes
02/17/2026	1	The Sibley guide to birds / by Sibley, David,		North Branch (current)	02/17/2027	
02/17/2026	1	Other birds / by Allen, Sarah Addison,		North Branch (current)	02/17/2027	

Clicking 'Select group holds' from that modal will select all of the holds in that group, which is helpful if staff want to cancel, suspend, or unsuspend all holds in the group. Clicking 'Ungroup holds' will retain the holds, but will ungroup them so that they behave like 'standard' holds.

Note that hold groups can be bib-level, item-level, or a combination.

Filling group holds using the Holds queue

At this time, if multiple bibs/items from the same hold group are available, they will all show on the Holds queue (see [Bug 42054](#) - Group holds and real time holds queue: multiple titles show at once). Also, note that the Holds queue does not have any indication that a title is part of a hold group (see [Bug 41983](#) - Holds Queue should show when holds are part of a group).

Once an item that satisfies a group hold is checked in and fills the hold, other titles from the group will not trigger to fill the hold. However, libraries using the real-time holds queue should note that filling a group hold does not trigger a rebuild of the holds queue (see [Bug 42055](#) - Real time holds queue doesn't rebuild when hold from group hold is filled).

Filling group holds using Holds to pull

As with the Holds queue, if multiple items are available to satisfy a hold group, those multiple items will show in Holds to pull at the same time. However, Holds to pull does have a '(part of a hold group)' link, so staff should check that for groups before pulling multiple titles for the same patron:

Refine results

Start date:

 ✖

End date:

 ✖

Holds to pull placed between 03/08/2026 and 03/10/2026

Reported on 03/10/2026

The following holds have not been filled. Please retrieve them and check them in.

Showing 1 to 4 of 4 entries

Show entries << First < Previous 1 Next > Last >> Search:

Pull this many items	Items available	Patrons with holds	First patron	Title	Libraries
<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="2"/>	Brown, Old Lady Baby (111111)	Mary Poppins / 50th anniversary edition, [DVD]. 2013 (part of a hold group)	North Branch
<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	Brown, Old Lady Baby (111111)	Pee-Wee's Big Adventure / 2008 (part of a hold group)	North Branch

(Inclusive, default is 2 days ago to today. Set other date ranges as needed.)

Submit

Once an item that satisfies a group is checked in and fills the hold, other titles from the group will disappear from Holds to pull and will not trigger to fill the hold if checked in.

Checkouts before holds are filled

If a patron checks out an item that is part of a group hold before the hold has been filled, the other holds in the group will be automatically cancelled. This is the same behavior as non-group holds.

Working with filled group holds

When an item belonging to a group hold is checked in and fills the hold, note that the other bibs/items in the group *will still show* as on hold from the bib(s) and from patron's account. However, as noted above, they will *not* trigger to fill the hold for that patron if checked in. (If other patrons are on the hold list, items *will* trigger to fill those other patrons' holds.) This is the expected behavior. Groups are retained even once a hold is filled in case, for instance, the filled hold has to be reverted - since the group still exists, the next available item will trigger without having to re-create the group.

Other holds from the group will automatically cancel once the filled hold is checked out.

Cancelling group holds

For unfilled group holds, cancelling an individual bib/item from the hold *will not* cancel the entire group. (If the group only has two bibs/items, the remaining hold will be automatically converted to a 'standard' hold.)

For filled holds that are part of a group, cancelling the waiting hold *will not* cancel the entire group - the other bibs/items in the group must be cancelled separately (See [Bug 41849](#) - Cancelling filled hold from group does not cancel remaining pending holds from group or indicate that it's a hyperhold).

Groups in hold history

Holds that belonged to a group where a different item filled the hold will show in patrons' hold history as Cancelled once the filled item is checked out. At this time, patrons' 'Hold history' tabs in the staff interface and in the OPAC do not show any information about the hold having been part of a group (see [Bug 41955](#) - OPAC: Patron hold history table should show hyperhold/hold group information and [Bug 41954](#) - Staff interface: Patron hold history table should show hyperhold/hold group information).

