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# SirsiDynix Symphony 3.2 Release Notes

## Corrections

- Entry ID and Course Term Policies Now Allow Forward Slash (/) Character in Policy Names
- Policies File Lock Wasn’t Removed in WorkFlows Java Client
- OCLC Connections Wizard Had No Field for Domain/IP Address

## Customize Policy List Wizard

- Selection of the Excludes Selected Policies Option is Retained in the Customize Policy List Wizard
- Customize Policy List Wizard Displays Policy Lists That Have Been Customized to Exclude Policies
- Customize Policy List Policies Couldn’t Use Exclude Option
- Customize Policy List Wizard Correctly Saves Changes to System-Wide Policy Lists

## Access Control Configuration

- Barcode Exempt Policy Wizard Does Not Allow More Than 10 Characters for New Policy Name for Copy
- Barcode Policy Labels Not Translating to French
- User Access List Changes Made in the WorkFlows Java Client Are Saved Correctly to the WorkFlows C Client Access List
- Request List Policy Changes Are Saved Correctly
- Operator Policies in French WorkFlows Java Client

## Acquisitions Configuration

- Fund Library Authorization Wizard Added
- New Invoice Taxes Policies
- Tax Tab Added to X12 Invoices Reports
- New Report to Lock Invoices Added to the Acquisition Report Group
- New Ability to Print Fund Summaries for Invoice Reports
- New List Invoices for Vendor Report

## Enhancements

- Policy Lists for the Tax Policy and Tax Structure Policy Can Be Customized with the Customize Policy List Wizard
- Selection of the Excludes Selected Policies Option is Retained in the Customize Policy List Wizard
- Customize Policy List Wizard Displays Policy Lists That Have Been Customized to Exclude Policies
- Customize Policy List Policies Couldn’t Use Exclude Option
- Customize Policy List Wizard Correctly Saves Changes to System-Wide Policy Lists

- User Access Policy Wizard Folders and Wizards Sorted
- Access List for K12 Web Client Tab Added to User Access Wizard

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Enhancements

Updating the WorkFlows Java Client for Non-System Administrators

The WorkFlows Java client requires that the user be logged in to a PC or Macintosh as an administrator before the client can be installed or upgraded. Previously, after the WorkFlows Java client was updated on the desktop by an administrator, when other users logged on to the PC or Macintosh they were prompted to update the client and could download it, but could not install it and were unable to continue.

SirsiDynix Symphony 3.2 WorkFlows operates like the Unicorn GL 3.1 WorkFlows client. After installing the new client, a user with administrator privileges on the desktop must log in to the SirsiDynix Symphony server using the normal login process. The user will be prompted to update the client. After this client is installed, the administrator user will be prompted to log in to the SirsiDynix Symphony server again so that site-specific files are downloaded to the desktop.

After the administrator user has logged in for the second time, other users can log in on the PC or Macintosh without being prompted to update the client.

Additionally, multiple types of stamp files are saved to the installation directory on the workstation, such as `C:\ Program Files` in Windows, which allows for updating different sets of files when the user logs in (or for preserving customized files), rather than updating all files each time. The stamp files saved under the installed directory include the following.

- Customized logo
- Customized wizards
- Installation package
- Customized and delivered labels and messages files
- Screens and wizards for software corrections

When any of these types of files are updated on the SirsiDynix Symphony server, the server will check the stamp files in the installed directory on the workstation to see if the files need upgrading. If so, the non-administrator user will see the following message, along with a list of files to be upgraded.

The following file needs upgrading. Contact your system administrator.

The user can evaluate whether to contact the system administration to upgrade the client, or click OK in the message dialog box and proceed with using the cli-
ent. This message will continue to appear to the non-administrator user until WorkFlows is upgraded.

**Function Key Mapping Wizard Drop-down List Dynamically Updated**

Function key mapping in the WorkFlows Java client has been improved. Once a wizard has been mapped to a function key sequence, the wizard drop-down lists are dynamically updated so that the newly mapped wizard no longer appears in the list. This alleviates the problem of a wizard being mapped twice. Access the Function Key Mapping command from the Preference/Desktop/Current Toolbar menu.

**Note:** A wizard cannot be remapped in one step, since the verify lists are continually updated as keys are mapped. First, unmap the wizard and function key combination, then remap the wizard to a new function key.

**New Active Menu for Themes Multiple Windows Mode**

In the WorkFlows Java client Themes mode, if the user selected Multiple Windows Mode in Desktop Preferences, it was difficult to switch to a different wizard window that was already opened. Now, an Active menu that lists all active wizards has been added to the Window menu.

Each time the user opens a wizard, the wizard is added to the Active menu list. A check mark will appear next to the current wizard. To switch to a different wizard, the user selects another wizard from this list, and a check mark will appear next to the selected wizard. When the user quits a wizard, the wizard will be removed from this list. When no wizards are open, the Active menu will not appear.

**Note:** The Window menu and Active submenu will only appear if the Multiple Windows Mode option is selected in Desktop Preferences.

**Increased Open Cash Drawer ASCII Sequence Values**

Previously, in the Preferences menu Peripheral/Receipt Printer options, users could type the ASCII sequence values receipt printers use to trigger opening cash drawers. Three text boxes were provided for typing these ASCII sequence values. However, some receipt printers require an open cash drawer sequence that is 5 bytes long. Now, there are five text boxes provided to type these sequence values.

**Note:** Not all receipt printers support opening cash drawers. To determine if the library’s receipt printers support this feature, refer to the manufacturer’s documentation. Also refer to this documentation for the open cash drawer ASCII sequence values.

**Policy Descriptions Printed on Receipt Printers**

Receipt printers will be able to print policy descriptions instead of policy names, if the configuration option for displaying policy descriptions is enabled.
WorkFlows Themes View Now Displays Balloon Help for Toolbars

In the WorkFlows Java client’s Themes view, balloon help has been added for the wizard toolbars. Now, the user can see the full descriptions of WorkFlows wizard groups and wizards by passing the cursor over the group menus and wizard icons/names.

Label Printing and Default Printer Usage

Previously in the WorkFlows Java client, label printing used the default printer setting of the operating system of the machine on which the client was run, even if a default had been set from Print Setup in the File menu.

Now, the default printer can be specified in WorkFlows. This printer functionality works the same way as screen printing in WorkFlows.

In the File menu, under Print Setup, if the Print to Printer option is selected and defined, the printer specified is used in the print job without requiring that the client be restarted. If Print to Printer is not defined, the operating system default printer is used for the print job.

24-Hour Clock Format Option Added to Desktop Setup Options

The Desktop Setup options for the WorkFlows client now include the 24-Hour Clock Format check box. If this check box is selected, the time display and selection options (such as in the data and time gadget in reports) will be in 24-hour format instead of the 12-hour A.M./P.M. time format. By default, the check box is cleared and the WorkFlows client uses the 12-hour A.M./P.M. time format.

Default Toolbar Section Added to Desktop Setup Preferences

Previously, if the user used a toolbar (usually a custom toolbar) in a WorkFlows session, then switched to a server that did not have the toolbar, the WorkFlows client would not start.

The Default Toolbar option has been added to the Desktop Setup window for the WorkFlows client desktop preferences. If a user connects to a server that does not have the most recently used toolbar from the previous WorkFlows session, the toolbar selected in the Default Toolbar field is used. By default, the Circulation toolbar is selected.

Note: The toolbar selected in the Default Toolbar field is used only if the user connects to a server that does not have the most recently-used toolbar from the previous WorkFlows session.
WorkFlows Client Checks for Write Permissions for a User's Home Directory and Subdirectories Before Starting a Client Session

If a user running the WorkFlows Java client did not have write permission to his or her own home directory, the client was unable to download and save the accesslist file in the /Sirsi/Configure directory. As a result, any user login that was used to log into the WorkFlows Java client would have access to all wizards in the client session.

The WorkFlows Java client has been enhanced to check the permissions set for the user's home directory and its subdirectories when the user logs in. If the user does not have write permission for his or her home directory, or does not have write permission for any of the subdirectories in the home directory, the WorkFlows client displays the following message and does not start the client session.

WorkFlows will halt because of insufficient permission to the user's home directory. Contact your system administrator.

Symbol Table Enhanced

The WorkFlows Symbol Table is frequently used with records in which characters that are not available on the standard keyboard need to be entered. Previously, the Symbol Table window could not be minimized, and always had to be on top of other wizard windows. The keyboard shortcut to open the Symbol Table was not working. The Symbol Table has been enhanced and corrected to address these shortcomings, and to add the ALA Character Set of Diacritics and Symbols as an additional available character set.

Manipulating the Symbol Table Window

Previously, the Symbol Table window could not be minimized, collapsed, moved, or restored. In addition, the Symbol Table window did not permit another window to be open on top of it, so the Symbol Table frequently obscured the wizard work area. The Symbol Table window can now be minimized, collapsed, moved, or restored; in addition, the size and location changes to the Symbol Table window are stored for the next time the Symbol Table is used. The Symbol Table window also permits a wizard window to be open on top of it so the user can work more easily in the wizard window.

Note: When multiple windows mode is used, and the Symbol Table is open but displays behind a window other than a wizard Properties window that was opened from the wizard's right-click menu, the table can be brought to the front. Point to the Windows menu, then point to Active, and select Symbol Table, or press ALT+D, A, and the underlined letter for the Symbol Table option displayed in the opened menu (usually S, but may be other letters if more than one Symbol Table window is open, or if wizard windows beginning with the letter S are open).

Keyboard Shortcut Corrected to Access the Symbol Table

Previously, the keyboard shortcut to access the Symbol Table stopped working, so the table could only be accessed by selecting Symbol Table from the Tools menu. The Symbol Table can now be accessed also by pressing ALT+T+S, which is the keyboard shortcut for opening the Symbol Table window.
Improvements in Inserting Diacritics and Symbols from the Symbol Table

Previously, the Symbol Table would always remain open after a special character or symbol was selected and inserted into a field. The Symbol Table has been changed as follows to allow flexibility in how the special characters can be selected and whether the Symbol Table window remains open after the character is inserted in a field.

- The user selects a character with the mouse or by using the Tab key in the Symbol Table, and presses Enter. The character displays at the insertion point in the field, and the Symbol Table window remains open.
- The user double-clicks a character in the Symbol Table. The character displays at the insertion point in the field, and the Symbol Table window remains open.
- The user selects a character in the Symbol Table, and clicks Insert or presses ALT+O (oh). The character displays at the insertion point in the field, and the Symbol Table window remains open.
- The user selects a character in the Symbol Table, and clicks Insert and Close, or presses ALT+B. The character displays at the insertion point, and the Symbol Table window closes.
- When the user is finished using the Symbol Table, the user can click Close or press ALT+C to exit the Symbol Table window.

Note: To enter special characters on a wizard Properties window, select the Wizard Startup option in the wizard properties so the Properties window will display as the first window when the wizard opens. When the Properties window displays at the wizard startup, open the Symbol Table window by selecting Symbol Table from the Tools menu, or by pressing ALT+T+S. If the Properties window is opened by selecting Properties from the wizard’s right-click menu, the Symbol Table window will not display on top of the Properties window when it is opened, and the table cannot be made to display on top of the Properties window by pointing to Active, and selecting Symbol Table, or by pressing ALT+D, A, and the underlined letter for the Symbol Table option displayed in the opened menu.

ALA Character Set of Diacritics and Symbols Added as an Available Character Set

SirsiDynix Symphony now includes the ALA Character Set of Diacritics and Symbols as an additional available character set in the WorkFlows Symbol Table. Unlike the larger Diacritics and Symbols code set in which the user selects combinations of letters and diacritics, the ALA Character Set of Diacritics and Symbols includes diacritics that are applied to a letter the user entered from the keyboard. This feature allows the ALA Character Set of Diacritics and Symbols to be an abbreviated table of diacritics and symbols instead of a large table encompassing all the possible combinations of letters and diacritics.

To use the ALA Character Set of Diacritics and Symbols set, place the insertion point immediately following the character to which a diacritic is to be applied. Ligatures, paired diacritics, and multiple diacritics are entered from the letter and moving left to right, bottom to top.
Example

To enter an A with dot below and a grave above, type the letter A, then enter the dot below from the ALA Character Set of Diacritics and Symbols set, then enter the grave above from the ALA Character Set of Diacritics and Symbols set.

Note: The ALA Character Set of Diacritics and Symbols check box must be selected in the Loaded Character Sets window (accessed by selecting the Tools menu, then selecting Loaded Character Sets) for the ALA Character Set of Diacritics and Symbols set to be available in the Symbol Table. If no check boxes are selected in the Loaded Character Sets window, the ALA Character Set of Diacritics and Symbols set is downloaded to the desktop by default.

Keyboard Shortcuts Added for the ALA Character Set of Diacritics and Symbols

Keyboard shortcuts have been added for use with the ALA Character Set of Diacritics and Symbols. The following key combinations may be used instead of selecting characters from the Symbol Table window.

<table>
<thead>
<tr>
<th>Character</th>
<th>Default Keystroke Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acute</td>
<td>CTRL+ALT+B</td>
</tr>
<tr>
<td>ae, lowercase</td>
<td>CTRL+ALT+5</td>
</tr>
<tr>
<td>AE, uppercase</td>
<td>CTRL+ALT+SHIFT+5</td>
</tr>
<tr>
<td>Alif</td>
<td>CTRL+ALT+. (period(decimal point))</td>
</tr>
<tr>
<td>Ayn</td>
<td>CTRL+ALT+0 (zero)</td>
</tr>
<tr>
<td>Breve</td>
<td>CTRL+ALT+F</td>
</tr>
<tr>
<td>British Pound</td>
<td>CTRL+ALT+9</td>
</tr>
<tr>
<td>Candrabindu</td>
<td>CTRL+ALT+O (letter o)</td>
</tr>
<tr>
<td>Cedilla</td>
<td>CTRL+ALT+P</td>
</tr>
<tr>
<td>Circle above letter</td>
<td>CTRL+ALT+J</td>
</tr>
<tr>
<td>Circle below letter</td>
<td>CTRL+ALT+T</td>
</tr>
<tr>
<td>Circumflex, non-spacing</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Circumflex, spacing</td>
<td>^ (circumflex)</td>
</tr>
<tr>
<td>d with crossbar, lowercase</td>
<td>CTRL+ALT+3</td>
</tr>
<tr>
<td>D with crossbar, uppercase</td>
<td>CTRL+ALT+SHIFT+3</td>
</tr>
<tr>
<td>Character</td>
<td>Default Keystroke Shortcut</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Dot below letter</td>
<td>CTRL+ALT+R</td>
</tr>
<tr>
<td>Dot in center of line</td>
<td>CTRL+ALT+SHIFT+9</td>
</tr>
<tr>
<td>Double acute</td>
<td>CTRL+ALT+N</td>
</tr>
<tr>
<td>Double dot below letter</td>
<td>CTRL+ALT+S</td>
</tr>
<tr>
<td>Double tilde (left half)</td>
<td>CTRL+ALT+Z</td>
</tr>
<tr>
<td>Double tilde (right half)</td>
<td>CTRL+ALT+{ (open bracket)</td>
</tr>
<tr>
<td>Double underscore</td>
<td>CTRL+ALT+U</td>
</tr>
<tr>
<td>Eth, lowercase</td>
<td>CTRL+ALT+SHIFT+; (semicolon)</td>
</tr>
<tr>
<td>Eth, uppercase</td>
<td>CTRL+ALT+SHIFT+3 (same as D with crossbar, uppercase)</td>
</tr>
<tr>
<td>Grave, non-spacing</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Grave, spacing</td>
<td>` (grave)</td>
</tr>
<tr>
<td>Hacek</td>
<td>CTRL+ALT+I</td>
</tr>
<tr>
<td>High comma, centered</td>
<td>CTRL+ALT+SHIFT+6</td>
</tr>
<tr>
<td>High comma, off-center</td>
<td>CTRL+ALT+M</td>
</tr>
<tr>
<td>Inverted cedilla</td>
<td>CTRL+ALT+X</td>
</tr>
<tr>
<td>I with slash, lowercase</td>
<td>CTRL+ALT+1 (one)</td>
</tr>
<tr>
<td>L with slash, uppercase</td>
<td>CTRL+ALT+SHIFT+1 (one)</td>
</tr>
<tr>
<td>Left hook</td>
<td>CTRL+ALT+W</td>
</tr>
<tr>
<td>Ligature (left half)</td>
<td>CTRL+ALT+K</td>
</tr>
<tr>
<td>Ligature (right half)</td>
<td>CTRL+ALT+L</td>
</tr>
<tr>
<td>Macron</td>
<td>CTRL+ALT+E</td>
</tr>
<tr>
<td>Miagkii znak</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Character</td>
<td>Default Keystroke Shortcut</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Musical flat</td>
<td>ALT+CTRL+SHIFT+0 (zero)</td>
</tr>
<tr>
<td>o with hook, lowercase</td>
<td>CTRL+ALT+, (comma)</td>
</tr>
<tr>
<td>O with hook, uppercase</td>
<td>CTRL+ALT+SHIFT+, (comma)</td>
</tr>
<tr>
<td>o with slash, lowercase</td>
<td>CTRL+ALT+2</td>
</tr>
<tr>
<td>O with slash, uppercase</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>oe, lowercase</td>
<td>CTRL+ALT+6</td>
</tr>
<tr>
<td>OE, uppercase</td>
<td>CTRL+ALT+SHIFT+7</td>
</tr>
<tr>
<td>Plus/minus</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Pseudo question mark</td>
<td>CTRL+ALT+SHIFT+2</td>
</tr>
<tr>
<td>Right hook</td>
<td>CTRL+ALT+Q</td>
</tr>
<tr>
<td>Script l</td>
<td>CTRL+ALT+SHIFT+. (period/decimal point)</td>
</tr>
<tr>
<td>Subscript 0</td>
<td>ALT+0 (zero)</td>
</tr>
<tr>
<td>Subscript 1</td>
<td>ALT+1</td>
</tr>
<tr>
<td>Subscript 2</td>
<td>ALT+2</td>
</tr>
<tr>
<td>Subscript 3</td>
<td>ALT+3</td>
</tr>
<tr>
<td>Subscript 4</td>
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<td>Subscript 5</td>
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<td>Subscript left parenthesis</td>
<td>ALT+[ (open bracket)</td>
</tr>
<tr>
<td>Subscript minus</td>
<td>ALT+- (minus sign)</td>
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<tr>
<td>Character</td>
<td>Default Keystroke Shortcut</td>
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<tr>
<td>Subscript plus</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Subscript right parenthesis</td>
<td>ALT+] (close bracket)</td>
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<tr>
<td>Superior dot</td>
<td>CTRL+ALT+G</td>
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<tr>
<td>Superscript 0</td>
<td>ALT+SHIFT+0 (zero)</td>
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<td>Superscript 1</td>
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<td>Superscript 2</td>
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<td>ALT+SHIFT+9</td>
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<tr>
<td>Superscript left parenthesis</td>
<td>ALT+SHIFT+{ (open bracket)</td>
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<tr>
<td>Superscript minus</td>
<td>ALT+SHIFT+- (minus sign)</td>
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<tr>
<td>Superscript plus</td>
<td>Use the Symbol Table window to enter</td>
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<td>ALT+SHIFT+] (close bracket)</td>
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<td>Thorn, lowercase</td>
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<tr>
<td>Thorn, uppercase</td>
<td>CTRL+ALT+4</td>
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<tr>
<td>Tilde, non-spacing</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Tilde, spacing (use in URLs)</td>
<td>` (tilde)</td>
</tr>
<tr>
<td>Turkish i without dot, lowercase</td>
<td>CTRL+ALT+8</td>
</tr>
<tr>
<td>Tverdyi znak</td>
<td>CTRL+ALT+7</td>
</tr>
<tr>
<td>u with hook, lowercase</td>
<td>CTRL+ALT+- (minus sign)</td>
</tr>
</tbody>
</table>
WorkFlows Complies with Daylight Savings Time Rules Changes

Some countries, including Canada, changed the laws or rules for Daylight Savings Time (DST) since the most recent software patch cluster was released by SirsiDynix. WorkFlows has been changed to accommodate the changes to the DST rules.

Corrections

Unable to Use Save As Command to Save Current Toolbar

With a current toolbar displayed, the user attempted to use the Preference menu’s Desktop/Current Toolbar/Save As command to save the current toolbar to another file name (thereby creating a custom toolbar). However, after typing the new file name and description, when the user clicked OK, the WorkFlows Java client froze.

This has been corrected.

Pasted Text Was Not in Uppercase

Previously, users noticed that the WorkFlows Java client displayed some item barcodes with lower case letters. In SirsiDynix Symphony, barcodes should only contain uppercase letters, and the WorkFlows client will uppercase letters as they are typed into text boxes. It was found that users were able to cut and paste barcodes with lower cased letters into the text boxes, and these lower cased letters were saved to the item records.

This has been corrected. Now, lower case letters that are entered into a barcode field using the copy/paste or cut/paste method will be automatically converted to uppercase. This is also true when a user scans a barcode containing lower case letters.

<table>
<thead>
<tr>
<th>Character</th>
<th>Default Keystroke Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>u with hook, uppercase</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Umlaut</td>
<td>CTRL+ALT+H</td>
</tr>
<tr>
<td>Underscore, non-spacing</td>
<td>Use the Symbol Table window to enter</td>
</tr>
<tr>
<td>Underscore, spacing (use in URLs)</td>
<td>_ (Underscore)</td>
</tr>
<tr>
<td>Upadhmaniya</td>
<td>CTRL+ALT+Y</td>
</tr>
</tbody>
</table>

Use the Symbol Table window to enter:
- u with hook, uppercase
- Umlaut
- Underscore, non-spacing
- Underscore, spacing (use in URLs)
- Upadhmaniya

Umlaut: CTRL+ALT+H

Underscore, non-spacing: Use the Symbol Table window to enter

Underscore, spacing (use in URLs): _ (Underscore)

Upadhmaniya: CTRL+ALT+Y
Unable to Log In When Alt ID Login was Configured

Previously, when a Unicorn or SirsiDynix Symphony server was configured to allow only alt ID logins, WorkFlows would display the following message.

Fatal communication error

The WorkFlows Java client was not sending the alt ID and PIN typed by the user to the server, but was sending erroneous data.

This has been corrected.

Logging in with an Alt ID Corrected

When logging in to a WorkFlows Java client, a user noticed that she was unable to perform an automatic update of the staff client. After selecting Yes in the Automatic Update Dialog box, the download dialog would show that the client download was successful, but the WorkFlows introduction window would freeze. The user had to close the WorkFlows program using Windows Task Manager. The user logged in a second time, and although the client successfully updated, she noticed significant problems with properties files, the stamp files not being updated, and reports not running.

It was determined that a previous user logged into the WorkFlows Java client on a workstation with an IP address of 10.x.x.x., and the user ID with an alt ID of 10 populated the login fields. However, subsequent logins would default to these values, even though users typed different user IDs/alt IDs. This caused file access and permission inconsistencies, which interfered with the client update.

This has been corrected.

More Appropriate Message/Display When Maximum Response Limit is Reached

Previously in the WorkFlows Java client, if a wizard requested information from the server, and the server attempted to return all of the information to the wizard but the maximum response limit was reached, a misleading message would display, and no search results were listed.

Example:

Using the What's in Transit wizard, the user attempted to search all items in transit from the Central library. Too many items were found, so the maximum response limit was reached. The wizard displayed the following message, and no intransit items were displayed.

No items are currently in transit to CENTRAL.

Now, when the maximum data response limit is reached, the WorkFlows Java client wizards will display a warning message that partial data will be displayed, and will list the results of the search up to the response limit.
Closing WorkFlows Java Client When Connection to Server is Lost

When the WorkFlows Java client loses connection to the SirsiDynix Symphony server (the server was halted or a network connection was lost), users were prompted to close WorkFlows. If users had been making edits, they were prompted to close open windows, but they had to click No when prompted to save their edits, or they would end up in a loop of prompts. There was no way to save their changes because the connection to the server was lost.

Now, when the WorkFlows Java client is closed, it first checks whether the connection to the SirsiDynix Symphony server is still active. If the connection to the server is lost, the client will close without checking to see if there are any wizards open that require the user’s attention. Without a connection to the server, there isn’t much the user can do to save changes and close the wizards properly.

Note: It is very important to remember not to halt and run the SirsiDynix Symphony server when it is possible that users are adding or modifying records or policies. If this happens, lock files will be created for the records and policies. No other users can modify the policies until the lock files are removed, and the edited records may be corrupted. Policy lock files will need to be manually removed by the SirsiDynix Symphony administrator.

Menu Option to Change Toolbars Didn’t Work

In the WorkFlows Java client using Themes, the Menu option to change toolbars (found under Preference--Desktop--Current toolbar--Select) was not working. The correct toolbar would appear to be selected, but the correct wizards were not displaying.

This has been corrected.

Symbol Table Customized Font Selection Retained Between Client Sessions

In the Special Character Table gadget, the font selected in the Customize Font field on the Symbol Table was not retained between WorkFlows client sessions. The gadget has been changed to save the customized font selection for the Symbol Table and use it when a future WorkFlows client session is started.

Help and Properties Selections Display

When right-clicking on a wizard, the user will now see the options for Help and Properties, if applicable.

Unnecessary Client Update Prompt Displayed

For sites that use the Display of User Photograph global configuration setting, if new photographs are added and are downloaded to the PC or Macintosh when the user record is displayed, users will be incorrectly prompted to update their WorkFlows Java client the next time they start a session. This has been corrected.
Outreach Toolbar Appears When Outreach Not Configured

In the WorkFlows Java client, the Outreach toolbar appears as an option even when the Outreach module was not purchased by the library.

This has been corrected. The Outreach toolbar will now only display if the Outreach module is configured.

Pasted Text Appended to Existing Text in Extended Information Fields

Previously, copied text that was pasted into an Extended Information field (such as the NOTE field) would incorrectly replace all of the existing text in the field.

The pasting of text into an Extended Information field has been changed so that when copied text is pasted into an Extended Information field, the pasted text is appended after any existing text in the field.
Wizard Text Didn’t Appear on Big Icons

In the WorkFlows Java client, when using Big Icons in the Classic theme, the text for the following wizards didn’t always appear. The toolbar the wizard is associated with is indicated in parentheses. The presence of a particular toolbar is dependent on whether the module was purchased.

Add Listlines (Selection)
Add Selection Lists (Selection)
Check Item Status (All)
Create History (Outreach)
Create Interest (Outreach)
Create Outreach Information (Outreach)
Create Template (Outreach)
Delete Selection Lists (Selection)
Display History (Outreach)
Display Interest (Outreach)
Display Outreach Information (Outreach)
Display Request (ILL and Requests)
Display Selection Lists (Selection)
Display Template (Outreach)
Display Title Holds (Circulation)
Duplicate Order (Acquisitions)
Duplicate Request (ILL and Requests)
Duplicate Selection Lists (Selection)
Load Properties (Utility)
Manage Digital Collections (Hyperion)
Maintain Holding Code Table (Utility)
MARC Editor Help (Configuration)
MARC Selection Import (Utility)
Modify History (Outreach)
Modify Interest (Outreach)
Modify Outreach Information (Outreach)
Modify Request (ILL and Requests)
Modify Selection Lists (Selection)
Modify Template (Outreach)
My Decisions (Selection)
Order Selection Lists (Selection)
Remove History (Outreach)
Remove Interest (Outreach)
Remove Outreach Information (Outreach)
Remove Request (ILL and Requests)
Remove Template (Outreach)
Save Properties (Utility)
Search Interest (Outreach)
Unsuspend User (Circulation)
Vendor Extended Info Format (Configuration)

This has been corrected.
Icon Images Didn’t Appear on Big Icons

In the WorkFlows Java client, when using Big Icons in the Classic theme, the following wizards did not have icons:

- Add Selection Lists
- Delete Selection Lists
- Display Selection Lists
- Duplicate Selection Lists
- Modify Selection Lists
- Order Selection Lists
- Selection List and Decision Info
- Vendor Extended Info Format

This has been corrected.

Incomplete Receipt Information Prints on 612 Receipt Printer

Previously on the 612 receipt printer, a full receipt could not be printed after an upgrade to the WorkFlows Java client version GL3.1.3. When the 10K buffer was sent to the printer, some printer drivers failed.

This has been corrected. The WorkFlows Java client now sends only the required information in the buffer for printing and not the entire buffer.

URLs Didn’t Link Correctly in WorkFlows Java Client

In the WorkFlows Java client, when selecting URLs from 856 fields that contained special characters such as an ampersand (&) or a caret (^), the links didn’t work properly.

This has been corrected.

WorkFlows Java Client Accepts Input After a Message Displays While Scanning Barcodes

If a message dialog displayed and was closed while user or item barcodes were being scanned rapidly, the insertion point would disappear from the current wizard window, and the WorkFlows Java client would no longer accept input from the scanner or the keyboard.

The WorkFlows Java client has been corrected so that if a message window opens and is closed while barcodes are being rapidly scanned, the insertion point returns to the current wizard window, and the client continues to accept input from the scanner or the keyboard.
Receipt Printer Configuration Finishes for the WorkFlows Client on Macintosh Systems

In libraries that run the WorkFlows Java client on the Macintosh operating system, the receipt printer configuration could not be completed. When the user selected Peripherals, then Receipt Printer from the Preference menu, the wait cursor would display when the user selected the Receipt Printer Available check box and selected a printer in the Receipt Printer list. The wait cursor would continue to display if the user selected the Attributes tab or the OK button, and the receipt printer could not be successfully configured.

The receipt printer configuration has been corrected so that if a library running the WorkFlows Java client on the Macintosh system, the wait cursor no longer displays indefinitely when the Receipt Printer Available check box is selected.

WorkFlows Java Client No Longer Stops When Downloading the Custom Screens File on Macintosh Systems

The following message would display when the WorkFlows Java client was trying to download the custom screens file (custom.jar) on a Macintosh system, and a custom.jar had already been previously downloaded by a user other than the user trying to run the WorkFlows client.

Uncaught Java Exception

The WorkFlows Java client was then unable to finish starting on the Macintosh system.

The WorkFlows Java client has been changed so that it checks for an existing custom.jar file before trying to create the file on a Macintosh system. If the custom.jar file already exists, the WorkFlows Java client will not download the file from the server. If the custom.jar file does not exist, the WorkFlows Java client will download the file from the server, and continue with its startup.

Toolbar Management Corrected

Previously in Toolbar Management, users were able to move wizards and wizard groups by dragging and dropping the wizards and wizard groups from the delivered toolbars to the Customized or Local toolbars. This feature has not worked as designed, and so it was removed from the client interface.

Now, a user can move a wizard (or wizard group) by pointing to the wizard on the toolbar in the Local Toolbar Files (or Customized Toolbar Files) pane, right-clicking, then selecting Remove in the shortcut menu. The user then moves the cursor to where the wizard should be pasted, right-clicks, then selects Paste After, Paste Before, or Paste Under. Paste Under is for wizard groups only and can paste the group under another group node.
French Translations Updated

The following translation problems have been corrected in the WorkFlows Java client.
- The MARC Editor 260 field has been updated so that the Manufacturer label is translated into French.
- Several labels in the WorkFlows Java client have been updated so that missing apostrophes were added to the French translations.
- Several French labels were missing (not translated) in the following wizards/properties/menu item, so these were corrected.
  - Report Session Settings wizard
  - Cataloging wizard properties Helper tabs
  - Preferences/Desktop/Desktop Setup menu

Using Print To Application To Print Record Information, Field Label and Data Appearing On Separate Lines

Previously, when using Print to application to print record information, the field label and text appeared on separate lines rather than on one line.

This has been corrected.

Temporary Log Files No Longer Accumulate in the Home Directory When the WorkFlows Client is Used on the Linux Operating System

In libraries that run WorkFlows on the Linux operating system, temporary log files that were 0 (zero) bytes in length were accumulating in the /home/Sirsi directory. These temporary log files were named logXXXXXX or log2XXXXXX, where XXXX is a series of randomly-generated characters.

The WorkFlows client has been changed so the temporary log files do not accumulate in the /home/Sirsi directory when the client is used on the Linux operating system.

Java_starter Service May Not Run On Solaris 10 Systems

On systems running Solaris 10 and configured to use Collection Exchange, the java_starter service would not run. When this occurred, the following system message would display in the /Unicorn/Logs/error file.

Stacksize specified is too small

In the Collection Exchange wizards, the Item Search and Display wizard, and the Call Number and Item Maintenance wizard, users would see the following message.

Unable to process request

This has been corrected.
Empty Dialog Box When Connection to Server Lost

In some cases, when the WorkFlows Java client lost the connection to the server, an empty error dialog box would display. The error dialog displayed only a red X icon and the OK button.

This has been corrected. Now, when the WorkFlows Java client loses the connection to the server, the error dialog box displays an appropriate message (which depends on where the user is in the client at the time).

Customized Policy Lists Sometimes Displayed Wrong Policies or No Policy at All

Previously, if the user was logged in to a library that did not have access to a particular policy in a record (per a customized policy list), wizards that modify that record would do either of the following.

- Display with the field (policy) as blank
- Display with the first policy in the customized list for the library of the logged in user

Now, when a library does not have access to particular policies, all wizards (except cataloging wizards) will display asterisks in the fields, so that the user is notified of some configuration problem. Cataloging wizards will still display blank fields. The cataloging wizards will be corrected in a future release.

Example:

For the Education library, the User Profile list was customized to include FACULTY, LOST-CARD, NEWGUEST, PUBLIC-L, SIRSI and STAFF only. The patron with a user ID of 21897 had a profile of PUBLIC. When the library staff member logged in to the Education library and displayed the user record in the Modify User wizard, the user record displayed the User Profile as FACULTY. With this correction, the user record will display asterisks for the User Profile.

Reports Scheduler Starts Correctly With New Custom Jar File

Download Procedure

When the user logged into the WorkFlows Java client after the system administrator made changes to customize wizards and/or report screens, the user was unable to schedule any reports.

The WorkFlows Java client has been changed so that when the system administrator customizes wizards and/or report screens, the user is able to schedule reports after logging in.
Symbol Table Updated

The WorkFlows Java client Symbol Table is based on a file called chartrans on the client. This file converts special symbols and diacritics characters to and from the WorkFlows Java client. It was noted that some characters were missing from the Diacritics and Symbols table set. The chartrans file has been updated so that the Symbol Table has the following updates.

- Additional diacritic characters have been included, with corresponding label identifiers.
- Typographical errors in the tooltips displaying on the symbol table have been corrected.
- All characters with compound diacritics are now grouped at the end of the table.

Note: The updates to the Symbol Table are primarily of interest to UNICODE systems.

Note: As of October 2007, there is a bug in the Arial Unicode MS font that prevents it from displaying doubletilde and ligature characters correctly. SirsiDynix still recommends this font because it supports the largest number of Unicode characters; there is no one font that supports all Unicode characters. For more information regarding the Arial Unicode MS font read the Bugs section under http://en.wikipedia.org/wiki/Arial_Unicode_MS

Item Search and Display

Enhancements

Call Number Browse List Now Starts with the Call Number Just Before the Term Searched

To match the functionality used by other browse indexes, the call number browse has been enhanced to display the call number just before the term searched. The closest result to the term searched will be in the second position in the browse list. This is especially useful when the search term is not found, and the cataloger wants to see nearby search hits.

Item Search and Display Wizard Charge History Tab Includes User Information

Previously, the Charge History tab under the Call Number/Item tab when you display the item record in the Item Search and Display wizard included item information, specifically Title and Item ID. However, user information would have been more useful here.
Now, the Charge History tab for an item record includes User ID and User Name rather than Title and Item ID.

Menu Shortcuts Ignoring System Setting

Previously, if the Windows Display properties setting Hide underlined letters for keyboard navigation until I press the Alt key was enabled, multi-line menu and button shortcuts for the Workflows Java client ignored the system setting and always showed their mnemonic character, rather than waiting until the Alt key was pressed.

This has been corrected.

Browsing Now Faster on Oracle Systems

Faster browsing and less CPU utilization during browsing have been achieved on Oracle systems that use authority control by adding a binary heading index in addition to the linguistic index. This new index is built automatically by the Rebuild Heading Databases report, which SirsiDynix recommends that Oracle sites that use authority control run after the upgrade.

Corrections

Some Bills Not Displaying

In the Item Search and Display wizard, the properties to display the Bills tab and all types for display was ignoring some bills. This has been corrected.

Item Record Displays Correctly for Items With Reservations

If a title had one or more reservations for it, the item record could not be displayed in the Item Search and Display wizard regardless in which module the wizard was used. The wizard display would go into an infinite loop instead of displaying the record.

The Item Search and Display wizard has been changed so that the item record displays correctly for items that have reservation records associated with it.

Item Search and Display Wizard Publication Year Lookup

The Workflows Java client publication year lookup option did not allow the entry of characters other than 0123456789<> and space.

This has been corrected. The publication year lookup option is now free text, as it is in the Workflows C client.
Advanced Search Helper in Item Search and Display Wizard French WorkFlows Java Client Gave 0 Results

In the French language WorkFlows Java client, using the Advanced Search helper in the Item Search and Display wizard, a search returned 0 hits with a browse list. This was in conjunction with the use of the French language operators (ET, OU, PAS, OUX).

This has been corrected. Use of French or English operators in the Advanced Search helper will return a search result in the Item Search and Display wizard.

Checkouts Tab Missing the Claims Returned and Overdue Status Types

On the Call Number/Item tab, the claims returned and overdue statuses were not displaying in the Checkouts tab's status column. The missing statuses were not being checked, and as a result, were not displayed. Now, the Checkouts tab has been corrected to check the claims returned and overdue statuses of the items and display this information.

Helpers Menu Not Updating Correctly in Item Search and Display

The Helper menu, where other wizard capabilities are displayed, was not updating appropriately when using Cataloging wizards or any wizard that begins with the item search. This affected the Item Search and Display wizard as well as any wizard that began with the Item Search and Display option.

This has been corrected.

Internal Undefined Search Error when Searching by Author

When attempting to search by author, the following message displayed.

Internal Undefined Search Error

This has been corrected.

Error Message When Entering ALL in Search Library Field of Item Search and Display Wizard

In the WorkFlows C client, when using the Item Search and Display wizard, typing ALL in the library field populated the field with ALL LIBRARIES. The subsequent search returned the following message

Holdings MARC record library Error in field size

This has been corrected.
Message No Longer Displays When Searching for New or Updated Titles On Systems Running Multiple Instances of SirsiDynix Symphony

When a user performed a search for a title that was created or updated today on a system that was running multiple instances of SirsiDynix Symphony, the following message often displayed.

Heading keys need to reindexed

However, if the user searched for the titles by title control number, the titles would display.

The WorkFlows client has been corrected so the message no longer displays when users search for titles on a system running multiple instances of SirsiDynix Symphony.

Menu Shortcuts Ignoring System Setting

Previously, if the Windows Display properties setting Hide underlined letters for keyboard navigation until I press the Alt key was enabled, multi-line menu and button shortcuts for the WorkFlows Java client ignored the system setting and always showed their mnemonic character, rather than waiting until the Alt key was pressed.

This has been corrected.

Servers

Enhancements

Removed Zoneinfo Library Dependency from Unicorn

Previously, Unicorn used its own Zoneinfo library and associated data files to control time zone calculations, Daylight Savings time rules, and more. SirsiDynix originally implemented the library and data files because legacy UNIX systems did not supply reliable time functions. Systems are now more reliable for maintaining time zone information, and so the Zoneinfo library has been removed from SirsiDynix Symphony. SirsiDynix Symphony now uses the operating system's built-in libraries, and as a result, the site's Daylight Savings time rules will remain up-to-date by standard operating system updates. Sites will no longer require software patches from SirsiDynix when time rules change.

Note: With this change, sites will need to be certain to keep their operating systems up-to-date for any time zone or Daylight Savings time-related patches.
Academic Reserves

General

Enhancements

**Course Wizards Now Start with Search Windows and Information Tabs**

In previous versions of Unicorn, the WorkFlow Java client Academic Reserves course wizards used the Course Search helper to locate records. In the helper, users had no way of returning to the original search list after displaying a single entry. The only way to return to the search list was to re-type the search. Users considered this a loss of functionality from the WorkFlow C client Academic Reserves wizards.

Now, the course wizards are more consistent with other WorkFlow Java client wizards. They start with a Course Search window, and when a record is found, they display tabs with the course information. The Course Search helper is no longer used.

The following wizards have been modified.

- Create Course
- Display Course
- Duplicate Course
- Modify Course
- Remove Course

**Corrections**

**No Default Property Values Appeared in Course Wizards**

In WorkFlow Java client, the Course wizards contained no default property information.

This has been corrected.

**Column Headers Now Display**

Column headers are now available in course list displays in academic reserves wizards. Previously, they displayed only after a search was completed.
Unable to Create or Modify Reserve Records in French WorkFlows Java Client

The Create Reserve wizard in the French-language WorkFlows Java client prevented creation and modification of reserve records and returned the following message.

Le statut de la notice de contrôle de la réserve n'est pas défini

This has been corrected.

Alternate Circulation Rule Not Saved in Reserve Records

When creating or modifying a reserve record, the alternate circulation rule value was not being changed successfully. Regardless of the change made, the field would display as empty. This occurred when the reserve desk policy was not configured to allow alternate circulation rule or the reserve desk policy was configured to allow circulation rule but did not automatically apply it.

This has been corrected. The alternate circulation rule will no longer be displayed as an option if the reserve desk policy is not configured to allow alternate circulation rule or it is configured to allow alternate circulation rule but does not automatically apply it.

User Without a Reservation Prevented from Charging an Item With Reservations for Consecutive Fixed Time Slots Starting the Same Day

If two reservations were placed on the same item for consecutive fixed time slots starting on the same day, the item could be checked out within the pickup time to a user who did not have a reservation on the item.

Now, if a user who does not have a reservation tries to check out an item that has reservations for consecutive fixed time slots starting on the same day, and the checkout time is within the pickup time for a reservation, the checkout is not permitted.
Items Are Checked Out to Multiple Users with Reservations for Copies of the Same Title for the Same Fixed Time Slot

Previously, if a library had multiple copies of a title on reserve, and the same number of users made reservations for the same day and the same fixed time slot, the software incorrectly prevented any of the users with reservations from checking out a copy at the start of the fixed time slot. The software incorrectly subtracted the number of reservations from the number of available copies when a user tried to check out a copy for which they had made a reservation, and determined that no copies were available. The checkout was denied with the following message.

**Item is booked for another user**

**Example**

The Salem Library has two copies of Introduction to Java Programming on reserve. The library accepts reservations for the reserved copies, and uses fixed time slots for reservations. Mary Smith has a reservation for the title on 09/25/2006 for the 09:00-12:00 time slot. Bob Jones placed a reservation for the same title for the same day and the same time slot. If either Mary or Bob tried to check out a copy of the title for her or his reservation, WorkFlows would incorrectly block the checkout and mistakenly report that the item is already booked for another user.

The software has been changed so that SirsiDynix Symphony correctly determines the number of copies that are available when the same number of users as reserved copies makes reservations for the same day and same fixed time slot. The users can correctly check out a copy for which they have reservations at the start of a time slot.

Create Reserve Wizard

Corrections

**Create Reserve Wizard Required Entry of Alternate Circulation Rule**

Previously in the WorkFlows Java client, the Create Reserve wizard required the entry of an alternate circulation rule, regardless of how the Allow Alternate Rules flag in the Reserve Desk policy was set.

This has been corrected.

Display Reserve Wizard

Corrections

**Item Status Display Incomplete for Reserve Items in Browse List**

Previously in the Display Reserve wizard, the Due Date did not display for reserve items in the Browse list when the Reserve Search helper was used.

This has been corrected.
Make a Reservation Wizard

Corrections

Incorrect Message No Longer Displays When Creating Consecutive Reservations

If the Create Recurrent Reservation button was selected in the Make a Reservation wizard to create a consecutive reservation for a user, the following message would always display.

The end time exceeds loan period

The Make a Reservation wizard has been corrected so the message no longer displays, and to make consecutive reservations for the user if the user is permitted to make consecutive reservations.
Acquisitions

General

Enhancements

Library Authorization Field Added to Acquisitions Fund Wizards

Various Acquisitions fund wizards have been enhanced with the addition of the Library Authorization field. When the Library Authorization field contains a policy value, the fund cycle can be used to purchase materials only for the libraries specified in the selected Fund Library Authorization policy. If the Library Authorization field is blank, the fund cycle is authorized to purchase materials for all libraries.

**Note:** The Library Authorization field displays only in multilibrary systems.

The Library Authorization field has been added to the following wizards in the wizard’s Fund Cycle Information tab, and allows the user to select a specific Fund Library Authorization policy.

- Add Fund
- Add Fund Cycle
- Duplicate Fund
- Modify Fund

The Library Authorization field has been added to the following wizards as a display field on the wizard’s Fund Cycle Information tab.

- Display Fund (Specific Cycle)
- Modify Fund Budget

The Library Authorization field has been added to the Acquisitions Session Settings wizard. The selected Fund Library Authorization policy is set as a default for the Library Authorization field in the following wizards.

- Add Fund
- Add Fund Cycle
Verification of Fund Library Authorization Added to Acquisitions Wizards, Helpers, and Tools

In multilibrary systems that use the Fund Library Authorization policy, various wizards, helpers, and tools that add and modify orderlines have been enhanced to verify each funding/holding distribution cluster to determine whether a fund is authorized for a holding code library. Each fund cycle's library authorization is compared to the holding code library in the associated holding distribution(s). The library of each holding code must be present in the fund cycle's library authorization. When the holding code library is not authorized in the associated fund cycle, the following message displays.

This fund cycle does not have library authorization for the library of the distribution holding code.

The message lists the fund ID and the holding code name that did not pass validation. When the message window is closed, the insertion point will be placed in the first fund ID field that did not pass validation. An invalid fund cycle/holding code pair will not be saved.

New Invoice Tax Feature

Some libraries in the U.S. (such as the State of California) and Canada and other countries have value added taxes (VAT), and they need the ability to report tax amounts separate from purchase prices on invoices. Libraries may also need the ability to report how much taxes they pay, since some of these libraries may receive financial credits or refunds.

SirsiDynix Symphony's new Invoice Tax feature supports these needs by reporting from invoices on purchase totals, tax subtotals, tax totals, and invoice totals. As invoices are created or modified, users can specify how invoice taxes are applied, using SirsiDynix Symphony's tax structure policies, and which funds are used to pay these taxes.

New Tax Policies

There are two policies that control invoice taxes. These policies display only when the Invoice Tax feature is configured.

- **Tax Policy** – Allows the user to define the attributes of the individual taxes applied to invoices.
- **Tax Structure Policy** – Allows the user to combine multiple taxes on an invoice. A tax structure can include up to three individual taxes, Tax 1, Tax 2, and 3 (typically City, County, and State in the U.S.). Names and values for these taxes are defined in the Tax policies.

For more information about these new policies, see the Acquisition Configuration section of this document.
Invoice Tax Work Flows

There are two methods of applying invoice taxes.

- Link tax amounts to a default tax fund – Similar to linking an invoice line to a fund, this method is used when all taxes are charged to an ATAX fund.

- Link tax amounts to order funds – Similar to adjusting invoice lines, this method charges taxes to the fund invoiced on the order. Additionally, the user can create invoices with taxed and non-taxed invoice lines. For example, books are not taxed in California, but other materials are taxed. On the same invoice, the user can create invoice lines for taxed materials and apply tax structures to these lines, and also create invoice lines for books and mark these lines tax exempt.

Additionally, the user can create invoices with taxed and non-taxed invoice lines. For example, books are not taxed in California, but other materials are taxed. On the same invoice, the user can create invoice lines for taxed materials and apply tax structures to these lines, and also create invoice lines for books and mark these lines tax exempt.

Most libraries will pay taxes to the vendor, but some libraries prefer to allow the tax to accrue, then pay the tax directly to the government agency that levies the tax. When adding, modifying, and paying invoices, the user can select a property default to allow paying taxes to the vendor, or to allow the taxes to accrue for later payment to the government agency.

