Important Upgrade Considerations

This section outlines all changes that require special consideration for customers in production. Configuration changes may be needed to prevent operational interruptions. See [checklist](#) for guidelines on how to fill this out.

### Changes and Required Actions

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Change or Addition</th>
<th>Considerations</th>
<th>Action timing, Action required</th>
<th>Comments</th>
<th>Contact person, Related JIRAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Out</td>
<td>The permission &quot;Check Out: View Loans&quot; was introduced in this release to better control the link on the patron information panel to loan information. The permission was added to support the following behavior:</td>
<td>What challenges may arise related to this change or addition</td>
<td>When can the action be taken (before, during or after upgrade)? If applicable, detail what action(s) must be taken here</td>
<td>Name of user leaving comment: comment on what you encountered or ask a question @mention Contact person</td>
<td>User name of person that can provide additional detail. Include issue link for bug fix, story or feature that applies</td>
</tr>
<tr>
<td></td>
<td>If a FOLIO user had &quot;Check Out: All Permissions&quot; but did not have &quot;Check Out: View Loans&quot;, they would see the number of open loans, but it would not be a link to view them in Users. However, this led to undesired behavior:</td>
<td></td>
<td></td>
<td></td>
<td>Erin Nettifee</td>
</tr>
<tr>
<td></td>
<td>- If a FOLIO user had &quot;Check Out: All Permissions&quot; and &quot;Check Out: View Loans&quot; but did NOT otherwise have permission to view loans in the Users app, they would see the number of open loans as a link, but clicking on the link would open a blank FOLIO screen.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff members who previously only had access to the Check Out app, but saw a broken link to loans, will now see the Users app appear in their list of available apps. That is because it is currently the only way for a link to view loans to be functional.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Before upgrade, if you assigned &quot;Check Out: All Permissions&quot; to a FOLIO user but did not want them to be able to get a link to see loan information:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Ensure the FOLIO user does not have &quot;Check Out: View Loans&quot; assigned to them.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If you assigned &quot;Check Out: All Permissions&quot; to a FOLIO User and you want them to be able to get a link to see loan information:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Ensure the FOLIO user has &quot;Check Out: View Loans&quot; assigned to them.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Ensure the FOLIO user also has &quot;Users: User loans view&quot; or &quot;Users: User loans view, edit, renew (all)&quot; assigned to them.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Check Out

The permission "Check Out: View Requests" was introduced in Iris to better control the link on the patron information panel to loan information. The permission was added to support the following behavior:

- If a FOLIO user had "Check Out: All Permissions" but did not have "Check Out: View Requests", they would see the number of open requests, but it would not be a link to view them in the Requests app.

However, this led to undesired behavior:

- If a FOLIO user had "Check Out: All Permissions" and "Check Out: View Requests" but did NOT otherwise have permission to view the Requests app, they would see the number of open loans as a link, but clicking on the link would open a blank FOLIO screen.

Before upgrade:
If you assigned "Check Out: All Permissions" to a FOLIO user but do not want them to be able to get a link to see request information:

- Ensure the FOLIO user does not have "Requests: View" assigned to them.

If you assigned "Check Out: All Permissions" to a FOLIO User and you want them to be able to get a link to see request information:

- Ensure the FOLIO user has "Check Out: View Requests" assigned to them.
- Ensure the FOLIO user also has "Requests: View" assigned to them. You could also assign one or more of the following: "Requests: View, create," or "Requests: View, edit, cancel."

Inventory

Item barcode is unique now.

Duplicate item barcodes fail the upgrade. Upgrade error response mentions index item_barcode_idx_unique. Find them with this SQL:

```
SET search_path TO diku_mod_inventory_storage;
SELECT lower(jsonb->'barcode')
FROM item
GROUP BY 1
HAVING count(*) > 1;
```

Use Inventory Item Barcode search to edit the duplicate barcode.

To delete all (!) duplicate barcodes from a test system:

```
SET search_path TO diku_mod_inventory_storage;
UPDATE item SET jsonb = jsonb - 'barcode'
WHERE lower(jsonb->'barcode') in ( 
    SELECT lower(jsonb->'barcode')
    FROM item
    GROUP BY 1
    HAVING count(*) > 1);
```

Datas Import & Inventory

Updates to the default MARC Bib-to-Inventory Instance MAP:

- 019$a and 035$z mapped to Instance Identifier type = Cancelled System Control Number.

After upgrade, library may want to review their default MARC Bib-to-Inventory Instance map, and decide if they want to add this mapping into it.

Note that this change relies on new default Identifier type values available in Kiwi, in Settings > Inventory/Instances:

- Cancelled system control number

See the instructions on how to update the rules.
### Data Import & Inventory

**Updates to the default MARC Bib-to-Inventory Instance MAP:**

- `024/Ind1=1, $aq` mapped to Instance Identifier type = UPC
- `024/Ind1=1, $zq` mapped to Instance Identifier type = Invalid UPC
- `024/Ind1=2, $aq` mapped to Instance Identifier type = ISMN
- `024/Ind1=2, $zq` mapped to Instance Identifier type = Invalid ISMN

After upgrade, library may want to review their default MARC Bib-to-Inventory Instance map, and decide if they want to add this mapping into it.

Note that this change relies on new default Identifier type values available in Kiwi, in Settings Inventory/Instances:

- UPC
- Invalid UPC
- ISMN
- Invalid ISMN

See the instructions on how to update the rules.