Logs

In hold logs, group holds can be identified by their `hold_group_id`:

02/17/2026 02:32 PM	Sara B. (414)	Holds	Modify	1484	\$VAR1 = { 'biblionumber' => 23526, 'borrowernumber' => 703, 'branchcode' => 'N', 'cancellation_reason' => undef, 'cancellationdate' => undef, 'deleted_biblionumber' => undef, 'desk_id' => undef, 'expirationdate' => '2027-02-17', 'found' => undef, 'hold_group_id' => 34, 'item_group_id' => undef, 'item_level_hold' => 0, 'itemnumber' => undef, 'itemtype' => undef, 'lowestPriority' => 0, 'non_priority' => 0, 'notificationdate' => undef, 'patron_expiration_date' => undef, 'priority' => 1, 'reminderdate' => undef, 'reserve_id' => 1484, 'reservedate' => '2026-02-17', 'reservenotes' => '', 'suspend' => 0, 'suspend_until' => undef, 'timestamp' => '2026-02-17 14:28:49', 'waitingdate' => undef };
02/17/2026 02:32 PM	Sara B. (414)	Holds	Modify	1485	\$VAR1 = { 'biblionumber' => 30072, 'borrowernumber' => 703, 'branchcode' => 'N', 'cancellation_reason' => undef, 'cancellationdate' => undef, 'deleted_biblionumber' => undef, 'desk_id' => undef, 'expirationdate' => '2027-02-17', 'found' => undef, 'hold_group_id' => 34, 'item_group_id' => undef, 'item_level_hold' => 0, 'itemnumber' => undef, 'itemtype' => undef, 'lowestPriority' => 0, 'non_priority' => 0, 'notificationdate' => undef, 'patron_expiration_date' => undef, 'priority' => 1, 'reminderdate' => undef, 'reserve_id' => 1485, 'reservedate' => '2026-02-17', 'reservenotes' => '', 'suspend' => 0, 'suspend_until' => undef, 'timestamp' => '2026-02-17 14:28:49', 'waitingdate' => undef };
02/17/2026 02:32 PM	Sara B. (414)	Holds	Modify	1483	\$VAR1 = { 'biblionumber' => 25370, 'borrowernumber' => 703, 'branchcode' => 'N', 'cancellation_reason' => undef, 'cancellationdate' => undef, 'deleted_biblionumber' => undef, 'desk_id' => undef, 'expirationdate' => '2027-02-19', 'found' => undef, 'hold_group_id' => 34, 'item_group_id' => undef, 'item_level_hold' => 0, 'itemnumber' => undef, 'itemtype' => undef, 'lowestPriority' => 0, 'non_priority' => 0, 'notificationdate' => undef, 'patron_expiration_date' => undef, 'priority' => 1, 'reminderdate' => undef, 'reserve_id' => 1483, 'reservedate' => '2026-02-17', 'reservenotes' => '', 'suspend' => 0, 'suspend_until' => undef, 'timestamp' => '2026-02-17 14:32:41', 'waitingdate' => undef };

Note that this is in addition to the `reserve_id`, and that `reserve_id` is the Object. The `hold_group_id` isn't a searchable Object, but managers can search using `'hold_group_id' => [#]` in Info:

Object:**Info:****Interface:**

All

Staff interface

OPAC

Display from:

(MM/DD/YYYY)

Display to:

(MM/DD/YYYY)

For troubleshooting, note [Bug 41878](#) - No logs for grouping existing holds or ungrouping a hyperhold.

For details on how group holds count toward hold limits, please see [Bug 42255](#) - Grouped holds counted inconsistently for circ rules.

Bug 31698 - Add ability to move a hold to a new bibliographic record/item

This enhancement allows staff to move holds from one bib (or item) to another. If, for instance, a patron mistakenly placed a hold on the young readers' edition of a title but actually wanted the standard/original version, staff would have had to cancel the original hold on the young readers' bib and re-place it on the standard bib. Or if the only copy of a book on CD was too damaged to circulate (and wasn't going to be reordered), and staff wanted to move its holds to the Playaway version, they would need to cancel them (which could be done in bulk) and re-place all of them (which would have to be done one by one). With this enhancement, staff can now move one or more holds at a time instead of cancelling and re-placing!

This feature will be available to staff with the 'Move holds between items and records (*alter_hold_targets*)' permission (under 'Place and modify holds for patrons (*reserveforothers*)'). The 'Move selected' button will not show for staff without that permission.

Record-level holds

In this example, a patron mistakenly placed a hold on the standard print version of a title, but they actually want the large print version.