Applying Invoice Taxes

When adding or modifying an invoice, the user can select the Tax Structure policy that will be applied to the invoice.

- In the Add Invoice wizard Default properties, the user can select the default Tax Structure policy. When adding an invoice, in the Enter Invoice ID and Vendor ID window, the user can select a tax structure for the new invoice, or accept the default tax structure selected in wizard properties.

- In the Receive Orders wizard, the user can use the Add Invoice for Order helper to add an invoice on-the-fly. In the Enter Invoice ID and Vendor ID helper window, the user can select the tax structure to be used for the invoice, or accept the default tax structure selected in the Add Invoice for Order helper properties.

- In the Modify Invoice wizard, the user can change the tax structure applied to the invoice by selecting a different tax structure on the Invoice tab.

**Note:** If the tax structure is changed while using the Add Invoice wizard, the Add Invoice for Order helper, or the Modify Invoice wizard, the user is prompted to check each invoice tax line to see if tax exemptions for the new tax structure should be modified. By default, the tax exempt check boxes are selected or cleared according to the tax exemptions set in the newly-selected tax structure.
When adding an invoice line or modifying invoice lines, the user can do the following.

- Indicate whether the invoice line is exempt from Tax 1, Tax 2, and/or Tax 3 by selecting the appropriate check box(es). It is possible for an invoice line to be exempt from some taxes, but not others. For example, the invoice line may be exempt from state tax (Tax 3) but not local or city tax (Tax 1).

**Note:** The Tax Exempt wizard property in the Add Invoice wizard and the Add Invoice Lines wizard can be used to create tax exempt tax invoice lines by default when tax lines are created manually. This wizard property does not affect tax exemption settings for tax invoice lines created automatically.

- Create a Tax/Fund linked invoice line by selecting this option from the Link drop-down list. The Tax/Fund link designates the fund from which the invoice line tax should be paid. When a Tax/Fund link is applied, the user indicates which Tax is used for the invoice line. The Tax selections are limited based on the tax structure that was selected for the invoice.

- Create a Tax/Adjust linked invoice line by selecting this option from the Link drop-down list. The Tax/Adjust link specifies that taxes are to be paid using the funds designated in the orderline being taxed. When a Tax/Adjust link is applied, the user indicates which Tax is used for the invoice line. The Tax selections are limited based on the tax structure that was selected for the invoice.

### Calculating Invoice Taxes Automatically

The Acquisitions Sessions Settings wizard has been enhanced to support the Invoice Tax feature. If the new Calculate Invoice Taxes Automatically property is selected in Session Settings, the Tax Calculated flag on the created invoice is set to Y. The taxes will be calculated automatically as invoice lines are created or modified. The Calculate Invoice Taxes Automatically option is cleared by default. When this option is selected, the following fields are available, and these values are required.

- **Tax Calculation Method** – Allows the user to select a tax calculation method. The Link Tax Amounts to Default Tax Fund will create Tax/Fund invoice lines for taxes (tax amounts are directly linked to a fund). The Link Tax Amounts to Order Funds or Default Tax Fund will create Tax/Adjust invoice lines for taxes (similar to adjust invoice line, tax amounts are linked to the funds used in the orders entered on the invoice). The default is Link Tax Amounts to Default Tax Fund.

- **Default Tax Fund** – Allows the user to select a default fund to use for tax amounts. When Calculate Invoice Taxes Automatically is selected, this default must be selected.

If the Order in Foreign Currencies check box is selected in the Acquisitions Sessions Settings wizard, each automatically-calculated invoice tax line includes the Vendor Calculated Tax field to show the amount of tax calculated in the vendor's native currency, and the Native Calculated Tax field to show the amount of tax calculated in the library's native currency. The Amount field can be modified if the Allow Edits to Amount Field in System Calculated Tax Invoice Lines property is selected in the Session Settings wizard, allowing for correcting rounding discrepancies.
**Caution:** If the Tax Calculated flag is set to Y on the invoice, and the Amount field on an invoice tax line is changed, taxes will no longer be calculated automatically for the invoice. Once a previously-calculated tax amount is changed manually, the user must manually maintain the invoice tax line information for the invoice.

**Note:** If the tax fund used for automatically created Tax/Fund linked lines will vary from invoice to invoice, the Display Property Page wizard property for the Add Invoice wizard and the Add Invoice Lines wizard should be set to Wizard Startup. This wizard property setting ensures the user will have the opportunity to review the current default tax fund before creating an invoice or invoice lines with these wizards.

**Note:** If the Calculate Invoice Taxes Automatically check box is selected in Session Settings, and the specified default tax fund does not exist or is overencumbered, the text “(Error calculating tax lines)” displays with the message text stating that the fund does not exist or the fund exceeded its expenditure limit when the user tries to add an invoice line. Invoice lines for taxes will not be automatically created, and the user must correct the default tax fund selection before the invoice can be created and/or invoice lines can be added.

### Automatically adding invoice lines for taxes paid from a fund

The Tax/Fund tax calculation method is used for taxes that are paid directly from a specified fund. Amounts linked to Tax/Fund are designated as tax amounts and accumulate in invoice tax totals.

If the Tax Calculated flag is set to Y on the invoice, and the default tax calculation method in Session Settings is set to Link Tax Amounts to Default Tax Fund, one or more tax invoice lines are added automatically as the first invoice line is created. The fund that is specified in the Default Tax Fund field in Sessions Settings is used for the tax invoice lines.

### Automatically adding invoice lines for taxes paid from funds designated in the orderline

The Tax/Adjust tax calculation method is used for taxes that are paid using the funds designated in the orderline being taxed. Amounts linked to Tax/Adjust are designated as tax amounts and accumulate in invoice tax totals.

If the Tax Calculated flag is set to Y on the invoice, and the default tax calculation method is set to Link Tax Amounts to Order Funds or Default Tax Fund, one or more tax invoice lines are added automatically as each invoice line is created. How the tax invoice lines are added depend on the invoice link type selected when an invoice line is created.

- If the invoice line is linked to ORDER or ADJUST, one or more tax lines linked to Tax/Adjust are added automatically. One tax line is added for every tax specified in the tax structure for the invoice that is not exempt. Each tax line is linked to the same orderline as the invoice line that is created.

- If the invoice line is linked to FUND, Copy Prorated, Line Prorated, or Price Prorated, one or more tax lines linked to Tax/Fund are added automatically. One tax line is added for every tax specified in the tax structure for the invoice that is not exempt. Each tax line is linked to the tax fund that is specified in the Default Tax Fund field in Session Settings.
How SirsiDynix Symphony Updates Tax Information

Automatically calculated taxes are recalculated in the following instances.

- The user adds an invoice line.
- The user modifies an invoice or invoice line.
- The user changes an invoice line amount.
- The user changes an exemption flag.
- The user pays the invoice or invoice line.
- The user reverses payment on the invoice or invoice line.
- The user removes an invoice line.
- The user changes the tax structure on an invoice.

**Note:** When the tax structure is changed on an invoice, the following happens.

- Any existing TAXFUND or TAXADJ UST lines are removed from the invoice.
- Automatically generated TAXFUND or TAXADJ UST lines are recreated, according to selections in Session Settings.
- Any tax exemptions used by the previous tax structure but not used in the new one are set to tax exempt. For example, if the original tax structure used Tax 1 and Tax 2, but the new tax structure uses Tax 1 only, Tax 2 is set to exempt in all invoice lines.
- A message displays to prompt the user to check each invoice tax line to see if tax exemptions for the new tax structure should be modified. By default, the tax exempt check boxes are selected or cleared according to the tax exemptions set in the newly-selected tax structure.

Changes to Invoice Reports

The invoice reports display the new tax fields on the Invoice Selection, Invoice Line Selection, and Print Invoice tabs. Users can make selections by vendor tax totals, native tax totals, tax amounts paid, tax structure policy, and more.

Additionally, the new List Invoices for Vendor report lists invoices by vendor and invoice totals for each vendor. Invoice tax information is included in this report.

**Note:** For more information about this new report, see the Acquisition Reports section of this document.

When multiple taxes are applied to one invoice, invoice reports will determine both the total tax and separated tax amounts, for example, provincial sales tax amounts separate from the value added tax amount. SirsiDynix Symphony reports on tax amounts on invoice totals or on purchase price or tax amounts by tax type. The user can specify whether or not the invoice reports will print the tax exemption status for each tax applied to the invoice.
In the List Invoices (Invoicelist) report and the List Invoices, Lines (Invlinelist) report, the Print Invoice tab contains options for printing subtotals, tax totals, and a breakdown of tax totals. The Subtotals and Tax Totals check box and the Breakdown Tax Totals check box are available only when the Invoice Tax feature is used.

**Created in Fiscal Cycle Field Added to Invoice Records**

A new Created in Fiscal Cycle field has been added to invoice records. This field is required, and will default from the fiscal cycle set in Session Settings. Users can now assign an invoice to a specific fiscal cycle by selecting a cycle when creating an invoice, or modifying an existing invoice. This field appears on the invoice tabs and invoice lists in acquisitions wizards, as well as in the invoice reports, such as List Invoices and List Invoices/Lines. When searching invoices in the WorkFLoWs Java client, it is now possible to qualify the search and browse by invoice ID and fiscal cycle or vendor ID and fiscal cycle.

**Note:** Typing a value in the Created in Fiscal Cycle field does not limit the ability to include invoices lines from multiple fiscal cycles. The Created in Fiscal Cycle field is used as a searchable indication of the time period when the invoice was added.

**New Tax Exempt Property Added to Add Invoice Wizard and Add Invoice Line Wizard**

The Add Invoice wizard and the Add Invoice Lines wizard have been enhanced with the Tax Exempt wizard property. This new property displays on the Defaults tab of the wizard properties page only if SirsiDynix Symphony is configured to use the Invoice Tax feature.

If the Tax Exempt wizard property is selected, the tax exemption check boxes are selected by default when tax lines are added manually. By default, the wizard property is not selected.

**Note:** This wizard property does not affect the tax exemption settings for tax invoice lines that are created automatically.

**New Default Tax Fund Property Added to Add Invoice Wizard and Add Invoice Line Wizard**

The Add Invoice wizard and the Add Invoice Lines wizard have been enhanced with the Default Tax Fund wizard property. This new property displays on the Defaults tab of the wizard properties page only if SirsiDynix Symphony is configured to use the Invoice Tax feature.

The Default Tax Fund specifies a default fund to use for tax amounts on an invoice or invoice line.

**Note:** Making changes to the default tax fund setting in the Add Invoice wizard properties and the Add Invoice Lines wizard properties changes the default tax fund setting in the Session Settings wizard.
New Tax Fields Added to the Display All Invoice Lines Helper Display

The Display All Invoice Lines helper display has been enhanced to show tax information in libraries that use the Invoice Tax feature. For an invoice, the helper shows tax information such as the tax structure, whether the tax was calculated automatically, the subtotals for each tax applied to the invoice, and the amount of tax paid on the invoice. For the Tax/Adjust and Tax/Fund lines in the invoice, the helper includes tax information such as the Tax policy applied to the invoice line, the amount of calculated tax, and whether the invoice line is tax exempt.

New Audit Fields for Invoices and Invoice Lines

Audit fields maintained by the SirsiDynix Symphony server have been added to invoices and invoice lines. Now, users can track what user access created or modified an invoice or invoice line, and when the invoice/invoice line was created or last modified. Additionally, users can make selections for these audit fields in invoice reports, limiting by the user access that created/modified invoices and invoice lines and the date created/last modified. And, it is possible to print this audit trail information to report output.

The following new audit fields were added to invoice records. These fields appear on the Invoice tab in invoice wizards.

- Created By — This field contains the user access of the user who created or duplicated the invoice record. This field is automatically populated when the invoice record is created.
- Last Modified By — The user access of the user who last modified the invoice record (or any linked invoice line) displays in this field. Changes to an invoice line that can affect the invoice's Last Modified By value include adding or deleting an invoice line, editing a line, or paying or reversing payment of a line.

The following new audit fields were added to invoice line records. These fields appear when displaying an invoice line.

- Created By — This field contains the user access of the user who created or duplicated the invoice line record. This field is automatically populated when the invoice record is created.
- Date Created — This field contains the date the invoice record was created. This field is automatically populated when an invoice line record is created.
- Date Last Modified — This field contains the date the invoice line record was last modified. This information is automatically updated by the system. NEVER is the value for records not modified since creation. Changes to an invoice line that can affect the invoice line's Date Last Modified include editing, paying, or reversing payment.
- Last Modified By — The user access of the user who last modified the invoice line record displays in this field. Changes to an invoice line that can affect the invoice line's Last Modified By value include editing, paying, or reversing payment.
The List Invoices report displays the new audit fields on the Invoice Selection tab. The List Invoices, Lines report displays the new audit fields on the Invoice Selection and Invoice Lines Selection tabs.

**Create Invoice Lines for Order Default Properties Moved to Session Settings**

In the WorkFlows Java client, the Create Invoice Lines for Orders default properties had to be set in individual Acquisitions wizards. In addition, the property settings could be difficult to find in the individual wizards.

These properties are now set globally in the Acquisitions Session Settings.

**Options for Create Invoice Lines for Order Default Properties**

In the WorkFlows Java client, the Create Invoice Lines for Order Default properties now have the following options

- Automatically invoice all orderlines
- Automatically invoice orderlines that are received-in-full
- Allow selection of orderlines for invoicing

The default is set to Automatically invoice orderlines that are received-in-full. Allow selection of orderlines for invoicing is a new option, which results in displaying the order as a tree with invoicing options in the viewer pane.

**Invoice Control Number Field Added to Invoice Records**

A new Control Number field has been added to invoice records. This field provides a unique key number for invoices for output to accounting software programs. This number will appear on invoice tabs and invoice lists in acquisitions wizards, as well as in the invoice reports, such as List Invoices and List Invoices/Lines. The Control Number field contains the internal key number for an invoice. SirsiDynix Symphony automatically assigns this number, and it cannot be modified. The invoice control number is logged in history logs when an invoice is created, and it will remain consistent, even if an invoice is recreated through a restore of transactions. It is also possible to search and browse invoices by the invoice control number.

**Ability to Search Invoices by Invoice Control Number**

It is now possible to search invoices by Control Number field values.

To search invoices by invoice control numbers, do the following.

1) In the Invoice Search step of invoice wizards, such as Display Invoice, select the Invoice Control number index from the drop-down list.

2) Type a control number value in the Search For box.

3) Select a Library value from the drop-down list (the Library value is required)

4) Click Search.
It is also possible to search all invoice control numbers for a library by clearing the Search For box, selecting the library, and clicking Search.

**Fiscal Cycle Field Added to Invoice Records**

In the WorkFlows C client, a new Fiscal Cycle field has been added to invoice records. This field is required, and will default from the fiscal cycle set in Session Settings. Users can now assign an invoice to a specific fiscal cycle by selecting a cycle when creating an invoice, or modifying an existing invoice. This field appears on the invoice tabs and invoice lists in acquisitions wizards, as well as in the invoice reports, such as List Invoices and List Invoices/Lines.

*Notes:*

- Typing a value in the Fiscal Cycle field does not limit the ability to include invoices lines from multiple fiscal cycles.
- Other Fiscal Cycle field features, such as searching invoices by fiscal cycle, are found in the WorkFlows Java client only.

**New Feature for Locking Invoices and Marking Invoices Ready for Processing**

Sites that output invoices electronically to a finance office needed a mechanism to indicate when an invoice is ready to be sent. A new Date Ready field has been added to invoices to support this process.

Additionally, some sites need a locking mechanism for invoices to prevent changing invoices that are considered finalized. A new Date Locked field has been added to invoices to support “locking” and “unlocking” invoices, thus preventing any modifications to invoices before sending them to a finance office.

The following two new fields have been added to invoice records to control invoice processing.

- **Date Ready** — This field contains the date the invoice is ready to send electronically to a finance or accounting office. When a new invoice is created, this date is set to NEVER.
- **Date Locked** — This field contains a date when an invoice is locked. Locked invoices are finalized, and no more changes can be made to the invoices. The only fields that can be modified when an invoice is locked are the Invoice Extended Information fields. When a new invoice is created, this date is set to NEVER.
Setting a Date Ready

Using the Add Invoice or Modify Invoice wizards, users can modify the Date Ready field when an invoice is ready to send to a finance office. Users can then run the List Invoices report to identify invoices ready to send.

In the Pay Invoice wizard, a new behavior property, Set Date Ready to TODAY When All Invoice Lines Are Paid, was added. If selected, when all invoice lines are paid using this wizard, the date ready will automatically be set to today's date, indicating that the invoice is ready to be sent electronically to an accounting or finance office.

Locking Invoices

When a date locked is set, the following occurs.

- No invoice line can be unpaid.
- No additional invoice lines can be added.
- No changes can be made to the invoice or to invoice lines, with the exceptions that invoice extended information can be edited and invoice lines can be paid.
- No invoice line can be deleted.
- The invoice cannot be removed.

There are several methods for locking invoices.

- Use the Lock Invoice helper in the Add Invoice, Add Invoice Lines, or Modify Invoice wizards. Wizard properties control access to this helper.
- When the paying an invoice, select the Set Date Locked to TODAY When All Invoice Lines Are Paid behavior property, and the invoice will be locked automatically when all invoice lines are paid.
- The Lock Invoices report locks invoices in batch, allowing acquisitions staff to work on invoices during the day and locking these invoices overnight.

Unlocking Invoices

Once a date locked is set, the only way to make changes to an invoice is to unlock it. There are several methods for unlocking invoices.

- Use the Unlock Invoice wizard to unlock invoices. SirsiDynix Symphony administrators can control who has access to this wizard, thereby controlling who can unlock invoices.
- In the Reverse Payment of Invoice wizard, the user can change the date locked to NEVER automatically if the Automatically Change Specific Date Locked to NEVER behavior is selected in wizard properties. The invoice can be unlocked and payment can be reversed in one step.
Changes to Invoice Wizards for Invoice Locking

The following changes have been made to the invoice wizards to support the invoice locking feature.

- **Add Invoice Wizard** – The Lock Invoice helper can be used to lock invoices. Access to this helper is controlled by wizard properties. “This invoice is locked” alert will display. If the date locked is set, the invoice fields cannot be modified except for Invoice Extended Information. The Create Invoice Lines for Order helper is unavailable, and the Add Invoice Line and Modify Invoice Line tools are unavailable. The Display InvoiceLine, Display Orderline, and other tools are available.

- **Modify Invoice Wizard** – The Lock Invoice helper can be used to lock invoices. Access to this helper is controlled by wizard properties. “This invoice is locked” alert will display. If the date locked is set, the invoice fields cannot be modified except for Invoice Extended Information. The Modify InvoiceLine, Pay InvoiceLine, and Reverse Payment of InvoiceLine tools are unavailable. The Display InvoiceLine, Display Orderline, and other tools are available.

- **Add Invoice Lines Wizard** – The Lock Invoice helper can be used to lock invoices. Access to this helper is controlled by wizard properties. “This invoice is locked” alert will display. If the date locked is set, the invoice fields cannot be modified except for Invoice Extended Information. The Create Invoice Lines for Order helper is unavailable, and the Add InvoiceLine and Modify InvoiceLine tools are unavailable. The Display InvoiceLine, Display Orderline, and other tools are available.

- **Pay Invoice Wizard** – A new behavior property was added, Set Date Locked to TODAY When All Invoice Lines Are Paid. If selected, when all invoice lines are paid using this wizard, the date locked will automatically be set to today’s date. The user cannot make changes to the invoice once a date locked is set. If cleared, the Pay Invoice wizard is unaffected by having the invoice locked.

- **Reverse Payment of Invoice Wizard** – A new behavior property was added, Automatically Change Specific Date Locked to NEVER. If selected, when a reverse payment is made on an invoice line, the invoice date locked will be automatically set to NEVER. It will be possible to make changes to the invoice once the date locked is set to NEVER. If this behavior is cleared, and an invoice is locked, it is not possible to reverse payment. If the date locked is set, the Reserve Payment InvoiceLine tool is unavailable.

- **Delete Invoice Wizard** – If the date locked is set, WorkFlows disables the Delete InvoiceLine tool and the Delete Selected Lines button to prevent the removal of any lines from the locked invoice or the removal of the entire invoice.

- **Unlock Invoice Wizard** — Use this wizard to unlock invoices.

**Note:** The Lock Invoice helper does not allow invoices with underlinked lines to be locked. The following message displays if the user tries to lock an invoice with one or more underlinked invoice lines. The message also lists the lines that are underlinked. Correct the listed invoice lines before attempting to lock the invoice again.
This invoice cannot be locked because one or more lines is underlinked. Please link this line to an order/fund.

Note: It is not possible to set either date ready or date locked for an invoice that needs proration.

New Report for Locking Invoices

A new Lock Invoices report was created for “locking” invoices in batch, allowing acquisitions staff to work on invoices during the day and locking these invoices overnight. For more information about the Lock Invoices report, see the release note in the Acquisition Group Reports section of this document.

Options Added to Validate Invoice Lines for Amount and Quantity Errors

The Session Settings wizard has been enhanced with options to validate invoice lines for errors when the difference between the amount invoiced for an item and the discounted price of the item exceeds a threshold, when total quantity invoiced is greater than the quantity received, or both. When an invoice line is created or modified, warnings can display when the invoice line does not pass validation for amounts or quantities.

In addition, various Acquisition wizards can be configured to display a warning message window during an invoice search when a selected invoice has invoice lines that do not pass validation for amounts, quantities, or both.

Validating Amounts in Invoice Lines

To validate invoice lines based on a threshold for the difference between the amount invoiced for an item and the discounted price of the item (from the orderline), use the Warn When the Difference Between Invoice Amount and Order Amount Exceeds % and $ option in the Session Settings wizard. If this option is configured, and a threshold is specified, warnings can display when invoice lines are validated in the following circumstances.

- An invoice line linked to an order is created using the Add Invoice wizard or the Add Invoice Lines wizard.
- An invoice line linked to an order is created using one of the helper or tools that automates the creation of invoice lines from orderlines.
- An invoice line linked to an order is modified, and the Amount field is changed.
- An invoice line linked to an order is created using the Book X12 Invoices (BookinvoiceX12) report.

To validate invoice lines based on amounts, set a percentage threshold, monetary amount threshold, or both a percentage and a monetary amount threshold.

- If just a percentage threshold is specified, a warning message displays only when the difference between the amount invoiced for an item and the discounted price of the item exceeds the specified percentage.
• If just a monetary amount threshold is specified, a warning message displays only when the difference between the amount invoiced for an item and the discounted price of the item exceeds the specified amount.

• If both a percentage threshold and a monetary amount threshold are specified, a warning message displays only when the difference between the amount invoiced for an item and the discounted price of the item exceeds the specified percentage and the specified amount.

The following message displays if the amount validation is configured, and an invoice line does not pass the validation.

**WARNING:** The difference between order price and invoice price exceeds the threshold.

For each invoice line that fails the amount validation, the warning message includes the order ID, order line number, fiscal cycle, library, native discounted unit price, invoice ID, invoice line number, library, vendor ID, and native unit price on the invoice line.

**Note:** If the Warn When the Difference Between Invoice Amount and Order Amount Exceeds % and $ check box is selected, but no percentage threshold, monetary amount threshold, or both are specified, the setting is ignored, and invoice lines are not checked for percentage or amount difference errors.

**Note:** Invoice lines that use the ADJUST link type are not validated for amount differences.

### Validating Quantities in Invoice Lines

To validate invoice lines when the total quantity invoiced is greater than the quantity received on the order line, use the Warn When the Invoice Quantity Exceeds the Received Quantity option in the Session Settings wizard. If this option is configured, warnings can display when invoice lines are validated in the following circumstances.

• An invoice line linked to an order is created using the Add Invoice wizard or the Add Invoice Lines wizard.

• An invoice line linked to an order is created using one of the helper or tools that automates the creation of invoice lines from order lines.

• An invoice line linked to an order is modified, and the Quantity field is changed.

• An invoice line linked to an order is created using the Book X12 Invoices report.

The following message displays if the quantity validation is configured, and an invoice line does not pass the validation.

**WARNING:** The quantity invoiced is greater than the quantity received.

For each invoice line that fails the quantity validation, the warning message includes the order ID, order line number, fiscal cycle, library, quantity ordered, quantity received, invoice ID, invoice line number, library, vendor ID, and quantity invoiced on the invoice line.
Optional Display of Amount and Quantity Warnings During an Invoice Search

Various Acquisitions wizards have been enhanced with properties to display amount and/or quantity warnings when the Select Search window is used in the wizards to search for invoices. These properties are used to select the Amount option and the Quantity option in the Select Search window. These options determine whether warning messages will display in a separate window if an invoice selected during an invoice search has invoice lines that fail validations for amount differences and quantity differences.

The following Warning options have been added to the Select Search window, and display only when the Invoice Control Number or Invoice ID is selected as the search index.

- **Amount** displays warning messages when the difference between the amount invoiced for an item and the discounted price of the item (from the orderline of the displayed invoice) exceeds the threshold set in the Session Settings wizard.

  **Note**: Invoice lines that use the ADJUST link type are not validated for amount differences.

- **Quantity** displays warning messages when the total quantity invoiced is greater than the quantity received on the orderline of the displayed invoice.

By default, the Amount and Quantity check boxes are selected according to how the following wizard properties are selected in the wizard in which the Select Search window is used.

- **Display Amount Warnings** determines whether the Amount option is selected by default in the Select Search window.

- **Display Quantity Warnings** determines whether the Quantity option is selected by default in the Select Search window.

**Example**

*If the Display Amount Warnings option is selected in the Display Invoice wizard properties, the Amount check box under Warnings will be selected in the Select Search window when the user starts the Display Invoice wizard. When the Select Search step displays, the user can accept the default settings of the Amount and Quantity check boxes, or change the settings.*

The following wizards have been enhanced with the Display Amount Warnings and Display Quantity Warnings properties. For each wizard, the Warnings options display in the Select Search window when Invoice Control Number or Invoice ID is selected as the search index.

- Add Invoice Lines wizard
- Delete Invoice wizard
- Display Invoice wizard
- Modify Invoice wizard
• Pay Invoice wizard
• Reverse Payment of Invoice wizard
• Unlock Invoice wizard

Certain settings in the Session Settings wizard must be configured for the warning messages to display. Even if the wizard properties and the Select Search options are selected, the warning messages do not display unless the following settings are configured in the Session Settings wizard.

• The **Warn When the Difference Between Invoice Amount and Order Amount Exceeds % and $** check box must be selected, and a percentage and/or monetary amount threshold must be specified in the Session Settings wizard to see amount warning messages.

• The **Warn When the Invoice Quantity Exceeds the Received Quantity** check box must be selected in the Session Settings wizard to see quantity warning messages.

When an invoice search is conducted using a wizard in which the Display Amount Warnings and Display Quantity Warnings properties are selected, warnings display in a separate window for invoice lines that do not pass amount or quantity validation. The warning message window may contain a list of invoice lines with amount errors, a list of invoice lines with quantity errors, or both, depending on the wizard property settings and the settings of the Warnings options in the Select Search window of the wizard.

Depending on the wizard in which the invoice was selected, the following tools may display above the lists of invalid invoice lines. These tools may be used to view and edit invoice lines and order lines.

• Display Invoiceline Tool
• Modify Invoiceline Tool
• Display Orderline Tool
• Modify Orderline Tool

**Users Can Set Invoice Line Defaults for Quantity when Invoice Line Link Is FUND**

Users have requested the option to edit the fund Quantity field for fund-linked invoice lines. In some instances, it is necessary to assign a default fund quantity value, such as when working with approval orders.

The Quantity field for fund-linked invoice lines has been added in the Add Invoice wizard's default properties and in the Add Invlne window as requested. The default value for fund quantity will be populated from properties. If the property value is missing, the default for fund quantity will be set to 0 (zero). Users can also modify the fund quantity as needed when editing fund-linked invoice lines.
Pay Invoiceline Tool Now Allows Editing the Exchange Rate Value

When using the Pay Invoiceline tool, if the line was invoiced in a foreign currency, a user can now modify the exchange rate value. In the Exchange text box, the user can type a fixed exchange rate or select TABLE from the drop-down list.

Enhancements to Invoice Wizards Invalidate Unicorn InfoVIEW Client Invoice Commands

In SirsiDynix Symphony 3.2, many new features have been added to the invoice wizards, such as invoice tax functionality, invoice locking and unlocking, and the new Created in Cycle and Date Ready fields. Because the Unicorn InfoVIEW client is no longer supported by SirsiDynix, the invoice commands used by this client have not been upgraded with these new features. Now, the invoice commands in the InfoVIEW client no longer work at all. The invoice commands, however, are still functional in the WorkFlows C client.

Account Number Index Added to Browse Fund Gadget

The Browse Fund gadget used in acquisitions wizards now includes an Account Number index for searching funds. Using this gadget, the user can select the Account Number index, select a Library and/or Fiscal Cycle, type an account number (or part of an account number), and then find the fund(s) that matches the search criteria.

Double-Click Options Added for Fund Wizards

Double-click options have been implemented for the following Fund wizards:

- **Display Fund (All Cycles)** - Double clicking on a row in the hit list behaves as though Display this fund was selected.
- **Display Fund (Specific Cycle)** - Double clicking on a row in the hit list behaves as though Display this fund was selected.
  - On the invoices tab, double clicking on an invoice in the table behaves as though the display invoiceline tool was selected.
  - On the orders tab, double clicking on an orderline in the table behaves as though the display orderline tool was selected.
- **Duplicate Fund** - Double clicking on a row in the hit list behaves as though Display this fund was selected.
- **Modify Fund** - Double clicking on a row in the hit list behaves as though Modify this Fund was selected.
- **Add Fund Cycle** - Double clicking on a row in the hit list behaves as though Add Fund Cycle to this Fund was selected.
Delete Fund - Double clicking on a row in the hit list behaves as though Remove Fund/Cycle(s) was selected.

Double clicking is not relevant and therefore is not implemented for the following Fund wizards:

Review All Funds, Review Available Funds, Modify Fund Budget, and Rollover Fund

**Volume Distribution Is Now Child Of A Parent Holding Or User Distribution**

When an order contains multi-volume sets, the volume distribution will now be placed under the appropriate parent holding or user distribution. This allows for better validation when the segments are removed.

**Vendor ID Gadget Displays Current Vendor ID and More Vendor Information**

When utilizing the Vendor ID gadget in Acquisition wizards, it was not retaining a current value. The Vendor ID gadget now displays the last vendor ID displayed or edited in a current vendor ID hyperlink. When the hyperlink is selected, it populates the Vendor ID field with the current vendor ID.

The Vendor ID gadget was displaying only the vendor ID and vendor name, which occasionally made it difficult to differentiate between vendor records. There is now a glossary in the Vendor ID column that displays the vendor ID, vendor name and vendor customer number when applicable.

**Multifunding Removed With Split Segments**

When using the segments interface in the WorkFlows Java client, when all split funding segments associated with a multifunding are removed, the multifunding is now also removed.

**Selection Fields and Date Fields Enhanced to Automatically Complete Values**

Many of the selection fields and date fields in SirsiDynix Symphony wizards have been enhanced to speed the entry information.

- In fields where a user can type a value or select a value from a drop-down list, the user can type one or more characters, and the matching value with the shortest string length is automatically completed (“auto-completed”) in the field.

- In date fields, the N character can be typed to select the NEVER value, or the T character can be typed for the TODAY value.
Automatic Completion in Selection Fields

Fields that give the user the options to type a value or select a value from a drop-down list have been enhanced with an “auto-completion” feature. In fields that are initially empty (that is, no default value is already supplied in the field), the user can type one or more characters, and the matching value with the shortest string length is automatically completed in the field. The most common example of this type of field is an ID field.

The following process is used when automatically completing values in a field.

1) If any of the possible values in the list start with the typed character (regardless of case), the value with the shortest string length is selected to automatically complete the field. All of the auto-completed value following the typed character is highlighted.

2) If the user types a second character, the value with the shortest string length of the possible values that match the two typed characters (regardless of case) is selected to automatically complete the field. All of the auto-completed value following the two typed characters is highlighted.

3) As the user types more characters, the automatic value selection and highlighting continues until the user presses the Tab key to advance to the next field, or otherwise exits the field.

Note: If the user presses the Backspace key to remove a typed character, the auto-completed portion of the value is removed, and only the characters the user typed remain in the field. Further use of the Backspace key will remove the typed characters. Auto-completion does not take place during backspacing; it only occurs when characters are typed.

Specifying “NEVER” and “TODAY” in Date Fields

Many of the date fields in SirsiDynix Symphony wizards (such as the Date Ready field in the Modify Order wizard) have been enhanced to speed the entry of dates, or the specification of the NEVER or TODAY values. Previously, the date fields that typically would be filled with a value of TODAY contained a date gadget for selecting a specific date, NEVER, or TODAY. These date fields have been enhanced as follows.

• The value of TODAY can be specified by typing the character T. SirsiDynix Symphony automatically completes the word TODAY in the date field.

• The value of TODAY can be specified by selecting TODAY in the date field’s drop-down list.

• Specific dates may be typed directly in the date field, provided the date is entered in the required date format.

• The value of NEVER can be specified by typing the character N. SirsiDynix Symphony automatically completes the word NEVER in the date field.

• The value of NEVER can be specified by selecting NEVER in the date field’s drop-down list.
**Note:** The date fields in the SirsiDynix Symphony wizards that have been enhanced are those date fields in which the most likely value is TODAY. Date gadgets will still be used in date fields that require the selection of a specific date.

### Message Displays When Modifications to a Fund Cycle Budget Causes a Fund to Become Overencumbered or Overspent

Wizards in the WorkFlows Java client and the WorkFlows C client have been enhanced to display error or warning messages when a fund cycle budget amount is edited such that the fund becomes overencumbered or overspent. Depending on the settings of the wizard and fund properties, modifications to the fund may or may not be saved. If the modifications cannot be saved, the user must first correct the fund cycle budget amount before saving the changes.

In the WorkFlows Java client, the Modify Fund wizard and the Modify Fund Budget wizard have been enhanced.

In the WorkFlows C client, the Modify Fund wizard and the Adjust Fund Budget wizard have been enhanced.

#### Modify Fund Wizard (WorkFlows Java Client)

The following enhancements have been made in the WorkFlows Java client to the Modify Fund wizard for when a user tries to change the fund cycle budget amount, and the fund becomes overencumbered or overspent.

**Note:** The Allow Modification of Budget Amount check box must selected in the wizard Behavior properties for a user to modify the Budget Amount field.

- If the Block Over Encumbrance check box is selected on the Fund Cycle Information tab of the wizard, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered, the following error message displays, and modifications to the fund are not saved.

  ```
  Fund over encumbered/spent
  ```

- If both the Block Over Encumbrance check box and the Block Over Expenditure check box are selected on the Fund Cycle Information tab of the wizard, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered or overspent, the following error message displays, and modifications to the fund are not saved.

  ```
  Fund over encumbered/spent
  ```

- If the Block Over Encumbrance check box and the Block Over Expenditure check box are cleared on the Fund Cycle Information tab of the wizard, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered or overspent, the following warning message displays, and the modifications to the fund are saved.

  ```
  Record updated; Fund over encumbered/spent
  ```
Modify Budget Amount Wizard (WorkFlows Java Client)

The following enhancements have been made in the WorkFlows Java client to the Modify Fund Budget wizard for when a user tries to change the fund cycle budget amount, and the fund becomes overencumbered or overspent.

- If the Block Over Encumbrance flag of any selected fund is set to Yes, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered, the following error message displays for each affected fund, and modifications to the funds are not saved. The fund ID in the message is the name of the affected fund.

  Fund over encumbered/spent (fund ID)

- If both the Block Over Encumbrance flag and the Block Over Expenditure flag of any selected fund are set to Yes, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered or overspent, the following error message displays for each affected fund, and modifications to the funds are not saved. The fund ID in the message is the name of the affected fund.

  Fund over encumbered/spent (fund ID)

- If both the Block Over Encumbrance flag and the Block Over Expenditure flag of any selected fund are set to No, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered or overspent, the following warning message displays for each affected fund, and the modifications to the funds are saved. The fund ID in the message is the name of the affected fund.

  Record updated; Fund over encumbered/spent (fund ID)

Modify Fund Wizard (WorkFlows C Client)

In the WorkFlows C client, the following message displays in the Modify Fund wizard if the fund is already overencumbered and/or overspent when the Block Over Encumbrance check box and/or Block Over Expenditure check box is selected for a selected fund.

  Fund over encumbered/spent (fund ID)

Adjust Fund Budget Wizard (WorkFlows C Client)

In the WorkFlows C client, the following enhancements have been made to the Adjust Fund Budget wizard for when a user tries to change the fund cycle budget amount, and the fund becomes overencumbered or overspent.

- If the Block Over Encumbrance flag of any selected fund is set to Yes, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered, the following error message displays for each affected fund, and modifications to the funds are not saved. The fund ID in the message is the ID of the affected fund.

  Fund over encumbered/spent (fund ID)
• If both the Block Over Encumbrance flag and the Block Over Expenditure flag of any selected fund are set to Yes, and the user tries to adjust the Budget Amount field such that the fund becomes overencumbered or overspent, the following error message displays for each affected fund, and modifications to the funds are not saved. The fund ID in the message is the ID of the affected fund.

Fund over encumbered/spent (fund ID)

**Added Ability to Display Orderline from Title on Order Window**

When creating an order for a title that is already on order, WorkFlows displays the following the message.

This title is already on order.

With this change, the font size of this message is bolder and larger than in previous versions. In addition, there is now the ability to display any existing orderlines that belong to this title from within the message window. Orderlines can be viewed by clicking on the Display Orderline tool or by double clicking on the selected orderline.

**Corrections**

**Wrong Fiscal Cycle Selected When Using Arrow Keys**

In a list of orders, if a user used the arrow keys to select a fiscal cycle of an order and clicked the Display Order button, a different fiscal cycle for that order displayed. However, if the user clicked a fiscal cycle in the list, highlighting the cycle to display, then clicked the Display Order button, the correct fiscal cycle displayed. This occurred in the Display an Order and Modify an Order wizards, and only if two (or more) orders had different fiscal cycles, but shared the same purchase order number.

This has been corrected.

**Fund ID Gadget Current Fund Link Not Functional**

In invoice wizards, when adding a fund link invoice line, if a user clicked the Fund ID gadget to select a fund, but then decided to use the Current fund link, when the user clicked this link, nothing happened. The gadget would not display the Current fund.

This has been corrected.

**Add Temporary Title Step Linking to Incorrect Order**

If the user created an order for an existing title that had at least one copy, and then used the Add Temporary Title step for the next order, but didn’t create a copy for the brief title record, the order intended for the brief title was incorrectly linked to the previously ordered, existing title.

The Add Temporary Title step in the order wizards has been corrected.
Unable to Save Claim Response Codes

When creating or modifying an orderline, the Claim Response codes could not be saved. A subsequent display of the orderline showed the Response field as blank.

This has been corrected.

Printer Helper Unable to Clearly Print Orders with More than 11 Orderlines

In the WorkFlows C client, when library staff used the Printer wizard to print orders with 11 or more orderlines, the printout was poor and incomplete. Funding, distribution, and extended price values were sometimes missing, or were not contained within the appropriate columns.

This has been corrected.

Browsing Invoices by Vendor ID Browse Not Working Properly

In the WorkFlows Java client, when browsing invoices by vendor ID, incorrect results displayed when browsing forward or backward through the invoice list. The vendor ID had not been included in the browse forward/backward command. This has been corrected.

FUND-linked Invoice Lines Defaulted to Quantity of 1

Invoice lines with FUND links are typically used for additional charges, such as tax, which have no copies associated with them. In the WorkFlows C client, a user creating a FUND-linked invoice line would type a 0 (zero) in the Quantity field. In the WorkFlows Java client, the Quantity field does not display when a user creates a FUND-linked invoice line, and by default, the quantity value was saved as “1.” This is incorrect.

Now, the invoice quantity value is only saved as “1” if the invoice line link is ORDER/ADJUST. The quantity will be reset accordingly when the invoice line linked is changed.

Problem with Adding Holding/User Distribution Segments After the Last Distribution

On the Segments tab, if a user highlighted the last distribution in the list, right-clicked, then selected Add a Holding Distribution After or Add a User Distribution After from the shortcut menu, the distribution was not added. The user was able to add holding or user distribution segments before or after other distributions in the list, but not the last distribution.

This has been corrected.
Unable to Create Multiple Percent Split Funding Segments in Order Wizards

In the WorkFlows C client order wizards, if more than one percent split funding was created, the wizards would reject the segments and display the following system message.

Percent must be 0 to 100

The validation process for ensuring that the percent split fundings add up to 100 percent was occurring too early in the funding creation process. This has been corrected.

Current Link in Fund Wizards Did Not Work

The current link in the Fund wizards was displaying but could not be selected.

This has been corrected.

Fund ID Displaying in Over Encumbered/Spent Messages

When creating or modifying an orderline, when the message was returned

Fund over encumbered/spent

no fund identification was provided.

This has been corrected. The message now indicates the Fund ID of the over encumbered/spent fund.

Incorrect Title Attached to Orderline

In the C WorkFlows client, when an order was created for a title already on order, subsequent orders for titles with NO copies in the same wizard session were linked to the first title instead of the selected title.

This has been corrected.

Current Order Not Carried from Item Search and Display to Order Wizards

In the WorkFlows Java client, when an order was selected on the Order tab in Item Search and Display, the order information was not being retained. Subsequent selection of an Order wizard did not carry over the order information as the current order.

This has been corrected. Selecting an order from the order tab of the Item Search and Display wizard will now make the selected order the current order. The current order is successfully carried over to the Order wizards.
Receiving Orders Holds Message Displayed in Black

In WorkFlows Java client, when receiving orders with holds, the message this title has holds was displaying in black. In previous versions of the client this message displayed in red.

This has been corrected. The message now displays in red.

Incomplete Funding Segment Information when Printing Orderlines in Modify Order and Display Order Wizards

In the Modify Order and Display Order wizards, if a user selected the Print command from the File menu to print orderline information from an order, the funding segments information did not include these fields: Fund ID, Quantity Funded, Date Paid/Quantity, or Amount Invoice/Quantity.

This has been corrected.

Context-Sensitive Help for Order and Invoice Wizards

Previously, if a user opened an order or invoice wizard and selected F1 to open context sensitive help, it did not open as expected. This has been corrected.

Find Holding Code Helper in Order Wizards Unavailable

The Find a Holding Code helper is found in the Add Basic Order, Add Dated Order, Add Recurring Order, Add Orderlines, Modify Order and Add Ordered Items to Catalog wizards. These wizards had the option to display the Find a Holding Code helper selected in the helper properties, but the helper was greyed out, rendering it unavailable.

This has been corrected.

Unable to Change Default Search in Order Wizards

All Order wizards, with the exception of the Add Basic Order wizard, were defaulting to an Exact search. The property setting under Search Preferences was not being used.

This has been corrected.
Acquisition Folder Closes Correctly in the User Access Policy
Wizard for Screen Resolutions Set at 1024 Pixels by 768 Pixels and
Higher

When a workstation monitor’s screen resolution was set to 1024 pixels by 768
pixels or higher, a display problem occurred when the User Access Policy wizard
was used. When the selected User Access policy was modified, clicking the
minus sign next to the Acquisition folder to close the folder would actually clear
all of the check boxes under the selected User Access policy name.

The User Access Policy wizard display has been corrected so that when the user
dicks the minus sign next to the Acquisition folder, the folder closes.

Creation of Invoice Lines Generated Messages in Error Log

In the WorkFlows Java client, when creating the first invoice line of an invoice
in the Add or Modify Invoice wizards, the following message was written to the
error log.

    error number 111 on invline start

No message was visible in the WorkFlows Java client.

This has been corrected.

Display Orderline Helper Showed All Invoices for Vendor

In the WorkFlows Java client, when using the Display Orderline helper in the
Review Vendor Invoices wizard, the Invoices tab displayed all invoices linked to
the vendor instead of invoices linked to the orderline.

This has been corrected.

Localized Text Displays Correctly in the Date Invoiced Field

The English text TODAY and NEVER would always display in the Date
Invoiced field in the Add Invoice wizard and the Modify Invoice wizard. Even if
the Calendar gadget was used to select the values in the localized language, the
English text would always display in the Date Invoiced field.

The Add Invoice wizard and Modify Invoice wizard have been corrected so the
localized values for TODAY and NEVER will display according to the selected
local language.

French-Language Systems Could Not Auto-Generate Fund IDs or
Set Fund to UNLIMITED

When creating a fund record in a French-language Unicorn system, the
AUTOMATIQUE option was not auto-generating a fund ID as it should. In addi-
tion, the Aucune limite (UNLIMITED) option was setting the fund amount to
$0.00.

This has been corrected.
Improved Warning Message for Over Encumbered Funds in Invoice when Invoice Is Prorated

Previously, when a user created an invoice with a proration link that could over-encumber a fund, and then attempted to prorate the invoice, the wizard would display the following message.

Fund overencumbered/spent

But, there were other lines on the invoice that did not over encumber any funds, and there was no indication of which invoice line, orderline, or fund was the culprit.

This has been corrected. Now, the fund overencumbrance message will display the fund ID and fund's fiscal cycle so users can more easily identify the fund that needs to have money added to it.

Saving Orderlines with Default Extended Information Values Corrected

While creating orderlines, users noted the following problems with saving orderline extended information entries that contained default values.

- The orderline template contained an extended information entry with a default value (defined in policies), which was not the first entry in the orderline extended information list. The user modified the first entry in the list while creating an orderline. When the user retrieved the newly created orderline, the first extended information entry displayed correctly, but the entry with default value would lose its default value set in the policy (the default value was not displayed).

- The user modified an extended information entry that contained a default value (defined in policies). When the user retrieved the newly created orderline, the extended information list would have two entries with the same tag: one original entry with the default value and another one with a modified value.

If the user did not modify any orderline extended information while creating a new orderline, everything was fine.

These issues have been corrected.

Funds No Longer Encumbered by Cancelled Amounts for a Multi-Funded Order

When the user tried to cancel all fundings for a multi-funded order using the Add a Cancellation tool, and amounts were entered for each fund segment instead of a percentage, the cancel segment is created, and the funded quantity and distributed quantity change to zero. However, when the user clicked Save Your Changes, only the last fund segment was set to zero. The order was cancelled, but the funds were still encumbered for the fund segments that were not set to zero.
The Add a Cancellation tool has been corrected so that when all funding segments that contain amounts instead of percentages are cancelled for a multi-funded order, the order is cancelled and the funds are no longer encumbered for the amounts.

On-Order Holds Created Item Database Errors

If a call number was removed while the call number was linked to an orderline with holds linked to its distributions, it resulted in item database errors. The system has been modified to prevent the removal of the call number if it is linked to an orderline that has holds linked to its distribution. A new report called Link Order Holds (Linkorderholds) has been added to the Circulation group of reports. This report allows staff to run orderlines through a program that links on-order holds to items. The Link Order Holds report will take holds currently linked to a distribution and link the holds to items. Once the holds are linked to items, the removal of a call number linked to an orderline is no longer blocked and the hold queue position will appear in Display User.

SirsiDynix recommends that this report be run nightly for customers that utilize the On Order Title Holds functionality.

List Catalog By Call Number Helper Didn’t Work Consistently

In the Workflows Java client, the List Catalog By Call Number helper gave no response in the following situation

1) Click the Add Ordered Items to Catalog wizard, selecting a title.
2) Select the Load Ordered Copies button
3) Select the Modify Title helper
4) Inside the Modify Title helper, select the List Catalog By Call Number helper. The helper gives no response.

This has been corrected.

System Message When Attempting to Use Produce Order Report Helper

Previously, the Produce Order Report helper available in some order wizards would sometimes produce the following system message.

Error in field size.

The error occurred when the combination of Library, Fiscal Cycle, and Order ID used as the Report Name exceeded 30 characters.

This has been corrected. The system-assigned report names are truncated to 30 characters, and the elements used to create the report names have been rearranged. The order is now Order ID, Fiscal Cycle, Library.
Empty Invoice Line Field Creates Invoice Line Database Error

Previously on the WorkFlows Java client, if an invoice line was created with an empty Invoice Line Number field, a database error occurred.