---

### Data Import & Inventory

**Updates to the default MARC Bib-to-Inventory Instance MAP:**

- For Inventory Resource Type (called instanceTypeID in the instance schema), assign based on the first 336$b if it exists, otherwise derive from the first 336$a if it is recognized; otherwise assign zzz (Unspecified)

See the instructions on how to update the rules.

---

### Inventory Search

Starting with Kiwi release 5.0, Inventory search will be powered by Elasticsearch:

- up to five language specific analyzers can be set up on the tenant level
- search by all inventory records fields

Facets will be rolled out in a later release.

---

### Data Export

Through the support of MinIO, data export is now hosting agnostic.

Anyone who plans to use MinIO server instead of Amazon S3.

External storage for generated MARC records should be configured to MinIO server (if needed) by changing ENV variable AWS_URL. In addition, the following ENV variables can be specified:

- AWS_REGION
- AWS_BUCKET
- AWS_ACCESS_KEY_ID
- AWS_SECRET_ACCESS_KEY

Data export performance report for the Kiwi release.

---

### Data Export

Number of records exported

Even thought the system can handle more, it takes a lot of resource to export large data sets.

The recommended max number of records exported in one batch is 300 000 records.

---

### mod-inventory-storage

To load MARC Holdings during data import flow, we should use pre-defined MARC Holdings source (which is created in the reference data with predefined id = 036ae4a-Ea4d4c3c-9aad-1a2b7f5555).

Anyone who plans to import and store MARC holdings.

Before upgrade.

Reference data should be added during an upgrade (by default).

---

### OAI-PMH

Holdings without associated items are now included in the response.

The institutional users that is associated with API key will need to have following permissions:

```
/inventory-storage/inventory-hierarchy.updated-instances-ids.collection.get
/inventory-storage/inventory-hierarchy.items-and-holdings.collection.post
```

---

**Ann Marie Breaux**

**MODDICORE-172 - Getting issue details...**

**STATUS**

**MODDICORE-184 - Getting issue details...**

**STATUS**

**Charlotte Whit Magda Zacharska**

**FOLIO-3113 - Getting issue details...**

**STATUS**

**Viachaslau Khandramai Magda Zacharska**

**Oleksandr Dakin Khalilah Gambrell**

**VL-MODDICORE**
<table>
<thead>
<tr>
<th>OAI-PMH</th>
<th>Significant improvements for the harvesting time</th>
<th>Periodically run:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>REINDEX index</td>
</tr>
<tr>
<td></td>
<td></td>
<td>audit_item_pmh_createddate_idx;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REINDEX xxxxx=&gt; REINDEX index audit_holdings_record_pmh_createddate_idx;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REINDEX xxxxx=&gt; REINDEX index audit_holdings_record_pmh_createddate_idx;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REINDEX xxxxx=&gt; REINDEX index holdings_record_pmh_metadata_updateddate_idx;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REINDEX xxxxx=&gt; REINDEX index instance_pmh_metadata_updateddate_idx;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ANAlyze instance;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ANAlyze item;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ANAlyze holdings_record;</td>
</tr>
<tr>
<td>Inn-Reach</td>
<td>New modules (mod-inn-reach, edge-inn-reach, and ui-inn-reach) added to FOLIO</td>
<td>New settings section added for INN-Reach.</td>
</tr>
<tr>
<td>Inn-Reach</td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Inn-Reach</td>
<td></td>
<td>Use/testing of this functionality with an INN-Reach system will require working with Innovative Interfaces, Inc. to set up access to the D2IR sandbox environment or a production system. This integration has not yet been certified for production use. The only D2IR functionality currently available in the release is initial (full) record contribution. This includes submission of locations, bibliographic, and item records.</td>
</tr>
<tr>
<td>Inn-Reach</td>
<td></td>
<td>Brooks Travis and Dmytro Tkachenko</td>
</tr>
<tr>
<td>Orders</td>
<td>&quot;Manually add pieces for receiving&quot; has been renamed &quot;Receiving workflow&quot; and is now a dropdown</td>
<td>This will not impact any logic. If the toggle was checked it will now appear as &quot;Independent order and receipt quantity&quot; in the dropdown. If the toggle was NOT checked it will appear as &quot;Synchronized order and receipt quantity&quot; in the dropdown.</td>
</tr>
<tr>
<td>Orders</td>
<td></td>
<td>This will be a training issue for users that create or receive orders. Ideally they are alerted to the change before production is upgraded. However, there are no time-sensitive technical requirements. Note: Users will now be able to add pieces in the receiving app for all orders. However, when synchronized with order quantity. Adding a piece will increase the quantity of the order and in turn the cost and any encumbrances.</td>
</tr>
<tr>
<td>Orders</td>
<td></td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>Orders</td>
<td></td>
<td>UIOR-836 - Getting issue details...</td>
</tr>
<tr>
<td>Orders</td>
<td></td>
<td>STATUS</td>
</tr>
<tr>
<td>mod-data-import</td>
<td>Set the chunk size value for EDIFACT import</td>
<td>Import of large EDIFACT file can fail if size of the payload exceeds the default value of 1048576 bytes. Set file.processing.edifact.buffer.chunk.size property to 10 (or smaller).</td>
</tr>
<tr>
<td>mod-data-import</td>
<td></td>
<td>Kateryna Senchenko</td>
</tr>
</tbody>
</table>
mod-source-record-manager

Upgrade fails if a mapping-rule type has two or more mapping rules, or if a mapping rule record doesn't contain the mappingRules property.

mapping_rules db table may contain default (not customised) versions of mapping rules for MARC records alongside the customised mapping rules.