1. To move a bib or record-level hold, start by finding the bib number of the record that holds are moving *to* (that is, the target). This can be found in the bib's URL or at the top of the 'Items' tab.
2. Next, go to the 'Holds' tab of the bib that holds are moving away *from*, select the holds that need to move, then click 'Move selected' > 'Record level holds to a different record':

The screenshot shows the 'Existing holds' interface. At the top, there are three buttons: 'Update hold(s)' (yellow), 'Cancel selected (1)', and 'Move selected (1)'. Below these buttons, there is a search bar and a 'Clear filter' button. A dropdown menu is open under 'Move selected (1)', showing two options: 'Item level holds to a different item' and 'Record level holds to a different record', with the latter option highlighted in orange. Below the dropdown, there is a table with columns: Priority, Change priority, Patron, Notes, Date, Expiration, and Pickup library. The table contains one row with a checked checkbox in the first column, a priority of 1, a change priority button, the patron name 'Nina Brown (111111)', a date of 02/02/2026, an expiration date of 02/02/2027, and a pickup library of 'North Branch'.

Priority	Change priority	Patron	Notes	Date	Expiration	Pickup library
1	↑ ↓	Nina Brown (111111)		02/02/2026	02/02/2027	North Branch

3. On the modal, paste the target bib number into the search box, then click 'Search':

Move hold(s) to a different record ✕

Enter the biblionumber of new hold target:

7103 Search

Review holds to move

	Hold ID	Original hold	Problem
<input checked="" type="checkbox"/>	1413	Biblionumber: 31793	

Move selected holds

Cancel

4. Select the checkbox for 'Move all selected record level holds to this record' to enable the 'Move selected holds' button, then choose 'Move selected holds':

Move hold(s) to a different record ✕

Enter the biblionumber of new hold target:

7103 Search

Biblionumber: 7103

Move all selected record level holds to this record

Review holds to move

	Hold ID	Original hold	Problem
<input checked="" type="checkbox"/>	1413	Biblionumber: 31793	

Move selected holds

Cancel

5. The success screen will have links to the bib the hold ^{19 of 40} moved *from* and the bib that it moved *to*:

Hold

Moved the following holds:

- Hold ID: 1413 - Moved from **Garfield snack pack. Volume two /** to **Garfield snack pack. Volume two /**

Place hold on **Garfield snack pack. Volume two /** by Davis, Jim,

6. Staff should review the priority of moved holds and adjust accordingly. Moved holds will be placed at the *bottom* of the target's list, regardless of the date that holds were originally placed. This means that even if the moved holds were placed before existing holds on the target bib, the moved holds will have a lower priority (that is, they will be filled later even though they were placed earlier).

Item-level holds

In this example, a patron originally placed a hold on the 2026 copy of a travel guide. The 2026 copy is now lost, however, so they've asked that they hold be moved to the 2025 copy as the next most recent.

1. For items, start by identifying the barcode of the item that holds will be moving *to* (the target).
2. Next, go to the 'Holds' tab of the bib that holds are moving away *from*, select the holds that need to move, then 'Move selected' > 'Item level holds to a different item':

Existing holds

Update hold(s) Cancel selected (1) Move selected (1) ▾

Item level holds to a different item

Record level holds to a different record

Showing 1 to 1 of 1 entries

Search: X Clear filter

Columns ▾ Export ▾ Copy shareable link Configure

<input checked="" type="checkbox"/>	Priority	Change priority	Patron	Date	Expiration	Pickup library	Details
<input checked="" type="checkbox"/>	Change priority to: 1 Current priority: 1	↑ ↑ ↓ ↓	Nina Brown (11111)	02/13/2026 X	02/13/2027 X	North Branch ▾	Only item N26026035 ▾

Showing 1 to 1 of 1 entries

3. Paste in the barcode of the target item, then click 'Search'. Note that this example uses another item from the same bib, but this also works for moving holds to items on different bibs:

Move hold(s) to a different item X

Enter the item barcode of new hold target:

N26026034 Search

Review holds to move

	Hold ID	Original hold	Problem
<input checked="" type="checkbox"/>	1473	Biblionumber: 31794 Itemnumber: 37106	

Move selected holds

Cancel

4. Check the box for 'Move all selected item level holds to this item' to enable the 'Move selected holds' button, then choose 'Move selected holds':

Move hold(s) to a different item

Enter the item barcode of new hold target:

N26026034

Biblionumber: 31794
Item: N26026034
 Move all selected item level holds to this item

Review holds to move

	Hold ID	Original hold	Problem
<input checked="" type="checkbox"/>	1473	Biblionumber: 31794 Itemnumber: 37106	

5. The success screen will have links to both bibs, similar to the success screen for bib-level moves.

6. As with moved bib-level holds, note that moved item-level holds will be placed at the *bottom* of the target's list, regardless of the date that holds were originally placed. This means that even if the moved holds were placed before holds on the target bib, the moved holds will have a lower priority (that is, they will be filled later even though they were placed earlier). Staff will want to review the priority of moved holds and adjust accordingly.