This has been corrected. If an invoice line number field is empty, a system message appears and the invoice line may not be saved until the error is corrected.

WorkFlows Client Enters Loop When Invoice/Order Vendor Mismatch Occurs in the Create Invoice Lines for Order Helper

Previously in the Create Invoice Lines for Order helper, if there is a mismatch between an invoice vendor and an order vendor, the WorkFlows client stopped working and the client would need to be shut down manually using the Windows Task Manager.

This has been corrected. If the Create Invoice Lines for Order flow is interrupted because of vendor mismatch, the following warning message appears.

Invoice line could not be linked.

Selection Lists Randomly Removed

In both WorkFlows clients, under certain circumstances, selection lists were being inadvertently removed. If a user changed the status of a selection list after another user had selected the Add Listline step, but before the new list line was saved, the following message displayed.

Listlines can be created or modified only when the selection list status is BUILDING or ACTIVE.

The WorkFlows Java client would then display a “Selection list not found” message, but the new empty list line was not removed.

The WorkFlows C client would display the same message, succeed in removing the empty list line, but would also remove the entire selection list.

These issues have been corrected.
Acquisitions Sessions Settings Wizard

Enhancements

New Invoice Tax Properties Added to Acquisitions Session Settings

Changes have been made to the Acquisitions Sessions Settings wizard to support the new Invoice Taxes feature.

If the new Calculate Invoice Taxes Automatically property is selected in Session Settings, the Tax Calculated flag is set to Y when an invoice is created. As invoice lines are created or modified on the invoice, taxes will be calculated automatically. The Calculate Invoice Taxes Automatically property is only available if Invoice Tax is configured on the library's system. This option is cleared by default. When this property is selected, the following fields are available, and these values are required.

- Tax Calculation Method – Select a tax calculation method from the drop-down list. The Link Tax Amounts to Default Tax fund will create Tax/Fund invoice lines for taxes (tax amounts are directly linked to a fund). The Link Tax Amounts to Order Funds or Default Tax Fund will create Tax/Adjust invoice lines for taxes (similar to adjust invoice line, tax amounts are linked to the funds used in the orders entered on the invoice). The default is Link Tax Amounts to Default Tax Fund.

- Default Tax Fund – Select a default fund to use for tax amounts. Use the Fund Search gadget to select a fund. When Calculate Invoice Taxes Automatically is selected, the default is required.

- Allow Edits to Amount Field in System Calculated Tax Invoice Lines – Select this check box to allow the Amount field to be edited in automatically-calculated tax invoice lines. By default, this check box is cleared.

Enter Date Ready Option Added to Acquisitions Session Settings

In the Workflows Java client, the ability has been added to prevent the Date Ready field from being edited in orders and orderlines. This is controlled by the Enter Date Ready option on the Behavior tab in Acquisition Session Settings.

This value is delivered enabled, so that the Date Ready field may continue to be edited. If this value is disabled, the Date Ready will display but is not editable in the wizards where it is currently editable.
Corrections

Cannot Receive Recurring Order When Session Setting “Display Only Selected Segment in Viewer Pane of Segments Interface” Is Enabled

Previously when the Display Only Selected Segment in Viewer Pane of Segments Interface setting was enabled in the Acquisitions Session Setting wizard, and Receive Order was used to attempt to receive a recurring order, the WorkFlows Java client ceased and required using Windows Task Manager to close the client.

This has been corrected.

Add Basic Order Wizard

Corrections

Cursor Not Visible in the Add Temporary Title Helper of the Add Basic Order Wizard

Previously in the WorkFlows Java client, when using the Add Temporary Title helper in the Add Basic Order wizard, there was no indication of the placement of the cursor.

This has been corrected.

Add Fund Cycle Wizard

Enhancements

Library Information Added to Add Fund Wizard

The Acquisition Maintenance Library now displays on the Fund Information tab of the Add Fund wizard.

Corrections

Fund Levels Inadvertently Changed When Adding a Budget Amount to All Funds

When using the Add Fund Cycle wizard to add a new cycle and new budget amount to all funds, a user noticed unintended changes to the fund levels for these funds. The fund levels of the last selected fund were applied to all funds.

This has been corrected. Fund levels will not be modified by this wizard.
Add Invoice Wizard

Corrections

Unable to Modify an Orderline in the Add Invoice Wizard

In certain circumstances, the Modify Orderline tool in the Add Invoice wizard could not find an existing orderline. After the user selected a newly created invoice line, and clicked the Modify Orderline tool, the wizard would display the following system messages.

Order not found
Cannot retrieve orderline info

Acquisition library information was missing from the display order step of the Modify Orderline tool, so the server was returning station library information instead. When the acquisition library and station library did not match, the preceding messages displayed.

This has been corrected.

Clicking Windows Close (X) Button When Adding Invoices Created Invoices Without Invoice Lines

Previously in the Add Invoice wizard, it was possible to create invoices without invoice lines.

1) In the Add Invoice wizard, after entering the basic invoice information (invoice ID, vendor, etc.), the user clicked Add Invoice.
2) The user clicked Modify Invoice without adding invoice lines.
3) The user then clicked the Windows Close button rather than the wizard's Close next step button.

Typically, if the user clicked the wizard's Close next step button, the Add Invoice Remove Confirmation dialog would display, where the user could remove the invoice completely, or return to the wizard. If the user clicked the X in the window instead, the invoice would be created, but with no invoice lines.

Invoices without invoice lines could be searched, but users could not select or view these invoices. They also could not be displayed, edited, or deleted by the invoice number. Essentially, invoices without invoice lines should not exist.

The Add Invoice wizard has been corrected. Now, the wizard will remain open even if the user clicks the Windows Close button. The confirmation dialog will display, and the user will prompted to make a choice, whether to remove the invoice, or keep the invoice and return to the wizard.
Incorrect Current Order Value When Adding an Invoice

Previously in the Add Invoice wizard, the Current Order value was not always correct. As a result, if the user clicked the Create Invoice Lines for Order helper, the invoice lines would be populated with invalid order information.

This has been corrected.

Erroneous Prompt in Add Invoice Wizard

The Add Invoice wizard in the WorkFlows Java client was incorrectly prompting the operator to remove an invoice with no lines or return to an invoice to add lines. This only happened if the Show Invoice Extended Information property was selected and the Add Invoice wizard was closed after creating the first invoice line.

This has been corrected.

Java WorkFlows Accepts Ten Characters in Invoice Line Field

Previously in the Add Invoice wizard, when twelve characters were typed into the Invoice Line field in the WorkFlows Java client, a system message was returned, and only the first ten characters displayed when the invoice line was viewed.

This has been corrected. The Invoice Line field now allows only ten characters to be entered.

Add Ordered Items to Catalog Wizard

Enhancements

New Date Received Default Property for Add Ordered Items to Catalog Wizard

A new default property was added to the Add Ordered Items to Catalog wizard. The Date Received property displays on the Defaults tab, and only displays when the Allow Receiving behavior property is selected. The user can a default date received using the Calendar gadget. When using the wizard, the distribution date received is set to this date when Allow Receiving is selected in behavior properties and the Add Item check box is selected in the wizard. The user can change this default date, if needed.
Transit and Holds Processing Wizard Properties Added and Modified to Support AVAILABLE_SOON Type Location

The wizard properties for the Add Ordered Items to Catalog wizard have been changed to include new options and modify existing ones for transit and hold processing. These enhancements were made to support the AVAILABLE_SOON type location, which can be used as a current location for items that have been added but are not yet available for circulation. For information about the AVAILABLE_SOON type location, see the New Location Type Added for “Available Soon” Items note in the System Configuration section of this release notes document.

The property changes vary depending on whether the library is part of a multilibrary system, or is a single library system.

Wizard Property Modifications for Multilibrary Systems

If the library is part of a multilibrary system, the following options are now available under Transit and Holds Processing on the Behavior tab of the Add Ordered Items to Catalog wizard properties.

- **Make Items Available at Owning Library/Location; Do Not Trap Items to Satisfy Holds** - If selected, the wizard will not trap newly created items for on order title holds, and will not transit these items.

- **Make Items AVAILABLE_SOON; Do Not Trap or Transit Items to Satisfy Holds** - If selected, the wizard will not trap newly created items for on order title holds, will not transit these items, and will set the current location of these items to AVAILABLE_SOON.

- **Transit Items to Owning Library; Do Not Trap or Transit Items to Satisfy Holds** - If selected, the wizard will transit newly created items to the owning library, but will not trap or transit these items to satisfy on order title holds.

- **Trap and/or Transit Items to Satisfy Holds, Make Remaining Items AVAILABLE_SOON** - If selected, the wizard will trap newly created items for on order title holds, transit items to fill these holds, and set the current location of any remaining items to AVAILABLE_SOON.

- **Trap and/or Transit Items to Satisfy Holds, Make Remaining Items in Transit to Owning Library** - If selected, the wizard will trap newly created items for on order title holds, transit items to fill these holds, and transit remaining items to the owning library.
Wizard Property Modifications for Single Library Systems

If the library is a single library system, the following options are now available under Transit and Holds Processing on the Behavior tab of the Add Ordered Items to Catalog wizard properties.

- **Make Items Available at Home Location; Do Not Trap Items to Satisfy Holds** - If selected, the wizard will not trap newly created items for on order title holds.

- **Make Items AVAILABLE_SOON; Do Not Trap Items to Satisfy Holds** - If selected, the wizard will not trap newly created items for on order title holds, and will set the current location of these items to AVAILABLE_SOON.

- **Trap Items to Satisfy Holds, Make Remaining Items AVAILABLE_SOON** - If selected, the wizard will trap newly created items for on order title holds, and set the current location of any remaining items to AVAILABLE_SOON.

- **Trap Items to Satisfy Holds, Make Remaining Items Available at Home Location** - If selected, the wizard will trap newly created items for on order title holds.

Corrections

**Unable to Update Base Call Number**

The Add Ordered Items to Catalog wizard can be used for multiple titles without closing the wizard. Previously, for any title after the first one, the wizard would not allow the base call number to be updated, unless the wizard was closed and reopened.

This has been corrected.

**Add Ordered Items to Catalog Wizard Didn’t Consider Display of New Call Number Case**

In the WorkFlows Java client, when modifying a call number in the Add Ordered Items to Catalog wizard, the setting for call number case was not being used. On systems configured for upper case call numbers only, lower case characters were allowed.

This has been corrected. The global variable setting Display of New Call Number Case is now used to determine the case of the Call Number field in the WorkFlows Java client Add Ordered Items to Catalog wizard.
An Item Could Be Created with no Barcode When Adding Ordered Items to Catalog

When using the Add Ordered Items to Catalog wizard to load an order, a user cleared the data in the New Item ID field, then pressed Enter. This created an item with no barcode. The user could not go back and type a barcode for this item.

This has been corrected. If while editing the New Item ID and/or New Call Number fields, a user clears the data in these fields, then clicks Add/Update Items or presses Enter, a warning message will display. To continue processing the order, the user will have to correct the data and click Add/Update Items, or press Enter.

Add Ordered Items to Catalog Intransit Message

In the WorkFlows Java client, the Add Ordered Items to Catalog wizard displayed the following message

Add Ordered Items to Catalog: Error. This item is in transit

This message occurred when the Behavior property was set to

Transit items to owning library; do not trap or transit items to satisfy holds

and a new barcode was scanned in for each item. The message displayed for each new barcode scanned.

This has been corrected. The wizard no longer gives an error message for items put in transit.

Add Ordered Items to Catalog Wizard Not Validating Barcodes

Previously, when using the Add Ordered Items to Catalog wizard in the WorkFlows Java client, a user noticed that barcode validation was not working even though the system was configured to use the Barcode Validation feature. This was also true for the Link Order Line Holdings to Title wizard in the WorkFlows C client. The order programs were missing the barcode validation logic.

This has been corrected.

Add Ordered Items to Catalog Wizard Limited to 30 Character Base Call Number

The maximum size for a SirsiDynix Symphony call number is 40 characters, yet the Add Ordered Items to Catalog wizard in the WorkFlows Java client limited the base call number to 30 characters.

This has been corrected. The maximum size of the base call number field has been increased to 40 characters.
Add Vendor Wizard

Enhancements

Library Information Added to Add Vendor Wizard

The Acquisition Maintenance Library now displays on the Vendor Information tab of the Add Vendor wizard.

Display Fund (Specific Cycle) Wizard

Corrections

Display Fund (Specific Cycle) Wizard’s Fund Information Tab Now Displays Fund ID

Previously, the Display Fund (Specific Cycle) wizard did not display the Fund ID field on the Fund Information tab. This has been corrected.

Display Order Wizard

Enhancements

Initial Cursor Focus on First Segment When Displaying Segments Tab

In the Display Order wizard, on orders with many segments, it is useful to use the Up and Down arrow keys to move through the Segment tree display. Previously, when displaying an order, after clicking the Segments tab, the user had to first click in the left pane before she could begin to navigate through the tree with the arrow keys. Now, when the Segments tab displays, the initial cursor focus is on the first segment in the Segment tree, and the user can immediately move about the tree using the Up and Down arrow keys.

Corrections

Inconsistent Scrolling through Segment Lists Between Segment Tree Pane and Editor Pane

If a user viewed a long list of order segments on an order’s Segments tab, there was inconsistent scrolling between the left pane (which displays the segment tree) and the editor pane, to the right. While using the DOWN ARROW key to navigate through the segment tree, the right pane scrolled much faster, so that eventually the selected segment elements in the tree did not match what was displayed in the editor pane.
This has been corrected. Now, when viewing long segment lists, as a user scrolls through the segment tree, the editor pane will display the matching segment elements.

Changing Search Index in Display Order Wizard Closed WorkFlows

In the WorkFlows C client, when attempting to change the search index in the Display Order wizard, the WorkFlows client would shut down. This occurred only when the system was set to use policy descriptions rather than policy names.

This has been corrected.

Display Selection List Wizard

Corrections

Data in List Description Groupbox Now Displays

After recent changes, the data for the fields in the List Description groupbox of the Selection List folder in the Display Selection List wizard didn't display unless the monitor resolution was set to 1280 by 1024. This has been corrected.

Selection List Tab Displayed Empty Fields

Previously, if a user's workstation screen resolution was set to 1280 by 1024, the Selection list tab of the Display Selection List wizard displayed field labels only and no data for most fields. No fields under List Description displayed data.

This has been corrected.

Duplicate Selection List Wizard

Corrections

Unable to Modify Selectionlist Info Tab

The Selectionlist Info tab wasn't modifiable in the Duplicate Selection List wizard. The selectionlist info can now be modified in the new selectionlist.
Modify Order Wizard

Corrections

Date Received and Date Loaded Defaulting to TODAY

In the Modify Order wizard, if the user set the wizard properties to allow receiving and loading, after receiving and distributing the first copy on the order, and when distributing the next copy, the new Date Received and Date Loaded fields for the second distribution default to TODAY. These dates should default to NEVER. This occurred when using the WorkFlows C client only. This has been corrected.

Current Title in Modify Order Caused Call Number Change

In the WorkFlows C client, the call number in the title information of an order was changing to a different call number belonging to the same title. This occurred when using the Current Title radio button in the Modify Order wizard to look up an order and the call number in the Current Title was different than what the orderline was linked to.

This has been corrected.

Order Records with Collection Exchange Data Cause Error

Previously in the Acquisitions Modify Order wizard, an error occurred when an attempt was made to open an order for editing if that order record contained Collection Exchange data.

This has been corrected.

Modify Order Wizard Print Screen Didn’t Include Segments

When using Print Screen from the segments tab of the Modify Order wizard, segments information was not being included. This happened in orders with a more complex set of segments. This worked correctly in the Display Order wizard.

This has been corrected.

Title On Order Would Change After User Clicked Return to List Button

In some instances, if a user selected an order from a display or browse hit list in the Modify Order wizard, then clicked the Return to List button, the order would become linked to the wrong title.

This has been corrected.
Message No Longer Displays When Selecting Localized Date Selections in the Modify Order Wizard

In the Modify Order wizard, if the localized text for the NEVER and TODAY selections was selected in a date field on the Segments tab, the localized text for the following system message displayed.

The month, day, and year of a date may not contain any characters other than numbers.

The Modify Order wizard has been corrected so that when the localized text for the NEVER and TODAY selections are selected in a date field on the Segments tab, the system message no longer displays.

Funds Decremented Incorrectly

If the Modify Order wizard was used to pay for an order, the fund was not decremented correctly. This has been corrected.

Modifying Cancel Segment Caused “Segments Not Correctly Balanced” Message

In the WorkFlows Java client, using the Modify Order wizard, after creating and saving a cancellation segment in any order containing information in the parts in set field further changes could not be made to the segment or the orderline. The following message displayed.

Segments not correctly balanced

This has been corrected.

Helpers Menu Disappeared

A user noticed that after using a helper in the Modify Order wizard, the Helpers menu disappeared. This occurred after an error dialog displayed in the helper, and the helper was closed. This could also occur when using helpers in other wizards.

This has been corrected.

Modify Order Wizard Tabs Empty With Fund Warning

In the WorkFlows C client, the following message displayed in the Modify Order wizard, directly from the search and before the order was viewed for the first time.

fund over encumbered/spent

If Return To Modify Order was selected, the display had empty tabs.

This has been corrected.
Modify Vendor Wizard

Corrections

Modify Vendor Wizard Didn’t Save Changes in Multiple Tabs

In the WorkFlows Java client Modify Vendor wizard, when selecting the Modify This Vendor option and changing to another tab, any subsequent changes to the vendor record were not saved.

This has been corrected.

My Decisions Wizard

Enhancements

My Decisions Wizard Improved to More Efficiently Retrieve Decision Lists from the SirsiDynix Symphony Server

Sites using very large selection lists sometimes found when using the My Decisions wizard that the SirsiDynix Symphony server response time was very slow. Changes were made to the My Decisions wizard to improve the process of retrieving the lists of a user’s decided and undecided list lines from the Unicorn server. This enhancement will only be noticeable to sites that use selection lists with very large numbers of list lines.

Corrections

Selection List Lines Process on the Undecided Tab Are Moved to the Decided Tab

When the user processed a selection list line by clicking Add Decision on the Undecided tab in the My Decisions wizard, the processed selection list line was not moved to the Decided tab. The My Decisions wizard has been corrected so that when a decision is made for a selection list line on the Undecided tab, the processed selection list line is moved to the wizard’s Decided tab.

Pay Invoice Wizard

Corrections

Pay Invoice Wizard Couldn’t Modify Exchange Rate

The exchange field in the Pay Invoice wizard could not be modified in the WorkFlows Java Client.

This has been corrected.
Date Paid Field Default Setting Retained After Cancelling the Use of a Helper in the Pay Invoice Helper

In the Pay Invoice wizard, the Date Paid field was changing from its default setting of TODAY to NEVER when any of the following helpers were started and cancelled in the wizard.

- Display Invoiceline
- Modify Invoice Extended Info
- Pay Invoiceline

The Pay Invoice wizard has been corrected so the Date Paid field retains its default setting of TODAY any time a helper is started and cancelled.

Receive Orders Wizard

Enhancements

Ability to Automatically Set Date Loaded When Receiving Orders

In the Receive Orders wizard, users can now set the distribution date loaded as well as the date received when an order distribution is received.

In the wizard properties, on the Defaults tab, the user can make the following selections. The user can change these default dates when receiving orders.

- Date Received – Sets the default date orders are received. TODAY is the delivered date.
- Automatically Set Date Loaded for Items Received – When this check box is selected, the date loaded is set to the current date for received items. This is typically used for preprocessed materials that are accompanied with bibliographic records and should be loaded as they are received.

Order Information Added to Receive Order Title Bar

When using the Order Extended Information and Orderline Extended Information toolbox buttons in the Receive Orders wizard, order information (order ID, orderline, fiscal cycle and library) now displays in the window title bar.

Receive Orders Wizard Displays Orderline ISXN

Using the interface preference for receiving entire orders (set in default properties), the viewer pane in the receive order tree now includes the orderline ISXN.

Enhanced Receiving Alerts for Titles with Holds

In the Receive Orders wizard, when receiving titles with holds, the receipt alert did not stand out enough, and could be missed. Now, the alert message for a title on hold appears in red.
Corrections

Incorrect Receipt Status for Partially-Received Orders

Using the Receive Orders wizard to completely receive an order that was previously partially received now gives the correct receipt status of Complete.

Date Loaded Was Updated Despite Property Setting

If a user set the Receive Orders wizard property to automatically set the date loaded for received items, but when receiving orders where the date loaded was already set to a value other than NEVER, the date loaded was updated anyway. The wizard should only update the date loaded only when the date loaded is set to NEVER.

This has been corrected.

Line Field Displays Correct Value When Receiving a Recurring Order with a Parts in Set Value

When the Receive Orders wizard selected a recurring order that was created with only alphabetic text in the Parts in Set field (such as “UPDATES ON ORDER”), the Line field in the wizard should have contained the NEW value, which the user would change to the line number to be received. Instead, the wizard incorrectly created an extra orderline and displayed the line number of the newly created orderline in the Line field.

The Receive Orders wizard has been corrected so that if the recurring order to be received contains alphabetic text in the Parts in Set field, the wizard will not create an extraneous orderline, and the Line field in the wizard displays the value of NEW for the user to change to the line number to be received.

Invoice Line Extended Information Defaults Not Populated by Helpers that Automate Invoice Line Creation

Previously in the Receive Orders, Add Invoice, and Add Invoice lines wizards, the helpers that created invoices/invoice lines did not populate invoice line Extended Information defaults.

This has been corrected.
Review All Funds Wizard

Enhancements

Review All Funds Wizard Displays New Fund Levels Tab

The Review All Funds wizard now displays fund level information for each fund ID on the new Fund Levels tab. This tab displays fund ID, fund name, and each of the four fund levels. Users can enable or disable displaying the Fund Levels tab in the wizard properties. Additionally, the wizard helpers, Save Financial and Copies Data to a File and Save Performance Data to a File, now export the fund levels information to the .csv files they create.

Corrections

Review All Funds Wizard Displayed Empty Columns

In certain circumstances, the Review All Funds wizard would only display data in the Fund ID and Budgeted columns for selected funds. No data would display in the Encumbered, Invoiced, Paid, Cash Balance, and Free Balance columns.

This has been corrected.

Review All Vendors Wizard

Corrections

Helpers Could Not Be Closed By Clicking Cancel

The two helpers in the Review All Vendors wizard, Save Financial and Copies Data to a File and Save Performance Data to a File, would not close when the user clicked the Cancel button. The user had to click the Close button (the X in upper right corner) in the helper windows to quit the helpers.

This has been corrected.
Selection List Wizards

Enhancements

More Efficient Handling of Decision Segments

If a site created one large selection list with all titles considered for selection on the list, and if a number of users were working with that list at the same time, users could experience a lot of record locking conflicts, and “records are busy” messages would display.

The “basic” interface for adding decision segments creates a fixed list of 10 funding and distribution pairs. Unused entries were previously deleted one by one, which was a slow method of processing the segments. Now, the unused entries are deleted in batch, which is more efficient, and should reduce the number of record locking conflicts when working with very large selection lists.

Add Selection List Wizard

Corrections

Add Selection List Wizard Did Not Retain New Title

In the Add Selection List wizard, if the Add Temporary Title helper was used after conducting a search the newly created title was not retained for the list line. Instead, the list line was created for the last title viewed from the hit list (or the first entry in the hit list, if none were viewed).

This has been corrected.

Transfer Budget Amount Wizard

Enhancements

New Transfer Budget Amount Wizard

The Transfer Budget Amount wizard allows the user to transfer money between funds. Using this wizard the user can transfer the budget amount from one source fund to one or more destination funds. It is possible to transfer funds within a fiscal cycle and across fiscal cycles. An audit trail of fund transfers can be maintained in the Fund Extended Information. A separate note will be added for each transfer.

The Transfer Budget Amount wizard is located after the Modify Fund Budget wizard in the Fund group on the Acquisitions toolbar. This wizard is available for the WorkFlows Java client only.
Using the Transfer Budget Amount Wizard

To use this wizard, do the following.

1) Before starting the wizard, select a Fiscal Cycle for destination funds in the wizard properties.

2) In the Fund Search step, identify the source fund for the transfer. This wizard includes a Fund Level search type. To further qualify a search, click the Fund Level option and select search values for the different fund levels.

3) A table of funds meeting the search criteria appears. The fund name, fund ID, and number of fund cycles displays for each fund.

   **Note:** An over encumbered/spent alert will appear next to funds that are over-encumbered.

4) Select a fund and click Display This Fund. Detailed information about the fund displays.

5) If this is the fund to use as the source fund, click Display Source Fund, and the Transfer Budget Amount window opens.

6) Financial information for the source fund displays at the top of the window. As funds are moved from the source fund, this information is updated. Under Destination Funds, you can change the Fiscal Cycle of Destination Funds by selecting a new cycle from the drop-down list.

7) In the Destination Funds boxes, select funds using the Browse Fund gadgets and type the Amount of Transfer values. Up to 10 destination funds can be selected.

8) Click Preview, and a window opens, displaying the effects of the proposed fund transfers. No changes to the funds are made at this step.

   **Note:** The Preview step is recommended.

9) Click Make More Changes if not satisfied with the proposed fund transfer results. Make adjustments to the destination fund values as needed.

10) If satisfied with the results of the fund transfers, click Transfer Budget Amounts. Under Destination Funds, the list of modified funds displays the transfer amounts, budgeted free balances, and cash balances. Under Source Fund, the amounts are updated, reflecting the budget transfers.

Exceptions When Transferring Budget Amounts

Warnings may display when previewing the budget transfers. These warnings display in the following instances.

- A destination fund does not exist.
- A destination fund does not exist in the specified fiscal cycle/library.
- The same fund ID/fiscal cycle is being used as both the source and destination.
- Block over encumbrances is No, and the encumbrance allowed percentage for the source fund will be exceeded by the transfer.
- Block over expenditure is No, and the expenditure allowed percentage for the source fund will be exceeded by the transfer.

System messages will display and no preview will be shown in the following instances.
- The total amount of the transfer is more than the budget amount of the source fund.
- Block over encumbrance is Yes, and the encumbrance allowed percentage will be exceeded by the transfer.
- Block over expenditure is Yes, and the expenditure allowed percentage will be exceeded by the transfer.

Unlock Invoice Wizard

Enhancements

New Unlock Invoice Wizard

The Unlock Invoice wizard has been added to the Acquisitions wizards. The Unlock Invoice wizard is used for unlocking an invoice, thereby setting the invoice date locked to NEVER. Once an invoice is unlocked, the invoice and invoice line fields can be edited, and additional lines can be added to the invoice.

The user can search invoices by invoice ID, check number, vendor ID, vendor name, customer number, order ID, call number, item ID, title control number, and by using catalog searches, such as title and author.

**Note:** Invoices cannot be modified using this wizard. Use the Modify Invoice wizard for this capability.

To unlock an invoice, follow these steps.

1) In the Invoice Search step, identify the invoice to unlock. A table of invoices meeting the search criteria appears.

2) Select an invoice and click Unlock Invoice. If the selected invoice is not locked, a “This invoice is not locked” message will display.

3) If the selected invoice is locked, the Invoice and Invoice Lines tabs display. Review the information on these tabs as needed.

4) Click Unlock Invoice, and a confirmation dialog opens. Click Yes. If No is clicked, the invoice will remain locked.

**Note:** To re-lock an invoice, use the Lock Invoice helper in the Modify Invoice or Add Invoice Lines wizards.
Authority Wizards

General

Enhancements

Enhanced Combination Authority Checking

Previously, combination authority checking for the Main Entry/Uniform Title Combination entries, such as 1XX/240, did not authorize bibliographic tags if the 1XX tag did not have terminal punctuation (such as a period "."), but the combined authority record did have terminal punctuation after the 1XX and before the subfield t.

Example:

The 100 entry does not contain a period after the death date.

100 1# Copland, Aaron,|d1900-1990

But, the combination authority record does contain a period after the death date.

Personal name: Copland, Aaron,|d1900-1990.|tRed pony.|pSuite

Previously, the 100 and 240 entries in the bibliographic record could not be authorized by the combination authority record.

id:100 ind:1 data:Copland, Aaron,|d1900-1990|?UNAUTHORIZED
id:240 ind:00 data:Red pony.|pSuite|?UNAUTHORIZED

With this enhancement, terminal punctuation after the 1XX tag will be ignored for the purposes of authorizing the 1XX/240 combination.

Conversion of Imported Authority Records

Importing of authority records has been enhanced to correctly handle the conversion of Unicode-to-MARC8 and MARC8-to-Unicode authority records.

This enhancement is primarily of interest to customers on a Unicode server.
Corrections

Oracle Sites Must Run Rebuild Authority Index Report

Sites that use the Oracle database management system must run the Rebuild Authority Index report after upgrading to SirsiDynix Symphony 3.2 if your site did not previously run this report after installing Unicorn GL3.1 patch cluster 4 or patch cluster 5. This patch cluster corrects a problem with inconsistent handling of data in bibliographic and authority records, and rebuilding the authority index ensures that all authority data will have been processed in the same way.

Deleting Authority Fields Not Always Successful

When deleting fields in an authority record, they were not always being removed successfully.

This has been corrected.

Some Browse Headings Displayed an Extra Parenthesis Around Heading

Previously, some browse headings displayed an extra parenthesis around the heading. The same heading was punctuated more than once, and if there were additions, such as beginning or ending punctuation, they were also added more than once.

The programs that create the authority headings were corrected to not punctuate a display heading more than once.

WorkFlows Java Client Authority ID Search Was Case-Sensitive

When searching by authority ID in the WorkFlows Java client, an authority record could not be retrieved if the authority ID was not entered in upper case. The following message was returned.

Authority not found

This has been corrected. Authority IDs can now be entered in upper or lower case and retrieve the correct authority record.

Unable to Validate Headings in Community Information Format Records

In the WorkFlows Java client, records with the Community Information format were not able to be authorized. Entries which matched authorized headings were persistently marked as UNAUTHORIZED.

This has been corrected.
Author Cross Reference Produces System Message

Previously in the WorkFlows Java client, when an Author cross reference was selected, the following system message appeared.

#csRequired field missing

Example:

A user browses for Author, as follows.

Jones, Dave

If the user clicks Search Under, the system message appears.

This has been corrected.

Add Authority Wizard

Corrections

Authority Records Can’t Be Created with Record Type: OTHER

Authority formats, defined on the Configuration toolbar, contain a Record Type value field. For Authority formats that had a Record Type value of OTHER, authority records could not be created. Any attempt to create an authority record of this type would cause the client to freeze.

This has been corrected.

Modify Authority Wizard

Corrections

Global Authority Change Helper Didn’t Successfully Change All Headings

In both the C and Java WorkFlows clients, when trying to update a personal name heading where the death year had been added, the Global Authority Change helper in the Modify Authority wizard was not changing the bibliographic heading if it was a 100 (Personal Author). It found and changed the heading if it was a 600 (Personal Subject) or 700 (Added Author) tag.

This has been corrected.

Global Authority Change Helper Included Value in Subfield w

In the WorkFlows Java client, when using the Global Authority Change Helper in the Modify Authority wizard, it was including the subfield w in the search string. As a result, no match was found.

This has been corrected.
Unable to Enter Specific Date in Modify Authority Wizard Date Authorized Field

Previously in the WorkFlows Java client, the Date Authorized field on the Control Tab in the Modify Authority wizard could not be edited to any value other than NEVER or TODAY, even though this field had been editable in the C client.

This has been corrected.
Cataloging Wizards

General

Enhancements

SirsiDynix Symphony 3.2 Enhancements for Loading of Bibliographic Records with Reports and the Smartport Wizard

SirsiDynix Symphony 3.2 includes many enhancements to offer users even greater flexibility for loading of bibliographic records with reports and the SmartPort wizard. The following list briefly describes each enhancement to the reports or wizard, and includes references to sections within this release notes document for more detailed information about each enhancement.

- In reports that contain the Remove Medical Subject Headings (MeSH) option on the Selection Criteria tab, this option functions as it has prior to the SirsiDynix Symphony 3.2 release. However, with the addition of various bibliographic record loading enhancements in the new software release, these reports will not run correctly if they are configured to use the Remove Medical Subject Headings option and were scheduled before the software upgrade. The library system administrator must reschedule certain reports in the Acquisition Load report group and the MARC Import report group, if the reports are configured to use the option, and the schedule settings were configured before the software upgrade. See General—Enhancements in the Reports section of this release notes document for more information.

- The Load tab in certain reports in the Acquisition Load report group have been enhanced with various title control processing options and fields, including new key matching options and new bibliographic record processing options. See Acquisition Load Group Reports—Enhancements in the Reports section of this release notes document for information.

- The Load tab in the Load Bibliographic Records report in the MARC Import report group has been enhanced with various title control processing options and fields, including new key matching options, new bibliographic delete status options, and new bibliographic record processing options. See MARC Import Group Reports—Enhancements in the Reports section of this release notes document for information.

- The Entry ID gadget in the Copy Processing gadget has been enhanced to allow one or more tags to be selected. The user can supply a list of tag numbers, in the desired order of search, from which to extract holding entry data in incoming MARC records. The Copy Processing gadget is in the Copy Processing field on the Load tab of the Load Bibliographic Records (Bibload) report. See MARC Import Group Reports—Enhancements in the Reports section of this release notes document for information.
• Previously, when printing spine or pocket labels from the Load Bibliographic Records (Bibload) report, only newly created items were being printed. If any items were updated by the report, no spine or pocket labels were printed for these items. Now, the report has new output options to print labels for only newly created items, or to print labels for new items and updated items. See MARC Import Group Reports—Enhancements in the Reports section of this release notes document for information.

• New options for matching and processing have been added to the SmartPort wizard. In addition to matching on the SirsiDynix Symphony title control number, the match and load option can now be told to match on a numeric keyword index key. The new options, found in the default properties of the SmartPort wizard, include Match on Title Control Number or Indexed MARC Tag, Match on Title Control Number and Indexed MARC Tag, the ability to select the Indexed MARC Tag Number, and the ability to Remove Subject Headings. See SmartPort Wizard—Enhancements in the Cataloging Wizards section of this release notes document for information.

• The Subject Source gadget has been added to select subject headings that should be removed from the matching bibliographic record, based on the MARC21 6XX second indicator values, before loading the record into the catalog. This gadget is in the Remove Subject Headings field, which has been added to the SmartPort wizard properties and some reports. See General—Enhancements in the WorkFlows Client section of this release notes document for information.

• The Match MARC Tag Hierarchy gadget has been added to specify the indexed MARC tag numbers to use for matching when importing records. This gadget is in the Indexed MARC Tag Number field, which has been added to the SmartPort wizard properties and some reports. See General—Enhancements in the WorkFlows Client section of this release notes document for information.

• A new option has been added to the MARC Export utility wizard properties to allow the inclusion of the Unicorn catalog key in the extracted record. The Export Unicorn Catalog Key to MARC Tag option allows the user to select the entry in which the catalog key will be placed. By default, the entry selected is the 001 entry. See MARC Export Utility Wizard—Enhancements in the Utilities section of this release notes document for information.
Match MARC Tag Hierarchy Gadget Selects Indexed MARC Tag Numbers

The Match MARC Tag Hierarchy gadget has been added to specify the indexed MARC tag numbers to use for matching when importing records. This gadget is in the Indexed MARC Tag Number field, which has been added to the following wizards and reports:

- SmartPort wizard properties
- Load Bibliographic Records (Bibload)
- Bibliographic Database Overlay (Bibloadbatch)
- Load Bibs with Order Info (Biborderload)
- Load Bibs for Selection report (Selectbib)
- Load Bibs with Selections and Decisions (Selectbibemb)

The indexed fields/subfields that may be used for matching include the following:

- 001 Control Number
- 010|a LCCN
- 020|a ISBN
- 022|a ISSN
- 024|a Other standard identifier
- 027|a Standard technical report number
- 028|a Publisher number
- 035|a System control number

International Cataloging Alternate Graphic Representation (880) Tag Functionality Added to SirsiDynix Symphony

SirsiDynix Symphony on a Unicode server supports simple multi script MARC21 records where all data is contained in regular fields and script varies depending on the data. Also, Symphony supports the use of MARC21 880 tags to code vernacular and transliterations of the regular tag. To facilitate the use of 880 tags, Symphony now has added enhancements to assist in the editing, adding, and displaying of the 880 tags.

Alternate Graphic Representation tags (or 880s) are used to record the fully content-designated representation, in a different script, of another field in the same record. 880 tags are linked to the associated regular field by subfield 6. 880 tags enhance MARC21 records with the ability to include multiple scripts for a normal tag (Paired Fields) in the same record. SirsiDynix Symphony can display these paired fields as linked for ease of adding, editing, and displaying records on a Unicode server.
Linked fields are defined by two fields containing associated subfield 6 linking tags and occurrence number. The first and second indicator positions in field 880 have the same definition and values as the indicators in the associated field. The subfield codes in field 880 are the same as those defined in the associated field.

The data in field 880 may be in one or more scripts, as follows.

- Non-Latin script data only
- Romanized data only (Latin script)
- Both Non-Latin script data and Romanized representation of the data

In order to add new fields that will be part of a pair and use the Link/Unlink options in the MARC Editor, SirsiDynix Symphony requires that the first tag of the pair contain Romanized text and the second tag contain non-Latin text.

**Subfield 6 (Linkage)**

Subfield 6 contains data that links fields that are different script representations of each other. Subfield 6 contains the tag number of an associated field and an occurrence number.

Subfield 6 is always the first subfield in the field. It is structured as follows.

```
$6<linking tag> - <occurrence number>
```

**Linking Tags and Occurrence Numbers**

The linking tag part of subfield 6 contains the tag number of the associated field. This part is followed immediately by a hyphen and the two-digit occurrence number part. A different occurrence number is assigned to each set of associated fields within a single record. The function of an occurrence number is to permit the matching of the associated fields (not to sequence the fields within the record). An occurrence number may be assigned at random for each set of associated fields. An occurrence number less than two digits is right justified and the unused position contains a zero. When there is no associated field to which a field 880 is linked, the occurrence number in subfield 6 is 00.

**Note:** Occurrence numbers may not necessarily be sequential.

**Global Configuration Paired Fields Policy and Search Hit List Policy**

The Global Configuration Paired Fields policy determines whether or not 880s display as linked pairs in bibliographic displays and whether or not MARC Editor 880 editing features are available in the SirsiDynix Symphony client. This policy is available only when the client is connected to a Unicode server.

The Global Configuration Display of 880s on Search Hit List policy determines if 880s also display on the WorkFlows search hitlist.
880 Display

If the Global Configuration Paired Fields policy is enabled on a Unicode server, 880s with the tag number and descriptive label of the normal tag appear in the following cataloging wizard displays.

- Bibliographic tab
- Bibliographic Description helper
- File\Print Preview
- File\Print Screen
- Search window view pane bibliographic Description tab

Also, if the Global Configuration Search Display of 880s on the Search Hit List policy is enabled, the 880s may display on the search window hit list.

Note: In order to display paired 880s in the Bibliographic Description helper and File\PrintPreview, add the 880 entry ID to any templates used by the Bibliographic Description helper.

If the Global Configuration Paired Fields policy is disabled, the 880 field displays the same as any other MARC tag.

The 880 tag displays the same tag number and the same descriptive label as the tag to which it is linked. Neither subfield 6 in the paired tags display in the client after linking or the saving of the record occurs. In the MARC editor, for fields that contain scripts with left-to-right orientation, a bracket to the left of the two fields indicates that the fields that are linked. For fields that contain scripts with right-to-left orientation, the bracket appears on the right.

Related Information

Administration

This enhancement includes new policies. For more information, see related release notes in the Administration section of this document.

Cataloging

This enhancement affects some Cataloging wizards. For more information, see related release notes in the Cataloging section of this document.

e-Library

This enhancement affects some aspects of the e-Library. For more information, see related release notes in the e-Library section of this document.
Notes

The following information applies to International Cataloging in SirsiDynix Symphony.

- In SirsiDynix Symphony, non-Latin script can be found in either tag of the linked pair.
- 880s are indexed as the normal (non-880) field to which it is linked.
- 880s are created and stored on the server as a normal 880 tag per the MARC21 standard (numerical tag order) and are exported in this format.
- When exporting records from Unicode to MARC8, the 066 field is automatically added to the exported record.

Search Hit List Can Display Alternate Graphic Representation Information from the Linked 880 Field

Note: These enhancements are primarily of interest to customers who use a Unicode server.

A keyword search in the Workflows Java client has been enhanced to allow the display of text from a corresponding 880 if it exists. This is controlled by the new Global Configuration policy Display of 880 on Search Hit list. This policy has the following options.

Display only the regular (non-880) entries (this is the delivered default)
Display both the regular (non-880) entries followed by the linked 880 entries
Display only the linked 880 entries (Note that if a linked 880 does not exist, display the regular (non-880) field)

Automatic Linking of Paired Fields in MARC Editor

If new paired fields are added to a record and are not linked, the Workflows Java client automatically links the two fields upon Save under the following conditions when the Global Configuration Paired Fields policy is enabled.

- The pairs contain the same tag number.
- The pairs display together.
- The first field of the pair contains Romanized script.
- The second field of the pair contains non-Latin script.

Once the paired fields are automatically linked, the following occurs in the record.

- The two fields are automatically linked and the bracket displays.
- Subfield 6 is automatically added to both fields.
- Subfield 6 is automatically created with correct with linking tag/occurrence number.
Note: Subfield 6 does not display in the MARC Editor.

Note: This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.

880 Tag Link Fields and Unlink Fields Options Created

As part of the 880 enhancement to the WorkFlows Java client, new right-click menu options are available in the MARC Editor when the Global Configuration Paired Fields policy is enabled, as follows.

- Link Fields
- Unlink Fields

The Link Fields option is available only when the following conditions are met.
- One field in the pair contains Latin data.
- One field in the pair contains non-Latin data and has the same tag as the field with Latin data.
- At least one of the fields in the pair is new.

Note: Linking and unlinking can be done three ways.
- Automatically after clicking on Save
- Manually using the right-click menu options
- Manually using the keyboard shortcuts for Link/Unlink.

The Link Fields option adds |6 to both fields.

The Unlink Fields option is enabled when pointing to one of the fields in the linked pair. The Unlink Fields option removes |6 in the first field.

Note: If one or both of the tags to be linked already contain |6, the subfield will be replaced with correct linking number and occurrence number when the fields are linked.

Note: This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.
Any One of Linked/Paired MARC Editor Fields Cannot Be Deleted Prior to Unlink

Functionality has been added to a pair of linked fields in the WorkFlows Java client MARC Editor so that a user is blocked from deleting one field of a linked pair when Global Configuration Paired Fields Policy is enabled. If the user attempts to delete a linked field using the Delete the Current Field helper or the right-click Delete Field option, the following message appears.

Field is one of a pair. Unlink the pair before deleting.

If the user clicks OK, the client returns to the record so that the pairs can be unlinked, if desired. Once the pairs are unlinked, one of the fields can be deleted.

*Note:* This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.

Modified Tag Number/Indicator for One of a Pair Results in Modification of Second of Pair

As part of the 880 enhancement, if a user modifies the tag number or indicator(s) of one of the linked fields, the tag and indicator(s) for the other field also change when the Global Configuration Paired Fields policy is enabled.

*Note:* This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.

*Note:* Linking of paired fields in a MARC record is only available for variable data fields. If a user attempts to link a field other than VARIABLE, the following message appears.

Only tags with the Entry Class of VARIABLE may be linked.

Fields Cannot Be Inserted Between Linked/Paired MARC Editor Fields

Functionality has been added to a pair of linked fields in the WorkFlows Java client MARC Editor so that a user is blocked from inserting a new field between the pairs when the Global Configuration Paired Fields policy is enabled.

- If the cursor is placed on the first of a pair of fields and then the Insert a Field After Current One helper is selected or the right-click Add Field After option is selected, the new field is inserted after the second field of the pair.

- If the cursor is placed on the second of a pair of fields and then the Insert a Field Before Current One helper is selected or the right-click Add Field Before option is selected, the new field is inserted before the first field of the pair.

*Note:* This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.
880 Tag |6 Display Masking

As part of the 880 enhancement to the Workflows Java client, the |6 display will be masked in both tags of a linked pair under the following conditions when the Global Configuration Paired Fields policy is enabled.

- If an existing pair is already linked and displays in a bibliographic record, neither |6 displays in the MARC Editor.
- If a new pair is created during a MARC Editor session and the pair is manually linked by the user or automatically linked when the record is saved, neither |6 displays in the MARC Editor after linking or saving the record.

Note: This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.

880 Non-Latin Tags Included with Latin Tags in Bibliographic Displays

Now in the Workflows Java client for bibliographic displays, if connected to a Unicode server and the Global Configuration Paired Fields policy is enabled, 880 non-Latin tags display immediately following the linked Latin tags in the following areas.

- The search window View Pane Description tab
- File/Print Preview
- The Bibliographic Description helper
- The MARC Editor

In addition, the 880 non-Latin tag information displays the same tag number as the linked Latin tag, and the 880 non-Latin descriptive field label is the same as the Latin descriptive label.

Note: This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.

880 Tags in MARC Records Sorted in Numerical Order When Records are Saved

For MARC records that contain Alternate Graphical Language (880) tags, SirsiDynix Symphony has been enhanced to sort the 880 tags in correct numerical order when the MARC record is saved and displayed on a Unicode server that is configured to display 880 tags immediately following the tags to which they are linked. Even when no changes have been made to the MARC record, the 880 tags will be sorted in numerical order.

Note: This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.
Bidirectional Enhancements Added to WorkFlows Java Client

Note: These enhancements are primarily of interest to customers who use a Unicode server.

The WorkFlows Java client has been enhanced to more correctly display MARC record text recorded in languages that have a right-to-left orientation such as Arabic and Hebrew and also in cases where the text has been recorded using a combination of right-to-left and left-to-right scripts (bidirectional).

The WorkFlows Java client has always supported the Unicode Bidirectional Algorithm which is defined in the Unicode standard. This algorithm determines where a certain character will be displayed within a text string depending on the character directionality and main component orientation.

If any characters with strong right-to-left directionality are encountered, the field orientation will be set right-to-left and the text of the field will be displayed right-justified. If the data contains no characters with strong right-to-left directionality, the field will be rendered left-to-right. Expanded mode will display individual subfields according to their field orientation.

On the search window view pane Description tab, if the data contains any strong right-to-left characters, the component orientation will now be set to right-to-left and vice versa.

Note: Note that fields with R2L text will not be displayed right-justified on this tab.

The following changes have further enhanced the WorkFlows Java client’s ability to display and edit bidirectional text beyond the limitations of the Unicode Bidirectional Algorithm:

- Fields that contain right-to-left script data now display right-justified by default.
- A new helper, Add Subfield Delimiter/Code, assists in the addition of new subfield delimiters/codes when cataloging in a right-to-left language.
- Two helpers added to allow entry of Unicode formatting characters.
- Unicode formatting characters can now be deleted in the MARC editor.
- Hit list capable of displaying alternate graphic representation information from the linking 880 field.
- Open wizards when switching toolbars in themes view will only be repainted when switching between right-to-left and left-to-right.
- Text directionality is taken into account when printing from cataloging (File/Print, File/Print Preview, File/Print Screen)
- Bibliographic Description helper applies the correct script orientation per MARC field.
- If truncated, the Current Title/Author adds ellipses in the correct order (to the left) if any strong right-to-left characters are encountered.
Add Subfield Delimiter/Code Helper Assists in the Entry of Non-Latin Data

Note: These enhancements are primarily of interest to customers who use a Unicode server.

The Add Subfield Delimiter/Code helper allows the input of subfield delimiters and codes in a MARC record without the need to change to a Latin keyboard or use the MARC editor’s expanded field mode. This helper is available on both Unicode and non-Unicode servers but was primarily designed for use by those who routinely catalog in non-Latin languages. By default, this helper will not appear.