Before upgrade do A) or B).

A) Manually select the correct rule
To ensure customised default mapping rules for MARC records are used consistently do the following:

1. Send GET request to /mapping-rules/marc-bib to retrieve the mapping rules
2. Send PUT request to /mapping-rules/marc-bib and put in the body the result of step 1.
3. Use the script to clear irrelevant records in the db (make sure the correct tenant is used in the script)
4. Manually delete all rule records where the jsonb doesn't contain a mappingRules property.

NOTE: the API for mapping rules changed since Kiwi, additional info on managing mapping rules https:// github.com/folio-org/mod-source-record-manager/blob/master /RuleProcessorApi.md#rest-api

B) Automated method to pick a random rule.

If you don't care which mapping rule is selected in case of a duplicate you don't need option A) and you can simply run https://github.com/folio-org/mod-source-record-manager/blob/master/server/src/main/resources/dbcripts/cleanup_mapping_rules.sql

This removes duplicates and rule records without mappingRules properly.

mod-inventory-storage

Holdings created by a MARC Bib, not a MARC Holdings, showed the source = MARC. The behavior was changed to show source = FOLIO for such holdings.

DB tables might contain holdings records with incorrect source value

Analyse existing Holdings records that has incorrect source value using the scripts. Correct values if needed.

mod-source-record-storage

In mod-source-record-storage schema records, bib table columns instance_id and instance_hrid were renamed to external_id and external_hrid respectively.

Import of MARC Holdings was added in Kiwi release, therefore external_id and external_hrid columns are now holding not only ids and hrids of Inventory Instance records, but also Inventory Holdings, which are external entities for SRS.

Make sure migration scripts run correctly - check the column names - external_id and external_hrid - in records_bib table for mod-source-record-storage schema

ui-orders and ui-receiving

Regarding locations users are now able to select a location OR an existing Holdings when the POL is linked to an instance that already has Holdings.

When building orders or receiving pieces the user can now indicate when they want a NEW holding record and when they do not. If "Create inventory" includes Holdings, choosing a location will always create a new holding record for that location. Selecting a Holding will link that holding directly to the POL any items received would be received to the specific holding.

No specific action required but it is important to be aware that this behavior is slightly different.

This change also allows acquisitions information to appear on Holdings records in inventory

Dennis Bridges

uxprod-1925 • Getting Issue details...

uxprod-2373 • Getting Issue details...

mod-quickmarc

Disable High Availability (HA) as it the module is not reliable when HA is set.

New Apps

Kafka Wrapper: folio-kafka-wraper library was extracted from mod-pubsub module. It contains utilities for interaction with Kafka for data import modules.

eUsage reports:
The eUsage Reports backend module (mod-eusage-reports) parses and stores relationships between COUNTER report lines and local KB title records, stores COUNTER usage statistics data, and provides report queries to generate the visualizations and downloads. By matching COUNTER data to local KB titles, eUsage Reports can display COUNTER data on the Agreement records that contain those titles.

The UI plug-in (ui-plug-in-eusage-reports) is a front end module that displays a matching summary on the eUsage Provider record and a reports accordion on the Agreement record.

eUsage reports is only useful for those who harvest COUNTER data using the eUsage app. It is recommended that libraries and hosting providers who are not using eUsage omit mod-eusage-reports and ui-plug-in-eusage-reports from their environments.

Only applies to libraries that are not using EBSCO KB.

INN-Reach:

- INN-Reach back-end module (mod-inn-reach) provides business logic to handle record contribution and circulation interactions with an INN-Reach D2Ir central server to enable participation in an INN-Reach resource sharing consortium and their relationship with FOLIO inventory, users, and circulation systems.
- INN-Reach edge module (edge-inn-reach) provides API endpoints and required authentication functionality to INN-Reach central servers to communicate with FOLIO
- INN-Reach UI module (ui-inn-reach) provides settings and staff user interfaces for managing the central server configuration, record contribution, circulation settings, transaction management, and INN-Reach specific circulation functionality.
- App only applies to libraries that have an INN-Reach subscription.

LDP:

- The LDP app is a query builder that makes some Library Data Platform reporting functions available in FOLIO without having to install a separate database client. It enables basic querying of many FOLIO data sets as well as querying of helper tables ("derived tables") created by the Reporting SIG community to simplify reporting.
- The ui-ldp module executes queries by calling the mod-ldp API, which mediates access to the analytical database maintained by LDP.