Both of the examples above moved a single hold, but the same process works for moving multiple holds at once.

There are some situations where holds **will not** successfully move:

- Holds won't move to a bib where holds aren't allowed per the circulation matrix ('Holds allowed (total)' \neq 0) or 'Holds and bookings policies by item type', even if hold policies can be overridden and would successfully fill for the former. Here is the error message for both scenarios:

Holds

One or more holds were not moved due to following errors:

- Hold ID: 1474 No holds are allowed on the target item(s)
- Holds won't move if the target record only allows holds from patrons matching the item's home library per 'Holds and bookings policies by item type'. For example, a patron from Main has a hold on bib A. Staff tries

to move the hold to bib B, whose only item belongs to North, and North only allows holds from North patrons:

Holds

One or more holds were not moved due to following errors:

- Hold ID: 1479 Target item cannot be placed on hold from other libraries

On the other hand, holds **will** move *and be unfillable* if a library's 'Holds and bookings policies by item type' allows holds by patrons from any library, but pickup at the item's home library only. The hold pickup location *will not* automatically update to reflect the rule, and there is no indication that the rule has been broken. This is the case even if Library transfer limits prevent the item from sending to the (new, not allowed) pickup location. For example, a patron is from West, and their original hold on bib A is to be picked up at West. Bib B belongs to East, which allows holds from West patrons but only for pickup at East. Staff move the hold to bib B. The move is successful, but since the pickup location remains West, it will never trigger to fill. For further discussion, see [Bug 41879](#) - Holds that move to a new bib can be unfillable.

Note that there are gaps in how moved holds are logged. See [Bug 41880](#) - Logs for moved holds don't indicate original bib number/item number for details and discussion.

[Bug 40335](#) - Holds queue does not allow multiselect

Staff can now multi-select collection codes and shelving locations in the holds queue:

Keep in mind that like Advanced search, Koha addresses multiple selections within a facet as OR, and between facets as AND. So if Non-fiction and Rare books are selected for Collection and Adult non-fiction is selected for Shelving location, the results will be (ccode = non-fiction OR rare books) AND (loc=adult non-fiction). This includes selections for item type and library as well.

Bug 37883 - Add a filter for staff search results to filter by library

This enhancement adds a convenient one-click button to allow staff to limit search result visibility by logged-in branch with the new system preference **FilterSearchResultsByLoggedInBranch**: "[Don't/Do] add a filter to the location column on staff interface search results to filter items by the library the user is currently logged into."

With the system preference set to [Do], catalog search results will have a new button on the right-hand side above the Location column. Initially, the button will read 'Show local items only' ('local' means the logged-in branch):

The screenshot shows a search results page for 'AUDIOBK' with 4277 results. The left sidebar contains filters for Availability, author, itype, location, and su-geo. The main results table has three columns: a checkbox, a 'Results' column with book details, and a 'Location' column. A yellow button labeled 'Show local items only' is positioned above the Location column. The first result is 'Autumn leaves / by Gail Saunders-Smith.' with 1 available item, 0 local items. The second result is 'Bake sale / Sara Varon.' with 4 unavailable items and 0 local items.

If staff click that button to filter results, the button will update to 'Show items in all libraries'. Clicking on that will return to the original results for all libraries:

The screenshot shows the same search results page after clicking the button. The button now reads 'Show items in all libraries'. The results table is identical to the previous screenshot, but the 'Location' column for the first result now shows '1 available: 0 local items' and for the second result 'None available 0 local items'. The third result, 'A man called Ove [sound recording] / Fredrik Backman.', now shows '2 available: 2 local items'.

If the staff member navigates away from the search results screen and then later performs another search, the results will default to the view they had set when they were last viewing search results.