When selected in the properties, this helper is available in wizards that use the MARC editor.

Clicking on the helper will open a table that displays all possible subfield codes. Selecting a code on the table will immediately add the subfield delimiter and the code to the current cursor position.

Added Support for UNICODE Formatting Characters

Note: These enhancements are primarily of interest to customers who use a Unicode server.

Two helpers have been added to allow entry of Unicode formatting characters. Unicode formatting characters may be needed primarily to change the default display produced by the Unicode Bidirectional Algorithm. These characters are used to change the direction of display of right-to-left within left-to-right or left-to-right within right-to-left because not all characters have a defined or strong display direction. This algorithm cannot always make the correct determination as to how one or more characters are to be displayed, and therefore the Unicode formatting characters are used to control that algorithm, so that the characters are displayed in a manner that is pleasing to the user. These formatting characters would generally only be used by those who routinely catalog in non-Latin languages. By default, these helpers will not appear.

Add Unicode Formatting Characters Helper

The Add Unicode Formatting Characters helper displays a list of Unicode format characters that can be added to the MARC record.

Show/Hide Unicode Formatting Characters Helper

The Show/Hide Unicode Formatting characters helper should be used to toggle on the display of the characters and then the formatting characters can be selected.
UNICODE Formatting Characters Can Be Deleted in MARC Editor

Note: These enhancements are primarily of interest to customers who use a Unicode server.

Formatting characters are defined in Unicode as zero-width characters. In order to delete formatting characters, they must be selected. Selection can be made with either the keyboard (hold Shift key down and use right or left arrow to move the caret) or a mouse. When on a formatting character, the caret will change its shape from standard flagged to rectangle outline around the character, hitting the Delete key when the rectangle is displayed around the formatting character will delete it.

Call Number/Item Detailed Display Tab Enhanced

The Call Number/Item detailed display tab has been enhanced so that, if the item is highlighted in the item tree, the pane to the right displays Call Number fields, Item fields, and Extended Information fields.

Note: In cataloging wizards that allow call numbers and items to be added or modified, Call Number fields can be changed and saved together with Item field changes; however, item and call number Library fields cannot be changed simultaneously.

Item Tree Default Property Added for Collapsed or Expanded Display

New Item Tree Defaults allowing the item tree display to be collapsed or expanded by default have been added to the Properties Defaults tab for the following cataloging wizards in the WorkFlows Java client.

- Call Number and Item Maintenance
- Item Search and Display
- Modify Title
- Duplicate Title
- Delete Title, Call Numbers or Items
- Add Item
- Edit Item
- Bound-withs
- Transfers

The property was also added to the Defaults tab for the Modify Selected Items helper properties, accessed from the Global Item Modification wizard properties.

This property controls the display of the item tree in both the search window view pane and on the detailed display screen’s Call Number/Item tab.
Note: This default property is not available in the wizard properties for single library systems.

If Item Tree Display Expanded is selected, item tree displays with all call numbers expanded. If Item Tree Display Collapsed is selected, only the user’s library call numbers display as expanded, while all other call numbers are collapsed.

Note: This change does not alter the order in which call numbers or items are displayed in the item tree.

Note: Additional call numbers that do not belong to the user’s library may be expanded, as follows.

- If the user reaches the Call Number/Item tab by way of clicking on a current title.
- If the user reaches the Call Number/Item tab by way of selecting a different call number or item from the view pane.
- If a call number or item is a default item.
- If a new call number or item is added.
- If a library does not own any call numbers or items for a title, the first title that displays is expanded by default.

Search Preferences and Item Tree Default Properties Added to Modify Selected Items Helper

The Modify Selected Items Helper in the WorkFlows Java client has been enhanced to include the following Default properties. The Modify Selected Items helper can be accessed from the Global Item Modification wizard properties.

- Search Preferences: Allows you to choose a search Type (Keyword, Browse, or Exact), Index, and Library by default.
- Item Tree Defaults: Allows the item tree display to be collapsed or expanded by default.

Add Ordered Items to Catalog Wizard Now Appears on Cataloging Toolbar

The Add Ordered Items to Catalog wizard has been added to the Cataloging toolbar. It appears in the Items group, following the Global Item Modification wizard. Previously, this wizard only displayed on the Acquisitions toolbar.

The Add Ordered Items to Catalog wizard guides the user through the process of adding the item(s) representing an orderline into the catalog. Call numbers and copies are added to the catalog from holding codes in orderline distribution records.

Note: Users who use custom toolbars will need to use Toolbar Management (either from the Preferences/ Desktop/ Current Toolbar menu or the Toolbar Management wizard on the Utility toolbar) to add this wizard to their customized Cataloging toolbar.
Search Sort Defaults to Twenty Characters

In the hit list resulting from a search in any search window in Symphony WorkFloWS, BRS sorts on the first twenty (20) characters of the hit list entry. If you wish to increase this limit, you may contact SirsiDynix Client Care for more information.

**Caution:** Only consider changing this limit if it is absolutely necessary. There is a performance tradeoff if the limit is increased.

**Example:**

A law library’s collection consists of a majority of periodicals in which the first 6 to 10 words of the title for each item are the same. Users tend to sort their search results by Title. In this case, it would be worthwhile to increase the sort character limit.

Error Reporting Enhanced in ANSEL to UTF-8 Record Conversion

When Chinese/Japanese/Korean (CJK) records are loaded on Unicode-compliant systems through SmartPort or bibliographic record loading reports, the programs that convert ANSEL-encoded records to UTF-8 encoded records now output records that include errors. Previously, errors were reported but the specific records were not identified.

Users No Longer Required to Select the General Index for Empty String Searches

Previously, when users performed empty string searches in the Item Search, they had to select the General index from the Index list. Now, users don’t have to actually select the General index in order to perform an empty string search. Empty string searches will always use the General index.

Subject Source Gadget Selects Subject Headings to Remove When Importing Records Using the SmartPort Wizard or Reports

The Subject Source gadget has been added to select subject headings that should be removed from the matching bibliographic record, based on the MARC21 6XX second indicator values, before loading the record into the catalog. This gadget is in the Remove Subject Headings field, which has been added to the following wizard and reports.

- SmartPort wizard properties
- Bibliographic Database Overlay (Bibloadbatch)
- Load Bibliographic Records (Bibload)
- Load Bibs with Order Info (Biborderload)
- Load Bibs for Selection (Selectbib)
- Load Bibs with Selections and Decisions (Selectbibemb)
The following valid MARC21 6XX second indicator values can be selected using the Subject Source gadget.

- 0 = LC Subject Headings
- 1 = LC Subject Headings for Children's Literature
- 2 = National Library of Medicine Subject Headings
- 3 = National Agricultural Library Subject Headings
- 4 = Source not specified
- 5 = National Library of Canada Subject Headings
- 6 = Répertoire de vedette-matière
- 7 = Source specified in subfield 2

**Corrections**

**Changes in Marc Editor Did Not Maintain Field Order**

When adding a field to a bibliographic record or making changes to an existing field in a bibliographic record, the original order of MARC tags was not always being retained.

This has been corrected.

**Current Title Search Not Defaulting to Exact Item**

In the WorkFlows Java client, the current item was not carried over in the Cataloging wizards. Rather than being taken to the exact item indicated, the user was taken to the first item for that title.

This has been corrected.

**Cross References Now Display in Alphabetical Order**

The WorkFlows Java client has been corrected so that if a list of cross references displays, the cross references display in alphabetical order.

**Shadow Flags for Title, Call Number, and Item Should Be Independent of Each Other**

In the WorkFlows Java client, the cataloging wizards' shadow flags for title, call number, and item were not independent of each other. For example, if a user selected the Shadow check box for a call number, the Shadow check boxes for the attached items were also selected and could not be changed. In contrast, the WorkFlows C client cataloging wizards allowed users to set the shadow flag at any level—title, call number, or item—and these flags were independent of each other.

Now, the WorkFlows Java client cataloging wizards that allow for shadowing have been corrected. These updated wizards include Add Title, Modify Title,
Duplicate Title, Call Number and Item Maintenance, Add Item, Edit Item, Global Item Modify, and Add Brief Title. The Shadow check boxes for title, call number, and item are now independent of each other. Selecting or clearing the Shadow check box at any level does not select or clear the Shadow check boxes at other levels. Except, shadowing at a higher level, by default and for convenience, shadows all call numbers and/or items at the lower levels. Lower-level check boxes do not need to be selected.

**Control Tab Fields Should Display Policy Names, Not Descriptions**

In some cataloging wizards (Title, Item, and Authority), the Control tab displayed policy descriptions rather than policy names.

This has been corrected.

**Browse fails with #ct not defined error**

When attempting a browse against a search field that has [no value] in the authority thesaurus, the WorkFlows Java client would return the error message "#ct not defined".

This has been corrected.

**Exact search allowing leading articles - WorkFlows Java Client**

The Exact search option in the Item Search in the WorkFlows Java client was not functioning properly. When browsing a title, it was allowing the leading article to be included and would return a result. Assuming a title field is cataloged with the appropriate indicators, it should require an exact match with the heading in the heading database, which does not contain the leading article.

This has been corrected.

**Call Numbers Do Not Remain Collapsed when Modifying Records**

The list of call numbers on the Call Number/Item tab was not remaining collapsed after saving a change to a call number. Instead, it would revert to the expanded view automatically.

This has been corrected.

**Call Numbers Sorting in Ascending Order**

The WorkFlows Java client was sorting all call numbers in ascending order on the Call Number/Item tab, regardless of classification scheme.

This has been corrected.
Unable to Copy Diacritic Characters from Connexion

The WorkFlows Java client was not allowing the direct copying of anything with diacritics from OCLC Connexion. The copy appeared to be successful, but the paste showed that the diacritics were translated inappropriately into question marks.

This has been corrected.

Unable to Delete Indicator Value in Marc Editor

When creating or modifying a bibliographic record in the WorkFlows Java client, when changing a tag that does not allow indicators to one that does the indicator values became difficult to modify. Tabbing into the indicator field and using the spacebar caused the 2nd indicator value to be placed in the 1st indicator position, and corrections could not be made by use of either the arrow or backspace keys.

This has been corrected. The spacebar, arrow and backspace keys now function correctly in the indicator field.

Editing Copy Number to an Existing Copy Number Did Not Allow Subsequent Change

When adding a new item to an existing title, there is the ability to indicate the copy number of the item. If the copy number is changed to one that already exists for this title, WorkFlows indicates that the copy already exists. However, a subsequent attempt to change the copy number to a new one resulted in an inability to save the newly created item.

This has been corrected.

007 Field Did Not Display Prompts

When a bibliographic record contains a 007 tag, the WorkFlows Java client provides some useful prompts to allow for correct entry of values in this field. When a 007 tag was part of the Template Entry ID list, however, these prompts were not displaying. The prompts would only display if a 007 was added manually to a record.

This has been corrected. The 007 will now display the prompts in both situations. If a 007 is part of a template, the drop-down arrow to the left must be used to expand the field in order for the prompts to display. If the 007 is added manually, using the arrow or the tab or enter keys will work to display the prompts.

Staff and Public Notes Did Not Appear in Item Search and Display

In the WorkFlows Java client, the STAFF and PUBLIC notes did not display under the view pane's Call Number/Item tab.

This has been corrected.
Analytic Erroneously Placed in Call Number

When creating new call numbers, the |z to indicate the analytic position was being placed incorrectly in certain situations. For example, any string that began with the letter V, such as “VAN”, would cause the |z to appear.

This has been corrected.

Smartport and Modify Title Wizards Locked Up when Changing Format

Previously in the WorkFlows Java client, when attempting to change the format of a record, either in Smartport or Modify Title wizard, the WorkFlows Java client locked up and required that the wizard be closed using the X in the wizard window. This occurred with any record that contained one call number with no copies and when the global configuration was not set to display UNIMARC formats.

This has been corrected.

Unable to Change MARC 21 Record Format

If global configuration was set to display UNIMARC formats, bibliographic records could not be changed from one MARC 21 format to another.

This has been corrected.

Display Bibliographic Description Helper Truncated Call Number Display

When using the Display Bibliographic Description helper in the WorkFlows Java client or the Display Description helper in the C Workflows client, longer call numbers were being truncated to 30 characters.

This has been corrected.

Diacritic Displayed Incorrectly

In the WorkFlows Java client, a bibliographic record containing a capital I with a circumflex (^) displayed as a capital J with a circumflex.

This has been corrected.

Unable to Add 007 to Marc Holdings Record

In the WorkFlows Java client, a 007 tag could not be added to a Marc Holdings record.

This has been corrected.
Post Holdings to OCLC Caused Program Error

In SmartPort, when attempting to post holdings to OCLC using the WorkFlows C client, the following system message displayed and the SmartPort client closed.

Z3950_32.EXE has encountered a problem and needs to close. We are sorry for the inconvenience.

Holdings were posted to OCLC, but subsequent attempts to re-connect to OCLC were unsuccessful.

Add Item Wizard Sending Incorrect Data to Director’s Station

Previously in the Add Item wizard (in the WorkFlows Java client) and the Add Copies wizard (in the WorkFlows C client), incorrect values in the Item Library field were being loaded into Director’s Station and causing data errors.

This has been corrected.

MARC Editor On-the-Fly Font Changes Corrected

Previously, if a user changed the font in the client while working on a bibliographic record, numerous display problems could occur, such as those in the following list.

• The title that displays at the top of the screen below the helpers was not changed until the record was saved, closed, and re-displayed.

• The subfield being edited did not change until the cursor was in a different subfield.

• Next step buttons only partially displayed.

• Fixed field data and data in the 001 and 005 fields overflowed their screen areas.

• When changing fonts from a larger size to a smaller size, the fixed field pane displayed excess space after the fixed fields.

These display problems have been corrected when a user changes fonts while editing a record.

Policy Names Displaying for Created By, Modified By, and Previously Modified By Fields

Cataloging wizard Created By, Modified By and Previously Modified By fields will now properly display the policy name, and not the description.
Validate Headings Helper Was Not Saving the 003 Tag

When using the Validate Headings helper to propose an authority record, if the user added a tag to the proposed record, then saved the record, the 003 tag was not saved. For example, if the user added a 400 tag to the authority record, then saved the record, the new 400 tag appeared in the record, but the 003 tag no longer appeared. The Helper was saving the new tag with the same entry number as 003 tag, thus replacing the 003 in the newly added record.

This has been corrected.

Validate Headings Helper Didn’t Function Correctly

In the WorkFlows Java client, the Validate Headings helper was returning the following message.

Field 007: Error minimum size

and no headings could be validated.

This has been corrected.

Searching Inconsistency Between Modify Title and Transfer Title

A general keyword search done in the Modify Title or Item Search and Display wizards for a record that did not exist in the database returned a subject heading listing, and the top of the screen retained the original index and search type of general keyword.

The same search in the Transfer Title wizard returned the same subject heading listing but the index and search type was changed to subject browse.

This has been corrected so that the Transfer Title wizard also retains the original index and search type used.

856 Could Not Be Opened in WorkFlows Java Client

In the WorkFlows Java client, when selecting a URL in an 856 that contains an authentication string, the Mozilla Firefox browser could not connect to it successfully. The following message displayed.

404 Not Found

The same URL could make the connection through Internet Explorer without difficulty.

This has been corrected. Both Mozilla Firefox and Internet Explorer can now connect successfully using a URL with an authentication string.
Item Extended Information Tabbing Stuck in Loop

Previously in the Cataloging wizards on the Call Number/Item tab, users could tab through the Item Information fields and the Extended Information fields, but could not tab out of the Extended Information fields once there.

Example:

If the user is on the Call Number/Item tab for an item in the Edit Item wizard, once tabbing has carried the user through all the Extended Information fields, the tab returns to the first Extended Information field rather than the next available area.

This has been corrected. Use Ctrl+Tab to move the focus to the Next Step buttons and Ctrl+Shift+Tab to return the focus to the Item Information area.

Typing Characters in Verify Lists Does Not Result in Autofill

Previously in the Cataloging wizards on the Control tab, verify lists were editable and would not open with available options when a character was typed.

Example:

If a user tabs through the available fields on the Control tab to the Created By list, characters typed are appended to the text already in the Create By field rather than opening the verify list to show available options.

This has been corrected. The Created By field is no longer editable and autofill functions as expected.

F6 Shortcut Did Not Move Cursor Between Panes on Call Number/Item tab

Previously for the Cataloging wizards on the Call Number/Item tab, the shortcut keys F6 did not move the cursor between panes on the tab.

Example:

If the cursor was in the item tree and a item was highlighted, F6 did not move the cursor focus to the item pane.

If the cursor was in the item tree and a call number was highlighted, F6 did not move the cursor focus to the call number pane.

This has been corrected.
CHAR_DEWEY Call Number Sorting Creates the Shelving Key Correctly

The character prefix (CHAR_DEWEY) call number sorting rule was not creating the full shelving key correctly.

Example

A call number is 823 BEA. The CHAR_DEWEY call number sorting rule creates a shelving key by mapping the first character in the call number to a two-digit prefix, then replacing the first character in the call number with a zero. Since the character 8 maps to the prefix 14, the CHAR_DEWEY shelving key should have been 14 023 BEA. However, the CHAR_DEWEY shelving key was being produced as 14 023.

The CHAR_DEWEY call number sorting rule has been corrected to properly create the full shelving key.

In the WorkFlows Java client, the CHAR_DEWEY call number sorting rule can be specified in a selected policy in the Classification wizard.

In the WorkFlows C client, the CHAR_DEWEY call number sorting rule can be specified in the selected Classification policy in Catalog Configuration.

Keyboard Shortcuts Didn’t Work in Certain Fields

In the WorkFlows Java client, when the cursor was positioned in certain fields of an item record the keyboard shortcuts would not work. This affected the following fields

- Price
- Total Charges
- Copy Number
- Number of Pieces

This has been corrected.

Wizards Start Correctly After Using Cataloging Wizards

If the user started any Cataloging wizard, then switched to another wizard on the Cataloging toolbar or other toolbar, the WorkFlows client would hang instead of opening the wizard.

The Cataloging wizards have been changed so that when a user starts a Cataloging wizard and later starts another wizard from any toolbar, the selected wizard will open correctly.
Bibliographic Records With 880 Entries That Contain a Caret Symbol Display Correctly

If a title or copy search located a bibliographic record in which the caret symbol (^) was part of the text in an Alternate Graphic Representation (880) entry, the following problems were reported.

- In the Workflows Java client, the browse list did not show any search results, or the following message displayed.
  
  Invalid datacode

- In the Workflows C client, the following message displayed, and the client session would end when the user clicked OK to close the message window.
  
  Communication Error

The Workflows Java client and the Workflows C client have been corrected so bibliographic records that have a caret symbol in the text of an 880 entry will display properly.

Combination Browse Headings Not Created Successfully

In a Main Entry (100)/Uniform Title (240) Combination Browse Index Variation, the headings were created incorrectly if an include subfield list was defined for the 240 subfields.

This has been corrected.

It is important to note that if the subfield list for a browse index variation is an Exclude list, and the subfield list for the combination browse index variation is an Include list, or vice versa, the combined heading will be built based on the subfields indicated in the Exclude list. Therefore it is recommended that all browse index variations contain the same type of subfield list (Include or Exclude).

Changes to Record Editor Delete Field Shortcut

Previously, when using the Record Editor in cataloging wizards, users could press CTRL+DELETE to delete a field. The Workflows Java client now uses Java version 1.6, and in this Java upgrade, the CTRL+DELETE shortcut is reserved for another function (deleting the word following the cursor).

Now in the Record Editor, users can press SHIFT+CTRL+DELETE to delete a field.

Can’t Circulate Message Added to Item Tree

Previously, if an item’s Circulate checkbox was not enabled on the Call Number/Item tab, the following text failed to display following the current location in the item tree.

can’t circ

This has been corrected.
Call Number/Item Tab Displays English in French Version of WorkFlows

Previously in several WorkFlows Java client wizards (including Modify Title, Edit Item, and Item Search and Display), some of the information that displayed on the Call Number/Item tab displayed in English, even if the French version of WorkFlows was used.

Example:

Dernier prêt: NEVER
Retour prévu: Aucun

This has been corrected.

ISXN Validation Fails in the WorkFlows Java Client When More Than One Entry Type Defined

Previously on the WorkFlows Java client, if ISBN or ISSN entries had more than one Entry Type defined in a catalog format and the ISXN Warnings Must Be Acknowledged property was selected on the Add Title wizard properties Behavior tab, ISXN validation did not work and a system message did not appear.

This has been corrected. If ISBN or ISSN entries have more than one Entry Type defined, ISXN validation functions correctly.

Note: ISXN validation functions correctly if the ISBN and ISSN entries have a single entry defined in the catalog format.

Show/Hide Search Pane Helper Causes Hit List to Disappear

Previously on the search window in Cataloging wizards such as Item Search and Display, if the Show/Hide Search Pane helper was used, the hit list did not reappear immediately as the screen was refreshed.

This has been corrected.

Records Updated in Dynamic Index Leave Unneeded Files in Temp Directory

For sites running Unicorn GL3.1 Patch Cluster 5, every time that a record or group of records was added, modified, or deleted, files were being created in the directory used for temporary files needed when running reports. In this case, these files were not being deleted, which could cause a shortage of disk space over time or could prevent reports from running correctly.

This has been corrected, and was also previously corrected in patch cluster 5A. Contact Client Care for assistance in cleaning up any disk clutter that may have resulted from this error.
Incorrect Policy Values in Modify Wizards When Using Customized Policy Lists

Previously in modify wizards that change existing records in the WorkFlows Java client, the first policy value on the custom list for Item Category 1 and Item Category 2 was displayed (rather than the specified value) when the existing policy value was not included in the customized list of policies for the Library of the logged in user.

*Example:*

*Use the following configuration for the Modify Title wizard.*

- Item Category 1 policy is configured to use customized policy lists per Library.
- For MAIN Library, the policy values CASSETTE, CD, DVD and VIDEO are excluded.
- The title The Bourne Ultimatum has one call number with two items.
- The first item has Item Category 1 value BOOK.
- The second item has Item Category 1 value DVD.

If the record is displayed using the Item Search wizard, when the second item is highlighted on the Call Number/Item tab, Item Category 1 correctly displays the value DVD. However, if the record is modified using the Modify Title wizard, when the second item is highlighted on the Call Number/Item tab, Item Category 1 incorrectly displays the value BOOK, since that is the first value in the drop-down list.

This has been corrected.

Shelving Keys Updated Correctly for Dewey Periodical Classification

If a record was created using the Dewey Periodical (DEWEYPER) classification scheme (with the DEWEY_SANBORN_SORT_RULE) and the |z field was not manually added to the record, the initial shelving key would incorrectly contain the 1 character for the |z field. This has been corrected.

*Example*

A record is created with call number 387.24 fU58 1975. The initial shelving key was created as 387.24 FU58 1 001975. With this correction, the initial shelving key will now be created as 387.24 FU58 00195.
Add Title Wizard

Enhancements

New Add Title Wizard and Add Temporary Title Helper Default Properties

Two new Default properties have been added to Add Title wizard and Add Temporary Title helper properties for 880s functionality.

- Include Paired Fields
- Entries to Pair

Note: This is primarily of interest to Unicode customers. Paired Fields policy is only available when connecting to a Unicode server.

Include Paired Fields

The Include Paired Fields property causes paired fields to display in the template in preparation for input of multiscrypt data. This property displays only if the global configuration Paired Fields policy is enabled, and is delivered disabled by default. If Include Paired Fields is selected, the Entries to Pair property becomes available.

Note: The Include Paired Fields property is active for any Entries Template selected. Paired fields can be added for the tags entered in the Entries box.

Entries to Pair

The Entries to Pair property allows you to enter the tags to be paired, separated by a comma. If no tags are entered, all fields in the selected template will be displayed as paired.

Corrections

Add Title Wizard Not Saving Collection Exchange Data

In the Add Title wizard, if item information was added before the call number, Collection Exchange data, such as Exchange Type and Category, was lost after the call number was added and saved.

This has been corrected.
Add Volumes and Call Numbers Wizard

Corrections

Adding Volumes or Call Numbers Clears the Library Field

In the Add Volumes and Call Numbers wizard, if a user made a mistake in the Add Volume/Call Number process, such as mistyping item information, and an error dialog displayed, after the user clicked OK to close the dialog, the wizard would clear the Library field. The user had to re-select a Library field value.

The wizard was not restoring the call number/copy library values after the error dialog displayed. This has been corrected.

Bound-with Wizard

Corrections

Bound-with Wizard Non-Functional on a Single-Library System

When using the Bound-with wizard on a single-library system, the following message displayed and the wizard was unable to proceed.

#NS required field missing

This has been corrected.

Call Number and Item Maintenance Wizard

Corrections

Call Number and Item Maintenance Wizard Didn’t Return Error When Number of Pieces Set to 0

In the WorkFlows Java client, if the number of pieces was inadvertently changed to 0 in the Call Number and Item Maintenance wizard, the WorkFlows client did not save the record but no error message was returned.

This has been corrected. An error message will now display if the number of pieces is set to 0.
When Editing Call Numbers, Title Line in Call Number/Item Tree Switched to Wrong Title

In the Call Number and Item Maintenance wizard, a user selected a title to modify. In the Call Number/Item tree, the user collapsed all the call numbers, and then edited the first call number record to a non-unique call number. After saving the changes, the user selected the call number record again to make more modifications. But, he noticed that the title switched to the first record in the system with this call number, rather than the title of the previously edited call number record.

This title switching behavior in the Call Number/Item tree occurred only when the call number node containing a non-unique call number was collapsed.

This has been corrected.

Duplicate Title Wizard

Corrections

Duplicate Title Wizard Didn’t Preserve Media Desk Property Value

In the WorkFlows Java client, the property setting for Media Desk was not saved when using the Duplicate Title wizard. Instead, the Media Desk value was empty.

This has been corrected.

Global Item Modification Wizard

Corrections

Global Item Modification of Item Category 1 Didn’t Dynamically Index

In the WorkFlows Java client, the Global Item Modification wizard allowed the modification of the value in Item Category 1. However, searching by the modified Item Category 1 value did not retrieve the appropriate record(s) until the next run of the Add, Delete, Update Database (Adutext) report.

This has been corrected.
Global Item Modification Wizard Changes Price Even When User Is Changing Other Values

When using the Global Item Modification wizard, the Price field of the selected items was changed, even though the user had selected to only modify the Item Type of these items.

This has been corrected. The Price field now includes a “blank” value that can be selected so that the item price will not be changed when other item fields are modified.

Modify Selected Items Helper Not Using Configure Options for Item Search Selections

Previously, the Global Item Modification wizard’s Modify Selected Items helper was not honoring the defaults selected in Configure Options for Item Search.

Example:

In the Item Search and Display wizard properties, a user clicked the Configure Options for Item Search button on the Helpers tab. In the Call Number Browse box, the user selected the DEWEY class scheme, and then saved her changes. However, in the Global Item Modification wizard, when the user clicked the Modify Selected Items helper and in the search window clicked the Configure Options for Item Search helper (binoculars icon), the call number browse scheme default in this helper was ALPHANUM, not DEWEY.

This has been corrected. The Modify Selected Items helper now honors defaults previously selected in Configure Options for Item Search.

Couldn’t Select Shadowed Field Value in Global Item Modification Wizard

In the WorkFlows Java client, a value in the shadowed field could not be selected. This occurred when there were no Item Category 1 and Item Category 2 policies present on the server.

This has been corrected. The selection of the shadowed field is no longer dependent on the presence of Item Category 1 and Item Category 2 policies.
Label Designer Wizard

Enhancements

Label Designer Wizard Next Step Buttons Enhanced

Several enhancements were made to the Label Designer wizard next step buttons for viewing and editing a label template.

- **OK button text changed to “Save”**—The Save step will update the template and allow the user to make additional modifications to the template without closing the window.

- **Cancel button text changed to “Close”**—This is more consistent with other wizards.

- **New Return to List button**—The user clicks this button to return to the list of templates from the single template window.

- **New Close or Return to List confirmation dialog**—If the user modifies the template and clicks either Close or Return to List, the following confirmation dialog appears.

> This template has been modified. Do you want to save the changes before closing?

Label Designer Template Now Includes Item Extended Info Element Type

The Label Designer wizard is now able to print item extended information. The Label Designer label template contains a new configuration element Type, Item Extended Info.

When Item Extended Info is the selected element Type, the user can select a value from the Value list as an element on a label line. All extended information entries defined for the Item Extended Information Format policy will appear in this list. The following entry options are delivered.

- **Circulation Note**
- **Public Note**
- **Staff Note**

When creating a label template, follow these steps to add an Item Extended Info element.

1) Under Label, click the line to include an Item Extended Info element.

2) In the Type list, select Item Extended Info.

3) In the Value list, select an option, such as Circulation Note, Public Note, or Staff Note.
New Label Designer Sample Template Delivered

A new Label Designer sample template is now delivered. The SirsiDynixSampleTemplate file is a sample template for catalogers to use as an example of how to set up a Label Designer template. The sample template uses a typical set of three labels for an item (a spine label and two circulation labels). Previously, a LabelTemplates file was delivered with no field definitions. The new SirsiDynixSampleTemplate file contains sample field definitions.

*Note:* SirsiDynixSampleTemplate is delivered for new installations only.

Label Designer Element Type Checkin Now Contains Holding Code Value

Users can now print a serial control record’s holding code on serial labels. When creating or modifying a label template, if a user selects the Checkin element Type, he can select the new Holding Code Value from the drop-down list.

Corrections

Label Templates Not Displaying for Non-Administrator User

User-created templates did not display in the Label Designer wizard if the user had not logged in as a user with administrator privileges on the workstation. This has been corrected.

Label Designer Wizard Now Prints Landscape

Previously, even if Landscape was selected on the Page tab in the Label Designer wizard, labels did not print in landscape format. This has been corrected.

Modify Title Wizard

Corrections

Removing Item Extended Information Didn’t Remove “Post-It” Icon

Previously in the WorkFlows Java client, in the Modify Title wizard on the Call Number/Item Tab, the left pane would display a barcode icon with a yellow “post-it” if a Public or Staff note is present in Extended Information. If the operator used the Delete button on the keyboard to remove information from an Extended Information field, rather than the right-click option to Delete Field, the “post-it” would remain.

This has been corrected.
Unable to Retain User ID When Deleting MARC Holdings

When deleting MARC Holdings in the Modify Title wizard, the user ID is stored in the previously modified by field of the catalog record, displayed on the control tab in the WorkFlows Java client. If logged in with a user ID containing more than 10 characters, the message was returned.

`#Io error in field size`

This has been corrected.

Problems Using Tab Key in Modify Title Wizard

In the Modify Title wizard, after using the Insert Row Before or Insert Row After helper, a user noticed that she could no longer tab through the fields in the MARC editor. When the user pressed TAB in one of the MARC fields, the Return to Search button at the bottom of the window was highlighted. The user had to tab through the Return to Search, Save, and Close next step buttons first before she was able to tab to the fixed fields and, eventually, the MARC fields.

This has been corrected.

Modify Title Wizard Prompts for Save When No Modifications

Previously in the Modify Title wizard, if CTRL+C is used to copy the Title Control Number from the Control tab, the user is prompted to save data when no modifications were actually made.

This has been corrected.

Remove Title, Call Number, or Copies Wizard

Corrections

Remove Check Boxes Appear for All Libraries Despite Behavior Property Setting

In the WorkFlows C client's Remove Title, Call Numbers, or Copies wizard properties, even though the Remove Only Copies for Lookup Library behavior property was selected, the wizard would display remove check boxes for all copies owned by other libraries, as well as for the lookup library copies. With this behavior property selected, the remove check boxes should only appear next to copies owned by the lookup library.

This has been corrected.
**SmartPort Wizard**

**Enhancements**

**New Matching and Processing Options Added**

New options for matching and processing have been added to the SmartPort wizard. In addition to matching on the SirsiDynix Symphony title control number, the match and load option can now be told to match on a numeric keyword index key. The new options, found in the default properties of the SmartPort wizard, include Match on Title Control Number or Indexed MARC Tag, Match on Title Control Number and Indexed MARC Tag, the ability to select the Indexed MARC Tag Number, and the ability to Remove Subject Headings.

- **Match on Title Control Number or Indexed MARC Tag** considers the incoming record a match if the title control number of a library catalog record matches one of the specified Title Control Number Source fields in the imported record, or if one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index.

- **Match on Title Control Number and Indexed MARC Tag** considers the incoming record a match if the title control number of a library catalog record matches one of the specified Title Control Number Source fields in the imported record, and if at least one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index.

- **Indexed MARC Tag Number** specifies the MARC tag values to check for a match in addition to the title control number, if desired. If this field is used, SirsiDynix Symphony checks the catalog for a MARC tag match on the first Indexed MARC Tag Number value. If no match is found, the second Indexed MARC Tag Number is checked, and this pattern continues until either a match is found, or all Indexed MARC Tag Numbers have been checked. A Match MARC Tag Hierarchy gadget is provided to select Indexed MARC Tag Number values.

**Note** The Indexed MARC Tag Number field is available only when the Match on Title Control Number or Indexed MARC Tag option or the Match on Title Control Number and Indexed MARC Tag option is selected.

- **Remove Subject Headings** specifies one or more subject headings to be removed from the incoming record, based on the 6XX second indicator values, before it is loaded into the catalog. A Subject Source gadget is available to select subject heading types.

**Capture Window Messages Added For Match On Options**

For the Match On options, the message that displays in the Capture window when a record is matched indicates which option was selected.

- If the match occurs on title control number only, the "Matching record found on title control #" message displays.
Example
Matching record found on title control #o16388481

- If the match occurs on an index key only, the "Matching record found on index key" message displays.

Example
Matching record found on index key 0898388481

- If the match occurs on both title control number and an index key, the "Matching record found on title control #nnn and index key nnn" message displays.

Example
Matching record found on title control #o16388481 and index key 0898388481

SmartPort Wizard Alerts User When an Auto-Generated Call Number is Created

When the SmartPort wizard is used in Library B to Match and Load captured records for call number records in Library A, an auto-generated call number is created for each new record with no copy in Library B. The SmartPort wizard has been enhanced to alert the user that an auto-generated call number was created.

Previously, the message displayed as follows.
Matching record found on title control #xxxxxxxxxxx and index key

The message has been changed to read as follows.
Duplicate call number with no copy not allowed. Assigning an AUTO call number
Matching record found on title control #xxxxxxxxxxx and index key

SmartPort Can Now Download OCLC Authority Data

Libraries who use OCLC Z39.50 Cataloging may now use the SmartPort wizard to connect to OCLC’s authority database and download authority records to their SirsiDynix Symphony databases. New Search Name policies and the associated Z39.50 attribute files have been added. SirsiDynix Symphony administrators will want to create a new search name map and new gateway element based on the documentation provided by OCLC at

http://www.oclc.org/support/documentation/z3950/config_guide/default.htm
and
http://www.oclc.org/support/documentation/z3950/searchauthorities/default.htm

New Search Name Policies

The following Search Name policies were added.

A-PERNAMKW|Personal name keyword (authority)|
A-PERNAMPH|Personal name phrase (authority)|
A-PERNAMEX|Personal name exact (authority)|
New Z39.50 Use Attributes

The following Z39.50 Name Mapping policies were added.

AUTHORITY_PERSONAL_NAME_KY (10239)
AUTHORITY_PERSONAL_NAME_PH (10240)
AUTHORITY_PERSONAL_NAME_EX (10241)
Clear Button Added to Search Window

The Smart Port wizard has been enhanced to contain a Clear button in the Search window. Clicking the Clear button will remove the search results for a previous search in the search results list and start a new search.

Corrections

SmartPort Wizard Would Not Import Records with a 006 Tag

Previously in the WorkFlows Java client, the SmartPort wizard would not import records with a 006 tag. When the user chose to capture a record with a 006, then clicked OK to Match and Load, the wizard would display a message indicating that there was already a matching record in the system, and then the following system message.

Edit not permitted.

The SmartPort wizard has been corrected.

Using the File/Print Command After Saving Record Prompted User To Save the Record Again

After capturing a record in SmartPort, if a user clicked Save, the record appeared in gray, indicating that it was saved. The user would then select the Print command from the File menu, and the record would print successfully. But, when the user clicked Close, SmartPort prompted the user to save the record to the database even though the record had already been saved once before.

After a user clicks Close in the Capture window, SmartPort now checks to see if a captured record has already been saved once. If so, SmartPort will not prompt the user to save the record a second time.

Additionally, after the user clicks Close, the wizard returns to the initial search hit list, and the user can now select another record to import and print.

Unable to Use Saved Files or Strategies in Smartport

The SmartPort wizard has the ability to save records to a file and to save search strategies. In the WorkFlows C client, SmartPort was not allowing staff to work with the saved files or search strategies and the following error messages displayed.

SAVE directory does not exist

cannot open STRATEGY directory

This has been corrected.
Print Screen Now Working from SmartPort

Previously, it was not possible to perform a screen print of the hit list or a record captured by the SmartPort wizard. This has been corrected.

Viewing Window Displays MARC Records Correctly When Using the View Helper

If the SmartPort wizard was used on a workstation with a 1024x768 screen resolution, the MARC record display would suddenly “jump” to the top of the Viewing window when a file of MARC records was viewed using the Move Forward and Move Backward buttons in the View helper.

The display in the Viewing window has been corrected so the MARC records being viewed using the Move Forward and Move Backward buttons in the View helper display properly.

SmartPort Wizard Prompts to Save a Captured Record When Closing the Wizard in Single Window Mode

If the WorkFlows Java client was configured to run in single window mode, the SmartPort wizard would save a captured record automatically upon exiting without giving the user the choice to save the record or discard it.

The SmartPort wizard has been changed so the following message displays if the user tries to open another wizard while the SmartPort wizard is open.

There are open wizards that require attention. Please close the wizards.

The user must close the SmartPort wizard before starting another wizard. If the SmartPort wizard is closed while a captured record is viewed, the wizard prompts the user to either save the record, or exit the wizard without saving the record.

SmartPort Search Results Display Information Columns Configured to Display

In the SmartPort wizard, the search results hit list was not displaying all of the entries that were configured correctly in the Z3950 Format wizard to display. The entries that contained numeric subfields included or excluded from the display were not displaying in the search hit list.

Example

The 245 (title), 100 (author), 040 (cataloging source), and 260 (publication info) entries are configured to display in the search hit list displays. However, the 040 entry and the 260 entry were not displaying in the search result hit list because they contained subfields that were excluded from display.

The SmartPort wizard has been corrected to display the entries that are configured in the Z3950 Format wizard to display in the search results hit list, regardless of whether or not the entries contain numeric subfields included or excluded from the display.
SmartPort Formatted Display Property Was Ignored

Previously, the SmartPort wizard was ignoring the Formatted Full Display default property. This has been corrected.

Smartport Duplicated 856 Field

In the WorkFlows Java client, when using Smartport to import records, when the bibliographic record contained an 856 the 856 was duplicated. This has been corrected.

Post Holdings Not Always Reflected in 948 of Records Captured by Smartport

In Smartport, when a subscription to OCLC is available, there is the option to search and post holdings to OCLC. In the WorkFlows Java client, when selecting the option to capture a record immediately after post holdings, the bibliographic record loaded contained a 948 tag with the following

|hNO HOLDINGS IN [3 digit library code]

The holding was posting to OCLC, but it was not reflected properly in the 948 of the captured record.

This has been corrected. Regardless of when the post holdings option is selected, the 948 will now contain

|hHELD BY [3 digit library code]

Search Strings That Contain Diacritics Return Search Results When Using a Unicode Z39.50 Server Connection

If a search in the SmartPort wizard included diacritics, no hits would be returned when a Unicode Z39.50 server connection was used.

Example

If diacritics, such as è or ê, â, ô were entered in the search term, a general search for "poussière" returned no matching records, but a search for "poussiere" returned over 100 hits.

The SmartPort wizard was expecting the matching records to be in Unicode or UTF8 format, but some retrieved records used MARC8 encoding.

The SmartPort wizard has been changed so the correct records are retrieved when a search containing diacritics is performed using a Unicode Z30.50 server connection.
Search Key Options Not Localized in Drop-down Lists

Previously, the SmartPort wizard search index options (such as Author, Title, General) and the Boolean operators (such as AND, NOT, and OR) were hard-coded in English, and could not be localized to the current language selected in the client. Now, these options have been localized and will be translated to the client’s current language.

Note: This change is for new SirsiDynix Symphony installations only. Existing sites can use the Name Mapping wizard in OPAC Configuration to update these labels manually.

Cancel Button and File Extension Check Added to Copy Helper in the SmartPort Wizard’s Saved Files Helper

Previously, if the Copy helper was used in the Saved Files helper to copy a saved file to a new file name, only the OK button was available. The copy operation could not be canceled if the user decided not to copy the saved file.

The Copy helper has been changed to have the following option buttons.

- **Copy File** copies the contents of the source file to the specified destination file.

- **Cancel** ends the copy operation and returns to the Saved Files helper.

In addition, the Copy helper has been modified to verify that the destination file’s file extension is the same as the source file’s file extension. If the file extensions do not match, the following message displays.

The destination file name should be of the same type as the source file name.

Publication Year Information Loads Correctly When a Record is Imported

When a bibliographic record was imported using the SmartPort wizard, the publication year did not display when the record was displayed in a search hit list. The SmartPort wizard has been changed to correctly load the publication year information when a bibliographic record is imported.
Transfer Title, Call Numbers, or Copies Wizard

Corrections

Removing Title After Transfer Not Working Properly

In the Transfer Title, Call Numbers or Items wizard, the following two behavior properties were not working properly in the WorkFlows Java client.

- Allow removal of last item remaining under title
- Prompt for removal of title after removing last item

The wizard would transfer the last item of a title, but it would not prompt for removal of the title nor remove the source title from the system.

The WorkFlows Java client would properly handle the case where only one, unique empty call number remained after the transfer was completed. A prompt would display, and the title would be successfully removed. (A prompt displays based on the wizard properties.) However, if the empty call number was not unique after the items were removed, the call number would be reset to a new value by the server, as required, but then the user would not be prompted to remove the title. This step has been corrected.

Transfer Wizard Causes VED Database Errors

Previously in the Transfer Items, Call Numbers, and Titles wizard, when a title transfer failed because one or more of the call numbers belong to a Library that was not in the user’s library Call Number Maintenance Libraries group, VED database errors occurred.

This has been corrected.
New Family Card (User Group) Features for Circulation

New Family Card (User Group) features have been added to SirsiDynix Symphony 3.2 for the Circulation module. The Family Card functionality will provide libraries with the ability to link user records together for circulation purposes. The functionality will allow libraries to set up user groups and allow users to have different levels of access within the group. When groups are set up, library staff will be able to determine if the group members are linked together for delinquencies. If members are linked for delinquency, then the entire group will inherit the worse case delinquency. Library staff will also be able to determine if group members can view charges, holds, and bills for members within the same group, if members can check out other members' hold items and pay other members' bills. A group member may also be designated as the notice master for notice reports so that notices for all group members will be sent to that user.

The Family Card (User Group) functionality can be used in both the public and academic library environments.

For example, in a public library setting, the Family Card functionality can be used to link together members of the same family. The system can be configured so that all users will inherit the worse case delinquency from any member of the group. The system can also be configured to allow the parents to see what their children have checked out and what bills they have.

In an academic environment, the Family Card functionality can be used to provide “proxy” charge functionality. The “proxy” charge allows group members to charge items for a designated “head” group member and apply the charges to the “head” group member's card. For example, a group could consist of a professor and graduate students. The group is not linked together for delinquency, but the graduate students are allowed to check out material for the professor. Using the “proxy” check out, the graduate students can check out material with their own cards and apply the checkout to the professor's card.

Note: To configure the Family Card features, contact SirsiDynix Client Care.
New Configuration Wizard

To support the Family Card features, a new configuration wizard was added to the User Configuration policy group. The User Group Responsibility policy is used to assign levels of responsibility to members in a group. This policy determines if group members share delinquencies and access to other group member's charges, holds, and bills. This policy also determines if members can check out other members' holds. The access levels set in this policy only apply to users logged into the e-Library. When library staff log in using WorkFlows, they can view all group members' charges, bills, holds, and more.

**Note:** For more information about this new policy, see the System Configuration section of this document.

Register User Wizard Updated

When adding a new user with the Register New User wizard, library staff members can now assign the user to a user group and also assign a user group responsibility. On the User Group tab in the user record, library staff can add a user to a new group, add a user to an existing group, or modify the user group and responsibility levels of an existing group member. When adding a user to a group, the staff member must select the appropriate User Group Responsibility policy. Once the policy is selected, the responsibility level and responsibility type will default from the policy settings. These can be modified, if needed.

**Note:** For more information about the user group fields on this tab, see the “User Group Tab” topic in the WorkFlows Java client online Help.

Circulation Wizard Changes

Circulation wizards were modified to support this new feature. Circulation wizard properties were added to control proxy checkouts, payments, and more. Wizard glossaries have been updated to display user group information.

For the following circulation wizards, if the site uses the Family Card feature and a user's responsibility level is LINKED, then the user will inherit the delinquency status of the worst-case user in the group. If a user in the same group is DELINQUENT, BLOCKED, or BARRED, an alert window will appear in the wizard.

The following circulation wizards have been modified.

- Bill a User
- Checkout
- Copy User
- Display User Holds
- Display User
- Ephemeral Checkout
- Modify User
- Pay Bill
User Group Helpers Added

The following helpers were added to the circulation wizards for browsing user groups, displaying user group information, displaying group bills, charges, and holds, removing group holds, and removing users from groups.

- **Browse User Group Helper** — This helper is available in the Register New User and Modify User wizards and is used to locate user groups.
- **Display User Group Bills Helper** — This helper is available in the Display User wizard and is used to display information about a user group and lists bills for the members of the group.
- **Display User Group Charges Helper** — This helper is available in the Display User wizard and is used to display information about a user group and lists charges for the members of the group.
- **Display User Group Holds Helper** — This helper is available in the Display User wizard and is used to display information about a user group and lists unfilled and available holds for the members of the group.
- **Pay User Group Bills Helper** — This helper is used to accept bill payment for members of a user group during another circulation activity, typically when using the Pay Bill wizard or Pay Bills helper. This helper can be used to make a payment for a single bill, all bills for a given user, or applied to the total bill for all group members.
- **Remove Group Holds Helper** — This helper is located on the Remove User Holds wizard. The helper allows library staff to view and select holds for members of a group for removal. Library staff may remove all holds for group or an individual group members’ holds.
- **Remove Group Membership Helper** — This helper is used to remove users from a group. This helper displays a list of all users in the group with check boxes to select for removal. Library staff can then remove individual users or all users in the group.

Reports Changes

The following changes were made to reports to accommodate the new Family Card functionality.

- A new report, Assign User Group to Bills, Charges, and Holds, was added. This report can be used to assign existing user records to groups. The report can also update existing bill, charge, and hold records with group information.
• If the library is configured for the User Groups functionality, and a member of the user group is indicated as the Notice Master on the User Groups tab of the user record, all notices for the group will be sent to the Notice Master only. If no Notice Master is indicated, the individuals in the user group will receive notices.

• The Load Users report was updated to allow for loading user group assignments and responsibilities. It can also update and reload user records with modified user group information.

• The Update User Delinquency Status and Update Select User Delinq Stat reports now handle user group delinquencies.

**e-Library Changes**

In the e-Library, users with the appropriate access levels can now view group member information. In Review My Account, this user can view bills, checkouts, and holds that belong to other group members, as well as cancel and edit group member holds.

**NCIP and SIP Support**

Family Card delinquencies are supported in NCIP and SIP transactions. When a patron is a linked member of a user group, the patron status returned by the SirsiDynix Symphony NCIP and SIP servers reflect the worst status in the group, not just the user’s individual status.

**Browsing User Group Functionality Has Been Added to the Lookup User Helper**

The ability to browse user groups has been added to the Lookup User helper.

For sites configured for the Family Card, in the User Lookup helper, there will be a third radio button search option labelled Browse Usergroup. Using the Browse a User button will return a list of user groups if more than one user group is found. The user can then choose the appropriate one and display the group’s users. If only one user group is found then a list of users in that group will display automatically.