Permissions Updates

<table>
<thead>
<tr>
<th>App</th>
<th>New Permissions</th>
<th>Deprecated Permissions</th>
<th>Product Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreements</td>
<td>Agreements: File download (ui-agreements.agreements.file.download)</td>
<td></td>
<td>Owen Stephens</td>
</tr>
<tr>
<td>Licenses</td>
<td>Licenses: File download (ui-licenses.licenses.file.download)</td>
<td></td>
<td>Owen Stephens</td>
</tr>
<tr>
<td>quickMARC</td>
<td>quickMARC: View, edit MARC holdings record</td>
<td></td>
<td>Khalilah Gambrell</td>
</tr>
<tr>
<td>eUsage reports</td>
<td>eUsage reports: charts may be viewed: This permission adds an accordion to the Agreement record in the Agreement app that displays charts and graphs of eUsage data for the titles related to an agreement.</td>
<td></td>
<td>Kristen Wilson</td>
</tr>
<tr>
<td></td>
<td>eUsage reports: title matches may be viewed and edited: This permission adds an accordion to the eUsage app that displays a summary of title matching results for incoming COUNTER reports and allows the user to review and edit the matches.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INN-Reach</td>
<td>INN-Reach App: All permissions: All permission for INN-Reach UI (settings and INN-Reach app)</td>
<td></td>
<td>Brooks Travis</td>
</tr>
<tr>
<td></td>
<td>Settings (inn-reach): All INN-Reach settings: CRUD: All permissions for create, read, update, and delete of INN-Reach settings</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Settings (inn-reach): All INN-Reach settings: Read, edit: Permissions to read and edit existing INN-Reach settings</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Settings (inn-reach): All INN-Reach settings: Read-only: Permissions to read INN-Reach settings</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Settings (inn-reach): display list of settings pages: Permissions to view the list of available INN-Reach settings pages</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>UI: ui-inn-reach module is enabled: Permissions to enable visibility of INN-Reach UI app</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LDP</td>
<td>LDP: all permissions</td>
<td></td>
<td>Charlotte Whitt Nassar</td>
</tr>
<tr>
<td></td>
<td>Settings (LDP): Can modify default record limits</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Settings (LDP): Can modify LDP database connection details</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Settings (LDP): Can modify saved-query configuration details</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Settings (LDP): Can select which tables are available to search</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Settings (LDP): Can view, create, edit, and remove</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Users</td>
<td>&quot;Users: Can delete user profile if user does not have any open transactions&quot; This permission is required to delete a user through the UI if they have no dependencies. Must be used with</td>
<td></td>
<td>Patty Wanninger</td>
</tr>
<tr>
<td></td>
<td>&quot;Users: Can check open transactions&quot; This allows the user to check for open transactions. If there are none, they are able to delete.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Known Issues

General
<table>
<thead>
<tr>
<th>App</th>
<th>Known issue</th>
<th>Workaround</th>
<th>JIRA issue</th>
<th>Product Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory</td>
<td>When doing download of In transit items (.csv file) the success toast is broken</td>
<td>The broken success toast do not prevent the download from happening. The download can take about 60+ seconds but eventually it will be downloaded.</td>
<td>CIRC-1330 - Getting issue details...</td>
<td>Charlotte Whitt</td>
</tr>
<tr>
<td>Inventory</td>
<td>Keyboard shortcuts does work on instances - but not fully functional on holdings and item</td>
<td>Use the mouse activated action menu and buttons to edit, duplicate, save etc. a holdings and item</td>
<td>UIIN-1866 - Getting issue details...</td>
<td>Charlotte Whitt</td>
</tr>
<tr>
<td>Inventory</td>
<td>The locations filter(s) can behave somewhat inconsistently. It displays in alphabetical order when first loaded, but once a result is selected in the result pane, the filter resorts and may not be in alphabetical order.</td>
<td>Use type ahead to search for locations as needed. The behavior of this facet is very different in Lotus; affected institutions may want to think about moving to Lotus as soon as feasible to address this issue if it is hampering workflows.</td>
<td>UIIN-1867 - Getting issue details...</td>
<td>Erin Nettifee</td>
</tr>
</tbody>
</table>
| Inventory         | Instances added in any release up to Iris (R1 2021) that hasn't been updated since then, does not have ".version" field that would result in error ("NumberFormatException: null") when trying to overlay such instance via Data Import in Kiwi release. | Wait for Kiwi Hot Fix #3. Or add a .version property with a number to all instances without a .version property.  
• Check if mod-inventory-storage contains such records, execute  
```  
select count ( id ) from <tenant>_mod_inventory_storage. 
"instance" where (jsonb- >>'_version') is null;  
```
• If request above returns number other then 0, execute  
```  
update <tenant>_mod_inventory_storage. 
"instance" set created_by = created_by where (jsonb- >>'_version') is null;  
```
Existing trigger would set the version for each Instance that doesn't have this property | MODINV-684 - Getting issue details... | Ann-Marie Breaux |
| Invoices          | A permission has been added for "Invoice: Cancel invoices" but the logic has not yet been implemented. As a result this permission will only allow a user to see the cancel action in the invoice action menu. | Do not assign this permission to users. If you do it will not affect how they use the system but they may be confused that "Cancel" invoice does nothing. | MODINVOICE-270 - Getting issue details... | Dennis Bridges |
| eholdings         | Following permissions are missing  
• Settings > eholdings > View Root Proxy list  
• Settings > eholdings > View selected Root Proxy  
• Settings eholdings > Usage Consolidation credentials | Assign these permissions manually. Issue will be resolved with Kiwi Hotfix #2 | UICIRCLOG-92 - Getting issue details... | Khalilah Gambrell |
| Circ log          | In Kiwi, the circulation log main page displays UTC time instead of local time. | N/A | CIRC-1449 - Getting issue details... | Stephanie Buck |
| Requests /Patron Services (mod-patron /edge-patron) | If the user performing the action (or the service user in-use with mod-patron/edge-patron) does not have permissions to read fixed due date schedules, recalls of loans with fixed due dates will fail. | The workaround is to ensure that the user account has the following permissions (invisible) assigned, either directly or via another permission set:  
• Circulation storage - get fixed due date collection  
• Circulation storage - get individual fixed due date | CIRC-1449 - Getting issue details... | Brooks Travis |
### quickMARC

A 500 error may display when editing a quickMARC record multiple times. Please note that updates are saved but an unfortunate UI message displays. Issue will be resolved with Lotus release.