Some libraries have custom code that performs a similar function to this new built-in feature. If your library has custom code for that purpose, please open a support ticket so that we can remove it.

[Bug 38438](#) - Make Add persistent selections and batch operations to item search optional

The Item search form now has a 'Forget item selections from previous search' option to make Koha's ability to retain selections between item searches more flexible and user-friendly.

If some cases, libraries want Koha to 'remember' selections between searches - for instance, if a staff member needs to run a batch item modification on a group of results from multiple separate item searches. But oftentimes selections from subsequent item searches *shouldn't* be retained. Previously, this could only be done from the search results screen. This meant that staff either had to remember to clear their selections before leaving the first search result screen, or before making any selections on their new search results screen:

Item search results

[Go to advanced search](#)

✎ Edit search
📄 Copy shareable link

✓ Select visible rows
✕ Clear selection
Export selected results (22) to ▾
Batch operations ▾

Items selected: 22
✕ Clear

Includes 20 items from previous search results, plus two below

Showing 1 to 20 of 349 entries Show 20 entries

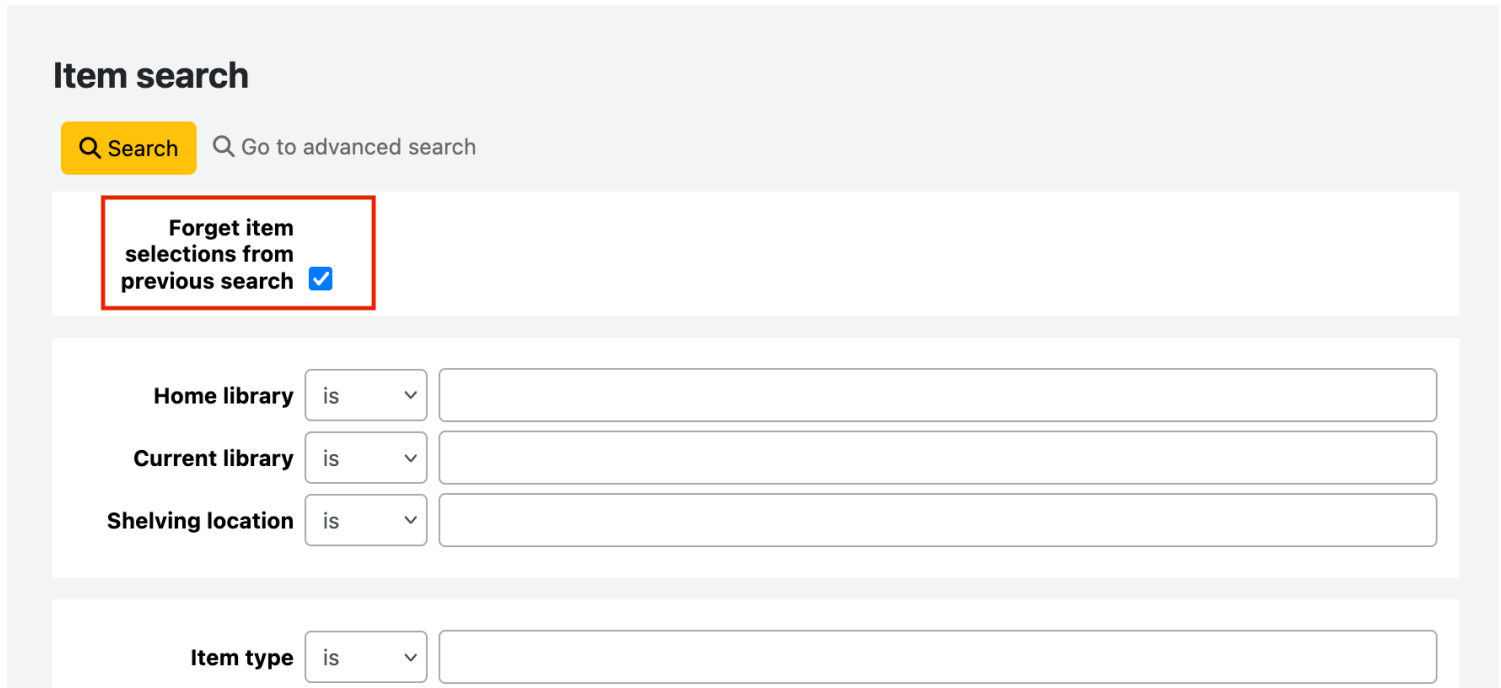
⏪ First
⏪ Previous
1
2
3
4
5
...
18
Next ⏩
⏩ Last