**New Patron Credit Account Feature**

SirsiDynix Symphony 3.2 now includes a Patron Credit Account feature. This feature gives library patrons the ability to pay bills, fines, and more from a credit or deposit account. Credit accounts are established using the new Credit User Account wizard, found on the Circulation toolbar. Libraries can define policies the “rules” for paying bills with a patron credit account, including the types of bills that can be paid with the account and the maximum credit amount allowed. As bills are paid from the account, library staff can review the patron account balances and the credit transaction histories. Circulation wizards can be configured to automatically pay bills directly from these credit accounts. For example, as overdue fines are created, when items are checked in, the system will automatically pay these fines with credit account money, as long as the credit balance is more than the amount billed.
The Patron Credit Account feature also gives libraries a way to issue refunds automatically for paid lost item bills, or to issue refunds manually for other types of paid bills. The Discharge/Checkin wizard can be configured to automatically add a refund credit to a patron’s credit account when a lost item that had been paid for is checked in.

Withdrawals from a patron’s credit account can be made manually for various library-defined reasons, or to close the credit account.

The Assumed Lost report has been enhanced so that if library policies are set up to automatically pay bills from patron credit accounts, the report will automatically pay the assumed lost item bills that it creates. If the patron credit account has enough funds to pay the bill (and processing fee, if applicable), the report pays the bill and fee immediately. If the patron credit account does not contain enough funds to pay the bill and processing fee, the bill and fee are added to the user record. The report can produce lost item notices to give automatic payment information for bills that were paid with funds from the credit account, and to list any other bills that could not be paid automatically using the credit account and were added to the user record.

Patron Credit Account Policy Configuration

The following new policies were created to support the new Patron Credit Account feature.

- Credit Reason Policy — Using the Credit Reason wizard in the Circulation Configuration group, SirsiDynix Symphony administrators can define Credit Reason policies. Each time a patron account is credited, a credit reason is recorded with the transaction. This credit reason indicates the purpose of the credit, such as REFUND, AUTOPAY, or DEPOSIT.

- Credit Rule Policy — Using the Credit Rule wizard in the Circulation Configuration group, SirsiDynix Symphony administrators can define Credit Rule policies. Credit Rule policies determine the basic rules regarding credit accounts. Credit rules are “mapped” to specific libraries and user profiles. These credit rules include bill reasons that can be paid by the credit account, bill reasons that can be automatically paid, as well as the maximum credit balance amount.

The Default Price policy was enhanced with the Automatic Refund attribute to support the new Patron Credit Account feature. If this attribute is selected, a refund credit for the amount the patron paid for the lost item bill (replacement cost and processing fees) is added to the patron’s credit account. If this attribute is not selected, no refund credit will be added to the patron’s credit account. A refund can be made manually at a later date using the Manual Refund helper. For more information, see the “New Helper for Manually Issuing Refunds for Paid Bills” section of this note.
The Patron Credit Maintenance Libraries attribute has been added to the Library policy to support the new Patron Credit Account feature. In a multilibrary system, the Patron Credit Maintenance Libraries attribute in each Library policy specifies the libraries that are permitted to access the library's patron credit accounts to deposit funds, withdraw funds, issue refunds to, and close the credit accounts. This attribute determines whether one or more libraries will have access to a select group of libraries or all libraries. Library groups are defined using the Library Group wizard. A group named ALL_LIBS is delivered with SirsiDynix Symphony and includes all libraries on the system. Use the Library Group Policy helper to create new library groups or modify existing groups, if needed.

**New Credit User Account Wizard**

The Credit User Account wizard is used to manually create a credit account for a patron by depositing funds, or add a credit to a patron's account.

If the patron does not have an existing credit account in the database, the wizard will display a message indicating an account has been created with a balance of 0.00 for the patron. The library staff member can then continue to manually add credits to the patron's account.

If the patron has an existing credit account but it is currently closed, the wizard will display a message to prompt if the account should be reopened. If the library member reopens the credit account, the account is reopened with a balance of 0.00 for the patron.

Using this wizard, the patron can do the following.

- Type the deposit or credit amount.
- Indicate what the deposit or credit is for by selecting the Credit Reason policy.
- Indicate how the deposit or credit was made, including credit card, cash, debit, refund, and so forth.
- Refund a paid bill and apply a credit to the credit account, using a helper.
- Withdraw funds from the credit account or close the credit account, using a helper.

The Credit User Account wizard contains properties that allow the patron to set defaults for payment type and credit reason. Only credit reasons of the type DEPOSIT appear for selection in the Credit Reason property list. Additionally, this wizard contains behavior properties for displaying credit transaction histories and printing receipts for these transactions.

The Credit User Account wizard has the Manual Refund helper and Manual Withdrawal helpers to issue refunds or to manually withdraw funds from the credit account, respectively. The Manual Withdrawal helper can be used to close the credit account when the patron no longer wants to maintain a credit account at the library. For more information, see the “New Helper for Manually Issuing Refunds for Paid Bills” and the “New Helper for Manually Withdrawing Funds and Closing Credit Accounts” sections of this note.
For each transaction for the patron’s credit account, the Date Created, Title, Item ID, Bill Reason, Credit Reason, and Amount fields display information, as applicable. If a transaction is associated with a bill payment or refund, the Title, and Item ID display information from the bill.

In the Credit User Account wizard, library staff can view the patron’s credit account balances by clicking the User glossary at the top of the wizard window.

**Circulation Wizard and Helper Changes**

Many changes were made to the circulation wizards to support the Patron Credit Account Feature. The following circulation wizards and helpers have been modified.

- Bill User
- Checkout
- Discharge/Checkin
- Display User
- Ephemeral Checkout
- Mark Item Lost
- Pay Bill
- Pay Bills Helper
- Remove User
- Renew Item
- Renew Privilege
- Renew Privilege Helper
- Renew User

**Bill User Wizard**

A bill can be paid with funds from the patron's credit account in the Bill User wizard by selecting the payment type of CREDITACCT and selecting the Pay Now button. The fine will be paid with money from the credit account. A withdrawal transaction will be issued against the patron's credit account for the bill amount. The credit transaction will contain the default credit reason configured in wizard properties. The Bill User wizard properties page displays the two new default properties: Payment Type and Credit Reason. When the bill is paid by the credit account, the bill will be paid with the default payment type and credit reason.

**Note:** If the patron's credit account exists but is closed, the following message displays, and the bill is not paid. The bill can be paid using another form of payment.

Patron credit account has been closed.
Checkout Wizard

If the patron has a credit account and policies are configured to automatically pay fines with money from the credit account, fines created when using the Checkout wizard may be paid automatically with funds from the patron's credit account. Credit Rule policies list the fines/bills configured to be automatically paid from the credit account. The Checkout wizard properties page displays two new default properties: Payment Type and Credit Reason. When a bill is created during checkout and is automatically paid by the credit account, the bill will be paid with the default payment type and credit reason.

Discharge/Checkin Wizard

If the patron has a credit account and policies are configured to automatically pay fines with money from the credit account, fines created when using the Discharge/Checkin wizard may be paid automatically at checkin. The Discharge/Checkin wizard properties page displays two new automatic payment default properties: Payment Type and Credit Reason. When a bill is created during discharge and is automatically paid by the credit account, the bill will be paid with the default payment type and credit reason.

If policies are configured to allow automatic refunds for paid lost items, and the Discharge/Checkin wizard defaults are configured to automatically refund paid lost item bills, automatic refund credit can be issued when the lost item is checked in. The Discharge/Checkin wizard properties page displays two new automatic refund default properties: Payment Type and Credit Reason. When an item that had been marked as lost and paid for is checked in, a refund credit for the lost item bill and processing fee is added to the patron's credit account. A message similar to the following displays.

A refund has been applied to the user’s credit account. : $35.95

If the patron does not have a credit account, the wizard prompts whether or not to create a credit account. If the account is created, the refund amount is automatically added to the patron’s credit account. If the account is not created, a message that the item had been reported as lost displays. The Manual Refund helper can be used later to manually issue a refund for the paid lost item bill. For more information, see the “New Helper for Manually Issuing Refunds for Paid Bills” section in this note.

Display User Wizard

The Display User wizard displays credit account balance information on the Summary tab of the user record. The credit balance also displays in the User glossary. Additionally, a new Credit Account Transaction History helper is available for displaying credit account transactions. For more information, see the “New Helper for Displaying Credit Account Transactions” section of this note.

Ephemeral Checkout Wizard

If the patron has a credit account and policies are configured to automatically pay bills/fines with money from the credit account, bills created when using the Ephemeral Checkout wizard may be paid automatically with funds from the user’s credit account. Credit Rule policies list the fines/bills configured to be automatically paid from the credit account.
Mark Item Lost Wizard

In the Mark Item Lost wizard, users can pay lost bills from the patron's credit account using the CREDITACCT payment type. The payment will be allowed if the patron has funds in the credit account to cover the amount of the bill, and the bill reason is listed in the Credit Rule policy as a bill reason that can be paid from a credit account.

Pay Bill Wizard

In the Pay Bill wizard, users can pay bills from the patron's credit account using the CREDITACCT payment type. The payment will be allowed if the patron has funds in the credit account to cover the amount of the bill, and the bill reason is listed in the Credit Rule policy as a bill reason that can be paid from a credit account. The Pay Bill wizard properties page displays the two new properties: Payment Type and Credit Reason. When the bill is paid by the credit account, the bill will be paid with the default payment type and credit reason.

Note: If the patron's credit account exists but is closed, the following message displays, and the bill is not paid. The bill can be paid using another form of payment.

Patron credit account has been closed.

Pay Bills Helper

Like the Pay Bill wizard, users can pay bills from the patron's credit account using the CREDITACCT payment type. The payment will be allowed if the patron has funds in the credit account to cover the amount of the bill, and the bill reason is listed in the Credit Rule policy as a bill reason that can be paid from credit account. The Pay Bills helper properties page displays the two new default properties: Payment Type and Credit Reason. When the bill is paid by credit account, the bill will be paid with the default payment type and credit reason.

Note: If the patron's credit account exists but is closed, the following message displays, and the bill is not paid. The bill can be paid using another form of payment.

Patron credit account has been closed.

Remove User Wizard

If the Remove User wizard is used to try to remove a user who currently has a patron credit account, the following message displays.

Patron credit account has not been closed.

The user's credit account must be closed with the new Credit User Account wizard and the new Manual Withdrawal helper before the user record can be removed. Refer to the “New Credit User Account Wizard” and the “New Helper for Manually Withdrawing Funds and Closing Credit Accounts” sections of this release note for more information.
Renew Item Wizard

If the patron has a credit account and policies are configured to automatically pay fines with money from the credit account, fines created during renewal may be paid automatically with funds from the patron's credit account. Credit Rule policies list the fines/bills configured to be automatically paid from the credit account. The Renew Item wizard properties page displays the two new default properties: Payment Type and Credit Reason. When a bill is created during renewal and is automatically paid by credit account, the bill will be paid with the default payment type and credit reason.

Renew Privilege Wizard

If the user has a credit account and policies are configured to automatically pay privilege fees with money from the credit account, fees created when renewing a user's privilege may be paid automatically with funds from the patron's credit account. The Renew Privilege wizard properties page displays the two new default properties: Payment Type and Credit Reason. When a bill is created during the renew privilege process and is automatically paid by the credit account, the fee will be paid with the default payment type and credit reason.

Renew Privilege Helper

When this helper is set to display in circulation wizards, if the user has a credit account and policies are configured to automatically pay privilege fees with money from the credit account, fees created when renewing a user's privilege may be paid automatically with funds from the patron's credit account. The Renew Privilege helper properties page displays the two new default properties: Payment Type and Credit Reason. When a bill is created during the renew privilege process and is automatically paid by the credit account, the fee will be paid with the default payment type and credit reason.

Renew User Wizard

If the user has a credit account and policies are configured to automatically pay fines with money from the credit account, fines created during renewal may be paid automatically with funds from the patron's credit account. Credit Rule policies list the fines/bills configured to be automatically paid from the credit account. The Renew User wizard properties page displays the two new default properties: Payment Type and Credit Reason. When a bill is created during renewal and is automatically paid by the credit account, the bill will be paid with the default payment type and credit reason.

Note: In these wizards' properties pages, if the user selects the payment type CREDITACCT, then only credit reasons of the Withdrawal type display for selection from the list.

Assumed Lost Report Changes

The Assumed Lost (Assumedlost) report has been enhanced to support the use of the Patron Credit Accounts feature.
Addition of the Patron Credits Tab

The Assumed Lost (Assumedlost) report has been enhanced with the Patron Credit report tab. If the library uses patron credit accounts, and if library policies are configured to allow the automatic payment of bills from credit accounts, the selection fields the Patron Credit tab can be used to specify the payment type and credit reason for the automatic payment of assumed lost item bills.

For more information, see the "New Tab Added to the Assumed Lost Report to the Support Patron Credit Accounts Feature" release note in the Reports -- Enhancements section.

Updated Processing of Lost Item Bills

When the Assumed Lost report runs, it generates an assumed lost item bill and processing fee bill (if applicable) for each assumed lost item for a user. If the user does not have a patron credit account, the bills are added to the user's record. For users with patron credit accounts, the report verifies that the library of the user running the report has bill maintenance library access for the item's owning library and has patron credit maintenance library access to the library that created the patron's credit account. If the report user's library does not have bill maintenance library access and patron credit maintenance library access, the bills are added to user's record.

For all the bills the Assumed Lost report can pay using patron credit accounts, each lost item bill and corresponding processing fee are added together and compared to the balance in the patron credit account. If the total exceeds the credit account balance, the bill and corresponding fee are added to the user's record. If the total does not exceed the credit account balance, the bill and corresponding fee are stored until every bill and processing fee are evaluated for the user.

When the report finishes sorting out the bills and corresponding fees that could potentially be paid with funds from the patron credit account, the report compares the first bill and corresponding processing fee total for the user to see if it can be paid with funds from the patron credit account. If the lost item bill and processing fee bill can both be paid in full from the credit account, the bills are both paid automatically and the credit account balance is adjusted. The report evaluates each of the remaining bills and corresponding fees and pays those that can be paid in full from the credit account. Any bills and fees that cannot be paid in full from the credit account are added to the user's record.

If the report is set up to generate assumed lost item notices for patrons, the report will generate two groups of notices. For assumed lost items that were automatically paid for using funds from patron credit accounts, the Assumed Lost report generates notices that include information about the item that is assumed to be lost, the replacement cost, the processing fee (if any), the amount paid from the credit account, and the payment type. The other group of assumed lost notices is for any bills that could not be paid by the patron credit account, and include item information, the replacement cost, and the processing fee (if any).

Note: If a user has multiple assumed lost item bills, and the patron's credit account can only pay some of the bills in full, the user will receive two assumed lost item notices from the same run of the Assumed Lost report. One notice will...
show the assumed lost item bills that were paid automatically with the patron's credit account. The other notice will show the assumed lost item bills that were added to the user record.

Displaying Patron Credit Account Balances

When displaying a user record, you can click the User glossary at the top of the wizard window to display the patron's credit account balance. The following wizards/helpers display the credit account balances.

- Bill User Wizard
- Checkout Wizard
- Credit User Account Wizard
- Display User Wizard
- Ephemeral Checkout Wizard
- Pay Bill Wizard
- Pay Bills Helper
- Renew Privilege Wizard
- Renew Privilege Helper
- Renew User Wizard

New Helper for Displaying Patron Credit Account Transactions

In the Display User wizard, the new Credit Account Transaction History helper displays the transaction history for a patron's credit account. This history includes deposits and withdrawals made to the credit account. The transaction fields that display for each transaction include the following: Date, Title, Item ID, Bill Reason, Credit Reason, and Amount. The Title, and Item ID fields display information only if the withdrawal or refund is associated with a bill.

The Credit Account Transaction History helper is only available when displaying a user record linked to a patron credit account. The display of this helper in the Display User wizard is controlled by the wizard's Helper properties.

New Helper for Manually Issuing Refunds for Paid Bills

The Credit User Account wizard includes the Manual Refund helper, which is used to issue a refund for paid bills and add a credit to the patron's credit account.

Example

A patron pays a lost item bill but later returns the item to the library. The Main Street Library prefers to issue refunds manually, so no automatic refund is given when the lost item is checked in. The library uses the Manual Refund helper to issue a refund for the lost item bill.

By using the Manual Refund helper, library staff can manually refund the amount of the lost item bill and add the refund to the patron's credit account balance.
When the Manual Refund helper is selected, a list of fully paid and partially paid bills displays for the specified user. Library staff may select one or more paid bills to refund. If a selected bill has already been refunded, the Credit Reason, Payment Type, Amount, and Date Created (refunded) display in case the patron questions the refund.

The display of the Manual Refund helper in the Credit User Account wizard is controlled by the wizard’s Helper properties. The helper defaults properties that can be set are Payment Type and Credit Reason.

**New Helper for Manually Withdrawing Funds and Closing Credit Accounts**

The Credit User Account wizard includes the Manual Withdrawal helper, which is used to withdraw funds manually from a patron’s credit account. Withdrawals can be made for library-defined reasons, or to close a patron’s credit account.

**Example**

The Lorenzo Library is charging a $1.00 admission fee for a travelogue event. Rather than add a bill to the patron record, the library simply collects the fee from the users who want to use their patron credit accounts to pay for admission.

When the Manual Withdrawal helper is selected, the current account balance displays. Library staff can specify an amount, payment type, and credit reason for the withdrawal. Only Withdrawal type credit reasons can be used with this helper.

If the amount entered is equal to the current account balance, the user is prompted as to whether or not the credit account should be closed. If the user answers No, the credit account remains open with a zero balance. If the user answers Yes, a confirmation message displays to verify that the patron’s credit account has been closed.

**Note:** If the account balance is 0.00 when the Manual Withdrawal helper is selected, the Close Account button becomes active, and all other fields in the helper are disabled. From this point, the user can only close the account, or select Cancel to exit the helper and keep the credit account open.

If the withdrawal amount exceeds the current balance, the following message displays.

The credit account does not have sufficient funds.

If a credit account is closed, it can be reopened automatically when the user is specified in the Credit User Account wizard, or when an automatic refund is made for the return of a paid-for lost item. A dialog box prompts the user to reopen the account.

If the user tries to pay bills in various circulation wizards or the Pay Bills helper using a credit account after it has been closed, the following message displays.

Patron credit account has been closed.

The display of the Manual Withdrawal helper in the Credit User Account wizard is controlled by the wizard’s Helper properties. The helper defaults properties that can be set are Payment Type and Credit Reason.
Printing Patron Credit Account Receipts

When a patron account is credited, it is possible to print a receipt describing the transactions that occurred during the wizard session. A receipt can be printed each time the patron account is credited, or it can be printed at the end of the wizard session. To allow patron credit account receipt printing, select the Print Patron Credit receipt behavior property in the Credit User Account wizard properties.

To configure the fields that appear in the receipt, click the Print Patron Credit Receipt button in the wizard properties, and select the fields for the header, receipt body, and footer. By default, in the patron credit account receipt, the receipt header contains information about the patron, such as name, user ID, station library, and the date the account was created. The receipt fields will include details about the credit transactions, including the credit account balance. The receipt footer contains the final balance on the account.

Note: Receipt printer availability options on the Preference/Peripherals/Receipt Printer menu must be selected before printing patron credit account receipts.

Check for Station Library and Patron Credit Accounts Added to Certain Circulation Wizards

In multilibary systems that use patron credit accounts, the following wizards will now check the station library to see whether that library has been granted access to patron credit accounts in other libraries before paying a bill automatically with funds from a patron's credit account.

- Checkout
- Discharge/Checkin
- Renew Item
- Renew Privilege
- Renew User

The Discharge/Checkin wizard has also been enhanced to check the station library for patron credit account access in other libraries before issuing a refund automatically when checking in a lost item for which the user has already paid.

The station library must be included in the Patron Credit Maintenance Libraries attribute in a library's Library policy in order for the station library to access patron credit accounts in that library.

Example

In the Library policy for the Hunt Library, the Hunt Library and Chase Library are listed in the Patron Credit Maintenance Libraries attribute. The Discharge/Checkin wizard used by a librarian logged in at the Chase Library can automatically pay bills for a user who has a patron credit account at the Hunt Library. However, if the Discharge/Checkin wizard is used by a librarian logged in at the Ketcher Library, the wizard will not be able to automatically pay bills for a patron whose credit account is at the Hunt Library because the Ketcher Library does not have maintenance library access to patron credit accounts at the Hunt Library.
Language Field Added to User Record

In SirsiDynix Symphony 3.2, the Language field has been added to the user record. In circulation wizards, library staff members can now select a user’s default language on the Demographics tab in the user record. This facilitates printing library notices in the user’s language. The Language field is a required field.

In Wizards and Helpers

The following wizards and helpers display the Language field on the Demographics tab of the user record.

- Copy User wizard
- Copy User helper
- Modify User wizard
- Modify User helper
- New User Registration wizard
- Register New User helper
- Offline WorkFlows New User Registration wizard
- Offline WorkFlows Register New User helper

The following wizard/helper displays the Language field on the Summary tab of the user record.

- Display User wizard
- Display User helper

In Reports

Notice texts for the various languages are stored in the /Unicorn/Notices/ [Language policy name] directories. For instance, notice texts in Spanish are stored in the /Unicorn/Notices/ [Spanish] directory (as long as the Spanish Language policy is defined on the library’s system). When notice reports are run, the reports check the Language field in the user records and pull the notice texts from the specified language directories.

Notice text files in the language directory(ies) must be named the same as the files in the /Notices directory. The files need to be named the same so the system will know which notice text to pull for the reports.

Example:

The first overdue notice text file is named “1stoverdue” in the /Notices directory. The first overdue notice file in the specific language directory(ies) must also be named “1stoverdue.” And so, the first overdue notice text file translated into Spanish is named “1stoverdue” and is found in the /Unicorn/Notices/Spanish directory.

Note: If the notice text or language directory is not found, the report will pull the default notice file from the /Notices directory.
Demand Management Functionality Added to WorkFlows

WorkFlows now uses the Order Hold Fill policy in conjunction with the List Onshelf Items with Holds report to determine the order of libraries from which items will be pulled to fill a hold. When the report runs, Demand Management will follow the current processes to identify items that could fill the hold based on permissions and prioritizations. Once the list of potential items have been identified, the report will check the Ordered Hold Fill policy to determine which library's items are selected first to fill the hold. If an item is not found, the report will move to the next library in the list.

Depending on selections made in the List Onshelf Items with Holds report, the report will either consider the order of libraries within the group when pulling items to fill holds or will randomly select an item from any of the libraries in the group.

The ordered list may be composed of groups of libraries. WorkFlows selects items from libraries listed in the Ordered Hold Fill policy based on the holds pickup library.

Books by Mail Functionality Added to the WorkFlows Java Client

New options for mailing books on hold directly to patrons have been added to the Circulation functions of the WorkFlows Java client. With this new option, items that are placed on hold can be marked for shipment and shipping charges can be calculated based on selected mail options.

Place Hold Wizard

The Behavior tab of the Place Hold wizard now includes the following Default Delivery Service options.

- Display Mail Flag – Specifies whether or not to display the Mail Item to User flag.
- Display Delivery Services – Specifies whether or not to display the Delivery Method options.
- Display Shipping Costs – Specifies whether or not to display the Shipping Costs information associated with a selected Delivery Method. This properties option is only available if Display Delivery Services is selected.

The Defaults tab of the Place Hold wizard now includes Default Delivery Service – Select a Mail Services policy option to determine the default delivery service for hold items that will be shipped via Books by Mail.

If the appropriate properties are selected, the following options are now available in the Place Hold wizard.

- Select Mail Item to User to disable the Pickup At library field and enable the Delivery Method field if the item on hold is to be mailed via Books by Mail rather than picked up at the library.
• If the Delivery Method list is enabled, select the delivery method that will be used if the hold item is to be shipped via Books by Mail. The mail service as specified by the default policy in the Shipping Cost policy wizard is selected by default. Once the Delivery Method is chosen, the Total Shipping Cost field is populated based on the Shipping Cost policy. This field is required if Mail Item to User has been enabled.

**Mail Items Wizard**

A new Mail Items wizard is used to charge an item for mail via Books by Mail to a user. You can do the following in the Mail Items wizard.

1) When the Item ID is entered, the Get Item Information button is activated and is the default action when Enter is pressed. When Get Item Information is clicked, the user for whom the hold is being held displays. If there are no holds placed on the item selected, the following system message appears.

No holds on this item.

2) If the user already has an existing package scheduled for mailing, the Shipping Package Already Exists dialog opens, including the user ID, user name, tracking number of existing package, the date and time the original package was created, and the mail service to be used. The current item can be added to an existing shipping record by clicking Yes, or you can create a new shipping record for the item by clicking No. If Yes, the existing Tracking Number displays.

3) If there is no existing package, type a new Tracking Number. The maximum length for this field is 80 characters. When the Tracking Number is entered, the Confirm Shipment button is activated and is the default action when Enter is pressed.

4) Click Check Out Item to User. User alerts, if any will display at this time.

5) If you are ready to ship the package, select Confirm Shipment. The Confirm Shipment dialog displays. If you select Yes, the shipped date is updated in the associated shipping record and the Print Packing List helper is opened. If you select No, the action is cancelled and you return to the Mail Item screen.

6) If required, click the Print Packing List helper to print out a packing list and mailing label for a tracking number's shipment.

Once the shipment has been confirmed, the user information and Tracking Number fields are cleared, and a new item can be chosen for mailing.

The following helpers are available for the Mail Items wizard on the Helpers tab of Mail Items wizard properties.
Helpers

On the Helpers tab, you can select the helpers you want to display in the Mail Items wizard by selecting the Allow check box next to each helper you want to display in the wizard. Click a specific Helper button to display the Helper properties that you can set.

- Item Search Helper
- Change Item ID Helper
- Shipping Package Search Helper
- Print Packing List Helper

Print Packing List Helper

Use the Print Packing List helper to look up and print packing lists for items mailed via the Mail Items wizard. The following additional helpers are available from the Print Packing List helper.

- Shipping Package Search Helper
- Export Mailing Label Helper
- Print Labels for User Helper

Shipping Package Search Helper

The Shipping Package Search helper is used to identify items to print in a packing list for a particular Books by Mail tracking number. The Shipping Package Search helper can be used in conjunction with the Print Packing List helper or directly from the Mail Items Wizard. The Shipping Package Search helper opens when you click the Print Packing List helper from the Mail Items wizard.

Print Labels for User Helper

After you create a label template with the Label Designer wizard, click the Print Labels for User helper to print labels automatically using your computer's current printer settings. You can also print labels from the Print Preview Labels window.

Purge Shipping Packages Report

The Purge Shipping Records (Purgeshippack) report is used to delete package and item shipping records.
Policies

The following policies were added to WorkFlows for Books by Mail functionality.

- The Shipping Cost policy is used to specify default shipping charges for each available mailing option.
- The Mail Service policy is used to specify default shipping methods for Books by Mail.

The Library policy has been updated with the following Books by Mail information.

- The Mailing Center Library attribute is available if the system is configured for Books by Mail and specifies the library from which Books by Mail items are processed and shipped. This attribute is referenced if, in the hold record, Mail Item to User is selected and the Delivery Method is identified. The Mailing Center Library list does not include an empty library or ALL_LIBS options.
- The Mailing Center Location attribute is available if the system is configured for Books by Mail. When a hold is made available, the item's mailing center library location is used for the item's current location.

New Books by Mail Delivery Options Added to Place Hold Wizard

The following changes have been made to hold functionality in SirsiDynix Symphony to support Books by Mail.

- New default behavior properties have been added to the Place Hold wizard properties on the Behavior tab. The new flags are:
  - Display Mail Flag
  - Display Delivery Services
  - Display Shipping Costs
- A new default property for Default Delivery Service called Mailing Services has been added to the Place Hold wizard properties on the Defaults tab. The available values for Mailing Services are populated from the new Mail Service policy.
- In the Place Hold wizard, a new Delivery Method selection is available, with a default value determined by the Mailing Services default in the wizard properties. In addition, a new Total Shipping Costs field displays cost information, based on the Delivery Method chosen and the corresponding costs configured by the new Shipping Cost policy.
- The hold record for an item that is on hold with the Books by Mail delivery option now includes a Mailed field that indicates if the hold should be mailed to the user when it becomes available or if it should be held for pick up.
- The hold record for an item that is on hold with the Books by Mail delivery option now includes the status Available for Mail. This status is true when the hold record’s Mailed and Item Available fields are both set to Y.
• The hold record for an item that is on hold with the Books by Mail delivery option now includes a Mail Service field that does the following.
  • Indicates what mail service should be used to mail the hold.
  • Determines the shipping costs.

**New Mail Items Wizard Added for Books By Mail Functionality**

The Mail Items wizard, used to charge an item for mail via Books by Mail to a user, has been added to SirsiDynix Symphony.

The Mail Items wizard in the WorkFlows Java Client is used once items have been placed on hold for mailing, as follows.

1) Click the Mail Items wizard.
2) In the Item ID box, scan the item ID and click Get Item Information. The user for whom the hold is being held displays at this time.
3) If the user already has an existing package scheduled for mailing, the current item can be added to an existing package. If yes, a Mail Service and Tracking Number displays. If there is no existing package, type a new Tracking Number.
4) Type a Comment, if required.
5) Click Checkout Item. User alerts, if any will display at this time.

Once the item is checked out, the item's current location is updated to reflect that it has been checked out and mailed to a user and the mail database is populated. Staff may choose to create a notice once the item has been checked out for mailing. Also, a mailing label may be printed on the fly, or the label may be sent to a file for batch printing at a later time.

**Mail Service Information Included in List of Holds**

The following wizards have been updated to display Mail Service in the List of Holds for Books by Mail functionality.

• Display User Holds Wizard
• Display Item Holds Wizard
• Display Title Hold Wizard
• Modify User Holds Wizard
• Modify Item Holds Wizard
• Remove User Hold Wizard
• Remove Item Hold Wizard
Multiple User ID Functionality Added to WorkFlows

The ability to utilize multiple user IDs has been added to the WorkFlows Java client. The following circulation user wizards now include a User ID Manager helper that can be made active from the wizard properties Helper tab.

- New User Registration
- Modify User
- Copy User

The User ID Manager helper manages lists of active and inactive user IDs. The User ID Manager helper is the only means by which these IDs can be edited.

The following additional features have been added to allow for this new functionality.

- Added two fields to the User Extended Information record.
  - ACTIVEID
  - INACTVID

The client stores and retrieves packed lists of additional active and inactive user IDs in these fields.

- Added a new global parameter, USEUSERIDLIST.

On client startup, the User ID Manager helper retrieves data from the current user record. A list of active barcodes is generated by “unpacking” the data retrieved from the ACTIVEID extended information field. Similarly, a list of inactive barcodes is created by unpacking the data from the INACTVID field.

A save command updates the primary user ID if it has been changed, and replaces the data in the ACTIVEID and INACTVID extended information fields by packing the corresponding displayed lists. The user record is marked as edited and passed for dynamic indexing. Entries on the remove list are effectively removed from the saved record.

**Note:** When staff manually delete a user record, all User IDs are automatically deleted. When staff execute a process that deletes one or more user records, all associated User IDs are also deleted.

**Example:** Recording multiple User IDs for a public user through the Modify User Wizard with the User ID Manager helper.

A patron comes to the desk at Library A and wishes to register. The patron is already registered at Library B, but not at Library A. The user record is retrieved in the Modify User wizard via the User ID issued by Library A. The staff member clicks on the User ID Manager helper and adds a User ID for Library A. The new ID functions as a direct user access point, and both IDs (Library A and Library B) have a status of Active.

**Note:** A second User ID is not automatically made the primary or default User ID.

**Note:** The User ID limit per user is currently 99.
**Note:** When the New User Registration wizard is run, the first User ID that is entered becomes the primary User ID by default. A new user record cannot be saved unless a primary User ID is specified. In addition, if a User ID is attempted to be assigned but is already in use, the following system message appears.

User ID must be unique.

**Note:** A patron may present any active User ID for user retrieval during checkout. If a patron attempts to use an inactive ID, the following system message appears.

ID is inactive; user cannot be retrieved into Check Out.

**Example: Changing an active User ID to the primary User ID**

Staff can change any active User ID to the primary User ID with the User ID Manager helper located in the Modify User wizard.

1. In the Primary User ID list, click on the User ID that is to be primary.
2. Click Save.

**Example: Activating or Deactivating a single existing User ID with the User Manager ID helper**

Staff can change the status of a single User ID from ACTIVE to INACTIVE using the User ID Manager helper from the Modify User wizard.

1. Highlight one active User ID to select it.
2. Click the appropriate arrow button between the Active User IDs and Inactive User IDs lists to move the ID from one list to the other.
3. Click Save.

**Example: Discarding User IDs that are no longer valid**

A Staff member wishes to discard an inactive User ID because the library card has been lost. The staff member moves the User ID to the Discarded User IDs list on the User ID Manager helper. When the staff member clicks Save, the User IDs in the discard list are unlinked from the user and deleted from the system. If the User ID is used to access a user record, it is treated as an unassigned User ID and does not retrieve anything.

**Note:** The User ID (primary) can be swapped with a selected entry in the active list. Entries can be moved between active and inactive lists. Inactive entries may be moved to the discard list. Additional IDs can be added to the active list by scanning or typing in additional field information. These new entries are subject to barcode validation. The Addition field is the only data entry field.

**Items or Users Selected From Circulation Lists Automatically Become the Current Item**

When searching for an item or a user and a hit list is produced, the name or item selected from this list becomes the current item or user only when there is no user or item on the same screen already.
System Now Displays Leading Zero in Fine Amounts

In previous Unicorn versions, fine amounts less than one unit of currency displayed without a leading zero. Many users did not notice the decimal point and would think that they owed 10 dollars (or pounds) rather than 10 cents (pence). Now, the system will display a zero before the decimal point. For example, when displaying 10 cents, the client will show $0.10.

Unseen Renewals Feature Added to the WorkFlows Java Client

SirsiDynix Symphony now includes the Unseen Renewals feature. With this feature, libraries can now control the consecutive number of times an item can be renewed “unseen” (that is, the item is not physically present at the time of the renewal). Items can be renewed unseen with the e-Library, by telephone, or with a Selfcheck station. Libraries may decide to set limits on unseen renewals so they can check the condition of the items before users can continue to renew them.

Example

The library allows users to renew items up to six times, but limits users to no more than two consecutive renewals by telephone or by the e-Library. The library sets the Renew Limit to 6 and the Unseen Renew Limit to 2. With this configuration, users can renew items two times consecutively with the e-Library, then they must renew the items at the library counter for the third renewal. The users may then renew the items another two consecutive times by the e-Library, and then renew the item one final time at the library counter, for a total of six renewals.

The Circulation Rule policy has been enhanced to configure how many times a user with a certain User Profile may renew an item of a particular Item Type with the e-Library, by telephone, or with a Selfcheck station.

The following wizards have been enhanced with the Unseen Renewals feature.

- Renew Item
- Renew User
- Checkout
- Display User

In the Renew Item, the Renew User, and Checkout wizards, the new Renew Unseen Limit override will display when the user tries to renew an item that has reached its unseen renewal limit.

Following sections describe the new override and the changes to each wizard.
Renew Item Wizard Enhancements

The Renew Item wizard display now includes a Mark Item as Seen check box. This check box is used to specify if the item is being renewed as “seen” (physically present for renewal) or “unseen” (not physically present for renewal). If the check box is selected before an item ID is scanned or typed, the renewal is marked as a seen renewal. If the check box is cleared, the renewal is marked as an unseen renewal.

**Note:** If the renewal is recorded as a seen renewal, the unseen renewal counter is reset to 0. The unseen renewal counter records the number of consecutive unseen renewals, and determines when the number of consecutive unseen renewals permitted by the Unseen Renew Limit attribute in the Circulation Rule policy is reached. Therefore, when a renewal is recorded as a seen renewal, the unseen renewal counter is reset to 0.

In the Renew Item wizard properties, the new Item Seen property has been added. This property determines whether the Mark Item as Seen check box is selected by default in the Renew Item display. The Item Seen property is selected by default.

Renew User Wizard Enhancements

The Renew User wizard display now includes a Select All Seen check box. This check box is used to select all items eligible for renewal so they will be marked as “seen” (physically present) when the items are renewed.

The wizard display also includes the new Seen column in the list of items eligible for renewal. The Seen column contains the check box that a user can select to mark the item renewal as a seen renewal.

**Note:** For each item being renewed as a seen renewal, both the Renew check box and the Seen check box must be selected. The Renew check box determines whether the item is selected for renewal; the Seen check box specifies that the renewal is to be recorded as a seen renewal. If the Select All Seen check box is selected, the Select All check box must be selected so all items eligible for renewal will be selected for renewal as well as renewed as seen.

The Select All and Select All Seen check boxes can be used in various combinations, as follows, to renew items as seen renewals or unseen renewals.

- To renew all eligible items as unseen renewals, select the Select All check box.
- To renew all eligible items and record the renewals as seen renewals, select the Select All check box and the Select All Seen check box.
- To renew only selected items as an unseen renewal, select the Renew check box next to the item or items to be renewed.
- To renew only selected items and record the renewal as a seen renewal, select the Renew check box and the Seen check box next to the items or items to be renewed.

**Note:** It is possible to renew some items as seen renewals and some items as unseen renewals from the same list of items eligible for renewal.
Note: If the renewal is recorded as a seen renewal, the unseen renewal counter is reset to 0. The unseen renewal counter records the number of consecutive unseen renewals, and determines when the number of consecutive unseen renewals permitted by the Unseen Renew Limit attribute in the Circulation Rule policy is reached. Therefore, when a renewal is recorded as a seen renewal, the unseen renewal counter is reset to 0.

In the Renew User wizard properties, the new Select All Seen property has been added. This property determines whether the Select All Seen check box is selected by default in the Renew User display. The Select All Seen property is selected by default.

Checkout Wizard Enhancements

The Checkout wizard process has been changed to handle items already checked out to a user as seen renewals or unseen renewals, depending on the setting of the Automatic Renewal wizard property.

In the Checkout wizard properties, the Automatic Renewal property determines whether the wizard will suppress the "Item already charged to this user" message and automatically renew an item already checked out to the user, and if the renewal will be recorded as seen or unseen. One of the following Automatic Renewal properties may be selected.

- **Automatically Renew Items Already Checked Out as Seen** suppresses the "Item already charged to this user" message, renews the item automatically, and records the renewal as a seen renewal.

- **Automatically Renew Items Already Checked Out as Unseen** suppresses the "Item already charged to this user" message, renews the item automatically, and records the renewal as an unseen renewal. This option is useful if the library processes most renewals by telephone.

- **Do Not Automatically Renew Items Already Checked Out** displays the "Item already charged to this user" message so the user can decide whether to renew the item, and if so, whether the renewal is recorded as a seen or an unseen renewal. The item is not automatically renewed. This option is selected by default.

Note: If the renewal is recorded as a seen renewal, the unseen renewal counter is reset to 0. The unseen renewal counter records the number of consecutive unseen renewals, and determines when the number of consecutive unseen renewals permitted by the Unseen Renew Limit attribute in the Circulation Rule policy is reached. Therefore, when a renewal is recorded as a seen renewal, the unseen renewal counter is reset to 0.

Display User Wizard Enhancement

In the Checkouts tab of the user record display, the Unseen Renewals field has been added to the Item ID glossary to show the number of times the selected item has been renewed as an unseen renewal.
Renew Unseen Item Override Added

The Renew Unseen Item override has been added, and will display when the user tries to renew an item that has reached the Unseen Renew Limit set in the Circulation Rule policy that applies to the item. The following override can display if the user tries to renew the item with the Renew Item, Renew User, or Checkout wizard.

Override required to exceed unseen renewal limit.

Print User Card Helper Allows Patron Card Printing

The following Circulation wizards now have printing functionality for a patron's card.

- Register User
- Display User
- Modify User
- Confirm Address
- Checkout
- Copy User

A new Print User Card helper allows you to print cards for users on-the-fly, using printers with built-in card printing capabilities.

Circulation Wizards Enhanced to Process Items With the “Available Soon” Location

When items are added to the catalog using the Load Bibliographic Records (Bibload) report or the Add Ordered Items to Catalog wizard on the Acquisitions toolbar, options can be set so the items being added are assigned the AVAIL_SOON (Available Soon) current location. Various Circulation wizards have now been enhanced to handle items that have a current location of AVAIL_SOON.

- Check Item Status Wizard — If an item with a current location of AVAIL_SOON is not in transit, does not have holds, and does not need to be put in transit to its home library, the wizard gives the user the option of routing the item to its home location, or leaving the item in its current location of AVAIL_SOON. If the user chooses to route the item to its home location, the item's current location is changed to its home location.

- Checkin Bookdrop Items Wizard, Discharge/Checkin Wizard, and Fine Free Discharge Wizard — If an item with a current location of AVAIL_SOON is checked in, and the item does not have holds and does not need to be put in transit to its home library, the item's current location is set to its home location. The item should be routed to the specified home location.

- Inventory Item Wizard — If an item with a current location of AVAIL_SOON is scanned, the wizard alerts the user about the special current location. The wizard does not change the item's current location.
• Mark Item Used Wizard — If an item with a current location of AVAIL_SOON is scanned, the wizard alerts the user about the special current location. The wizard does not change the item’s current location.

• Receive Items in Transit Wizard — If an item with a current location of AVAIL_SOON is not in transit, does not have holds, and does not need to be put in transit to its home library, the wizard gives the user the option of routing the item to its home location, or leaving the item in its current location of AVAIL_SOON. If the user chooses to route the item to its home location, the item’s current location is changed to its home location.

Trap Holds Wizard — If an item with a current location of AVAIL_SOON is not in transit, does not have holds, and does not need to be put in transit to its home library, the wizard gives the user the option of routing the item to its home location, or leaving the item in its current location of AVAIL_SOON. If the user chooses to route the item to its home location, the item’s current location is changed to its home location.

**Total Checkouts and Total Checkouts Per Session Added to Date Due Receipt**

The count of Total Checkouts and Total Checkouts per Session have been added to the date due receipts generated by the Checkout wizard and the Renew User wizard.

These options are controlled by property settings on the wizards.

**Extra Step Added for Marking Item Lost or Missing**

In the Workflows Java client, when using the Mark Item Lost or Mark Item Missing wizards, an extra step has been added to confirm that the item should be marked as LOST or MISSING. After identifying the item to mark LOST or MISSING and the item information displays, it is now necessary to select the Mark Item Missing or Mark Item Lost buttons for confirmation. If the operator chooses to close the wizard at this step, it would prevent the item from being marked LOST or MISSING.

**New Property to Put Items in Transit when Pickup Library is Changed**

A behavior property has been added to the Modify User Holds and Modify Item Holds wizards that will allow an item to be put in transit when the pickup library is changed for an available hold.

**New Labels Added for Printing Receipts**

New variables have been added to the delivered labels file to allow for alternate language field labels when printing receipts.
Date Available Added to Hold Glossary

In the WorkFlows Java client, the Date Available for a hold has been added to the hold glossary. This glossary appears in the Display User Hold, Display Item Hold, and Display Title Hold wizards as well as on various hold lists.

Print User Helper Added to Checkout and Discharge Wizards

The Print User helper has been added to the Checkout and Discharge/Checkin wizards in WorkFlows. The Print User helper is visible in these two wizards when selected from the Helpers tab in wizard properties.

Note: The Print User helper is only available in the Discharge/Checkin wizard if Display User Information on the Behavior tab is selected.

Ability to Display Inactive Holds in the Holds List

Circulation wizard holds list displays have been enhanced to show inactive holds. In wizard properties, the Inactive Holds option was added to the Type of Hold list. This option will display the inactive holds for the user or item, along with the inactive hold reason. Reasons can be holds that are cancelled, expired, or a hold that was cancelled when item was placed on reserve, a hold was filled, or a hold expired on the hold shelf. Also, the Active Type of Hold option was modified to include only active holds, and the All option was modified to display all holds, both inactive and active.

The following wizards were modified.

- Display User
- Display User Holds
- Display Item Holds
- Item Search and Display

Added Ability to Search Users by Web Auth ID

Libraries now have the ability to configure the User Search to search by the Web Auth ID index. The Web Auth ID is a Web authentication key from a centralized authentication server. This ID works behind the scenes to verify that the user is authorized to use library services. To include the Web Auth ID index, the SirsiDynix Symphony administrator will need to modify the User Search Fields global configuration policy. Once configured, the User Search helper will display “Web Authentication” in the Index drop-down list.
Both Charge Date and Renew Date Checked When Calculating Maximum Fines

How the SirsiDynix Symphony server checks the date when grouping items together for a maximum fine has been enhanced.

Previously, the charge date alone was checked to determine the maximum fine. Now, both the charge date and the renew date are checked, and the later date is used to group items together for calculating the maximum fine. This is only used if the server is configured to use the Maximum Fee policy.

In addition, the renew date is now recorded in the bill at discharge.

Pay Bills and Waive Access Rights Separated

The Allow Bills to Be Forgiven/Cancelled property has been added to the Pay Bill wizard properties, the Bill a User wizard properties, and the Pay Bills helper properties. Select the property check box to include payment types of FORGIVEN or CANCEL on the payment type list. If this property is not selected, the payment type list does not include payment types of FORGIVEN or CANCEL. This property is selected by default.

Trap Hold With First Item Received

Previously, when an item was trapped and put in transit to fill a hold, the item was linked to the hold record. If another item was returned to the library that could fill the hold before the trapped item in transit was received, the item was not used to fill the hold.

Now, using Demand Management, the system can be configured to allow filling a hold with the first item received at the pickup library--be it a checked in item or an item in transit. To pre-empt another item currently in transit, the library where the item is checked in or received must match the pickup library.

When items are checked in, the system will check for outstanding holds, including holds that have been flagged to be filled but are not yet Available. If the item can fill the hold, it will be trapped to fill the hold and the hold will become available.

When the item in transit is received at the pickup library, it will either be used to fill other holds or be routed back to the items owning library.
Cash Drawer Always Opens When Accepting Bill Payments

In wizards and helpers that may be used to pay bills and accept payments from users, the cash drawer would open only when the library issued a receipt. Since a library may choose not to issue a receipt, the cash drawer now opens for bill payment transactions regardless of whether a receipt is printed.

The following wizards and helpers have been enhanced to always open the cash drawer (if the library uses one) when accepting payments for bills.

- Credit User Account wizard (in libraries that use patron credit accounts)
- Bill a User wizard
- Pay Bill wizard
- Pay Bill helper
- Pay User Group Bills helper

Display Inactive Holds in Display User Wizard & Display User Hold Wizard

The display of holds has been modified in Display User Wizard & Display User Hold Wizard to accommodate displaying inactive holds and their inactive hold reason. Inactive hold reasons include holds that are cancelled, expired, cancelled when item was placed on reserve, filled, or expired on hold shelf.

Corrections

Calendar Gadget Missing for Birth Date Field in User Record

In the WorkFlows C client, the Birth Date field on the Demographics tab in the user record was missing the calendar gadget.

This has been corrected.

Print Screen Did Not Print Consistent User Information

The Print Screen option found in the File menu of the WorkFlows Java client was not printing consistent user information. For some users, the Identify User section was missing.

This has been corrected.
Browse User Lookup Displayed Transaction List

In the WorkFlows C client, in the Global Configuration wizard on the Config toolbar, there are the options to Configure Display of User Information Header and Configure Display of User Transaction Lists. If these options were set to Display User Status Information and Do Not Display User Transaction Lists in Circulation Wizards respectively, a Browse User lookup would still show user transactions (such as bills and checkouts).

This has been corrected.

Display of User Category Information Inconsistent in Pay Bills Helper

In the WorkFlows C client, in the Global Configuration wizard on the Config toolbar, there is the option to Configure Display of User Information Header. If this option was set to Display User Status Information, user category information didn’t display consistently in the header of the Pay Bills helper found in the Checkout and Discharge/Checkin wizards.

This has been corrected.