N/A

**MODOM-213** - Getting issue details...

STATUS

Khalilah Gambrell

### Data Import

If an incoming MARC Bib record has an invalid record type (LDR/06), the import job fails to complete, and does not show an error message.

Cancel uncompleted job. Manually correct invalid MARC record and re-import.

**MODSOURMAN-715** - Getting issue details...

STATUS

Ann-Marie Breaux

### Data Import

A very large job profile can be created in Settings (Data import), but then errors when the user tries to edit it.

Break the job into multiple smaller jobs

**UIDATIMP-1166** - Getting issue details...

STATUS

Ann-Marie Breaux

### Data Import

Logs for Inventory Single Record Imports do not always show the details for the imported record.

Run a one-time script to set the "order" field of the SRS record. See more details here: Script for setting the SRS record "order" field so that Inventory Single Record Imports do not display blank log information

**UIDATIMP-1136** - Getting issue details...

STATUS

Ann-Marie Breaux

---

### Acquisitions

<table>
<thead>
<tr>
<th>Key</th>
<th>Summary</th>
<th>T</th>
<th>Status</th>
<th>Resolution</th>
<th>Reporter</th>
<th>Release</th>
<th>Potential Workaround</th>
</tr>
</thead>
<tbody>
<tr>
<td>UISAC QCOM P-78</td>
<td>timezone support in FolioFormattedDate</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Hleb Surnovich</td>
<td>Lotus R1 2022</td>
<td>The dates are stored in UTC in the database and the issue is that they are also being displayed in UTC. Depending on your timezone this may mean that the day is actually ahead or behind your current time and expectation.</td>
</tr>
<tr>
<td>UIREC-211</td>
<td>Adding tenant's timezone in UI</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Hleb Surnovich</td>
<td>Lotus R1 2022</td>
<td>The dates are stored in UTC in the database and the issue is that they are also being displayed in UTC. Depending on your timezone this may mean that the day is actually ahead or behind your current time and expectation.</td>
</tr>
<tr>
<td>UIREC-208</td>
<td>Hide &quot;Suppress from discovery&quot; toggle from Piece form</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Dennis Bridges</td>
<td>Lotus R1 2022</td>
<td></td>
</tr>
<tr>
<td>UIREC-207</td>
<td>Kiwi - Hide &quot;Suppress from discovery&quot; toggle from Piece form</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Dennis Bridges</td>
<td>Kiwi (R3 2021) Hot Fix #1</td>
<td></td>
</tr>
<tr>
<td>UIOR-1016</td>
<td>Order form is refreshed after save attempt fails</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Cannot Reproduce</td>
<td>Dennis Bridges</td>
<td>Morning Glory (R2 2022) Bug Fix</td>
<td></td>
</tr>
<tr>
<td>UIOR-921</td>
<td>Orders csv export has errors in the location column when orders are linked to holdings</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Jenn Colt</td>
<td>Lotus (R1 2022) Bug Fix</td>
<td>Edit all the locations in the CSV by hand.</td>
</tr>
<tr>
<td>UIOR-919</td>
<td>Order: Error message does not indicate what Fund does not have money</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Andrei Makaranka</td>
<td>Lotus (R1 2022) Bug Fix</td>
<td>Look through order lines and Fund manually to identify which fund is short. For larger orders this could be very time consuming.</td>
</tr>
<tr>
<td>UIOR-910</td>
<td>Adding tenant's timezone in UI</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Hleb Surnovich</td>
<td>Lotus R1 2022</td>
<td>The dates are stored in UTC in the database and the issue is that they are also being displayed in UTC. Depending on your timezone this may mean that the day is actually ahead or behind your current time and expectation.</td>
</tr>
<tr>
<td>UIOR-863</td>
<td>POL Title selection overwriting Order template location</td>
<td>✔️</td>
<td>CLOSED</td>
<td>Done</td>
<td>Dennis Bridges</td>
<td>R3 2021 Bug Fix</td>
<td>There is really no workaround for this. The user will need to select a location after connecting a title. If title lookup is not used this issue is avoided. If not connected directly by user, system will still match POL to instance. As long as user adds a product ID to the POL.</td>
</tr>
</tbody>
</table>
### Notes on functionality

- **MARC Holdings - Kiwi functionality**
- **MARC Holdings - System updates and quickMARC validation rules**
- Two things to know when using data import app to create MARC Holdings
  - 004 must be a valid instance HRID with Source = MARC
  - 852 must include $b value of a Location code. Location codes are stored Settings > Tenant > Locations (see below mockup with Code column highlighted)