✕ Clear filter
⚙️ Columns ▾
📄 Export ▾
📄 Copy shareable link
🔧 Configure

	Title	Publication date	Publisher	Barcode	Item number	Call number	Home library	Current library
	<input type="text" value="Title search"/>	<input type="text" value="Publicati"/>	<input type="text" value="Publishe"/>	<input type="text" value="Barcode sea"/>	<input type="text" value="Item"/>	<input type="text" value="Call numb"/>	<input type="text" value="Main Library"/>	<input type="text" value="Main Library"/>
<input checked="" type="checkbox"/>	An unquiet mind / Jamison, Kay R.	1995	A.A. Knopf,	326040	26040	616.895 JAM	Main Library	Main Library
<input checked="" type="checkbox"/>	AP biology.	2007	Barron's,	304870	4870	570.76 AP 2017	Main Library	Main Library
<input type="checkbox"/>	Arthur Christmas [videorecording] /	2012	Columbia Pictures,	301285	1285	Art	Main Library	Main Library

However, it's easy to overlook the 'Clear' option entirely, and it could be frustrating for staff to realize they needed to 'Clear' results from an earlier search once they had already started selecting results on subsequent searches.

While the 'Items selected: [#]' button is still available, the new 'Forget item selections from previous search' provides additional flexibility and more visibility. The option is clearly visible at the top of the Item search screen, and it is checked by default on initial search:



The screenshot shows the 'Item search' interface. At the top left, there is a yellow 'Search' button and a link to 'Go to advanced search'. Below this, a red box highlights the 'Forget item selections from previous search' checkbox, which is checked. Underneath, there are three rows of search filters: 'Home library', 'Current library', and 'Shelving location'. Each row has a dropdown menu set to 'is' and an empty text input field. At the bottom, there is a fourth row for 'Item type' with a dropdown menu set to 'is' and an empty text input field.

If it remains checked, any item search results selected in previous searches will not be added to selected results from the newly-performed search.

If staff click the 'Edit search' button above the Item search results table, 'Forget item selections from previous search' will retain the state (checked or unchecked) it had when the last search was performed.

Bug 32581 - Update dateexpiry on categorycode change

This enhancement gives staff the option to automatically update patrons' account expiration dates when updating their patron category, instead of having to manually calculate and change it.

For instance, consider a library where NONRESIDENT patrons have a 6 month enrollment period, and RESIDENT patron accounts are enrolled for 12 months. When E.A. Poe registers as NONRESIDENT, their account would be set to expire 6 months from the original registration date. Two months later, however, they moves and is eligible to be a RESIDENT patron. When staff save the account updated with the new RESIDENT category, they will now have an option to automatically change their account expiration date:

The screenshot shows a web interface for library management. At the top, there are 'Save' and 'Cancel' buttons. Below, under 'Library management', there is a form with fields for 'Card number' (1234), 'Library' (North Branch), and 'Category' (Resident). A modal dialog titled 'Confirm expiration date' is overlaid on the form, asking 'Change expiration date to default for this category?'. The dialog has a close button (X) in the top right and two buttons at the bottom: a yellow 'Yes' button and a grey 'No' button.

Clicking 'Yes' will update the account expiration date to 12 months from the day the change is made.

- ⓘ Automatically updating expiration dates will calculate *from the day the change is made*, not from the original day of registration or the existing expiration date.

Clicking 'No' (or X to close the modal) will retain the original expiration date. Staff can update it manually, if they wish, and when they renew their account, the renewal period will be 12 months per the RESIDENT patron category settings.

Bug 40245 - Support option to display firstname in patron search results when different than preferred_name

This enhancement adds the system preference **ShowPatronFirstnameIfDifferentThanPreferredname:** "[Show/Don't show] a patron's firstname in search results if their preferred name is different."

If it is set to [Don't show], nothing changes about how patron search results will display. As is the case pre-25.11, a patron whose preferred name differs from their first name can still be searched by their first name even with the system preference set to [Don't show]:

The screenshot shows the 'Search for patron' interface. The search field contains 'eleanor' and 'First name' is selected. The search results table shows one entry for card number 117, name 'Oliphant, Ellie Preferred name', date of birth 03/28/1996, and library 'North Branch'. The preferred name 'Ellie Preferred name' is highlighted in red.