Blank Box Displayed in Ephemeral and Check Item Status Wizards for Deleted Title

If the Ephemeral and Check Item Status wizards were used immediately after deleting a title, they displayed a blank box for the current title.

This has been corrected.

Operator Not Authorized for Override Not Allowing Entry of Correct Override

If an incorrect override operator value was entered in an override situation, the following message displayed.

Operator not authorized for override

The wizard in use had to be closed and reopened in order for a correct operator override to be entered. This only occurred when an existing operator override was entered that did not allow the particular override situation.

This has been corrected.

User Birth Date Defaults to the Correct Year

If a one-digit or two-digit year was manually entered as part of the user's full birth date in the user record, the year was not stored correctly in the user database.

Example

The user’s full birth date was manually entered as 3/1/01, which caused the birth date to be incorrectly written to the user database as 3/1/1.
The software has been corrected so that if a user’s birth date year is entered as a one-digit or two-digit year, the full four-digit year is written correctly to the user database. The birth date is compared to the current date to determine the correct century digits for the four-digit year.

**Note:** To print a list of user records currently in the database with incorrect one-digit or two-digit user birth years, run the List Users (Userlist) report with the Birth Date selection field set to select users with birth dates within a specific date range earlier than 1/1/1908. For example, the report can be run to select users with birth dates between 1/1/1900 and 1/1/1908. The birth year for these users may have been entered as 00, 01, and so on, so library staff should verify each user’s birth year before modifying user records.

**Caution** When running the List Users report, use a specific date range to select users with birth dates earlier than 1/1/1908. Since the value of NEVER is stored as 0 in the user database, running the List Users report with a birth date selection of <1/1/1908 will select all user records with NEVER in the birth date field in addition to user records with specified birth dates before 1/1/1908.

**Message No Longer Displays When Selecting a User Record in the User Browse Helper**

In Circulation wizards, if the User Browse helper produced a browse list of user records, the following message displayed if the user tried to display any record in the list.

*This is an empty screen for internal/hidden states*

The User Browse helper has been corrected so that when it is used in Circulation wizards, the message will no longer display when a user record is viewed from the browse list.

**Users Without Alternate IDs Could Not Be Displayed in Renew Wizards**

In the Renew User and Renew Privilege wizards, if the Current user was a user without an alternate ID, selecting the Current user displayed the following message.

*user not found*

After the message box was closed, a subsequent search for a user by alternate ID was unsuccessful.

This only occurred if the display of the user ID was turned off in global configuration.

This has been corrected.
Quick Scanning in the WorkFlows Java Client Caused Client Freeze

When scanning too quickly while using the Checkout or Discharge wizards, the WorkFlows Java client would freeze.

This has been corrected.

Amount Owed Field Updated Correctly in Certain Wizards After Paying Bills With the Pay Bills Helper

The Amount Owed field in the status header of certain Circulation wizards was not displaying the updated amount when bills were paid using the Pay Bills helper.

The following wizards have been corrected to display the current amount owed in the Amount Owed field in the status header after bills are paid using the Pay Bills helper.

- Display User
- Place Hold
- Renew User

Changing User Status on French Systems

Previously, users of the French WorkFlows Java client could not change a user’s user status. This has been corrected.

No Override Field for Suspended Users

When a staff member placed a hold for a user that was suspended, the following message displayed with no override field available.

user suspended

This has been corrected so that an override may be entered.

Duplicate Checking Properties not Reset

If duplication checking was turned on in circulation wizard properties, and a field or fields were selected for duplicate checking, then if duplication checking was turned off the fields for duplicate checking would be inactive, but a check mark still displayed next to the fields for duplicate checking. This has been corrected.

Bills Are Now Displaying for Items if User Has Been Deleted

Not all bills would show for an item if there was a bill linked to a user and the user had been deleted.

Since the user has been deleted, the user name and User ID fields were not processing correctly. This has been corrected.
Focus Lost in User Search Helper with Pay Bill and Checkout Wizards

In the Workflows Java client, if the User Search helper in the Pay Bill and Checkout wizards was used more than once in a session the focus would no longer appear in the Search for field. The wizards had to be closed and reopened before the cursor would again default to the Search for field.

This has been corrected. The focus will now default to the Search for field when opening the User Search helper.

Unable to Print Confirmation Screen for Lost Item Paid In Full

In the Workflows Java client, after marking an item lost and paying for the item in full there was no confirmation screen that contained all of the payment, user and item information that could subsequently be printed as a receipt.

This has been corrected. The Workflows Java client now displays a confirmation screen that contains user ID, name, lost and processing fees, whether it was paid, and item details. The confirmation screen can be printed.

Remove User Required Field Missing when Removing Holds

In the Workflows Java client, when attempting to remove a user that has holds the system prevents the removal and provides a Remove User Holds button. If the user had more than one hold, however, when selecting to remove all holds the following message displayed and only one hold was removed.

Required Field Missing

This has been corrected.

Unable to Cancel Blocked Override

In the Workflows Client, an override screen appears when attempting to check out to a BLOCKED user. When the option to Enter override and checkout was selected, cancelling the subsequent override screen caused the operator to be placed in the previous screen rather than cancelling the transaction.

This has been corrected.

Could Not Clear Web Auth ID Field

In the Workflows Java client, the Web Auth ID field used for LDAP user authentication on the Privilege tab of the user record could not be cleared out even when entering the override. The following message displayed.

USER Database Error--unable to process request

This has been corrected. An existing Web Auth ID may now be cleared out if the override is provided.
Charge Information Displayed in a Bill Not Associated with a Charge

The following steps were used to mark an item lost.

1) The item was discharged.
2) A bill was created for the user with the bill reason of LOST for the item just discharged.
3) The item was checked out to a special library-specific LOST user.

In this scenario the LOST bill displayed erroneous charge information. The charge information was not in any way associated with the item that had been discharged.

This has been corrected.

Call Number Does Not Print on Hold Available Slip

Previously in the Print Available Hold Slips behavior property for the Trap Hold wizard, the call number displays under author in the Receipt Fields box in default properties. However, the item's call number does not appear on the actual holds available slip.

This has been corrected.

Policy Names Displayed Single Period in WorkFlows Java Client

In the WorkFlows Java client, when displaying a user record, on the Summary tab policy names would sometimes display a single period (.) rather than the three periods (...) that indicate policy description balloon help.

This has been corrected. If a policy has policy description balloon help, three periods (...) will display after the policy name.

Recall Overdue Fines Didn’t Accrue Properly

Recall overdue fines were not being accrued if the library policy did not have closed dates/days and the accrue fine option was not selected. If the accrue fine option was selected, fines were calculated correctly.

This has been corrected.

Barcode Validation Not Working With Modified Barcode Formats

If using barcode validation and an active barcode format with strip character(s) defined for it, then the SirsiDynix Symphony system might contain either modified or unmodified barcodes in the user or item database.

Programs were modified to first lookup item and user records by the modified barcode. If the record is not found by the modified barcode, then the original barcode (un-stripped) is used for the database lookup.
An Administration report, Re-Synchronize Valid Barcodes (Resyncbarcodes), was created to list and/or update affected barcodes. This report will report valid barcodes in the system that contain extra barcode character(s) and/or digit(s) stored in the database record. If the report is run to update the database, then the reported barcodes will be modified in the item or user database to remove the extra character(s) and/or digit(s).

**Data Entered in Department Field Displayed in Mixed Case in WorkFlows Java Client**

In the WorkFlows Java client, data entered in the department field of a user record was displaying in mixed case. This differed from the behavior of the WorkFlows C client, which defaulted the display to all upper case regardless of how it was entered.

This has been corrected. The WorkFlows Java client now displays the data in the department field in upper case, regardless of how it was entered.

**Cursor Defaults in User Wizards Updated**

In the WorkFlows Java client, the cursor was not defaulting to the same fields as the WorkFlows C client in the Register User and the Copy User wizards.

This has been corrected. The WorkFlows Java client will now default to the following fields for the following wizards

**Register User**
- Basic Tab - User Name
- Privilege Tab - Privilege Expiration Date
- Demographics Tab - User Category 1
- Address Tab - First Address Entry Field
- Extended Info Tab - First Extended Info Entry Field
- Outreach Tab - Route

**Copy User**
- Basic Tab - User Name
- Privilege Tab - Privilege Expiration Date
- Demographics Tab - User Category 1
- Address Tab - First Address Entry Field
- Extended Info Tab - First Extended Info Entry Field
- Outreach Tab - Add Outreach Info Check Box

**Charge Limit Override Dialog Not Displaying as Expected**

In circulation wizards, if a Charge Limit Override dialog displayed and the user clicked Cancel, when the user attempted to check out more items, the override dialog would not appear again. Instead displaying the “Has too many charges” message as expected, the wizard displayed the following system message.

Charge limited override not defined

This has been corrected. The Charge Limit Override dialog will re-display with each new charge (until the charge limit is resolved).
Unable to Perform a Name Keyword Search

On a Unicorn for Oracle Windows server, if a site was configured to use Unicode, library staff members were unable to perform user name keyword searches in the circulation wizards. The BRS indexing software used by Unicorn for name searching was not modified to perform an external search on Windows servers, which is how Unicode sorting is performed in BRS. This has been corrected.

Paying Bills Could Update Wrong Title or Call Number Records

In certain circumstances, the pay bills program, used by wizards such as Pay Bill and Pay User, could update the wrong title and call number records. This occurred during LOST item processing.

This was corrected in a previous Unicorn version, but the shadow flags for some of the items linked to these records still were not correct. When a user searched these items in the e-Library or Web2, they were not appearing, even though the item records were not shadowed. The corrections to the pay bills program were revisited and adjusted. The pay bill program now updates the correct title and call number records, and the shadow flags are left intact.

Display User and Renew User Privilege Helpers Incorrectly Included with Pay Bills Helper

Previously in the Pay Bills helper, the Display User helper and Renew Privilege helper displayed when they should not.

This has been corrected.

Recall Due Date and Fine Inconsistencies

Previously, there was a discrepancy between the recall date due reported in WorkFlows (both the WorkFlows Java client and C client) and the recall date due used by Update User Delinquency Status (Setdelinq) report in declaring the recall overdue and the recall date used in computing the overdue fine.

In WorkFlows, the recall due date reported was the date the item was recalled plus the recall grace period. The recall due date used by the Update User Delinquency Status report when declaring the recall overdue and the recall due date used in computing the overdue fine was the date the item was recalled plus the recall grace period plus the number of closed days/dates during the recall grace period.

This has been corrected. The Update User Delinquency Status report now uses only the date the item was recalled plus the recall grace period when declaring the recall overdue. And, the calculation of fines and suspensions includes only the date the item was recalled plus the recall grace period. Closed days/dates are not included in these calculations.
Extended Info Flag Displayed “Yes” When User Record Did Not Contain Extended Information

In circulation wizards, the Extended Info flag on Summary tab of the user record displayed “yes” when there was no extended information in any extended information field of the user record. The value displayed as “yes” because the user record contained an empty extended information entry. This entry did not appear in the client.

This has been corrected. If a user record contains an empty extended information entry, the value for extended information on Summary tab will display as “none.”

User Titles Didn’t Appear in Checkout Screen in Brief Header Display

In the Workflows Java client, if the Global Configuration setting for the Configure Display of User Information Header on the Circulation tab was set to Display Brief User Information, the User Title (Mr, Mrs, Dr,) did not display in the Checkout screen.

This has been corrected.

Modifying User ID from 20 Characters to a Shorter ID Corrected

In circulation wizards, if a library staff member changed a user’s ID from 20 digits to something shorter (such as 18 digits), the ID could not be searched, and on Windows server systems, the Workflows client would freeze.

This has been corrected.

Duplicate Bills Printed from Print User Helper

Previously, the Print User helper listed duplicate bills for a user if the helper was configured to print to an application (such as Microsoft Word) rather than a printer.

Example:

In the File menu, a library staff member clicked Print Setup, selected Print to an Application, and selected Microsoft Word. In the Display User wizard, the staff member displayed a user record. This user had one overdue item. In the Print User helper, only one overdue bill was listed. But, when the staff member clicked Print, two bills for the user’s overdue item printed to the Word document. When the staff member configured the helper to print to a printer, only one bill was created.

This has been corrected.
Search Request Too Long When Searching for Users in Custom Library Group

Previously when searching for users in SirsiDynix Symphony WorkFlows, if a custom Library Group contained a list of several libraries, the total characters of which equalled more than 2047 characters in the search string, the following message appeared.

Search request too long.

This has been corrected.

Unable to Use Edit/Copy and Edit/Paste Commands When User Search Helper Was Displayed as the First Step of a Wizard

Previously, if the User Search Helper was configured to open as the first step of a circulation wizard, the library staff member was unable to use the Edit menu's Copy and Paste commands to copy and paste information from the User Search window. The client window focus was not set properly, and these commands could not determine which wizard window to copy and paste from.

This has been corrected.

Hold Notice Counter Now Decrements When Hold Is Unavailable or Suspended

When a hold pickup notice was created and sent for an available hold, the date notified and the hold notice counter in the hold record was updated. If, for some reason, the hold became unavailable or was suspended, the date notified was cleared, but the hold notice counter was not decremented.

Now, the hold notice counter is decreased when a hold becomes unavailable or is suspended. Also, the date notified will be cleared when a hold is suspended.

Receipt Printing the Same Whether No Builtin Raster Property Is or Is Not Selected

Previously, when the No Builtin Raster Driver property was not selected for Receipt Printer properties, the User ID, User Name, and Library printed at the top of the receipt. However, when the No Builtin Raster Driver property was selected, the User ID, User Name, and Library printed for each item that was checked out.

This has been corrected. User information will always print at the top of the receipt, whether or not No Builtin Raster Driver is selected.
Checkout Wizard

Corrections

Proxy Checkout Did Not Apply Hold Fee

The Checkout wizard has a behavior property for proxy checkout with cancel hold. When the property was selected, a hold fee (when applicable) was not being created.

This has been corrected.

Cursor Did Not Appear in User ID Box in Checkout Wizard

The Checkout wizard in the WorkFlows Java client has a property setting to Start with Search helper. When this property setting was selected, and the subsequent user search screen was cancelled, the cursor did not appear in the User ID box of the Checkout wizard. The staff member had to click in the box for the cursor to appear.

This has been corrected.

Special Due Date Applied in a Checkout When the Helper is Used Before Selecting a User

In the Checkout wizard, if the Special Due Date helper was used first to set a due date, and the Current user button was selected to use the most recently viewed user record in the checkout, the special due date was not applied when an item was checked out to the user.

The Checkout wizard has been corrected so that if a due date is set with the Special Due Date helper before selecting a user record for the checkout, the special due date is applied for items checked out to the user.

User Search Helper in Checkout Wizard Displayed Incorrect Library List

In the WorkFlows Java client, the library pull-down list in the Checkout wizard's user search helper was controlled by the user maintenance libraries in the library policy. This was inconsistent with the behavior of the WorkFlows C client.

This has been corrected. The user search helper in the Checkout wizard now uses the circulation libraries in the library policy.
Suspend User Override Didn’t Display at Checkout

In the WorkFlows Java client Checkout wizard, the Suspend User override did not display unless the property to Display user blocks in a separate window was selected.

This has been corrected. The Suspend User override will now display regardless of the value in the Display user blocks in a separate window property.

Checkout Wizard Displayed Scrollbar with Circulation Note

In the WorkFlows Java client, if the behavior property to display circulation notes was selected in the Checkout wizard, it caused a horizontal scrollbar to appear. The scrollbar had to be used in order to read the patron information.

This has been corrected. The horizontal scrollbar no longer appears. The circulation note will appear on one line if it is up to 45 characters, and on multiple lines if it is more than 45 characters.

Notes Label in User Status Information Header Now Appears in Red

If a site was configured to display User Status Information headers in circulation wizards, the Checkout wizard in the WorkFlows Java client did not display user notes or comments in red text. In the WorkFlows C client, the notes would appear in red text, and so catch the library staff member’s attention.

Now, in the WorkFlows Java client Checkout wizard, the label for the Notes field appears in red.

Error Message Corrected

In the Checkout wizard, on a system configured to use barcode validation and with the Automatically Restart Checkout on Item ID Error property selected, an inaccurate message appeared in the wizard window when an invalid item ID was scanned.

Invalid user ID; format unknown

This message appeared even though the user was scanning an item barcode.

This has been corrected. Now, the following message appears when a user scans an invalid item ID or user ID when barcode validation is configured.

The ID entered is not a valid user or item in the system.
Add Brief Title wizard

Enhancements

New Properties for Modifying Item Fields in Add Brief Title Wizard and Helper

New Behavior properties have been added for both the Add Brief Title wizard and the Add Brief Title helper that allow users to select which item fields are included by default and which fields can only be changed with appropriate privileges.

For the item fields listed below, a selected check box indicates that the field can be edited. If the checkbox is not selected, the field can not be edited.

- Call Number
- Library
- Item Type
- Home Location
- Item ID
- Item Category 1
- Item Category 2

*Note:* The Modify Item ID option is selected and disabled if the Auto-Generate Item ID When Adding Item Option is selected.

Add Brief Title Wizard Property Displays ISBN or ISSN Validation Warnings

The ISXN Warnings Must Be Acknowledged wizard property has been added to the Add Brief Title wizard. If this check box is selected in the wizard properties, the wizard displays ISBN or ISSN validation warnings when an incorrect ISBN/ISSN is entered. The ISBN or ISSN can either be corrected, or the warning can simply be acknowledged before the wizard continues. By default, the ISXN Warnings Must Be Acknowledged check box is cleared.
Bill a User Wizard

Corrections

Display User Helper in Bill a User Wizard Does Not Initialize Correctly When Switch to Another User

Previously, when the Display User helper is used in the Bill a User wizard, the helper did not clear user information when Bill Another User was selected.

This has been corrected.

Blanket Hold Wizard

Corrections

Could Not Place Hold With Expiration Date of NEVER in Blanket Hold Wizard

In the Workflows Java client, using the Blanket Hold wizard to place a hold with the expiration set to No date (NEVER) returned the following message.

Components of date must be all digits

This has been corrected.

Able to Place Blanket Hold Even When System Not Configured to Allow Blanket Holds

Previously, it was possible to use the Place Blanket Hold wizard even when the system was not configured to allow blanket holds. Using the wizard, a user placed a blanket hold, and a confirmation dialog appeared. But, when the user displayed the holds list, there was no blanket hold ID. Workflows did not indicate that a blanket hold was not placed. Actually, the Place Blanket Hold wizard should not appear on systems not configured to use this feature.

This has been corrected. Now, when Workflows starts, it checks the blanket hold configuration flag and will prevent the Place Blanket Holds wizard from appearing on the toolbar if this feature is not configured on the system.
Checkin Bookdrop Items Wizard

Enhancements

Display Circulation Note Option Added to Checkin Bookdrop Items Wizard Properties

The Behavior properties for the Checkin Bookdrop Items wizard now include an option to Display Circulation Note.

Corrections

Clear Date of Discharge in Checkin Book Drop Items Wizard

Previously, in the Checkin Book Drop Items wizard, if Clear Discharge List was selected, the Enter Date of Discharge field was also cleared.

This has been corrected.

Check Item Status Wizard

Corrections

Message Displays Correctly in the Check Item Status Wizard

If the Check Item Status wizard was used to check the status of an item that was currently checked out to a user, the following message displayed twice, once in the wizard window and once outside the wizard window.

Item checked out

The Check Item Status wizard display has been corrected to show the status message properly.

Check Item Status Didn’t Work Correctly

In the Workflows Java client, when using the Check Item Status wizard to send an item from the hold shelf to the owning library, the option to send the item in transit was not presented.

This has been corrected.
Change Item ID Wizard

Corrections

Item Maintenance Libraries Allowed Change of Item ID

The Change Item ID wizard allowed the change of an item ID for a library for which the login did not have Item Maintenance privileges. The Item Maintenance libraries setting is found in the Library policies.

This has been corrected.

Existing and New Item IDs in Change Item ID Wizard

Previously in the Change Item ID wizard when Change Item ID was selected, both the Existing Item ID and New Item ID fields were populated with the existing ID.

This has been corrected. The New Item ID field is no longer populated with the Existing Item ID.

Copy User Wizard

Enhancements

New Property Added to Copy User Wizard

In the WorkFlows Java client, the Auto-generate Auto ID Behavior property has been added to the Copy User wizard.

Auto-generate Auto ID

This new property allows the ability to auto-generate a user ID when copying a user record. As a result of this addition, the Default property New Patron ID has been removed.

Corrections

Original User Name Displays in the Name Field of the Copy User Wizard

When the Copy User wizard was used to duplicate a user record, the following text displayed in the Name field instead of the name of the original user.

NAME NOT YET SUPPLIED

The Copy User wizard has been changed so the name of the user from the original user record displays in the Name field when a user record is copied. The original name can be preserved or edited, as needed.
Barcode Scanner Difficulty in Copy User Wizard

In the WorkFlows Java client, any attempt to scan in a user ID in the Copy User wizard using a barcode scanner resulted in extra characters appearing with the user ID.

This has been corrected. The User ID field in the Copy User wizard now supports the use of barcode scanners for user ID entry.

Missing Clone User Extended Information Property in Copy User Wizard

Beginning with WorkFlows Java client version GL3.1, the Clone User Extended Info property in the Copy User wizard properties was missing.

This has been corrected.

Discharge/Checkin Wizard

Enhancements

List of User Checkouts Displayed at Discharge/Checkin

The Display User ID in List property has been added to the Discharge/Checkin wizard properties. This property is available under these conditions.

- The Global Configuration policy Configure Display of User Transaction Lists is enabled.
- The Discharge/Checkin wizard property Accumulate Fines is disabled.

If the Display User ID in List check box is selected, the User ID displays in the Discharge/Checkin list as a glossary. When the glossary is selected, a list of the user’s current checkouts displays.

Note: If the Configure Display of User Transactions Lists is disabled, this property does not appear. If the Accumulate Fines property is enabled and the Configure Display of User Transactions Lists is enabled, this property appears but is not available.
Corrections

**Discharge/Checkin Wizard Puts Items in Transit After Checking In Items From a Suspended User**

If the Discharge/Checkin wizard checked in an item from a user who was currently suspended, the message showing the next allowed loan date for the user displayed. However, the item was not being put in transit if it was needed at another library or was to be sent back to its owning library for reshelving.

The Discharge/Checkin wizard has been changed so that after displaying the next allowed loan date for the suspended user, it checks to see if the item should be placed in transit. If the item is to be sent to another library, the wizard puts the item in transit.

**Message Column Displays in the Discharge/Checkin Wizard If Property to Display “Item Not Checked Out” Message in a Separate Window is Not Used**

If the Display “Item Not Checked Out” Error in a Separate Window property is not selected in the Discharge/Checkin wizard properties, the user would have not received any indication that the scanned item could not be discharged because it had not been checked out to a user.

The Discharge/Checkin wizard has been enhanced so that if the Display “Item Not Checked Out” Error in a Separate Window property is not selected in the Discharge/Checkin wizard properties, the Message column displays in the list of discharged items. If the wizard attempts to discharge an item that is not currently charged, the following text displays in the Message column.

*Item not charged*

**Message for Lost Item not Always Displaying**

When an item that had been declared lost was checked in and the Display User Information property was enabled, a message to alert the library staff that this was a lost item did not display. This has been corrected.

**Circulation Note Didn’t Display in Discharge Wizard**

When scanning an item in the Discharge wizard that is not checked out, a message displayed.

*Item not charged*

If the item contained a circulation note, the message prevented the circulation note from displaying.

This has been corrected.
User ID and User Name Didn’t Print on Bill Receipts when Accumulate Fines Property Was Selected

In the Workflows Java client, in the Discharge wizard there is a Behavior property for Accumulate Fines. If this property was selected, for multiple users with fines, only the user ID of the first user’s discharge in the Discharge wizard appeared on the bill receipt. The user name did not appear for any user even though the user name was specified as a field to include on the receipt.

This has been corrected. All user IDs and user names now print on the receipts in this situation.

Item Lost Message Not Displaying When Discharging Items

In the Discharge/Checkin wizard, the item lost message was not always displaying when an item was checked in. This only occurred if the user selected the Display User Information behavior in wizard properties. When the wizard was obtaining the user information, it cleared the message about the item being lost. This has been corrected.

User Glossary at Checkin Displayed Incorrect Number of Charges

In the Discharge/Checkin wizard, a library staff member discharged all items from a user and then discharged several items (but not all) from a second user. When the staff member selected an item in the discharge list for the first user and clicked the User ID glossary, the glossary displayed several charges for this user, even though the user no longer had any charged items. The charged information for the second user was being carried over to the first user in this glossary display.

This has been corrected.

Floating Item Type Policy Not Allowed with Item Scoping

Item Type policies have an attribute to indicate that the item type is part of a floating collection. Library policies have Call Number Maintenance and Item Maintenance options, also known as Item Scoping, to determine whether staff from one library will be able to modify records for another library.

When discharging an item with an item type that was part of a floating collection, if the Item Scoping options were set to a library that the Workflows login was not a part of, the following message displayed:

You may not modify this library’s item/call number information

and the item would remain in its home library rather than moving to the discharge library.

This has been corrected.
Discharge Bookdrop Wizard

Enhancements

New Behavior Property Added to Bookdrop Wizard

In the Workflows Java client a new behavior property, Display “item not checked out” error in second window, has been added to the Discharge Bookdrop wizard. This displays the “Item not checked out” message in a separate window when the operator checks in an item that is not currently checked out. If the check box is not selected, the item is added to the list of discharges and the “Item not checked out” message displays in the message column for the item.

This property is already present in the Discharge wizard.

Corrections

Sound Not Playing When Using Discharge Bookdrop Items Wizard

In previous Unicorn versions, if the Play Sound properties were selected in the Discharge/Checkin wizard properties and a user discharged an item using the Discharge Bookdrop Items wizard, the wizard would play a sound. In Version GL3.1, the wizard no longer played sounds. Changes made for the Fine Free Discharge feature in GL3.1 interfered with initializing the sound alerts in the Discharge Bookdrop Items wizard. This has been corrected.

Display Item Holds Wizard

Corrections

Status Glossary Not Displaying for Blanket Holds

When displaying a blanket hold item using the Display Item Holds wizard, the status glossary (Unavailable/Available) does not work. This has been corrected.

Status Alert Disappeared in Display Item Holds Wizard

In the Workflows Java client, the status alert in the Display Item Holds wizard was disappearing if it was clicked more than 12 times. Closing and reopening the wizard allowed the alert to display again.

This has been corrected.
Display User Wizard

Enhancements

User Group Search Has Been Added to User Lookup

A new user lookup field, User Group, has been added to the Display User wizard.

Print User Helper Added to Display User Wizard

In the WorkFlows Java client, a new Print User helper has been added to the Display User wizard to allow for printing of user information from inside the wizard. The helper allows you to select to print All user information, or select from the following options.

- **Summary** — Prints user information from the Summary tab of the user record.
- **Addresses** — Prints all user address information.
- **Extended Information** — Prints all user extended information.
- **List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.
- **List of Bills** — By default, prints all Unpaid bills. To change, select from the list options Unpaid, Paid, All.
- **List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, Reserve, Active, Inactive.
- **List of Suspensions** — Prints all Active suspensions for the user.
- **List of Bookings** — If you are using the Materials Booking module, you can print all bookings for the user.
Property Added to Display Suspension Dates

In the WorkFlows Java client, a new behavior property, Display Suspension Dates, has been added to the Display User wizard. If selected, it will affect the display of suspension dates in hold lists in the following wizards.

- Display Item Holds
- Display Title Holds
- Display User Holds
- Remove Item Holds
- Remove User Holds
- Display User
- User Lost Card

In addition, if the global configuration setting for Display of User Transaction Lists is turned on, the Holds list in the Checkout, Renew User and Pay Bills wizards will be affected.

Pickup At Column Added to Holds Display

In the WorkFlows Java client, a new column (Pickup at) showing the Pickup library has been added to the Holds lists.

 Corrections

Bill Information Cut Off When Printing

In the WorkFlows C client, paid bills can be displayed in the Display User wizard on the bills tab. When displaying paid bills and selecting MORE, the print option via the printer icon on the toolbar was cutting off the information to the right.

This has been corrected.

Browse User Returned Error Message in WorkFlows C Client

In certain situations in the WorkFlows C client, browsing user records in the Display User wizard would return the following error message.

You must select a user

This has been corrected.

Display User Wizard Displayed Inconsistent List of Libraries

Previously in the WorkFlows C client, the Modify Another User option in the Display User wizard was truncating the list of libraries in the pulldown list. This only happened if the user did not belong to the station library.

This has been corrected.
Property Tab Changes Lost

Previously, changes made to the Property tab were lost if any of the library selections were made. This has been corrected.

Previous User ID in Workflows Java Client Didn’t Carry Over to Display User Wizard

In the Workflows Java client, the previous user ID displays on the Call Number/Item tab in the Item Search and Display wizard if it is set to display in the global configuration policies. However, the previous user ID was not carrying over to the Display User wizard as it does in the Workflows C client.

This has been corrected. In the Workflows Java client, if there is a previous user ID in an item record, the previous user ID will carry over as the current user to any wizard that displays current user, from the Call Number/Item tab in the Item Search and Display wizard.

Wrong Libraries Listed in Default Search Library Property

In the Workflows C client Display User wizard, users were unable to set the appropriate default search library in wizard properties. The list of libraries presented in properties did not match the list of libraries available when searching for users. The list of libraries in the User Display wizard was built from the Bill Display Libraries attribute in the Library policy. Instead, the list should be built from the User Display Libraries attribute of the Library policy.

This has been corrected.

Label Corrected in the User ID Glossary

In the Display User wizard, selecting the user ID glossary in the user record would display additional information for the user record. However, if the user record contained User Access policies instead of User Profile policies, the field displaying the User Access policies was labeled as “Profile Name.” The user ID glossary has been corrected to label the field showing the User Access policies in the user record as “User Access.”
Ephemeral Checkout Wizard

Enhancements

Optional Number of Copies Field Added to Charge Receipts and Date Due Slips Generated by the Ephemeral Checkout Wizard

In the Ephemeral Checkout wizard, the charge receipt and date due slips would print one line for each item checked out, instead of just the number of copies checked out.

The Number of Copies field has been added as an option to print on the charge receipt and due date slips generated by the Ephemeral Checkout wizard. If the Number of Copies field is configured in the charge receipt printing and date due slip printing for this wizard, the number of copies checked out is printed on charge receipts and date due slips.

Override Allowed for Noncirculatable Items

The Ephemeral wizard now allows an override to be entered for noncirculatable items.

Corrections

Ephemeral Checkout Wizard Discharges Item Correctly After “Loan Period Shortened” Message Displays

The Ephemeral Checkout wizard was not immediately discharging an item after charging it when the item’s loan period was shortened. If a message similar to the following displayed, the item remained charged to the user.

Charged, loan period shortened to next open date after user privilege expiration date.

In addition, the Ephemeral Checkout wizard was not processing a transit override correctly.

The Ephemeral Checkout wizard has been corrected so that if the item’s loan period is shortened, the item is charged to the user and then immediately discharged. The wizard also processes the transit override as it is processed in checkouts made with the Checkout wizard.

Number of Copies Field Didn’t Clear in Ephemeral Wizard

When using the Ephemeral wizard, the Number of Copies field did not clear upon the completion of a checkout. The only way to clear the field was to select Checkout to New User.

This has been corrected.
Pay Bills Helper is Active After an Alert Message in the Ephemeral Checkout Wizard

In the Ephemeral Checkout wizard, the Pay Bills helper was not active after an alert message displayed the user status as Delinquent even though the helper was selected in the wizard properties.

The Ephemeral Checkout wizard has been corrected to activate the Pay Bills helper after an alert message displays a Delinquent user status.

Ephemeral Wizard Has Been Corrected

When using the Ephemeral wizard to charge an item, if a value other than the numbers 1 through 9 was entered in the Number of Copies box, WorkFlows would get in a loop until it shut down.

The WorkFlows client was not checking for valid numeric values so the entry was not being processed correctly. This has been corrected.

Ephemeral Wizard Displays Shortened Due Date Message

Previously in the Ephemeral Charge wizard, when the user’s privilege is set to expire in the near future but the circulation rule was specified as UNLIMITED, the following system message displayed incorrectly.

Charged, loan period shortened to next open date after user privilege expiration date.

This has been corrected.

Fine Free Checkin Wizard

Corrections

Fine Free Checkin Wizard Property Page Was Not Correct in Save Properties Wizard

In the WorkFlows Java client, the properties set in the Save Properties wizard for the Fine Free Checkin wizard did not correspond with the property settings in the wizard itself.

This has been corrected. The Fine Free Discharge wizard originally shared properties with the Discharge wizard. The Fine Free Discharge wizard now points to the correct set of independent properties.
Label Designer Wizard

Enhancements

User Labels Can Now Print Image Via URL Address

The Label Designer wizard for user type labels now includes an option to print an label with an image from a URL address.

When Image is the selected element Type, you can select a value from the Value list as an element on a label line with the following options.

- Photo of user
- URL image

If the Value of Image is set to Photo of User, the photo information is taken from the User Extended Information policy.

If the Value of Image is set to URL Image, you may enter a URL address in the URL text field of no more than 256 characters. No URL validation is performed. The URL image uses the entire label of display (i.e., the image will fill the horizontal and vertical dimensions of the label).

Examples:

The URL may be an actual URL, as follows.

http://pc-richardson.sirsi.pvt/edpubliblogo.jpg

The URL may contain a file location (as the file is viewed in browser), as follows.

file:///C:/Program%20Files/Apache%20Group/Apache/Htdocs/edpubliblogo.jpg

Note: SirsiDynix does not recommend using other elements in a label when printing a URL image.

To use a background image, create a label containing the background image first (label 1), then create another label on top of that label (label 2). Use the next and previous arrows in the Label Set Preview to move easily move between numbered labels.

Mark Item Lost Wizard

Enhancements

New Property Added to Mark Item Lost Wizard

In the WorkFlows Java client, the Display Item from Search Before Marking it Lost Behavior property has been added to the Mark Item It Lost wizard.

This property allows the display of each item found with the User Checkouts or Item Search helpers for review before marking it lost.
Corrections

Could Not Mark Multiple Items Lost Using User Search Helper in
Mark Item Lost

In the WorkFlows Java client, when using the user search helper in the Mark
Item Lost wizard and attempting to mark multiple items lost, only one item
could be marked lost.

This has been corrected.

Mark Item Missing Wizard

Corrections

Item Search and Display Appeared on Top of Mark Item Missing
Window

The Mark Item Missing wizard has a helper property that allows the ability to
start with the search helper. If this property was selected, at the time an item
was marked missing the confirmation screen was obscured by the subsequent
Item Search screen.

To alleviate this difficulty, a new behavior property has been added. The option
to show a Mark Another Item Missing button at the end of the wizard is now
available, which allows the confirmation screen to show more clearly.

Unable to Mark Item Missing When Item Is On Reserve

In certain circumstances, the Mark Item wizard would not permit marking
reserve items as missing. The Mark Item Missing wizard has now been cor-
crected in the WorkFlows Java client. In the WorkFlows C client, users should
remove items from reserve before marking them missing.

Mark Item Missing Unable to Mark Checked Out Items with Multiple
Pieces

Previously, if an item with multiple pieces was currently checked out, the Mark
Item Missing wizard was unable to mark the item missing.

This has been corrected.
Modify Due Dates Wizard

Corrections

Modify Due Dates Wizard Didn’t Check Maintenance Library Settings

The Modify Due Date wizard was not checking the Maintenance Library settings in the Library policy to verify whether the WorkFlows login had the appropriate permissions.

This has been corrected. The Modify Due Date wizard uses the Maintenance Library settings in the following manner:

1. When searching for a user’s charges to display in the Modify Due Date wizard, the Circulation Maintenance library settings are used to determine if the user can be displayed.

2. To determine what checkouts will display in the list, the User Maintenance library settings are checked.

Modify Item Holds Wizard

Corrections

Reshelving Current Location Carried Over from Item to Item

In the Modify Item Holds wizard, when an item with the current location of RESHELVING was displayed, the circulation summary would carry over the RESHELVING location to all items.

This has been corrected.
Modify User Wizard

Enhancements

“Record Updated” Confirmation Message Added to the Modify User Wizard

When changes are made to a user record with the Modify User wizard, the following confirmation message displays.

Record Updated

In the message dialog box, the user can select one of the following options.

- Make More Changes returns to the user record so additional modifications can be made.
- Close exits the wizard.

New Properties Added to Modify User Wizard

In the WorkFlows Java client, the Allow Privilege Renewal By Profile Behavior property has been added to the Modify User wizard.

This property displays a check box that, when selected, renews a user's library privileges based on the user profile.

In addition, the following options have been added to the End of Wizard Behavior properties.

- Modify Another User
- Make More Changes
- Close

Now Able to Type AUTO in User ID Field

In the Modify User wizard, library staff can now type AUTO in the User ID field when changing a user’s ID. When the staff member types AUTO, SirsiDynix Symphony will auto-generate the new user ID.
Corrections

**User Status Field in Modify User Wizard Has Been Changed so That it is Not Editable**

In the French Unicorn WorkFlows Java client, a patron's status could not be changed to BARRED. In the French interface the BARRED option displayed as Interdit de prjt.

**Example:**
1. On the Circulation toolbar, select Modify User wizard and bring up a User ID, such as 12345.
2. On the Abonnement tab, in the pull-down list, the available user statuses show as Delinquent (or Interdit de prjt) which is the BARRED status.
3. If the user tried to change the status of the user from Delinquent to Interdit de prjt, the field would be empty and not allow the user to make the change.

The length of the Status field was not calculated properly. This field has now been changed so that it is non-editable.

**Browse User Did Not Restrict by User Maintenance Library**

In the Modify User wizard, the User Maintenance Library setting in the Library policy was not being correctly applied when browsing by user. It worked correctly in a standard keyword search by user.

This has been corrected.

**Cursor Focus Not Going to User ID Field When Modify Another User Selected**

Previously in the Modify User wizard with Show Checked Buttons and Modify Another User selected in the properties, the cursor focus did not go to the User ID field as it should when Modify Another User was selected in the wizard.

This has been corrected.
New User Registration Wizard

Corrections

User Duplication Checking Works Correctly When the Outreach Route Default is Specified

If an outreach route default was specified in the Route field on the Defaults tab of the User Registration wizard, the user duplication checking feature would not function correctly. When the user duplication checking feature identified possible duplicate user records, the following message displayed when any of the possible matching records was selected.

User not found

The User Registration wizard has been corrected so the message no longer displays, and the user duplication checking feature works correctly.

Unable To Clear User Duplication Checking Property

In the New User Registration wizard properties, a user clicked the Yes radio button for Duplication Checking, selected a value to check, such as Company, then clicked OK. When the user opened the wizard properties again, cleared the Company check box, then clicked the No radio button to turn off Duplication Checking, she could not save the property value change. Duplication Checking appeared greyed out, but the Company check box was still selected.

The wizard properties have been corrected to save the cleared selection criteria when Duplication Checking is turned off. A new warning message will display if Duplication Checking is turned on and no check boxes are selected—the user must make a selection.

Title Is Not Copied Consistently When Cloning User Records

Previously when cloning a series of users with the New User Registration wizard, the title carried over on the initial cloned record, but subsequent records did not carry over the title.

This has been corrected.

Privilege Date Was Set to User Profile Instead of Custom Date

When registering a new user in the New User Registration wizard, if the user profile was changed and the privilege expiration date was changed (using an override) in the same step, the privilege limit date of the user profile would always overwrite the custom date.

This has been corrected. Now, if library staff change the privilege expiration date with an override in the New User Registration wizard, the custom date will be used rather than the privilege limit date defined in the user profile.
Note: This is contrary to the behavior of the Modify User wizard. In this wizard, when the Profile Modified/Auto Extend Privilege property is selected, if library staff change the user profile and attempt to modify the privilege expiration date, the date will always be the privilege limit date defined in the user profile. The wizard displays a confirmation message explicitly stating the new date.

Ability To Type More than 20 Characters in User ID Field Corrected

Previously in the New User Registration wizard, a library staff member was able to type up to 40 characters in the User ID field. The maximum size for this field is 20 characters. When the staff member typed more than 20 characters, the wizard would display the following message.

error: user ID Error in field size

This has been corrected. Now, staff members cannot type more than 20 characters in the User ID field. Also, the field was only displaying 15 characters of the user ID. The field now displays all 20 characters.

Duplicate User Next Step Corrected

In the WorkFlows C client New User Registration wizard, a user ID was in the system already as a previous ID, and so the Duplicate User(s) Found During Registration dialog appeared. The library staff member then clicked View Duplicate User Records. After viewing the duplicate records in the List of Users Found on Lookup dialog, the staff member clicked Close, and the following warning message displayed.

New user record must be removed with Remove User wizard.

But, when the user clicked OK, the following system message displayed.

Invalid pop stack state-current stack will be used.

If the staff member clicked OK again, the same List of Users Found on Lookup dialog appeared with the same choices, and when the user clicked Close, the same error message appeared.

If the staff member selected one of the users in the list, clicked Display Duplicate User, and then Return to Register User, the wizard would skip over the Identify New User dialog to the Entering Info For dialog. If the staff member clicked Cancel, the wizard would enter a program loop as described previously. If the staff member clicked Return to Register User again, the following system message displayed.

This is an empty screen used for internal/hidden states.

These issues have been corrected. In the first sequence of steps, clicking Close in the List of Users Found on Lookup dialog will return the user to the wizard properly. In the second sequence of steps, when the user clicks Cancel, the wizard will display the profile of the just-displayed user record.
Pay Bill Wizard

Corrections

Incorrect Error Message in Pay Bill Wizard

In the WorkFlows C client, when using the Pay Bill wizard and entering a dollar value with no cents value, the wizard displayed the following messages in succession.

amount paid Cents field must contain 2 digits
#BACents fields must contain 2 digits

This has been corrected to only return the message

Cents field must contain 2 digits

Receipt Fields Do Not Print on Second Pay Bill Slip

Previously in the WorkFlows Java client, when the Paying Bills wizard was used to process multiple payments, the second receipt always printed with missing fields. User information was being printed only for the first bill on the list when individual bills were paid.

This has been corrected.

Current User ID Not Carried Over from Item Search and Display to Pay Bills Wizard

In the WorkFlows Java client, bills for a particular item can be viewed on the Bills tab in the Item Search and Display wizard. If bills were viewed in this way, and the Pay Bills wizard was subsequently selected, the current user ID was not carried over into the Pay Bills wizard.

This has been corrected.

Place Blanket Hold Wizard

Corrections

Override Code Can Be Used to Place a Blanket Hold for a Blocked User

In the Place Blanket Hold wizard, if the user tries to place a blanket hold for a Blocked user, selecting Enter Override and Return to Place Hold displayed an override dialog box with no field for entering the override code. If the OK button was clicked on this screen, the following message displayed.

Place Blanket Hold Error: You must enter an override to continue.
The Place Blanket Hold wizard has been corrected so that an override code can be entered to place a blanket hold for a Blocked user.

**Place Blanket Hold Wizard Was Hanging**

In the WorkFlows Java client, when keying in a user ID or using the current user, the Place Blanket Hold wizard would hang. The blanket hold could not be placed.

This has been corrected.

**Place Hold Wizard Enhancements**

**Search Helper Now Available in Place Hold Wizard**

The Place Hold wizard now has a new option to start with a search helper.

**Corrections**

**Placing Holds For Same User-WorkFlows C Client**

When using the Place Hold wizard, if the pickup library was changed to something other than the default it would revert back to the default when subsequent holds were placed for the same user. This happened in the WorkFlows C client only.

This has been corrected.

**Calendar Gadget Displays Current Date When Modifying the Hold Expiration Date in the Place Hold Wizard**

If the Modify This Hold option was used in the Place Hold wizard to specify a hold expiration date for a hold that was just placed, the Calendar gadget used with the Expires field would always begin by displaying a date in December 1969 instead of the current date, month, and year.

The Place Hold wizard has been corrected so that if the hold is modified to change the hold expiration date using the Modify This Hold option and the Calendar gadget in the Expires field, the calendar displays the current date, month, and year.
Item Information Did Not Display in Place Hold Wizard

In the WorkFlows Java client, after entering an item ID in the Place Hold wizard the item information did not display.

This has been corrected.

Hold Pickup Library Focus in Place Hold Wizard

Previously in the WorkFlows Java client, the cursor defaulted to the Hold Pickup Library field on the Place Hold screen after an invalid override was entered in the Duplicate Hold Override field or No Holds Allowed Override field. In addition, if an invalid override was entered, the following vague message appeared.

Not defined.

This has been corrected. Now if an invalid override is entered in the Duplicate Hold Override field or the No Holds Allowed field, the cursor defaults to the Override dialog rather than the Place Hold screen, and the following message appears.

Invalid override code.

Unable to Place a Hold for a Suspended User

In the WorkFlows C client Place Hold wizard, library staff members were unable to place holds for suspended users. In Unicorn GL3.0, an override prompt was added to the Place Hold wizard for users with suspended privileges. When a hold was placed for a suspended user, the prompt appeared with the message “User has privilege suspended,” and the library staff member could type an override in the User Suspension box. But, when the staff member typed the override, nothing happened, and the override was not accepted.

This has been corrected.

“Error Name Required Field Missing” Message Displayed in Place Hold Wizard

Using the Place Hold wizard, a library staff member searched a title, clicked the Place Hold button, then clicked the User Search helper to search a user name. After the staff member clicked the helper’s Search button, the wizard returned to the Place Hold window and displayed the following message.

Place Hold: Error Name Required Field Missing

When the staff member used the User Search helper again, a list of user names was retrieved and the wizard work flow could continue. This occurred only when there were multiples of the same user name, and a particular sequence of title and user searches were followed.

This has been corrected.
Suspended Dates Displayed in Place Hold Wizard Were Not Applied to the Holds

In the Place Hold wizard, a user placed a hold on a title and entered suspension dates for the hold. This first hold was suspended. But, when the user placed additional holds with suspension dates, these holds were not suspended, even though the exact suspension dates appeared in the wizard. In the Display User Holds wizard, only the first hold displayed the suspension dates.

This has been corrected.

Register New User Wizard

Corrections

Duplicate User ID Not Indicated in Register New User Wizard

When attempting to create a user record with a user ID that appeared in a PREV_ID field of an existing user record, the Workflows Java client prevented the creation of the new user record but no message was returned to indicate why.

This has been corrected. The following message now displays.

Duplicate User(s) found during Registration: View user’s record?

Remove User Holds Wizard

Corrections

Receipt Printing Not Working

In the Remove User Holds wizard, when a library staff member removed a hold for the first user, and a hold was trapped for the next user, the available hold slip would not print, even though wizard properties were set to print receipts.

This has been corrected.
Remove User Wizard

Corrections

Remove User Wizard Starts With Identify User Window or User Search Helper

When the Remove User wizard was started, a user information screen with blank fields displayed; however, the Profile Name field would display the User Profile policy name assigned to the user login.

The Remove User wizard has been changed so that the wizard starts with the Identify User screen or with the User Search helper, if the helper property is selected in the wizard properties.

Cursor Defaults to Payment Field

When library staff attempt to remove a user that has bills in the Remove User wizard, a prompt displays with the option to pay bills. When the pay bills prompt is selected, the Pay Bills wizard displays, and the cursor will now default to the payment field.

Renew Item Wizard

Enhancements

Ability to Display Inactive Holds in the Holds List

Circulation wizard holds list displays have been enhanced to show inactive holds. In wizard properties, the Inactive Holds option was added to the Type of Hold list. This option will display the inactive holds for the user or item, along with the inactive hold reason. Reasons can be holds that are cancelled, expired, or a hold that was cancelled when item was placed on reserve, a hold was filled, or a hold expired on the hold shelf. Also, the Active Type of Hold option was modified to include only active holds, and the All option was modified to display all holds, both inactive and active.

The following wizards were modified.