<table>
<thead>
<tr>
<th>Issue ID</th>
<th>Description</th>
<th>Status</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>UIOR-862</td>
<td>Order template can not be saved without receiving workflow</td>
<td>Done</td>
<td>Mikita Siadykh</td>
</tr>
<tr>
<td>UINV-396</td>
<td>R3 Kiwi Hotfix #3: Invoices stuck in Approved status</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>UINV-372</td>
<td>Invoices stuck in Approved status</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>UINV-357</td>
<td>Invoice: Error message does not indicate what Fund does not have money</td>
<td>Done</td>
<td>Andrei Makaranka</td>
</tr>
<tr>
<td>UINV-351</td>
<td>Adding tenant's timezone in UI</td>
<td>Done</td>
<td>Hleb Surnovich</td>
</tr>
<tr>
<td>UINV-329</td>
<td>When editing invoice accounting code does not appear in dropdown</td>
<td>Cannot Reproduce</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>UIIN-1995</td>
<td>Instances linked to package order lines are not displaying Order information</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>UIF-349</td>
<td>Edit &quot;Enforce all budget limits&quot; ledger toggles in create/edit form</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>STSM ACOM-640</td>
<td>Applying a date range filter clears other filters</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>MODOR DSTD OR-273</td>
<td>Order export limit is preventing Large library from exporting orders</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>MODORD RDER S-712</td>
<td>Encumbrances are created for closed orders during FYRO</td>
<td>Done</td>
<td>Dennis Bridges</td>
</tr>
</tbody>
</table>

Showing 20 out of 37 issues
Imported MARC Bibs and MARC Holdings have the same UUIDs in 999ff$s and 999ff$i fields

Post-Release Hotfixes

Hot fix release #1 - RELEASD AT JANUARY 28

Tickets list

<table>
<thead>
<tr>
<th>Key</th>
<th>Summary</th>
<th>T</th>
<th>Assignee</th>
<th>P</th>
<th>Resolution</th>
<th>Reporter</th>
</tr>
</thead>
<tbody>
<tr>
<td>UIU-2506</td>
<td>Adding staff note to fee/fine increases fee/fine remaining balance for patrons with other outstanding fees/fines</td>
<td></td>
<td>Stanislau Snapok</td>
<td>Done</td>
<td></td>
<td>Holly Mistlebauer</td>
</tr>
<tr>
<td>UIREC-207</td>
<td>Kiwi - Hide &quot;Suppress from discovery&quot; toggle from Piece form</td>
<td></td>
<td>Mikita Siadykh</td>
<td>Done</td>
<td></td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>MODSOUR</td>
<td>Schema migration error when upgrading from Juniper hotfix 4.3 to Kiwi-GA</td>
<td></td>
<td>Pavlo Smahin</td>
<td>Done</td>
<td></td>
<td>Varun Javalkar</td>
</tr>
<tr>
<td>MODORDS</td>
<td>Order export limit is preventing Large library from exporting orders</td>
<td></td>
<td>Siarhei Hrabko</td>
<td>Done</td>
<td></td>
<td>Dennis Bridges</td>
</tr>
<tr>
<td>MODINVOI</td>
<td>Approving an invoice with multiple lines that ref the same POL 2 payment 1 credit. Causes over reported encumbrance value on budget</td>
<td></td>
<td>Siarhei Hrabko</td>
<td>Done</td>
<td></td>
<td>Siarhei Hrabko</td>
</tr>
<tr>
<td>MODFISTO-</td>
<td>Budget encumbrance calculation can be wrong with negative pending payments</td>
<td></td>
<td>Siarhei Hrabko</td>
<td>Done</td>
<td></td>
<td>Damien Guillaume</td>
</tr>
</tbody>
</table>

6 issues

Modules list
<table>
<thead>
<tr>
<th>Project</th>
<th>Priority</th>
<th></th>
<th></th>
<th></th>
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<tr>
<td></td>
<td>P1</td>
<td>P2</td>
<td>T:</td>
<td></td>
</tr>
<tr>
<td>mod-finance-storage</td>
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<td>1</td>
<td></td>
</tr>
<tr>
<td>mod-invoice</td>
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<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>mod-orders-storage</td>
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<td></td>
</tr>
<tr>
<td>mod-source-record-storage</td>
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<td>1</td>
<td></td>
</tr>
<tr>
<td>ui-receiving</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>ui-users</td>
<td>1</td>
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<tr>
<td><strong>Total Unique Issues:</strong></td>
<td><em>5</em></td>
<td><em>1</em></td>
<td><em>6</em></td>
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</tbody>
</table>

Showing 6 of 6 statistics.