Card	Name	Date of birth	Li
117	Oliphant, Ellie Preferred name 80 E. Rock Maple St. Niceville, FL Email: Eleanor@example.com	03/28/1996 (29 years)	North Branch

If the system preference is set to [Show], the patron's first name will be in italicized brackets next to the preferred name in patron search, checkout search, and hold search results.

Full patron search:

The screenshot shows the 'Search for patron' interface. The search field contains 'eleanor'. The search results table shows one entry for card number 117, name 'Oliphant, Ellie [Eleanor]', date of birth 03/28/1996, and library 'North Branch'. The first name 'Eleanor' is enclosed in brackets.

Card	Name	Date of birth	Libra
117	Oliphant, Ellie [Eleanor] 80 E. Rock Maple St. Niceville, FL Email: Eleanor@example.com	03/28/1996 (29 years)	North Branch

Checkout search:

Circulation Patrons Search ByWater Help Me! Koha Opac More

Check out ellie Check out Check

Oliphant, Ellie **[Eleanor]** (117) 03/28/1996, 80 E. Rock Maple St. Niceville, FL North Branch Expired

Spellman, Izzy (76) 8371 Lakeview Dr. Bar Harbor, ME East Branch Expired

News Circulation

Hold search:

Holds

Place hold on **Teenage Mutant Ninja turtles /**

Search patrons or clubs

Patrons Clubs

Enter patron card number or partial name:

ellie Search

Oliphant, Ellie **[Eleanor]** (117) 03/28/1996, 80 E. Rock Maple St. Niceville, FL North Branch Expired

The first name will not show in 'Add guarantor' search.

Permissions

[Bug 32682](#) - Add permission for viewing patron reading history and [Bug 40364](#) - Add permission for viewing patron holds history

Instead of the **Intranetreadinghistory** (for circulation history) and **IntranetReadingHistoryHolds** (for holds history) system preferences functioning as global on/off switches for circulation and hold history visibility in the staff interface, two new permissions allow libraries to control which staff members can see patrons' history when those system preferences are enabled.

In addition to setting **Intranetreadinghistory** and/or **IntranetReadingHistoryHolds** to [Allow], libraries must also grant individual staff members two new permissions in the 'Add, modify and view patron information (*borrowers*)' permission section to see circulation and/or hold history in patron accounts:

- 'View checkout history (*view_checkout_history*)' - required to access patrons' 'Circulation history' tab
- 'View holds history (*view_holds_history*)' - required to access patrons' 'Holds history' tab

Staff members who don't have those permissions won't see the 'Circulation history' or 'Holds history' tabs even when **Intranetreadinghistory** and/or **IntranetReadingHistoryHolds** are set to [Allow].

ⓘ Keep in mind that if patrons have their privacy set to 'Never', no data will show in those tabs even if **Intranetreadinghistory** and/or **IntranetReadingHistoryHolds** are set to [Allow] and staff members have the permissions above.

[Bug 35830](#) - Add separate permission for Merging Patrons

The ability to merge patron accounts is now separated into its own permission instead of being part of the general 'Add, modify and view patron information (*edit_borrowers*)' permission. Any staff who should be able to merge patron accounts will need to be granted the 'Merge patrons (*merge_borrowers*)' permission under the 'Add, modify and view patron information (*borrowers*)' umbrella.

[Bug 40082](#) - PatronDuplicateMatchingAddFields isn't respected in the OPAC or the API

The system preference **PatronDuplicateMatchingAddFields** allows libraries to select fields that should be used for duplicate checks when creating new patron accounts. For instance, a library can set it to check for matches on first name, surname, and email address, and if the information entered into a new account matches an existing patron account, the new one will be flagged as a potential duplicate.

Previously, the system preference only applied to accounts created in the staff interface, but it now also checks for duplicates when patrons self-register through the OPAC or via API (including Aspen).

Here is the result when a duplicate is flagged using self-registration in Aspen:

Register for a Library Card

Could not create your account. A patron record matching these details already exists

Note that *all* of the selected fields have to match for an account to be flagged as a potential duplicate. For details on how null values in existing or new accounts are handled, see [Bug 42018](#) - Inconsistent behavior for null values for fields selected in PatronDuplicateMatchingAddFields.