- Display User
- Display User Holds
- Display Item Holds
- Item Search and Display
Corrections

Insertion Point Returns to the Item ID Field in the Renew Item Wizard

In the Renew Item wizard, the insertion point was not returning to the Item ID field after scanning or entering an item barcode. Since the insertion point was moving to the Item(s) Renewed list, the library staff had to return the insertion point to the Item ID field before scanning the next barcode.

The Renew Item wizard has been changed so that when an item ID is entered or scanned, the insertion point returns to the Item ID field to accept the next barcode.

Item Renewed After User Privileges Are Extended

In the Renew Item wizard, if the user’s library privileges were extended while renewing an item, selecting the Renew Item option on the user privilege extension confirmation message would not renew the item.

The Renew Item wizard has been corrected so that if the user’s library privileges are extended while renewing an item, selecting the Renew Item option on the library privilege renewal confirmation message will renew the selected item.

Pay Bills Helper Not Working Properly

When renewing an overdue item with the Renew Item wizard, the library staff member clicked the Pay Bills helper, which displayed the appropriate user and bill in the window. But, when the staff member tried to pay the bill, the following system message displayed.

You must identify a user

The helper was searching for fines owed by the individual user ID, but this user was linked to other family members who owed the fines.

This has been corrected. Now, the Pay Bills helper will skip checking for an individual user ID, but will search all linked IDs, when paying bills for multiple users.
Renew User Wizard

Corrections

User Alert For Delinquent Users Displays Consistently in the Renew User Wizard

An alert window would display for a user with a Delinquent status in the Renew User wizard if the wizard properties were configured to display an alert for a Delinquent user, and the user ID was scanned or manually entered in the User ID field. However, no alert window would display for the Delinquent user if the User Search helper was used to locate the user record.

The Renew User wizard has been changed so that an alert window always displays for a Delinquent user no matter how the user record is located, if the wizard properties are configured to display alerts for Delinquent users.

Renew User Charges Wizard

Corrections

Renew User Wizard Prevented Renewal for Users with BLOCKED Status

Previously in the WorkFlows C client, when attempting to renew items for a BLOCKED user in the Renew User wizard, after entering the override the following message was returned

No items selected for renewal

and no option was given to select any items for renewal.

This occurred in the C WorkFlows client.

This has been corrected.

Renew User Charges Wizard No Longer Returned to Checkout List After Renewal

In the WorkFlows Java client, using the Renew User Charges wizard, once you renewed items for a user the list of charges with updated due dates was no longer displaying.

This has been corrected. The Renew User Charges wizard now displays the updated list of charges with their due dates.
Trap Hold Wizard

Corrections

Trap Hold Wizard Pickup Library Modification Gave No Prompt to Transit

If the Trap Hold wizard was used to trap a hold, and the pickup library was subsequently changed, there was no message indicating that the item should be routed to a different pickup library. This meant that the hold appeared to be available at the incorrect pickup library.

This has been corrected.

Unsuspend User Wizard

Corrections

Incorrect Default Value Displaying

In the Unsuspend User wizard, the number 1 or 2 was defaulting in the Unsuspend By field. This has been corrected.

User Claims Returned Wizard

Corrections

User Claims Returned Information Displayed Uncorrected

The User Claims Returned wizard in the WorkFlows C client allows the user to select a charge that has been marked as claimed returned and clear the claims returned date. This results in the item no longer being claimed returned. In the WorkFlows Java client, when the user cleared the claims returned date in the wizard, the date was being cleared but the item still showed as claimed returned in the user record. This has been corrected.

User Lost Card Wizard

Corrections

Library Field Incorrectly Displayed on a Single Library System

In the User Lost Card wizard, on the Summary tab of a user record, the Library field displayed the value “ALL_LIBS” even though the system was configured for a single library. On single library systems, the wizard windows should not display the Library field. This has been corrected.
What’s in Transit Wizard

Corrections

History Column Header Changes

In the What’s in Transit wizard, if a user attempted to sort transits by clicking on the History column header, the records did not sort properly. This has been corrected by changing the History column into three new columns -- Date Sent, From, and Reason. Clicking on any of the three new columns will result in correct sorting.
Collection Exchange

General

Enhancement

Trap Hold Functionality

Previously, the system did not prompt the operator to fill a hold when exchanging an item with outstanding title level holds. Also, if the item being exchanged was attached to the last call number for the title or was the last copy that could fill the title level holds, the exchange was denied.

This has been enhanced.

Depending on the specified wizard properties, when attempting to exchange an item having outstanding holds, the hold information dialog that appears lets the operator fill holds, remove holds, or ignore holds for the exchange item.

Corrections

Order Records with Collection Exchange Data Cause Error

Previously in the Acquisitions Modify Order wizard, an error occurred when an attempt was made to open an order for editing if that order record contained Collection Exchange data.

This has been corrected.

Workform Values Not Used in Exchange Library Record

Previously, default values in a workform were not included when a workform was used to create an Exchange Library record.

This has been corrected.

Note: If the workform for an existing exchange library is changed, any fields with defaults in the new workform are added to the Exchange Library record, but the default values themselves are not added.

Example:

Workform 1 does not include a Population field. Workform 2 includes the Population field, which has a value of 5,000. When Workform 1 is changed to Workform 2, the Population field is added to the Exchange Library record, but the default value is not added.
Exchange Errors When Originating Library Not HQ Library

Previously, when the user was logged in as the HQ library and the originating library was a branch library, the following system message displayed when items were attempted to be exchanged.

This item is owned by another library and cannot be exchanged.

This has been corrected.

System Message When Exchanging Simple Set

Previously, when simple sets were exchanged and a suitable Exchange Library was not identified, the set was not exchanged normally and the following system message displayed.

Could not get the exchange number for this Library.

This has been corrected.

Invalid Title Hold Message When Exchanging Item

Previously, Collection Exchange was not checking to see if a hold had been filled by another item with the same title, resulting in an invalid title hold message.

This has been corrected.

Timeout Errors if Collection Exchange Configured

Previously, WorkFlows sometimes experienced read timeout errors when users searched for items if Collection Exchange was configured.

This has been corrected.

BIB Flag in Exchange Item Record Always Default

Previously, when new barcodes were wanded into the Item ID field of an Item Record, the BIB flag in the Exchange section of the Item Record were checked by default.

This has been corrected.

Collection Exchange Data Not Saved When New Title Added

Previously, Collection Exchange data was not saved when a new title was added.

This has been corrected.
Exchanges Item Record Option Does Not Update Local Collection

Previously, if the Exchanges option was disabled in the item record, the In Exchange and Local Collections columns in the Profiles tab Status area of Manage Profiles were not updated to reflect the change.

This has been corrected.

Item Can’t Be Sent Home if Exchange Status is Incorrect

If an item’s originating library is modified in the Call Number and Item Maintenance wizard, this can cause an incorrect status to occur in Collection Exchange.

Example:

If the originating and current exchange libraries do not match, but the exchange Status is Home, this is an incorrect status. Also, if the originating and current exchange libraries match, but the exchange Status is InExchange, this is also an incorrect status.

The incorrect status only poses a problem if a user is trying to exchange an item that has an incorrect status for its location and the item is suggested to be sent back to its home library. If that library is not active, the exchange will fail without notifying the user.

This has been corrected so that a message is displayed indicating the item could not be sent home because the originating library is not active. Also, once the item is used in the Exchange Items wizard, the status will be reset to InExchange instead of Home.

Incorrect Exchange Library Displayed in Collection Exchange Wizards

After running the List Exchange Items report, a user noted that exchange items for other libraries appeared in the report results, even though the user had selected only one exchange library.

Example:

The user selected the MAIN library as the current exchange library in the List Exchange Items report selections. But, the report results also listed exchange items for BRANCH1 and BRANCH2.

It was determined the report results were accurate, but the WorkFLOWS client was displaying the incorrect exchange library for these items. If an item had a different item library and exchange library (such as MAIN and BRANCH1), it would appear in the client that the item library and exchange library matched (such as MAIN and MAIN). This was not correct.

WorkFLOWS was corrected to appropriately display the item library and exchange library values.
Activate Exchange Library Wizard

Corrections

Now Able to List the Exchange Libraries By Status

After upgrading to Unicorn Version GL 3.1, sites using Collection Exchange were unable to activate exchange libraries. The Activate Exchange Library wizard was unable to list the exchange libraries by status. This has been corrected.

Incorrect Dates in Activate Exchange Library Wizard

Previously in the Activate Exchange Library wizard, some sites reported that exchange libraries showed a date of exchange of 14/01/1970 after they upgraded to Unicorn version GL3.1. If an attempt was made to change this date, the following system message appeared.

Illegal argument [record opened for read only mode cannot update a record]

This has been corrected.

Exchange Items Wizard

Corrections

Exchanging an Incomplete Set Step Corrected

In the Exchange Items wizard, when a user typed an item ID that is part of a simple set, a message displayed asking if the user wanted to “Wait for complete set,” “Exchange incomplete set,” or “Cancel.”

If the user selected “Wait for complete set,” the item was placed in exchange pending shipping. In the Confirm Shipping wizard, a warning message displayed indicating that the user had chosen to wait for a complete set before shipping items. The item remained in pending shipping.

However, if the user selected “Exchange incomplete set,” the same warning message and selection options displayed, and the Confirm Shipping wizard displayed the same warning message as if the user had selected “Wait for complete set.” The item remained in pending shipping even though the user had specified that incomplete sets could be exchanged.

This has been corrected. If the “Exchange incomplete set” option is selected in the Exchange Items wizard, items belonging to a simple set can be exchanged even if the set is incomplete.
Unable to Confirm Exchange on Simple Sets

Previously in the Exchange Items wizard, the user could exchange a simple set but was unable to confirm shipping on items that were in the simple set.

This has been corrected.

Manage Exchange Group Wizard

Corrections

Unable to Add More than One Group in Manage Exchange Groups Wizard

In the Manage Exchange Groups wizard, a user was unable to add more than one Exchange Group at a time. After creating a group, the user tried to create a second group, but the following system message displayed.

not defined (XRULESGROUP: asdfsadf)

To create more groups, the user had to close and reopen the client between each addition, which was not an acceptable work flow.

This has been corrected.

Manage Exchange Types & Exchange Categories Wizard

Corrections

Exchange Types and Categories Not Displaying When Manage Exchange Types & Exchange Categories Wizard Is First Opened

Previously, when a user first opened the Manage Exchange Types & Exchange Categories wizard, the exchange types and categories did not display. The wizard window opened but the Exchange Types and Exchange Categories panes were empty. If the user closed and re-opened the wizard, the types and categories displayed.

This has been corrected.
Manage Profiles Wizard

Corrections

“Library is still active” Message Displayed Even Though Libraries Were Deactivated

Previously, the Manage Profiles wizard displayed the warning message “Library is still active” even though the user had deactivated all libraries. This appeared to be a message only, as the user was able to modify profiles successfully.

This has been corrected.

My Exchange State Wizard

Corrections

Exchange State Should Not Add New and Core items from Profiles

Previously, when an exchange profile contained new and core items, the My Exchange State wizard was adding the two item counts to produce a total number of items wanted by an exchange library. This was not correct.

Example:

ORANGE library wanted 10 DVDs. In the exchange library record, new items were optional. The exchange profile included 5 new items as part of the 10 DVDs. When the exchange library was activated, the My Exchange State wizard should have indicated that ORANGE needed 10 DVDs. But, the wizard indicated that 15 items were needed because the new and core items were being added to the total.

This has been corrected.

This Exchange Counter Numbers Decrease as Items Ship

Previously in the My Exchange State wizard, the numbers in the This Exchange counter were decreasing as items were shipped. However, the This Exchange counter should be static throughout an exchange, and the numbers should change only when the exchange is closed and reactivated.

This has been corrected.
What’s in Transit Wizard

Corrections

What’s In Transit Wizard Displayed Incorrect Transit Reason for Exchange Items

Previously, the What’s in Transit wizard was not displaying the correct transit reason for items that are in transit because of an exchange. The wizard displayed the following transit reason.

For temporary shelving

The What’s in Transit wizard was corrected to display the following transit reason for exchange items.

For collection exchange
EDI

General

Corrections

Order of Segments Incorrect in Enriched EDI Order

When a user sent an enriched order (one that contains orderline information) to a book vendor using data output from the Book X12 Orders report, the vendor noticed that the MSG segment was out of order. The SirsiDynix Symphony EDI/X12 mapping outputs the MSG segment immediately before the REF segment. According to EDI standards, the MSG segment should be output after the REF segment and before the SLN segment.

This has been corrected.
Enhancements

Online User Registration in the e-Library

The e-Library has been enhanced to offer online user registration with the SirsiDynix Symphony Online User Registration program. The SirsiDynix Symphony Online User Registration program provides an interface between SirsiDynix Symphony and the e-Library that allows users to register with the library. The SirsiDynix Symphony Online User Registration program can be configured to use a number of different checks to prevent duplicate or fraudulent registrations.

Online Registration Process Overview

To register online, a new library user enters registration information in the e-Library. The registration information is sent to the Online User Registration program. The Online User Registration program validates the information and checks for duplicate users. If the user's information validates and no duplicate users exist, the user is registered. Online User Registration receives confirmation from SirsiDynix Symphony and passes that information to the e-Library. The e-Library then displays a message telling the user whether the registration is successful. An optional feature allows the library to require the user to activate the registration to gain full library privileges.

Information Validation and Duplicate User Checks

When the registration information is received by the SirsiDynix Symphony Online User Registration program, the program performs validation and duplicate user checks.

The Online User Registration validation may be configured to check the following information when a user submits a registration.

- Fake names
- ZIP codes
- Geographic area
- Social Security Numbers
- E-mail Addresses
- Age

These checks can be controlled by settings in the Online User Registration program configuration file.
If the user information does not pass validation, the "Data validation errors" message displays in the e-Library, and the user's registration is rejected. If the information is successfully validated, the Online User Registration then verifies that the user is not already registered in the library system. The duplicate user verification may be configured to check for existing user records by the following information.

- Name
- Nickname
- Address
- Social Security Number

If an existing user record is found, the "User already exists" message displays in the e-Library, and the user's registration is rejected. If the duplicate user check verifies that the user has not already registered, the user's registration is accepted and the "User created" message displays in the e-Library. Online User Registration can be configured to send a welcome message by electronic mail when the user's registration is successful.

If users are required to activate their new accounts to get their full library privileges, the Online User Registration program can be set up to immediately send a message by electronic mail when users complete the account activation.

**Items Can Be Renewed Using Review My Account**

The eLibrary has been enhanced with a new environment variable to control whether the Checkouts/Select Items to Renew area under Review My Account displays. This area displays a list of the user's current checkouts, and allows the user to renew the items. By default, the environment variable is set to display a read-only list of checkouts in the Checkouts section on the Review My Account page. The user is not able to renew any items in the Checkouts list.

**Users Can Now Pay Library Bills Using Capita's AXIS Payment**

On e-Library systems configured to allow online bill payments, users can now pay their bills using Capita's AXIS Payment. It requires the use of the Capita AXIS Payment service (http://www.e-paycapita.com) and an Internet Merchant Account with a bank. SirsiDynix highly recommends using e-Library with HTTPS when using this feature.

In the e-Library, when users with outstanding bills go to the My Account/Review My Account window, a Pay Bill button displays next to each bill and a Pay All Bills button displays at the bottom of the list of bills. This allows users choose to pay their bills individually or pay all of their bills at the same time.

To implement this change, the system administrator will need to make changes to the e-Library configuration file. For more information, see the SirsiDynix Symphony Administrator Notes.
Unseen Renewals Information Added to My Account and Renew My Materials

The My Account display and Renew My Materials display have been enhanced to show the number of “seen” and/or “unseen” renewals for the user’s checked-out items, if the e-Library has been configured to allow renewals by the user and to display renewal information.

Renewals done by the user with the e-Library are called “unseen” renewals since the user does not need to bring the material to the library to renew them. However, the library may decide to limit the consecutive number of times a user may renew the materials through the e-Library, with a Selfcheck station, or by telephone so the library staff can inspect the items at the time they are renewed.

Example

The library allows users to renew items up to six times, but limits users to no more than two consecutive renewals by telephone or by the e-Library. With this configuration, users can renew items two times consecutively with the e-Library, then they must renew the items at the library counter for the third renewal. The users may then renew the items another two consecutive times by the e-Library, and then renew the item one final time at the library counter, for a total of six renewals.

If the library policies and e-Library configuration are set to permit a certain number of consecutive “unseen” renewals for materials, the user will see renewal and unseen renewal information in the Review My Account screen, and in the renewal confirmation message from the Renew My Materials screen.

If the user goes to the Renew My Account screen, he or she can see how many times the item was renewed, and how many of those renewals were “unseen” renewals. The following example shows the user has renewed The Princess Diaries three times, with two of the renewals being “unseen” renewals done by telephone or by using the e-Library.

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Times renewed</th>
<th>Date due/Recall date due</th>
</tr>
</thead>
<tbody>
<tr>
<td>As of now, you owe</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The princess diaries</td>
<td>Cabot, Meg.</td>
<td>3</td>
<td>7/31/2007, 23:59</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(unseen renewals: 2)</td>
</tr>
<tr>
<td>$4.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If the user renews materials using the Renew My Materials screen, the renewal information in the renewal confirmation message has been enhanced to show unseen renewal counts. The following example shows that the user has successfully renewed Harry Potter and the Deathly Hallows. The user has renewed the book two times. The number of renewals remaining is four. Of the previous renewals and the renewals remaining, the user renewed the item once unseen, and can renew the item one more time unseen before having to renew the item at the library.

| Item renewed                  |                          |                          |                          |
| Date renewed: 8/20/2007, 11:06 |                          |                          |                          |
| Times renewed: 2              |                          |                          |                          |
Renewals remaining: 4
Unseen renewals: 1
Unseen renewals remaining: 1

Note: If the user cannot renew an item because the item has reached its maximum number of consecutive unseen renewals, the following message displays, and the user must bring the item to the library to renew it.

Renewal limit reached for materials unseen by staff.

Books By Mail on eLibrary (iBistro/iLink)

Books by Mail functionality has been added to iBistro/iLink.

When a user selects Place Hold on an item, there is a new option, Mail Item to Me.

When this option is selected, the item will be mailed to the user instead of going to a Pickup Library. The Delivery Method for mailing is selected via a drop-down list.
To view the Cost of a selected delivery method, click Cost and a summary of shipping, handling, and other charges for the delivery method displays.

Once the hold item has been selected for Books by Mail, the user's Holds listing in the My Account page displays the Delivery Method for the hold.
Interest Level Search Page Added to i-Bistro and iLink

The iBistro and iLink e-Library clients now support searching materials by the 521 Target Audience Note for interest levels. The Interest Level selection appears in the e-Library rootbar. Libraries can configure the e-Library to support Interest Level searching. For more information, see the SirsiDynix Symphony Administrator notes.

To use the Interest Level search, the library user can do the following.

- On the Interest Level page, if the user sees By grade level, she can type a grade level.
- If the user sees By reading level, she can type a reading level.
- If the user sees By age level, she type an age level.

The library user can then type a Search term and select a Library. When she clicks Search, the Interest Level search results display.

New Keep All in this Page Button for Saving All Records to the Kept List

If a user logs in to My Account, when viewing search hit lists, the user can now select all records on the current page with one click. By clicking the Keep All in this Page button, all records on the page are selected and added to the user’s Kept list. The user can view this list by clicking the Kept button.

Best Seller and Recommended Reading Hit List and Single Item View Displays Can Now Be Restricted to the Login User’s Library

The e-Library Best Seller and Recommended Reading hit list and single item view displays have been enhanced to only display holdings for the library associated with the login user. The SirsiDynix Symphony administrator can control the Best Sellers and Recommended Reading holdings displays by modifying a new variable in the e-Library environment file.

Reading Program Search Page Added to i-Bistro and iLink

iBistro and iLink e-Library clients now display a Reading Programs search page which allows users to search materials by Reading Program levels or by Lexile score range. Libraries can configure the e-Library to support either Reading Program searching, Lexile score searching, or both. For more information, see the SirsiDynix Symphony Administrator notes.

The supported Reading Programs are Accelerated Reader and Reading Counts (a Scholastic product). For the Reading Program searches to work, the Accelerated Reader or Reading Counts information must appear in the 526 tags of the library’s catalog records. For Lexile score searches, the Lexile scores must appear in the 521 tags (with a first indicator of 8) of the catalog records.

To use the Reading Programs search, the user can do the following.

- On the Reading Program page, if the user sees Reading Program Search,
she can select a program from the drop-down list, such as Accelerated Reader or Reading Counts. The user can select a Reading Level from the drop-down list, type a Search term, and select a Library. Clicking Show Matching Books displays the search results.

- If the user sees Lexile Score Search, she can type a Lexile score range in the text boxes. The user can type a Search term and select a Library. Clicking Show Matching Books displays the search results.

- If the user sees no choices, the library has one reading program, and has pre-selected that program. The user can type a Search term and select a Library. Clicking Show Matching Books displays the search results.

The user can sort the Reading Program or Lexile Score search results by selecting criteria in the Sort By box. By default, sorting is highest level to lowest level.

New Option to Change System Range Hold to Group Range Hold

For all system range holds placed via iBistro or iLink on systems using Demand Management, there is now an option for the software to do an additional check to determine if there is a holdable copy owned by the pickup library or owned by a library within the hold group of the pickup library.

- If yes, the hold is changed to a group range hold
- If no, the hold remains a system range hold

In addition, there is also a new option for whether to base group range holds on the station library of the user or the pickup library of the hold.

Users Can Search e-journals Using 360 Link

The iBistro and iLink e-Library clients now support searching e-journals using 360 Link by Serials Solutions (a URL Resolver provider). If configured for the library's system, 360 Link lets users search for journal articles by citation or by title or ISSN, browse by title or subject, and more. A link labeled “Other Resources” appears on the search screens, hit list, and Single Item View page. When the user clicks Other Resources, the 360 Search window opens, where the user can search for a term over several resources.

Typically, the user must be logged into the e-Library to see the Other Resources link. If the user is not logged into the e-Library, the following message may display.

To access other resources, you must first log in.

On the Search page, the SirsiDynix Symphony administrator can configure the following links to display.

- Journal Articles
- Journal Titles A-Z
**Journal Articles**

After clicking the Journal Articles link, the user can type appropriate citation information into the form, then click LookUp to view full text options. The user can click Reset to clear the fields and retype the citation information.

**Note:** Remember to include a journal title, ISSN, DOI, or PMID.

**Journal Titles A-Z**

After clicking the Titles A-Z link, the user has the following options.

- **Find e-journals by title or ISSN** – The user can select a search option from the drop-down list, type a search term, and click Search.
- **Browse e-journals by title** – The user can click a letter, then search by title or ISSN, or by subject.
- **Browse e-journals by subject** – The user can select a subject category from the drop-down list, then click Search.
- **Search by DOI or PubMed ID Number** – The user can type a DOI or PubMed ID number, then click Search.
- **Search for keywords in e-journals** – The user can click a journal title, and in the journal Web page, perform a keyword search.

**Time Out for Content Retrieval**

Sometimes in the e-Library, retrieving enrichment content for an item would take too long, causing the e-Library to freeze. The user had to close and restart the e-Library to continue. Now, each e-Library session will time enrichment content retrieval, and if the retrieval takes more than X seconds (where X is a configured number of seconds from an environment file variable), then content retrieval will be disabled for the remainder of the session. The user can log out and log back in to retry the content. By default, the retrieval time out is five seconds.

**New Option to Configure Station Library for e-Library Holds**

When placing a hold in the e-Library, if the patron did not log in to the e-Library, the WEBSEVER login’s library was used as the workstation library for placing the hold, instead of the library associated with the patron’s user ID. The WEBSEVER login’s library did not necessarily match the patron's library, and this was an issue for sites that do not honor holds for patrons at other libraries.

Now, SirsiDynix Symphony administrators can control whether or not the WEBSEVER’S login library is used for placing e-Library hold or the patron's library is used for placing the hold. The administrator can control this setting by “turning on” or “turning off” a variable in the e-Library configuration.

- When the variable is “turned on,” and a patron does not log in to the e-Library, if the patron places a hold on an item, the library associated with the patron's user ID will be used as the workstation library for placing the hold. If Demand Management is configured, SirsiDynix Symphony will determine whether or not the patron can place a hold on that library’s items.
• When the variable is “turned off,” the e-Library will behave as before. If the patron does not log in to the e-Library, the WEBSERVER login’s library will be used as the workstation library for placing the hold.

Search Hit List and Item View Can Display Alternate Graphic Representation Information

The eLibrary has been enhanced with a new environment variable to control whether the catalog search list and detail view will display only information from linked 880 entries (Alternate Graphic Representation) in the MARC record, both the normal entries and the linked 880 entries, or only the normal entries. By default, the environment variable is set to display only the normal entries in the catalog search list and detail view.

New Environment Variable Controls the Display of Alternate Tag Names for 880 Tags

The eLibrary has been enhanced with a new environment variable to control whether the detail view of a catalog record with 880 tags will display the standard label, or the linked entry’s alternate tag name. By default, the environment variable is set to display the linked entry’s alternate tag name.

Alternate Graphic Representation Entries Can Be Made to Display With Linked Fields in the Full Record View

The eLibrary has been enhanced with a new environment variable to control whether the full record view in the e-Library will display linked 880 entries (Alternate Graphic Representation) in numerical field order, or immediately following the record field to which they are linked. By default, the environment variable is set to display the 880 entries in numerical field order in the full record view.

Note: If an 880 entry is not correctly linked to a field, the 880 entry will display in numerical field order in the full record regardless of the setting of the environment variable.

Spacing in the Brief Record View Can Be Changed for Records With Alternate Graphic Representation Entries

The e-Library has been enhanced with a new environment variable to remove extra spacing that may display in the brief record view for records that contain Alternate Graphic Representation (880 entries), particularly for languages read in a direction opposite from the direction in which most of the Web page is displayed. For example, the environment variable can control the amount of spacing that is used to display a language read right-to-left (such as Arabic) on a Web page that is displayed in a language read left-to-right (such as English). By default, the environment variable is set to display the amount of spacing that is normally used by the paragraph tag (<p>) in Web pages to display text that is read from left to right.
Local Currency and Payment Verification URL Can Be Specified For Bill Payments Using PayPal

If a user in a country other than the United States tried in the e-Library to pay bills with a PayPal account, the following message displayed.

The link you have used to enter the PayPal system contains an incorrectly formatted item amount.

The message displayed because the PayPal payment request did not specify the local currency to be used for the payment. When no currency is specified, PayPal assumes the payment is in U.S. Dollars (USD), which is not the currency used in countries other than the United States.

Users in countries other than the United States also reported that the PayPal payment verification was not working because the URL always used for the verification was a URL that is only used to verify payments for users in the United States.

The e-Library has been enhanced so international users can use PayPal to pay bills using their local currency. The e-Library will use the currency defined in the library policies to specify the currency to be used in the PayPal payment for bills. In addition, the PayPal payment verification URL for an international user’s country can be configured as needed to specify the URL used by PayPal for payment verification in that country.

French Language Support Added for Kids’ Library and Find It Fast! Subject Search Headings

If the local language for the e-Library was set to French, the page text and labels would in French except for the Kids’ Library subject search headings and the Find It Fast! subject search headings. These subject search headings would always display and be sorted alphabetically in English.

The Kids’ Library subject search headings and Find It Fast! subject search headings have been changed so that if the e-Library is configured to display text in French, the subject search headings display in French according to the list of standard subject headings in the Répertoire de vedettes-matière (RVM).

“Buy Now for Barnes & Noble” Feature Changed to the “Buy Now” Feature

The e-Library used to have the Enhanced Buy Now for Barnes & Noble feature, which enabled SirsiDynix and libraries to offer their patrons a link to the Barnes & Noble Web site to purchase material. SirsiDynix would send the libraries a portion of the price for each purchase. Barnes & Noble no longer offers this partnership program with SirsiDynix, so the e-Library has been changed to remove any references to the program.

The environment files have been changed so libraries can offer their patrons a “Buy Now” link to purchasing sites of the libraries’ choosing. Consult the library system administrator to enable or disable the “Buy Now” feature.
New Recommended Reading Lists and Best Seller Lists Added

New recommended reading and best sellers lists are added frequently between releases. For a complete listing of all current recommended reading and best sellers lists, refer to the e-Library Content Lists page on the Client Care Website at http://www.sirs.com/uhlbin/custinfo/Documentation/Contentlists/index.html.

Configuration Option Added to Resolve Messages and Labels

The e-Library has been enhanced with a new configuration option to improve the response time for remote e-Library sessions. The configuration option determines if the reading and resolving of labels and messages is done by making calls to the library server for the translations, or by reading a local copy of the labels and messages file on the machine running the remote e-Library session. By default, the configuration option is set to resolve labels and messages on the library server.

Corrections

Option Fails to Display netLibrary® URLs as Normal

Previously in the e-Library, even if the environment file indicated that the netLibrary® URL should display as a normal 856 field URL, the field did not display as a link to netLibrary data.

This has been corrected.

e-Library Not Displaying Kept List Properly

In the e-Library, when the Kept List View option was used, the Library policy name and a long section of blank data displayed. This has been corrected.

Unable to View Kept List in the e-Library

In the e-Library, the kept list would display but any attempt to use the View, Print or E-Mail options resulted in a blank screen. This affected Oracle systems only.

This has been corrected.

No Detail View for Community Information or Memo Records in e-Library

In the e-Library, when displaying records with a Community Information (COMMINFO) or Memo (MEMO) format (records that allow no associated holdings), the detail view for these records displayed no catalog record data. This occurred in the RevC page detail view.

The e-Library was corrected to suppress attempting to display item holdings for these types of records, as there will never be holdings associated with them, and will correctly display the catalog information for these records.
Internet Information Systems (IIS) Version 6.0 Web Server Does Not Process URLs with Terminal Slash

Previously, for the e-Library running on Web server Microsoft Internet Information Systems (IIS) version 6.0, if Nearby Items on Shelf was selected and the Details button was clicked from the resulting hitlist, the following system message displayed.

The system cannot find the file specified.

This has been corrected.

Content Enrichment Missing When Using IIS 6.0

Windows sites running Microsoft IIS 6.0 and using Content Enrichment could not see content because a script file was using the incorrect command. This has been corrected.

Best Sellers List Covers Not Displaying in e-Library on UnicornECOLE

Previously in the e-Library on UnicornECOLE, if a best seller list was selected, the cover did not display and the following system message displayed.

[P]Syntax error, line 146: Markup mismatch

This has been corrected.

e-Library on UnicornECOLE Calls SingleSearch in Error

Previously on the e-Library on UnicornECOLE, if the variable for SingleSearch was called in error, the following system message displayed when a call number search was conducted.

Missing file error: K12/search_other.h.

This has been corrected, and e-Library on UnicornECOLE no longer calls the SingleSearch variable.

SingleSearch Cannot Be Accessed from e-Library

Previously, an obsolete forward slash in the SingleSearch link from the e-Library caused the user to be unable to access SingleSearch.

This has been corrected.
URL Icons Not Displaying on Item Information Tab

In the e-Library RevC pages for Unicorn Version GL3.1, the Item Information tab should display the label “A Look Inside” followed by the netLibrary content icons and/or the URL icon.

Previously, the Change Display/Unformatted Display option was set to Yes with any view of the record and when the View of the record was Brief, the URL icons would not display after the “A Look Inside” label.

It appeared that ebook searching had to be configured if the netLibrary URL was to display on the Item Information tab of the Detail View.

This has been corrected.

e-Library Link to Hyperion Was Not Working

After upgrading to Unicorn Version GL3.1, the link to the HYPERION gateway on the rootbar in the e-Library was no longer working. This occurred when the environment file variable HTTP_ADDRESS was undefined or blank.

Example:

The site’s system.env contained the following values.

USE_FULL_HTTP_ADDRESS| 0|

HTTP_ADDRESS| |

A previous change was made to the e-Library that launches new browsers through JavaScript to control the address bar and other elements for security purposes. Sites using relative addressing found that the Hyperion link would not work, since a new browser window was being sent a URL as a parameter. Now, if the environment parameter, USE_FULL_HTTP_ADDRESS is 0, then the Hyperion gateway displays properly.

Place Hold Button Missing from Full Record Display

After upgrading to Unicorn Version GL3.1, the Place Hold button was missing from the full record display after a call number browse search. A Place Hold button should appear in the Item Information tab when all available items are checked out.

This has been corrected.
Search Results Display Correctly in Libraries That Display Content for Search Hits

In libraries that configured the e-Library to display content, the search results would not display if the size of the list of ISBNs for all of the retrieved records exceeded 500 bytes. Since MARC records can have multiple 020 fields to record multiple ISBNs for items, the list of ISBNs for all of the records retrieved in a search could be quite large.

The e-Library has been corrected so the list of ISBNs for all of the retrieved records does not prevent the search results from displaying properly in libraries that configure the e-Library to display content.

Gateway Request Returns Ma Required Field Missing Message

Previously in the eLibrary, when the library information link was selected with an optional gateway, the library information request returned the following system message.

Ma required field missing

This has been corrected.

URL Links Missing from Reserve List Page

In RevC only, the list of titles on reserve for a class or instructor did not display the associated URL links. This occurred when the site’s e-Library was not configured to use enrichment content. It was found that the e-Library testing for enrichment content configuration mistakenly included standard URL and Hyperion links, and excluded these links from the display. This has been corrected.

USE_SEARCH_OPERATORS and Search Icons Configuration Not Working Properly

When the Quick Search element in the gateway was set to use Search Icons and the variable USE_SEARCH_OPERATORS|0| was set in the e-Library environment file, a search, such as “Harry Potter,” caused the following message to display.

Error in query NEAR “AND((AND))”

The search worked when the presentation type was Single Field, but did not work when the presentation type was Search Icons.

This has been corrected.
Search Only Electronic Books Search Qualifier Displaying on Hit List

Previously on the e-Library, the Search Only Electronic Books search qualifier was displaying in error in the hit list, even if the Search Only Electronic Books check box had not been selected on the Quick Search page.

This has been corrected.

JavaScript Error when Using Internet Explorer

Some predefined searches that used a presentation style of Labelled Fields caused a JavaScript error in Microsoft Internet Explorer, because Internet Explorer does not allow the focus to be set to a hidden field. This has been corrected.

System Message Displays when Viewing Bulletins from an Optional Gateway

If a user attempted to view a bulletin element, such as Library Hours, from a gateway that was set up to control Information Desk choices available for library-specific generic logins to the e-Library, the following system message displayed instead of the bulletin.

#MaRequired field missing

In this case, bulletin elements failed to display because their internal element number was searched for in the default gateway instead of the specified gateway. This has been corrected.

e-Library Unable to Make Z39.50 Connection to Library of Congress

On a Unicorn for Linux system, a user could not make a Z39.50 connection through the e-Library to the Library of Congress (Z3950.loc.gov). This destination would work in the Workflows Java client and C client. But, when accessing the destination through the e-Library, the following system message would display.

Internal Server Error
The server encountered an internal error or misconfiguration and was unable to complete your request.

A previous change made to e-Library gateway searching caused this Z39.50 connection issue for Linux systems and other systems as well. This has been corrected.

Limit Search Option Displays the Item Type Option for Electronic Book Search Results in Quick Search or Power Search

In libraries that allow users to search for electronic books using Quick Search or Power Search in the eLibrary, the Limit Search option in the search results list did not display the item type as a search limit option. The Limit Search option has been corrected to display the item type as a search limit option.
**Message Written to Web_Error File for Records Without 020**

The following message was being written to the web_error file when a 020 field was not present in a bibliographic record.

cgiopac: ERROR! content.xml.XXXXXX datafile not present!

This was not a useful message in this situation.

This has been corrected. This message is no longer recorded as the result of a missing 020 field.

**Messages Display Correctly When Using the e-Library in Libraries Running a Unicode System**

In libraries using a Unicode system, the e-Library was not displaying any error messages (such as “You must pick a specific copy or volume” when the user tries to place a hold without selecting a specific copy).

The e-Library has been corrected so error messages will display as expected when the e-Library is used in libraries running a Unicode system.

**Correct Payment Amount Sent to PayPal Payflow Pro Payment**

In libraries that allow users to pay bills online with credit cards, the payment amount sent from the e-Library to the PayPal Payflow Pro Payment Processing Gateway Service was incorrect by one penny ($0.01). The e-Library has been changed so the correct bill payment amount is sent from the e-Library.

**Credit Card Payments Processed by PayPal Payflow Pro No Longer Cause Messages in the Cash Per Workstation Report**

If PayPal Payflow Pro is used in the e-Library to accept credit card payments from users for bills, the following message would often display in the results of the Cash Per Workstation (Cash) report.

#BHRequired field missing

The e-Library has been corrected so that credit card payments for bills no longer cause messages to display in the Cash Per Workstation report.

**Holds Subsequent to a Failed Hold are Placed Correctly**

If a user placed holds on multiple volumes simultaneously using the e-Library, and one of the holds could not be placed, the holds following the failed hold would also not be placed. The user would only see a message about the failed hold (such as “Hold not allowed”) and would have no indication that the holds before the failed hold were placed successfully.
Example

According to library policies, users can not place holds on items that are available on the shelf. Volumes 1 and 3 of The History of Music are currently checked out. A user wants to place a hold on Volumes 1, 2, and 3 simultaneously using the e-Library. The hold for Volume 1 is successfully placed, but the hold for Volume 2 fails since the item is on the shelf. The hold for Volume 3 should have been placed, but it also fails. In addition, the user is not notified that the hold on Volume 1 was successful.

The e-Library has been corrected so that if holds are being placed simultaneously on multiple volumes, and a hold cannot be placed on a particular volume, the e-Library will continue to try to place the holds following the failed hold. For each hold, the user will see a message confirming the placement or failure of the hold.

Best Sellers Lists Didn’t Display Records with Only 13-Digit ISBNs

In the e-Library, if a catalog record contained only a 13-digit ISBN number, the Index Content Titles (Idxcontentkeys) report could not find the record. As a result, the best sellers lists were indicating that the library did not own that title.

This has been corrected. If records are cataloged with 13-digit ISBNs only, this change will allow those new titles to appear as holdings on the best sellers lists.

URLs Updated for Cool Sites Links

The following delivered Uniform Resource Locators (URLs) were updated in the iBistro/iLink e-Library Cool Sites gateway element delivered to new customers installing SirsiDynix Symphony GL3.2.

- The Kids Click! URL delivered to UnicornEcole customers changed from http://sunsite.berkeley.edu/KidsClick/ to http://kidsclick.org/.

New customers installing SirsiDynix Symphony GL3.2 will not need to make any configuration changes. Existing customers should have their library system administrators update the Cool Sites gateway element to use the revised URLs.
Single Library Holdings Display Incorrect for Best Sellers and Recommended Reading Lists

Previously in the eLibrary on a single library system with Best Sellers and Recommended Reading Datastream Content lists, holdings information erroneously read as holdings in a multilibrary system, as follows.

2 copies at Peyton Place Public Library in AVAIL

This has been corrected.

Web Server IIS 6.0 Cannot Process URLs

Previously in the eLibrary on Web Server IIS version 6.0, after the user selects Nearby on Shelf, every Details button on the hit list displays a system message, as follows.

The system cannot find the file specified.

This has been corrected.

Author Favorites Created at Checkout Contained UNAUTHORIZED Text

In eLibrary, the option in MyBistro to automatically update favorites will create favorite records for authors and subject headings at time of checkout. Unicorn was creating the favorite record for the author, but was incorrectly adding the text UNAUTHORIZED to the favorite record. Once the heading was authorized, the users author favorite link no longer works as a search in the OPAC.

This has been corrected. The author favorite records will now get created without the UNAUTHORIZED flag being part of the entry.

Remote e-Library Session Checks the Message File on the Server for Message Text

In a remote eLibrary session, if a message was generated, the eLibrary tried to look up the message in the labels file instead of the messages file on the library server. Since the message code could not be found in the labels file, the eLibrary then accessed the local messages file on the machine running the remote eLibrary session to retrieve the message text to display. If the library had changed the message text in the messages file on the library server, the remote eLibrary session user did not see the modified message text because the eLibrary was displaying the message text from the local copy of the messages file.

The eLibrary has been corrected so that when a message is generated in a remote eLibrary session, the eLibrary checks the messages file on the library server for the message text to display. The eLibrary will check the local copy of the messages file for the message text only if the messages file on the library server does not contain the requested message text.
Holdings List Sort Retained When User Selects the Previous, Next, or Change Display Options in the Details View

The default sort order for the holdings list on the Full Details view was not retained when a user selected the Previous, Next, or Change Display options.

Example

The user searches for the title “Sudden Fearful Death.” The user selects Details for the title, and the list of holdings displays in the default order set in the environment file (Library Policy Description order) as Main, Jefferson, Roosevelt, and Washington. However, if the user selects the Previous, Next, or Change Display buttons, and then returns to the Details view for the title “Sudden Fearful Death,” the list of holdings displays in Library Policy Number order, which is Washington, Jefferson, Roosevelt, and Main.

The e-Library has been corrected so the holdings list shown on the Full Details view displays in the sort order set in the e-Library environment file when the user selects Previous, Next, or Change Display in the search hit list.

Content Enrichment Displays in the e-Library for Libraries Using Oracle Databases on the Linux Operating System

In e-Library sites using the Linux operating system with a SirsiDynix DataStream subscription, the content could no longer be seen after upgrading the system to Unicorn GL3.1. This has been corrected.

“Bad Request” Message No Longer Displays When the Reset Button is Used in a Power Search

In the Power Search page of the e-Library, clicking the Reset button would display the following message in some browsers, particularly in versions of Internet Explorer.

HTTP Error 400 - Bad request

The e-Library has corrected so the message no longer displays when the Reset button is clicked.

MARC Holdings Summary Display in e-Library Corrected

Corrections were made to the MARC holdings summary displays in the e-Library. Two issues were noted.

- If the 886 tag in the MARC holdings record contains the linking number 0 (zero), all 853/863 entries should not appear in the e-Library display of the MARC holding record. In previous Unicorn versions, these entries did not appear, but the Unicorn GL3.1 e-Library was displaying these entries.

- When an 886 tag of the MARC holding record has the same linking number as a set of 853/863 entries, only the 866 entry should display in the e-Library. The Unicorn GL3.1 e-Library displayed all entries.
Now, the e-Library MARC Holdings summary displays have been corrected to do as follows.

- Suppress displaying all 853/863 entries if the 866 tag contains the 0 linking number
- Only display the 866 entry if it contains the same linking number as a set of 853/863 entries

**URLs That Contain a Backslash or Ampersand Character in the 856 Tag Work Correctly**

Previously, if a bibliographic record displayed in the e-Library had a URL that contained a backslash character (\) or ampersand character (&) in the 856 tag field, the link would not work when the user selected it. This has been corrected.

**“Continue Search in Google” Option Works When a Search Term is Enclosed in Single Quotation Marks**

If the user enclosed a search term in single quotation marks, the Continue Search in Google option did not open a link to the Google Web site to perform a Google search with the user’s search term. This has been corrected.

**Location Description Displays in the Details View When Using the e-Library in a Single Library System**

When the e-Library was used to search for items in a single library system, the Location policy name would display instead of the Location policy description when the user used the Detail view and clicked the Item Information tab to see information about the selected item.

**Example**

A user searches for the title “Runaway Jury,” and the search hit list displays an entry that says “1 copy available in Mystery Fiction.” If the user selects the Details button on this hit list entry, the Item Information tab displays the text “1 copy available in MYSFIC.”

The e-Library has been changed to display the Location policy description in the search hit list and in the Item Information tab of the Details view when the user searches for items in a single library system.

**e-Library No Longer Halts Unexpectedly**

In some libraries, e-Library users were prompted to log in when the e-Library was configured to log in automatically. The e-Library was halting unexpectedly, and a message similar to the following displayed in the web_error log file.

```
20070129090319 WEBSTARTER:1001: message read error, tx_error=1, errno=22
```

The e-Library has been corrected so it no longer halts unexpectedly.
Full List of Search Limit Options Displays in the Power Search

When the Power Search option was selected, the full list of search limit options did not display. Only the Library, Language, Format, and Type search limit options displayed.

The Power Search in the e-Library has been corrected so the complete list of search limit options now display.

Most Popular Links Display a Specific Record and the Search Text

When the user selected a “most popular” link in the e-Library to view the most popular title, author, or subject, the following problems were reported.

- A browse list often displayed instead of a specific record.
- If the selected link contained any numerals in the link text, the search text that displayed at the top of the matching record was the internal search string used to locate the record.

Example

The most popular author link displays as “Smith, John 1977-.” When the user selected this link, the text “Record 1 of 1 for search Smith John 001977” displayed at the top of the record.

The “most popular” links have been corrected so they will display specific records when selected. If the selected link contains numerals, the search string used to locate a record displays in a more readable format at the top of the record.

Updated Sample Amazon URL for the Buy Now Link

The sample Amazon URL for the Buy Now link has been updated in the ibistro.env and ilink.env files. The Buy Now link now reads as follows.

```
BUYNOW_URL_PT1=http://www.amazon.com/exec/obidos/search-handle-url/index=books&field-isbn=|
```

Could Not Display Recommended Reading Lists with a Large Number of Holdings Libraries

Large consortia systems found that they could not display some of their recommended reading lists in the e-Library. This occurred when the list of holdings libraries was very large (over 2000 characters). Now, if the list of holdings libraries for a recommended reading title is more than 2250 characters, the e-Library will display the message “many of our libraries,” and the reading list will display.
Configured Hold Information Prompts Display for Users with Personal User Access Type

If the eLibrary was configured to prompt a user with a Personal user access type for the mail delivery method, the hold expiration date, and/or the hold suspension date when placing a hold, but not a pickup library, the user would immediately see the completed hold screen instead of being prompted for the hold information. If the eLibrary was configured to prompt the user for a pickup library in addition to the mail delivery method, the hold expiration date, and/or the hold suspension date, the user would be correctly prompted for the information when placing a hold.

The eLibrary has been corrected so a user with the Personal user access type will be prompted to specify the mail delivery method, the hold expiration date, and/or the hold suspension date when placing a hold whenever the eLibrary is configured to prompt for this information.

Correct Hold Removed When Removing a Hold on One of Two Volumes of a Title

If a user placed holds on both volumes of a title with exactly two volumes attached to it, the hold on Volume 1 is incorrectly cancelled when the user removes the hold on Volume 2. The eLibrary has been changed so that when the user cancels the hold on Volume 2, the hold on Volume 2 is removed.

“Most Popular” Hypertext Links That Contain Special Characters Display the Correct Title Records

In the eLibrary, if any hypertext links under Most Popular contained special characters, a browse list would display instead of the title record when a user selected the links.

Example

In the Most Popular list, the title Selskapsrett lists the author as Bjørby, Pål. The special characters display correctly in the Most Popular list, but the author’s name is incorrectly searched as “Bjrby Pal.” Since this search will not work, the user is taken to a browse list.

The eLibrary has been corrected so that if any links under Most Popular contain special characters, the proper title records are displayed when the user selects the links.

Central Search and SingleSearch Links Do Not Display in Hit List

Previously in the eLibrary, the Central Search and SingleSearch links did not appear on the hit list if a Web search engine (such as Google) or a Z39.50 broadcast search was not also configured.

This has been corrected so that Central Search and SingleSearch links appear on the hit list, even if a Web search or Z39.50 broadcast search is not configured.
Hyperion

General

Corrections

Resource Data Corrupted When Diacritics Present

Previously in Hyperion, if diacritics were present in the Name or Description field of a Resource, the data was corrupted.

This has been corrected.

Hyperion Resource with Large Amounts of Metadata not Displaying in eLibrary

Previously in Hyperion, if a user input data over 1K into a Hyperion resource's Extended Metadata field, when the information was called from the eLibrary, the image and metadata could not be displayed together and the following system message displayed.

#xIError in field size

This has been corrected so that the image and metadata can display together without a system message.

Hyperion on Oracle Unable to Locate Image Resources

Previously, Hyperion running on Oracle could not locate image resources. This has been corrected.

Hyperion Bulkload Operation Fails

Previously in Hyperion on Windows, the bulk load operation failed and files were not uploaded.