**Hot fix release #2 - RELEASED AT MARCH 11**

Tickets list

<table>
<thead>
<tr>
<th>Key</th>
<th>Summary</th>
<th>T</th>
<th>Assignee</th>
<th>P</th>
<th>Resolution</th>
<th>Reporter</th>
</tr>
</thead>
<tbody>
<tr>
<td>UIIN-1831</td>
<td>Bugfest. Holdings with more than 5000 items does not display</td>
<td>![image]</td>
<td>Michal Kuklis</td>
<td>![image]</td>
<td>Done</td>
<td>Charlotte Whitt</td>
</tr>
<tr>
<td>UIEH-1235</td>
<td>Multiple requests to /resources sent when viewing Titles list on Package Show page</td>
<td>![image]</td>
<td>Maria Sychova</td>
<td>![image]</td>
<td>Done</td>
<td>Denys Bohdan</td>
</tr>
<tr>
<td>UIEH-1232</td>
<td>Check eHoldings Title Search (Juniper vs Kiwi)</td>
<td>![image]</td>
<td>Denys Bohdan</td>
<td>![image]</td>
<td>Done</td>
<td>Viacheslav Kolesnyk</td>
</tr>
<tr>
<td>UIEH-1231</td>
<td>Missing Permissions on upgrade from Juniper to Kiwi</td>
<td>![image]</td>
<td>Andrei Shumski</td>
<td>![image]</td>
<td>Done</td>
<td>Sobha Duvvuri</td>
</tr>
<tr>
<td>UIDATIMP-1086</td>
<td>Need to be able to nest match profiles under action profiles (Kiwi HF)</td>
<td>![image]</td>
<td>Ann-Marie Breaux</td>
<td>![image]</td>
<td>Done</td>
<td>Ann-Marie Breaux</td>
</tr>
<tr>
<td>MODSOURMAN-726</td>
<td>Performance issue with job statuses screen</td>
<td>![image]</td>
<td>Alvar Iusupov</td>
<td>![image]</td>
<td>Won't Do</td>
<td>Vitaly Demchenko</td>
</tr>
<tr>
<td>MODSOURMAN-706</td>
<td>Error loading MappingParametersSnapshot (Kiwi HF2)</td>
<td>![image]</td>
<td>Ruslan Lavrov</td>
<td>![image]</td>
<td>Done</td>
<td>Martin Tran</td>
</tr>
</tbody>
</table>
### Modules list

<table>
<thead>
<tr>
<th>Project</th>
<th>Priority</th>
<th>T:</th>
<th>P1</th>
<th>P2</th>
<th>P3</th>
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<td>ERM Platform</td>
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<td>folio-kafka-wrapper-util</td>
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<tr>
<td>liquibase-util</td>
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<td>mod-audit</td>
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<td>mod-data-export-spring</td>
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<td>mod-data-export-worker</td>
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<tr>
<td>mod-inventory</td>
<td></td>
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<td>0</td>
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</tr>
<tr>
<td>mod-login-saml</td>
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</tr>
<tr>
<td>mod-quick-marc</td>
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<td>0</td>
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<tr>
<td>mod-source-record-manager</td>
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<tr>
<td>mod-source-record-storage</td>
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<td>2</td>
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<td>3</td>
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<tr>
<td>ui-data-import</td>
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<tr>
<td>ui-eholdings</td>
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<td>2</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>ui-inventory</td>
<td></td>
<td>1</td>
<td>0</td>
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<td>1</td>
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<tr>
<td><strong>Total Unique Issues:</strong></td>
<td></td>
<td>6</td>
<td>19</td>
<td>3</td>
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</table>

Showing 17 out of 17 statistics.

### Tickets list

#### Hot fix release #3 - RELEASED AT MAY 24

<table>
<thead>
<tr>
<th>Key</th>
<th>Summary</th>
<th>T</th>
<th>Assignee</th>
<th>P</th>
<th>Resolution</th>
<th>Reporter</th>
</tr>
</thead>
<tbody>
<tr>
<td>MODPATBL K-134</td>
<td>Kiwi HF3: Automated Block for Max Amount Owed Not Removed When Aged to Lost Item Returned</td>
<td>♻️</td>
<td>Oleksandr Vidnieiev</td>
<td>♻️</td>
<td>Done</td>
<td>Stephanie Buck</td>
</tr>
<tr>
<td>MODPATBL K-131</td>
<td>Release v1.4.2</td>
<td>✔️</td>
<td>Oleksandr Vidnieiev</td>
<td>✔️</td>
<td>Done</td>
<td>Oleksandr Vidnieiev</td>
</tr>
</tbody>
</table>
**Hot fix release #4**

Installations that use an older PostgreSQL version than 12 (only 12 is recommended) need to pin some modules to the hot fix #3 version because later module versions reject the upgrade on older PostgreSQL versions. Affected modules and version to pin: mod-user-import v3.6.5, mod-configuration v5.7.7.

**New Features by Epic (Sub-Project)**

<table>
<thead>
<tr>
<th>Key</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>UXPROD-3061</td>
<td>Thunderjet - R3 Enhancements/Bugfixes</td>
</tr>
<tr>
<td>UXPROD-2875</td>
<td>Agreements Organisation management</td>
</tr>
<tr>
<td>Issue ID</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>UXPROD-3090</td>
<td>UX improvements for Agreements R3 2021</td>
</tr>
<tr>
<td>UXPROD-3101</td>
<td>Thunderjet: Karate API Integration Testing (NFR) - Kiwi work</td>
</tr>
<tr>
<td>UXPROD-2939</td>
<td>Data Import Log - refine error handling</td>
</tr>
<tr>
<td>UXPROD-3120</td>
<td>Folijet - R3 2022 Kiwi Module releases, RMB/Stripes updates, migration scripts verification</td>
</tr>
<tr>
<td>UXPROD-2697</td>
<td>NFR: Create integration tests for key Data Import functionality using Karate (Kiwi)</td>
</tr>
<tr>
<td>UXPROD-3041</td>
<td>NFR: Data Import (Batch Importer for Bib Acq) R3 2021 Kiwi Technical, NFR, &amp; Misc bug work</td>
</tr>
<tr>
<td>UXPROD-3193</td>
<td>NFR: R3 2021 Kiwi Data import Stability/Reliability work</td>
</tr>
<tr>
<td>UXPROD-3191</td>
<td>NFR: R3 2021 Kiwi Data import performance work</td>
</tr>
<tr>
<td>UXPROD-3103</td>
<td>NFR: Refactor Data Import forms to use final-form instead of redux-form - R3 2021 Kiwi</td>
</tr>
<tr>
<td>UXPROD-3081</td>
<td>NFR: UI end-to-end tests for Data Import (Kiwi)</td>
</tr>
<tr>
<td>UXPROD-2924</td>
<td>Recently UNblocked Mapping updates for Inventory records</td>
</tr>
<tr>
<td>UXPROD-3106</td>
<td>Tech Debt: Migrate UI automated unit tests from BigTest to React/JEST - R3 2021 Kiwi</td>
</tr>
<tr>
<td>UXPROD-2858</td>
<td>Define human readable identifiers (HRIDs) and UUIDs for SRS MARC Holdings records</td>
</tr>
<tr>
<td>UXPROD-1575</td>
<td>quickMARC</td>
</tr>
<tr>
<td>UXPROD-3184</td>
<td>Course Reserves list - add ability to customize columns that display in results pane</td>
</tr>
<tr>
<td>UXPROD-3005</td>
<td>Courses: Implement Notes for Courses</td>
</tr>
<tr>
<td>UXPROD-2948</td>
<td>Agreements</td>
</tr>
<tr>
<td>UXPROD-3162</td>
<td>Kiwi Release - eholdings app and notes helper app updates</td>
</tr>
<tr>
<td>UXPROD-3129</td>
<td>Accuracy improvements in Inventory ES Search</td>
</tr>
<tr>
<td>UXPROD-3200</td>
<td>mod-search maintenance - Kiwi release</td>
</tr>
<tr>
<td>UXPROD-2961</td>
<td>Capture cost and use data</td>
</tr>
<tr>
<td>UXPROD-1267</td>
<td>Configure statistics to be shown in ERM</td>
</tr>
<tr>
<td>UXPROD-1266</td>
<td>Display statistics visualizations previews</td>
</tr>
<tr>
<td>UXPROD-1268</td>
<td>Download calculated statistics and visualizations</td>
</tr>
<tr>
<td>UXPROD-2859</td>
<td>Parse and store structured usage data</td>
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<tr>
<td>UXPROD-1264</td>
<td>Statistics visualization and download: Cost per download per agreement</td>
</tr>
<tr>
<td>UXPROD-2907</td>
<td>Statistics visualization and download: Use by publication year</td>
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<tr>
<td>Issue Number</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>UXPROD-1265</td>
<td>Statistics visualization and download: Use over time</td>
</tr>
<tr>
<td>UXPROD-2860</td>
<td>eUsage harvest summary and results</td>
</tr>
<tr>
<td>UXPROD-3274</td>
<td>Add FOLIO info to Created_By value in exported COUNTER files</td>
</tr>
<tr>
<td>UXPROD-2930</td>
<td>Download COUNTER 5 report views as CSV/xlsx</td>
</tr>
<tr>
<td>UXPROD-3098</td>
<td>No required configuration fields for inactive harvesting status</td>
</tr>
<tr>
<td>UXPROD-3108</td>
<td>UX improvements for Dashboard R3 2021</td>
</tr>
<tr>
<td>UXPROD-3064</td>
<td>Financial Transactions Detail Report (for balancing cash drawer)</td>
</tr>
<tr>
<td>UXPROD-3053</td>
<td>Loan: Claimed Returned - SET COST Fee/Fine work for R3 2021 (Kiwi)</td>
</tr>
<tr>
<td>UXPROD-3044</td>
<td>Add Contributors to account requests</td>
</tr>
<tr>
<td>UXPROD-3218</td>
<td>Create Record Contribution of Inventory Records (&quot;Bibs&quot; and &quot;Items&quot;) to INN-Reach Central Server</td>
</tr>
<tr>
<td>UXPROD-3051</td>
<td>Create Settings For Managing Contribution of Inventory Records (&quot;Bibs&quot; and &quot;Items&quot;) to INN-Reach Central Server</td>
</tr>
<tr>
<td>UXPROD-2714</td>
<td>Create Settings to Manage Configuration of Relationship(s) Between D2IR Local Server (FOLIO) and INN-Reach Central Servers</td>
</tr>
<tr>
<td>UXPROD-2794</td>
<td>Create a Data Model to Track/Represent INN-Reach Transactions</td>
</tr>
<tr>
<td>UXPROD-2777</td>
<td>INN-Reach: Submit Local Server Locations to INN-Reach Central Server</td>
</tr>
<tr>
<td>UXPROD-2672</td>
<td>Implement &quot;Third Party&quot; OAuth2 Token Endpoint for D2IR (INN-Reach)</td>
</tr>
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<td>Implement Required Local API Endpoints for D2IR (INN-Reach) Local Server Status in FOLIO</td>
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<td>Implement Required Local Inventory-related Local API Endpoints for D2IR (INN-Reach) Local Servers in FOLIO</td>
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<td>Manage a Map of Local Patron Groups to INN-Reach Central Server Patron Types (PTYPE)</td>
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<td>Retrieve List of Local Servers in an INN-Reach Consortium and their Associated Agencies and Provide Representations in the FOLIO Location System</td>
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<td>Inventory. Result list Refined display rules. Display Resource title in MCL and Sort on Index title</td>
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<td>Inventory. UI improvements of record header (Instance, Holdings, Item)</td>
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