This has been corrected.

Unable to Display Images on Windows Systems Using Oracle

Previously, sites that use Oracle databases on a Windows server were able to display metadata when selecting a resource from Hyperion, but the associated image did not display. This has been corrected so that the images display for Windows sites using Oracle.
Unable to Create Hyperion Resources with Unicorn GL3.1 Hyperion Client

On a system configured to use Accountability, in the Unicorn GL 3.1 Hyperion client, users were not able to create Hyperion resources. The client would display “Required field missing” messages because the Need to Know and Restrictions fields were blank. Previously, users were able to create resources without populating these fields, which is not valid for Accountability systems. This was corrected so that these fields displayed and could be filled in. In a subsequent change, the Create Resource default property area of the Resource Manager wizard properties Defaults tab includes default property fields for Need to Know and Restrictions.

“Search Request Too Long” When Searching Metadata

Previously, users were unable to search Hyperion metadata in the e-Library. When searching metadata, the following message would display.

Search request too long

The BRS indexing software was updated in a previous Unicorn version to support 2047 characters in a search string, up from 300 characters. But, the Hyperion programs were not updated to handle this search string character increase.

The Hyperion programs have now been updated.

Hyperion Format Wizard

Corrections

Should Not Be Able to Create Entry IDs with Same Entry ID Number

Previously in the Hyperion Format wizard, users were able to create Entry ID policies within a format (such as DUBLIN) that shared the same entry ID value.

Example:

A user was able to create a new Entry ID policy with an entry ID of CREATOR, even though there was already a delivered Entry ID policy named “CREATOR” with a CREATOR entry ID.

This has been corrected. In the Hyperion formats, a user can only create Entry ID policies with unique entry ID values. When a user attempts to create an Entry ID policy that uses the same entry ID as another policy, the wizard will display a “Policy by that name already exists” message. The user will have to type a unique entry ID in order to save the policy.
Resource Manager Wizard

Corrections

Paging Through Resource Images Not Working Correctly

In the Resource Manager wizard, when a user paged through the resource images, the page numbers were not being updated, and the forward and backward arrows were not activating and deactivating correctly.

This has been corrected.

Unable to Delete a Single Row of Extended Metadata in Modify Resource Helper

After upgrading to Unicorn GL 3.1, a user noticed that the Delete Row tool was unavailable (appeared in grey) under Resource Extended Metadata in the Modify Resource helper if there was a single row of extended metadata. If the user added another row of metadata, the helper became available. But, the user could not remove the final row of metadata because the helper would become unavailable again.

This has been corrected.
Materials Booking

General

Enhancements

Materials Booking Wizards Added to WorkFlows Java Client

SirsiDynix Symphony Materials Booking enables libraries to establish a comprehensive schedule for the booking, circulation, and maintenance of audio-visual media, equipment, and rooms. An onscreen calendar shows days free and days booked, so that scheduling can take place days or weeks in advance. The Materials Booking wizards are now available in the WorkFlows Java client.

The following wizards appear on the Booking toolbar.

- Checkout Bookings – The Checkout Bookings wizard is used to check out booked items to a library user, and should be used instead of the Circulation Checkout wizard.

- Create Bookings – The Create Bookings wizard guides you through the process of creating a booking. A booking is a means of reserving library material for a date and time up to two years in the future.

- Discharge Bookings – The Discharge Bookings wizard is used to check in booked items returned to the library by the user, and should be used instead of the Circulation Discharge wizards.

- Display Item Bookings – The Display Item Bookings wizard displays the booking record(s) for a single item.

- Modify Booking Due Date – The Modify Booking Due Date wizard is used to change the due date of an existing charged booking. It allows you to search for the booking record with user information.

- Modify Item Bookings – The Modify Item Bookings wizard is used to make changes to the booking record.

- Modify User Bookings – The Modify User Bookings wizard is used to change an existing booking record. It allows you to search for the booking record with user information.

- Remove Item Bookings – The Remove Item Bookings wizard allows booking record(s) to be removed.

- Remove User Bookings – The Remove User Bookings wizard allows booking record(s) to be removed.

Each booking wizard contains wizard properties that allow you to customize the wizard work flow.
**Note:** For more information about the Materials Booking module, see the WorkFlows Java client online Help topic "FAQs: Getting Started with Materials Booking."

The WorkFlows Java client also includes the following Booking Configuration policy wizards.

- Booking Extended Informations
- Booking Profile
- Media Desk
- Shipping Schedule

The WorkFlows Java client includes the following Booking Group reports.

- Booking Notice
- Bookings with Charges Notice
- Count Booking Calendars
- Count Bookings
- List Booking Calendars
- List Bookings
- List of Bookings with Charges
- Packing Lists of Bookings
- Pull List of Bookings
- Remove Bookings
- Shift Calendar Date
Create Booking Allows Selection of Different Copy When First Selection Is Unavailable

When using the Item Search helper in creating a booking, you can now determine if a particular title already has bookings by clicking on the item in the item tree and selecting the Bookings tab.

The Bookings tab appears under the Call Number/Item tab in the Item Search helper, as follows.

```
<table>
<thead>
<tr>
<th>Description</th>
<th>Call Number/Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.B. King &amp; friends [Videorecording]: a night</td>
<td>MIN Video - AV CENTER</td>
</tr>
<tr>
<td>ISBN 34998001126552 - 1 - Video - INTRA</td>
<td></td>
</tr>
</tbody>
</table>
```

**Note:** When an item is selected from the item tree while creating a booking, the Item Info tab is selected by default. If the tab selection changes, the tab that was selected becomes the default.

**Corrections**

Users Denied Consecutive Bookings Cannot Book Non-consecutive Bookings

Previously in the WorkFlows Java client and the C client, staff were unable to create non-consecutive bookings for PUBLIC users who were not allowed consecutive bookings.

This has been corrected.

**Note:** Bookings that span the last time slot of one day and the first time slot of the next day are considered to be consecutive.

Create Booking Wizard

**Corrections**

End Time No Longer Exceeds Loan Period in Group Booking

When a user attempted to create group bookings, the following error message occasionally displayed.

```
End time exceeds loan period
```

To clear the error and complete the booking, an override code had to be entered.

Previously, the comparison of the booking end time and the date due was incorrectly performed on just one item in the group booking. This has been corrected.
Create Booking Wizard Copied Extended Information

Previously in the WorkFlows C client, Booking Extended Information was copied from one Booking record to another in the Create Booking wizard when the Booking Profile policy was set to use fixed time slots.

This has been corrected.

Create Booking Wizard Could Not Display a Large Number of Months

In the properties for the Create Booking wizard, if the calendar options number of months to display was above 18, the WorkFlows client would hang when attempting to create a booking record.

This has been corrected. The number of months can now be set higher than 18 without the WorkFlows client being affected.

Modify Booking Wizard

Corrections

Unable to Modify Booking Records

In the C WorkFlows client, when attempting to modify a booking record using the Modify Booking wizard, the following message was returned.

Unable to complete request

This has been corrected.
Outreach

General

Corrections

User Lookup Policy is Empty Message Displayed when Working with Interests

Previously, users were unable to create, modify, or remove interest records in the Outreach module. When a user clicks one of the wizard buttons, such as Create Interest, a window should open, allowing the user to search an outreach user, and then create the interest record. Instead, the following system message displayed.

UserLookup policy is empty.

This has been corrected.

Outreach Templates Have Been Corrected

When using Outreach templates, any qualifiers in any of the outreach templates were read in and applied to any interest created for the patron. Now the qualifiers are only applied to the intended interest records specified in the template.

The template process read through every interest in the template list to find which have been selected for the particular patron. When doing the read-through, the qualifiers were applied inappropriately to patron interest records. This has been corrected.

Publication Year Field Added to Outreach Interest and Template Wizards

In the WorkFlows C client, the outreach interest and template wizards display a Pubyear field which allows users to limit interest and template profile selections by publication year. This field did not appear in the WorkFlows Java client outreach interest and template wizards. Now, the Publication Year field appears on the Interests tab and Template tab of these wizards. Users can click the Number Range gadget in this field and select operators (such as >, <, or =) and year to limit the publication year selections.
Search Interest Wizard

Corrections

Search Interests Carried Over in Search Interest Wizard

In the Search Interest wizard, interests were being carried over from one outreach user to another. Using the Search Interest wizard, a library staff member viewed an outreach user's interests, clicked the Suggestions tab, then clicked the Display Another User's Interests button to search another outreach user. Although this second outreach user had no interests, the suggestions for the first user were carried over to the second user. When the staff member closed the Search Interest wizard and searched the second user again, no suggestions were listed, as expected.

The Display Another User's Interests next step was not clearing the suggestions list before displaying the next outreach user. This has been corrected.
Pocket Circ

General

Enhancements

Name Search Used as the Default User Search

When a user search is performed in PocketCirc using the User Search form, the Name search is set as the default search.

Note: If a Browse type search is used to search user records, the search index is automatically set to a Name search and cannot be changed.

Corrections

Item Checked Out Successfully to a Blocked User if an Override Code is Entered

If the Charge Item command was used in PocketCirc's online mode to check out an item to a user with a Blocked status, the item was not actually checked out to the user even though an override code was entered.

The Charge Item command has been corrected to check out an item to a Blocked user if the override code is entered.

Checkout Cancelled If the Override Message is Cancelled

When the Charge Item command was used in PocketCirc's online mode to check out an item, and if any override message displayed to require an override code to complete the checkout, selecting Cancel on the override message caused the Check Item command to enter an endless loop in which the override message displayed repeatedly.

The override message has been corrected so that if Cancel is selected to close the override message window and cancel the checkout, the checkout is cancelled successfully.

Transit Message Displays During Inventory, Item Use, and Check Item Status for Items That Belong to Another Library

In a multilibrary system, no transit messages would display for items that belonged to a library other than the current station library when PocketCirc inventoried items, marked item use, or checked the item status of an item in the online mode.
The Inventory, Item Use, and Check Item Status commands in PocketCirc have been changed to display a transit message when an item that belongs to a library other than the station library is scanned in online mode. The title, call number, item ID, and item status display in the message. The item status shows the library to which the item should be put in transit.

**Note:** Special status messages (item to go in transit, item on hold, etc.) do not display when PocketCirc is used in the offline mode.

**Users Can Log in With an Alternate ID Instead of a User ID**

If a user tried to log into PocketCirc using an alternate ID instead of a user ID, the login attempt would fail and display the following message.

*Login is incorrect*

If the user tried to log in again using an alternate ID instead of a user ID, the subsequent login attempts would fail and display the following characters.

@|SXX

In addition, the Alt ID field was not accepting the entry of a mixed-case alternate ID.

PocketCirc has been changed so a user can log in successfully using an alternate ID instead of a user ID, and the Alt ID field accepts alternate IDs of mixed case.
Reports

General

Enhancements

MARC Holdings Information Can Now Be Included in Report Output

Reports that output bibliographic information present a Print Item tab where a user can select the kind of information to be output (such as title, call number, item), how much information to output, and how it is arranged. Examples of these types of reports are List Inventory, List Bibliography, List Ordered Titles, and Bibliography by Item Type.

Now, users can also choose to output MARC holdings information from these reports. The Print Item tab now displays the MARC holdings output selections. The following output selections may or may not be available, depending on the report.

- **No MARC Holdings**—This option suppresses MARC holdings information in the report output. By default, this option is selected.
- **Formatted MARC Holdings**—This selection outputs a textual description of the MARC holdings information.
- **Unformatted MARC Holdings With Descriptive Labels**—This selection outputs the MARC holdings entry data with descriptive labels for these entries. In the Entry List box, use the Entry IDs gadget to select the MARC holdings entries to output.
- **Unformatted MARC Holdings With Entry IDs**—This selection outputs the MARC holdings entry data along with the entry IDs for these entries. In the Entry List box, use the Entry IDs gadget to select the MARC holdings entries to output.
- **Unformatted MARC Holdings Without Tags**—This selection outputs the MARC holdings entry data without the entry IDs or labels. In the Entry List box, use the Entry IDs gadget to select the MARC holdings entries to output.
- **Entry List**—The Entry List selection is only available if one of the unformatted MARC holdings options is selected. This selection controls what MARC Holdings entry information displays in the report. Use the Entry ID gadget to select a specific entry ID list. Fields can be printed as they display in the ALL, FULL, BRIEF, and TEMPLATE entry lists of the MARC Holdings format.
  - **All** — This option outputs the most complete entry list. All of the tags, or entry IDs, originally found in the record that was loaded or created are output.
• Brief — This option outputs the brief entry list, which contains more concise MARC holdings information.

• Full — This option outputs extensive MARC holdings information in the entry list. This option is the default.

• Template — This option outputs the entries that display as a template when a new record is created.

• List — This option allows the user pinpoint exactly the fields to display. The user lists specific entry IDs, separated by commas. The entry IDs will display in the report in the order in which they are listed.

• Library — Use this selection to limit the MARC holdings output by a library or specific libraries.

• Locations — Use this selection to limit the MARC holdings output by a location or locations. Use the Policy List gadget to select locations.

• Restrict MARC Holdings by Item Library—Select this check box to restrict the MARC holdings output to the item library (or owning library) of these items only. This list is restricted by the libraries previously selected in the Library field. This prompt is only available in those reports which do not include bibliographic selections.

Scheduled Reports Using the Remove Medical Subject Headings Option Must Be Rescheduled After the Software Upgrade

In reports that contain the Remove Medical Subject Headings (MeSH) option on the Selection Criteria tab, this option functions as it has prior to the SirsiDynix Symphony 3.2 release. However, with the addition of various bibliographic record loading enhancements in the new software release, these reports will not run correctly if they are configured to use the Remove Medical Subject Headings option and were scheduled before the software upgrade. The library system administrator must reschedule the following reports in the Acquisition Load report group and the MARC Import report group, if the reports are configured to use the option, and the schedule settings were configured before the software upgrade.

• Bibliographic Database Overlay (Bibloadbatch)

• Load Bibliographic Records (Bibload)

• Load Bibs with Order Info (Biborderload)

• Load Bibs for Selection (Selectbib)

• Load Bibs with Selections and Decisions (Selectbibemb)

Note: If the Remove Medical Subject Headings option is not used, the reports do not need to be rescheduled after the software upgrade.

Note: In UnicornEcole systems, the Load Other MARC Types (Loadbib) report in the Import/Export report group must be rescheduled if the schedule settings were configured before the software upgrade.
Notice Text Helper Allows Creating/Modifying Notices for Other Languages

To support the new Patron Language feature for sending notices in a patron's native or preferred language, the Notice Text helper has been enhanced to allow users to create and modify notice texts in different languages.

A new Language field appears in the helper. When the helper opens, the notice text files from the default / Unicorn/ Notices directory display. The user can select a different language from the drop-down list, and the notice text files listed in the / Unicorn/ Notices/ [Language] directory will display. After the user creates or modifies the notice text, the new text or modified text will be saved to that language directory.

Notes:

- Notice texts for the various languages are stored in the / Unicorn/ Notices/ [Language policy name] directories. When notice reports are run, the reports check the Language field in the user records and pull the notice texts from the specified language directories. The translated notice files must be named the same as the files in the / Notices directory so the system will know which notice text to pull for the report. If the notice text or language directory is not found, the report will pull the corresponding notice file from the default / Unicorn/ Notices directory.

The language directory must exist on the server before the user can create and save notice text to that directory. Contact the system administrator about creating directories on the server.

Bill Selections Now Disabled When User Selects Total Balanced Owed

On the Bill Selection tab of reports, if a user selected the Total Balance Owed option, the rest of the selections the user made were ignored, except for Library. Now, if a user types a Total Balance Owed, the rest of the selections will be disabled (appear in grey), except for Library.
Print Item Tab Updated for Reports

Reports with Print Item tab options have been updated to facilitate printing call number and item information without printing title information, as follows.

- In Title Information, the None (Control Data Only) option has been changed to None.

In order to print call number and item information without title information, select the following options on the Print Item tab.

- For Title Information, select None.
- For Call Number Information, select Call Number Only.
- For Item Information, select No Copy Information and Circulation Summary.

Reports Can Select Users by Delinquency Status and Delinquency Type

Previously, reports that have a User Status Selection report tab to select users by user status would only permit users to be selected by the delinquency statuses of OK, DELINQUENT, BLOCKED, or BARRED. With the addition of the User Standing policy in SirsiDynix Symphony 3.2, the User Status Selection tab has been enhanced so users can now be selected by delivered or custom user statuses and/or delinquency type.

- The gadget in the User Delinquency field has been enhanced to include custom user statuses that have been defined by the User Standing policy. The custom statuses can be used in addition to or instead of the delivered delinquency statuses of OK, DELINQUENT, BLOCKED, or BARRED to select users for the report.

The Delinquency Type field has been added to further limit the selection of users who have a user status with a delinquency type of OK, DELINQUENT, BLOCKED, or BARRED. The delinquency type of a user status is defined by the User Standing policy.

Confirmation Dialog Displays When Sending Reports to a System Printer

In the WorkFlows C client, if a user elected to send a finished report to a system printer, a confirmation dialog would display, indicating that the report had been sent to the selected system printer. Previously, the WorkFlows Java client did not display this confirmation. Now, the WorkFlows Java client will display a system printer confirmation dialog.
Preserve Template Owner Property Added to Report Session Settings

Previously, report template ownership was always based on the logged in user rather than the template owner. Now, Report Session Settings has been enhanced to allow the template owner to preserve ownership when reports are run.

A new property, Preserve Template Owner, has been added to the Setup and Schedule section of Report Session Settings. When this option is selected and a report is run, ownership is reported as the template owner. If the option is not selected and a report is run, ownership remains with the logged in user.

Tax Information Output Option Added to Print Invoice Tab in Reports

The Tax option has been added to the Invoice Line Information output options on the Print Invoice tab in reports that print invoice information.

Select the Tax check box to print tax exemption information for each invoice line. Exemption information for up to three taxes on each invoice line may display in the report output.

**Note:** This check box displays only when Invoice Tax feature is configured.

**Example**

The following sample invoice shows a fund line that includes tax exemption status for three taxes (State, County, and Local). Each of the three taxes has a tax fund line to show the fund used to pay the tax, the tax, and the amount paid.

```
0001) Fund Line
     invoiced:$10.00 total paid:$0.00
     Not Paid
     additional information--
     none
     Fund:NEWBOOKS copies:0 amount:$10.00
     created by: LAD last modified by: LAD
     State exempt: NO County exempt: NO Local exempt: NO

STATE) Tax Fund line
     invoiced:$0.40 total paid:$0.00
     Not Paid
     additional information--
     none
     Fund: NEWBOOKS Tax: STATE amount:$0.40
```
The Tax option was added to the Print Invoice tab for the following reports.

- Book X12 Invoices (Bookinvoicex12)
- Invoice Lines by Check Number (Checknumber)
- List Invoices (Invoicelist)
- Serials X12 Invoices (Serinvoicex12)
- Update Discount Prices (Updatediscount)
- Update Invoice Exchange Rates (Updateinvexch)

**Browse Invoice Gadget Allows Users to Select Multiple Invoice IDs**

When making invoice selections in SirsiDynix Symphony reports, users can now select multiple invoice IDs using the new Browse Invoice gadget.
X12 Invoices Reports Enhanced with the Created in Fiscal Cycle Field

The Book X12 Invoices (Bookinvoice12) report and the Serials X12 Invoices (Serinvoice12) report have been enhanced with the Created in Fiscal Cycle field. The specified fiscal cycle is used to populate the Created in Fiscal Cycle field of all invoices loaded by the reports. The Created in Fiscal Cycle field is required to run the reports.

In the Workflows Java Client, the Created in Fiscal Cycle field is on the Fiscal Cycle tab.

In the Workflows C Client, the Created in Fiscal Cycle field is on the Selection Criteria tab.

Reports Can Now Send UTF8-Encoded Notice Text

Previously on Unicorn Unicode systems, users reported problems with report notices that had Chinese characters in them.

- If the patrons checked the notices in Microsoft Outlook mail, they would have to change the encoding to UTF8 before reading the notices.
- If the patrons received the notices via Internet Explorer, after selecting UTF8 encoding to view the notice, the window turned blank, and would exit the mail system.

Now, on SirsiDynix Symphony Unicode systems that use the sendmail program, a content-type attribute is added to the mail header, which changes the encoding to UTF-8 before sending the notices.

```
content-type: text/plain;charset=utf-8
```

Corrections

Reports with Vendor Selections Not Running If Vendor Name Contains a Single Quote or Hyphen Character

In acquisitions and serial reports that allow vendor selections, if a user selected a vendor whose vendor name included a single quote or hyphen character, the reports would not run. This affected any report where the user can select by vendor name, such as the List Vendors report, Create Late Order Claims report, Print Purchase Orders report, and more. This has been corrected on Unix servers, and will be corrected on Windows servers in a future release.
Changes to Email and Printer Settings Are Retained When a Report is Scheduled

When scheduling a new or scheduled report, changes made to the Email to Individual(s) option and the Send to Printer option were not retained when the report schedule settings were saved.

- If the Email to Individual(s) check box was cleared, and all email addresses were removed from the Email Address List field, the changes were not saved.
- If the Send to Printer check box was cleared, and the printer name was removed from the Printer Name field, the changes were not saved.

The report scheduling process has been corrected to save changes made to the Email to Individual(s) option and the Send to Printer option.

Unable to Email Notices to Users with Multiple Email Addresses

If a staff member ran a notice report, such as the Hold Pickup Notices report, the notices were not being sent to users with multiple email addresses. Typically, user records will have only one email address, and notices are successfully sent to those users. When a user has more than one email address, the addresses in the EMAIL field of the user record will be separated by commas. Previously, notice reports were disqualifying recipients with multiple email addresses because of these commas that separate the addresses. Now, the report programs have been modified to accept the commas between email addresses, and notices will be sent to these addresses.

Subject Line No Longer Duplicated in Email Notices Generated on Unix Systems

When notice type reports run on a Unix system generated email notices, the email notice contained two Subject lines. The first Subject line was in the correct place, but the second Subject line was a copy of the first Subject line, and it was printing on the first line of the notice.

The notice reports have been changed so that when they are run on Unix systems to generate email notices, only one Subject line prints in the message header.

Mailing Labels Emailed with Notices

Previously, mailing labels were being emailed to users along with notices when Produce Mailing Labels was selected in the following reports.

- Generalized Bill Notices (Bill)
- Failed Call Notice Printing (Failedcallsrpt)
- Failed Calls Circulation Mailer (Fccirrmr)
- Hold Overdue Notices (Hoverdue)
- New Overdue Notices (Noverdue)
• Overdue Notice (Overdue)
• Hold Pickup Notices (Pickup)
• Recall Notice on Charged Items (Recallntc)

This has been corrected

Unable to Email Notices Reports—Windows ISAM Systems Only

A library was unable to email report results for notice-type reports. The library was running Unicorn on a Windows Server ISAM platform. It was determined that this occurred only when the user selected Include Log or Include Results, but not both, in the Report Session Settings wizard.

The program used by notice-type reports for auto-mailing report results was not correctly checking the view type of the reports. The program would only email the results file if the user selected both Include Log and Include Results in Session Settings. This has been corrected.

Pipe-Delimited File Output Failure

Previously, if reports with a due date were sent to pipe-delimited file output, the print failed.

This has been corrected.

Pipe-Delimited Field Problems

The following problems were occurring with reports with pipe-delimited fields.

• If a user chose not to print the library address, the empty pipe fields were not printing to the pipe-delimited file.

• The brief address for the pipe-delimited file was printing out too many empty pipes.

• The accrued fine and price did not always print out empty pipe fields.

• If a user chose not to print the brief record or call number, the empty pipe fields were always placed after the end of the fine.

• For brief addresses, the binaries were always printing out a total of four (4) address lines regardless of what the brief user address field had defined.

These problems have been corrected.
The following enhancements were made related to pipe-delimited fields.

- Additional checks were added to the ntcbill, ntcharge, ntccancelhold, and ntcancelhold binaries to determine when to print the empty piped fields.
- Extraneous pipes in process_output_options were removed.
- Added checks to print_ved_display_entries_advanced to count the entries listed in the brief address to determine how many total pipes should be written to the pipe delimited file.
- Circulation reports that create notices to pipe-delimited files now use the Brief Format policy for user and library addresses. Since address fields will not always be LINE, STREET, CITY_STATE, and ZIP, these have been removed from the search and variable fields are now used.

**Example:**

If Rockefeller Library has only the zip filled in, the pipe-delimited file includes the following information.

Rockefeller Library |63132|||

If Dewey Public School has all fields filled (LINE, STREET, CITY/STATE, ZIP), the pipe-delimited file includes the following information.

Dewey Public School|1276 N. Street|c/o Testing Public|St. Louis, MO|63132|

**Brief Entries in User Address Format Wizards Used When Creating Pipe-Delimited Output For Bill, Charge, Hold, and Canceled Hold Notices**

Previously, in reports that generated pipe-delimited output for bill notices, charge notices, hold notices, and canceled hold notices, the address fields had to be defined as Street, Line, City/State, and Zip for information to print correctly in the pipe-delimited fields. Since address formats for the user and library may vary according to country, the reports have been changed to use the entries listed in the Brief Entries attribute of the User Address Format wizards when creating pipe-delimited output for bill notices, charge notices, hold notices, and canceled hold notices. The reports will check the user record for the fields listed in the Brief Entries attribute and print only the populated fields in the pipe-delimited output for the notice.

**Example**

The User Address Format wizard has the following entry IDs in its Brief Entries attribute.

LINE, CITY/STATE, ZIP, DAYPHONE, HOMEPHONE

The Smith Law Library only has the city and state (Hometown, VA), and zip code (22122) in its user record. The pipe-delimited file output will display as follows.

Smith Law Library|Hometown, VA|22122|||
Reports Do Not Create Pipe-Delimited File

A previous change added the option to output pipe-delimited data (.pipe) for reports, in addition to print data (.prn). However, no matter what option was selected for some reports, the output file is given the file extension of .prn.

If Generate Pipe Delimited Output is selected on the Print Item tab, the pipe-delimited data is sent to a .prn file. However, in order for that data to be read by the Fixed Format helper, the pipe-delimited data must be saved in a file with the file extension of .pipe.

Now, if Generate Pipe Delimited Output is selected, the report creates the .prn file, then copies the pipe-delimited data to a new .pipe file.

The following Accountability group reports have been modified.

- Change Contract Numbers Report (Changecontract)
- Change DB to Acknowledge Items (Setacknowledge)
- Move Items Between Libraries (Globalmove)
- Remove Items by Purge Date (Rempurged)
- Set Destruction Date (Setdestroyed)
- Set Postal Reg. Num. (Setregnum)
- Set Transmittal Method (Settranmethod)

The following Acquisitions group reports have been modified.

- List Titles for Order Lines (Processlist)
- List Titles on Order (Ordertitle)

The following Authority group report has been modified.

- List Unauthorized Bib Records (Unauthbib)

The following Bibliographic group reports have been modified.

- Display Items by ID (Dispitem)
- List Bibliography (Bibliography)
- List Call Number Records (Calllist)
- List Entries from Catalog (Entrylist)
- List Inventory by Item Number (Invlist)
- List Items (Itemlist)
- List Titles (Catlist)
- Move Collection Items (Movecollection)
- Remove Items By Location (Rembylocation)
The following Circulation group reports have been modified.

- List Items with Bills (Billitem)
- List Items with Charges (Chargeitem)
- List Items with Holds (Holditem)

The following Info Desk group report has been modified.
- Print Bulletins (Prtbulletin)

The following Serial group report has been modified.
- Serial Controls by Item (Serctlitemlist)

The following User group reports have been modified.
- List of Suspensions (Susplist)

**Note:** The naming convention for both the .prn and .pipe files is as follows.

`yyyymmdd_xxxx.prn`

`yyyymmdd_xxxx.pipe`

**Scheduling Reports to Run Weekly Caused Report to Run on Current Date**

In the WorkFlows Java Client, when scheduling a report to run weekly on a specific date, the system was also selecting the current date.

This has been corrected.

**Filtering Reports Caused Options to be Unavailable**

In the WorkFlows Java client, when filtering scheduled reports by OWNER and DATE, the following options are grayed out and unavailable.

- View
- Modify
- Copy
- Remove
- Advanced

This has been corrected.

**WorkFlows Not Loading Report Format Options**

Previously in reports with the Format option, when a report was scheduled with the Format option cleared, the option appeared to save. However, when the report was copied and scheduled, the Format option appeared selected.

This has been corrected.
Report Log and Printed Notices Print Automatically for Notice Type Reports

In notice type reports scheduled by the Schedule New Reports wizard and the Scheduled Reports wizard, the report log and printed notices were not printing automatically even if the report was configured correctly to do so.

This has been corrected so the notice type reports scheduled by the Schedule New Reports wizard and the Scheduled Reports wizard will print the report log and printed notices automatically if the reports are configured to do so.

Unable to Load Flat Bibliographic Records if Unicorn Encoding set to UTF8

The batch bibliographic load reports were not able to load flat bibliographic records if the Unicorn encoding was set to UTF8.

This has been corrected.

Displaying Report Results with Multiple Columns Corrected

When viewing a finished report, if a user selected to view only the report results, and that report contained multiple columns of information, the columns were separated into several pages. The user had to scroll through these pages to see all the data for each item.

The program for formatting the report results has been corrected. All columns now appear on the same page, and all data for each item appears on the same page.

Finished “Count Copies By” Reports Display in Libraries Using Oracle Databases

The following reports were not displaying the report log and report output correctly when the reports finished in libraries that use Oracle databases.

- Count Copies by Current Location (Invcountbycloc)
- Count Copies by Home Location (Invcountbyhloc)
- Count Copies by Item Cat1 (Invcountbyict1)
- Count Copies by Item Cat2 (Invcountbyict2)
- Count Copies by Item Type (Invcountbytyp)
- Count Copies by Publication Year (Invcountbypbyr)

The reports have been corrected so that if a library using Oracle databases runs any of these reports, the report log and report output display correctly.
User ID Prints in the Correct Location for Notices

In notices generated by notice type reports, the patron’s user ID was being printed in the address block instead of being printed separately to the right of the address block. The notice reports have been changed so the user ID displays in the correct location in the printed notice.

Separate Reports for Each Library Sort Alphanumeric Group IDs and Zip Codes Correctly

In certain reports, the group ID and zip code sorting of alphanumeric IDs and zip codes did not produce correctly-sorted results when the Print Separate Reports for Each Library option was selected.

The following reports have been changed so that if the Print Separate Reports for Each Library option is selected, the group ID sorting or zip code sorting of alphanumeric IDs and zip codes produces correctly-sorted results.

- Assumed Lost (Assumedlost)
- Expire Available Holds (Expshlfholds)
- Expire Holds (Expireholds)
- Generalized Bill Notices (Bill)
- Hold Overdue Notices (Hoverdue)
- New Overdue Notices (Noverdue)
- Overdue Notice (Overdue)
- Recall Notice on Charged Items (RecallIntc)

Community Info Format not Listed for Selection

The Community Info (COMMINFO) format was not listed for selection in reports when the format gadget was used. This has been corrected.

Data on Scheduled Reports Disappears from Server

Previously when reports were scheduled on clients running on Windows desktops, data for all scheduled reports was disappearing from the server with an error message written to the report log.

This has been corrected. While some errors may occur in Windows, data no longer disappears.
Report Processing Replaces Existing Temporary Report Files with New Temporary Report Files

In large library systems or library consortia, when a report failed and did not display in the finished reports list, the report's temporary report file was not removed from the temporary reports directory. If a future report ran and used the exact same temporary report file name, the report's output would be appended to the existing temporary report file from the failed report. When the report was viewed in the finished reports list, the output contained data that the user did not expect to see. This situation typically occurred in libraries that ran enough reports such that the available temporary report file names where exhausted, and subsequent runs of reports would incorrectly append the contents of a temporary report file to an existing temporary report file.

Temporary report files are generated when a report runs, and are removed when the report finishes. However, if a report fails and does not display in the finished reports list, the temporary report file remains in the temporary reports directory (such as the /tmp directory). The temporary report file name has the form of rpt[process ID][a-z].

Example

If the report process ID is 2001, and the report run was the first run of the report with that process ID, the temporary report file name is rpt2001a. The next run of the report using process ID 2001 has the temporary report file name of rpt2001b.

If enough reports were run to reuse a process ID to generate filenames rpt[process ID]a through rpt[process ID]z, the next run of a report using that process ID would append the report contents to an existing temporary report file that remained from a previous report that failed.

The report processing has been changed so that if a temporary report name is exactly the same as an existing temporary report file, the existing temporary report file is replaced by the new temporary report file.

Old Finished Report Output and Logs Appended to New Reports

On a system with old finished reports, some report output (.prn) and log (.log) files remained on the system even though the finished report they were associated with had been removed. When a new report was run, and if its print ID happened to be the same as one of these old files, the old output or log information was appended to the new report result.

This has been corrected. Now, when a new print ID is generated, the report script will remove the old [print ID].log and [print ID].prn files to make sure no old output or log information will append to the new report result.
Unable to Schedule Reports with Call Number Range Selections When Call Numbers Included Dashes

When a user tried to run a Move Collection Items report with selections that included a call number range from “BECKETT COLLECTION--STAGD” to “BECKETT COLLECTION--STAGF” (each limited by 24 characters), she was unable to schedule the report. WorkFlows displayed the following system message:

Data type too large for available memory

This occurred only when the user made the call number range selection of x-y. Using the dash (-) as the call number range operator presented a problem because dashes may be part of call numbers.

This has been corrected. The call number range operator has been changed from XX.XXX-XX.XXX to >XX.XXX<XX.XXX. Users can now search call number ranges that include dashes.

Caret Characters No Longer Require a Backslash Character For Strings Entered in a Report’s Search String Tab

In reports that contain the Search String tab, search strings that contained a caret character (^) required a preceding backslash character (\) for the report to be saved successfully as a template report.

Example

In a report’s Search String tab, the search string "(hurricane{245} and ^L1) not (^L2 or ^L6 or ^L7 or ^L8 or ^L9 or ^L10)" had to be entered as "(hurricane{245} and \^L1) not (\^L2 or \^L6 or \^L7 or \^L8 or \^L9 or \^L10)" before the report could be saved as a template report.

When the report was run, the following message displayed in the report log.

**Error in query NEAR END OF QUERY

Reports that have a Search String tab have been corrected so search strings that contain a caret character do not require a backslash character to be typed before the caret character. When the reports run, the report logs no longer contain the error message.
User Access Policy and Environment Policy Information Displays Correctly in Report Output

Reports that can be set up to select user records often did not include the User Access policy name or the Environment policy name in the report output for the user records when the following conditions existed.

- The report was configured to select all user records (that is, the report was run without specific user selections).
- The library used the Oracle database system.
- The system in configured so that User Profiles do not contain the User Access, Environment, and Location policies.

This problem has been corrected so that when a report that can select user records is run under the previously-listed conditions, the User Access policy name and the Environment policy name will display for the user records in the report output.

Incorrect Results When Making Report Selections by Birth Date—AIX Oracle Systems Only

Previously on Unicorn AIX Oracle systems, if a library staff member made birth date range selections in reports such as the Edit User Characteristics or List Users, the reports could produce inconsistent results. Sometimes the reports correctly selected users with birth dates in a specified range, and sometimes not. This typically occurred when the date selections were pre-January 1, 1970.

The report programs used a date function that did not return the correct date before January 1, 1970 on all system platforms. This has been corrected.

Unable to List Template or Scheduled Reports after Running MARC Export Utility Wizard

Previously, after using the MARC Export Utility wizard, a user was unable to open the Schedule New Reports wizard or Scheduled Reports wizard. When the user tried to open either wizard, Unicorn would display the following message.

ERROR LISTING SCHEDULED REPORTS. DATE SCHEDULED OR COMPLETED ERROR IN FIELD SIZE.

It did not matter whether or not the user actually ran the MARC Export Utility wizard. Just opening and closing this wizard made the report wizards nonfunctional. The user had to quit and restart WorkFlows to be able to use the report wizards.

This has been corrected.
Call Number Range Selection Option Selected Call Numbers Outside of Range

In reports that contain a call number range selection option, such as the Item Statistics (Itemstat) report, records were being selected that fell outside of the specified call number range.

This has been corrected.

Finished Reports Wizard

Enhancements

Print Finished Reports Window Added to the Finished Reports Wizard

Previously, when the user printed a finished report in the Finished Reports wizard by selecting the report in the list and clicking the Print button, no indication was given that the report had been successfully sent to the printer.

The Finished Reports wizard has been enhanced with the Print Finished Reports window. This window displays when the user selects a finished report and clicks the Print button. The user can send the report to the default printer or another selected printer. The user may also choose to print just the report log, just the report results, or both. The report can be printed using the defined formatting specific to each report, or without the formatting.

Corrections

User Returns to Finished Reports List After Clicking OK on the Email Finished Reports Window

After selecting a report in the finished reports list and clicking OK to close the email confirmation window, the Email Finished Reports window displayed. The user had to click Cancel in this window to return to the finished reports list.

The Finished Reports wizard has been changed so that when the user clicks OK in the confirmation window after emailing a finished report, the user is returned to the finished reports list.
Print Settings in the Report Wizard Properties Are Used When Printing Report Output, Notices, and Notice Mailers

If a finished report, notices, or notice mailers were printed, the print settings specified in the report wizard properties were overwritten by the system printer settings. As a result, the report output, notices, and notice mailers were not formatting correcting and printing as expected.

The Finished Reports wizard been corrected to use the print settings specified in the report wizard properties for printing report output, notices, and notice mailers.

Scheduled Reports Wizard

Corrections

User Returns to the Scheduled Reports List After Verifying or Changing Report Ownership in the Scheduled Reports Wizard

In the Scheduled Reports wizard, if the user clicked the Ownership button to verify or change the report owner, the wizard would close when the user clicked OK to return to the scheduled reports list.

The Scheduled Reports wizard has been changed so that if a user clicks the Ownership button to check or change the report owner, the user is returned to the scheduled reports list in the wizard after the Change Owner window closes.

Acquisitions Group Reports

Enhancements

Subtotals, Tax Totals, and Breakdown of Tax Totals Output Options Added to Print Invoice Tab in Reports

The Print Invoice tab in certain Acquisitions reports has been enhanced with the Subtotals and Tax Totals output option and the Breakdown Tax Totals output option.

The Subtotals and Tax Totals output option determines whether to print subtotals and tax totals of all selected invoices. Subtotals are totals that do not include tax amounts. Tax totals are totals that do not include subtotals (that is, amounts that are not tax amounts). When added together, the subtotals and tax totals equal the grand totals.

The Breakdown Tax Totals option determines whether to print a breakdown of the tax totals. Totals can be printed for each tax policy included in the invoices selected by a report. When added together, the tax breakdown amounts equal the tax totals.
The Subtotals and Tax Totals output option and the Breakdown Tax Totals output option have been added to the following reports, and display only if the Invoice Tax feature is enabled.

- Book X12 Invoices (Bookinvoicex12)
- Invoice Lines by Check Number (Checknumber)
- List Invoices (Invoicelist)
- List Invoices, Lines (Invlinelist)
- List Invoices for Vendor (Listvendinv)
- Serials X12 Invoices (Serinvoicex12)
- Update Invoice Exchange Rates (Updateinvexch)

Library Authorization Output Option Added to Fund Cycle Information Output Options

The Library Authorization check box has been added to the Fund Cycle Information output options that are available on the Print Fund tab in various Acquisitions reports. Selecting this check box will print the Library Authorization policy associated with a fund cycle in the report output. The Library Authorization policy defines the libraries for which a fund cycle is authorized for purchasing materials based on the holding code library.

Certain Acquisitions Reports Can Generate Pipe-Delimited Output Files for Invoice, Invoice Line, and Tax Information

The Print Invoice tab for certain reports in the Acquisitions report group has been enhanced with options to generate pipe-delimited files for invoice, invoice line, and tax information. The pipe-delimited files can be opened using the Fixed Format Manager helper in the Finished Reports wizard.

The following options are now included on the Print Invoice tab for some Acquisitions reports.

- **Generate Delimited Output Files** specifies that parts of report output are to be saved in one or more external files as pipe-delimited files. The pipe-delimited files are saved to the Unicorn/Rptprint directory on the library server.

  **Note:** When this option is selected, all output options that do not create pipe-delimited output are deactivated. The user must select one or more pipe-delimited output options when the Generate Delimited Output Files option is selected.

- **Fund Summary Totals** creates a pipe-delimited file of a grand total of fund summaries for all invoices selected by the report. The pipe-delimited file created by this option is named fund_summary_XXXX.pipe, where XXXX is the four-letter report ID that corresponds to the report.
• **Invoice and Invoice Line Information** creates a pipe-delimited file of invoice and invoice line information. The file contains basic information from the invoice, including amounts, number of lines and copies, dates, and funding summaries. In addition, the file contains information for each invoice line, including amounts, funding, payment dates, and audit trail information. The pipe-delimited file created by this option is named inv_and_invline_XXXX.pipe, where XXXX is the four-letter report ID that corresponds to the report.

• **Invoice by Invoice Fund Summaries** creates a pipe-delimited file of fund summaries for each invoice selected by the report. The pipe-delimited file created by this option is named inv_funds_XXXX.pipe, where XXXX is the four-letter report ID that corresponds to the report.

• **Totals for Selected Records** creates a pipe-delimited file of subtotals and tax totals for the invoices selected by the report. Subtotals are totals that do not include tax amounts. Tax totals are totals that do not include subtotals (that is, amounts that are not tax amounts). When added together, the subtotals and tax totals equal the grand totals. The pipe-delimited file created by this option is named invoice_totals_XXXX.pipe, where XXXX is the four-letter report ID that corresponds to the report.

The Print Invoice tab for the following reports have been enhanced with the new options.

• Book X12 Invoices (Bookinvoice12)
• Invoice Lines by Check Number (Checknumber)
• List Invoices (Invoicelist)
• List Invoices, Lines (Invlinelist)
• Serials X12 Invoices (Serinvoice12)
• Update Invoice Exchange Rates (Updateinvexch)

**Mapping for Extended Price, Requestor ID, and Orderline Extended Information Fields Added to the Load Bibs with Order Info Report**

The Load Bibs with Order Info (Biborderload) report has been enhanced with new options for mapping the extended price, requestor ID, and optional orderline information fields. Data entered into these new tag name and subfield options are mapped to flat order records that can be loaded into the SirsiDynix Symphony database. The new options are on the Order Options tab of the report.

The following information applies to the new tag name and subfield options.

• If a tag name is specified, the subfield must also be specified. Likewise, if the subfield is specified, the tag name must also be specified.

• SirsiDynix reserves the 999 tag for a special use in the 9XX record loading process; order information cannot be housed in the 999 tag.
• If a MARC tag has been specified for the extended price, requestor ID, or orderline information, and the record being imported into the database is a match for an existing database record, the MARC tag will be merged into the database record.

• Data specified in the tag number and subfield will be mapped into a flat order record, according to the flat order format for 9XX ordering.

Extended Price

The Extended Price Tag Name and Subfield option can be used to specify the extended price. The extended price is the price in the vendor's currency for the entire quantity on the orderline, with discounts applied. Supplying the extended price is optional.

If the extended price is not supplied, SirsiDynix Symphony calculates it by multiplying the number of copies by the unit price, then applying any discounts specified in the vendor record.

When the extended price is supplied, that value overrides SirsiDynix Symphony's calculation of the extended price.

Note: If the extended price tag number and subfield are supplied, the unit price tag number and subfield are not required to be supplied.

Requestor ID

The Requestor ID Tag Name and Subfield option can be used to specify the user ID of the requestor. Supplying the requestor user ID is optional. When a requestor ID is supplied, the requestor user ID must be a valid user ID from the SirsiDynix Symphony user database.

Orderline Extended Information Fields

Previously, only one MARC Tag Number and Subfield combination could be mapped to an orderline extended information entry ID. With this report enhancement, up to four unique MARC Tag Number and Subfield combinations can be mapped to up to four orderline extended information entry IDs.

New Manage Fund Cycle Records Report

A new report, Manage Fund Cycle Records (Managefundcyc), has been added the Acquisition report group. This report allows acquisitions departments to manage the ordering allowed/paying allowed flags in the fund cycle records, in batch, as fiscal years begin and end. In addition, other fields in the fiscal cycle can be edited by this report.

This report is password protected. If the user does not know the password, the user should contact the system administrator.

The Manage Fund Cycle Records report contains the following tabs.

• Basic
• Fund Selection
• Fund Cycle Selection
• Edit Fund Cycle
• Sorting
• Print Fund

On the Fund Selection tab, a Library selection is required.

On the Fund Cycle Selection tab, a fund cycle selection is required.

On the Fund Cycle Editing tab, you can make changes to the following fund cycle record fields.

• Block Over Encumbrance
• Block Over Expenditure
• Expenditure Allowed
• Encumbrance Allowed
• Ordering Active
• Paying Active

**Note:** For more information about these tabs, see the Workflows Java client online Help.

**Date Received and Date Loaded Fields Added to the Load Bibs with Order Info Report**

The Load Bibs with Order Info (Biborderload) report has been enhanced with the option to set defaults for the Date Received field and the Date Loaded fields. These new defaults display in the report’s Order Options tab.

The Date Received field can be used to specify the date the order was received. Supplying the date received is optional.

The Date Loaded field can be used to specify the date the order was loaded. Supplying the date loaded is optional.

Each of these date fields contain the Calendar gadget, which can be used to select a specific date, or the value TODAY.

**Library Authorization Copied to New Fund Cycle Records in the Rollover Fund Cycles Report**

The Rollover Fund Cycles (Rolloverfund) report has been enhanced to copy the value of the Library Authorization field from existing fund cycle records to the new fiscal cycle fund records.

**Note:** The Library Authorization field displays in fund cycle records only in multilibrary systems.
New Report for X12 Purchase Order Acknowledgement and Database Update

The new Book X12 Acknowledgements with Purchase Order Update report (BookX12POAack) generates an EDI acknowledgment that indicates to the library that the vendor has electronically received the purchase order and has indicated what orderlines the vendor can fulfill, as well as orderlines that are cancelled by the vendor. This report updates the SirsiDynix Symphony orders database with this information.

This report contains the following tabs.

- Basic Tab
- Orderline Extended Information
- Cancellation Tab

The acknowledgement codes sent by the vendors are listed in the “Book X12 Vendor Acknowledgement Codes” topic in the Workflows Java client online Help.

Important Note: Acquisitions staff can use either the Book X12 Acknowledgement report or Book X12 Ack with PO Update report to record order acknowledgments from vendors. Every run of either report will process all of the available POA files. However, one library in the system cannot use one report, while another library uses the other report to process POA files. The libraries must decide on one report to use for POA processing.

How This Report Works

Once the X12 acknowledgement has been received, this report will update the status of the orderline in the order record, if necessary.

A note will be written to orderline extended information for every PO1 segment in the purchase order acknowledgement. The orderline extended information entry is specified on the Orderline Extended Information tab.

This note includes the text "X12 POA," quantity ordered (PO102), product service ID, line item status code (ACK01), optional quantity (ACK02), industry code (ACK29) and optional quantity and name from the SCH segments.

Example: Purchase Order Acknowledgement Note in Orderline Extended Information

X12 POA / 05/17/2007 17:46 / Baseline Order Data - Ordered quantity 2 / Line Item Acknowledgement - Line item status Item accepted

How This Report Cancels Orderlines

On the Cancellation tab, if the Cancel Orderlines check box is selected, the report will use information from ACK01 segment to determine if an orderline needs to be considered for cancellation.

- When the codes IR or IA are in ACK01, this report will continue checking as follows to determine whether the orderline will be cancelled.
- If no quantity is provided in ACK02, the report won't cancel the orderline.
• If the quantity provided in ACK02 is not equal to the orderline quantity from the orderline database or if the orderline quantity is 0, the report won't cancel the orderline.

• If the quantity provided in ACK02 is equal to the orderline quantity from the orderline database, the report will continue checking to determine whether the orderline will be canceled.

• If the orderline quantity received is 0 and the orderline quantity paid is 0, and all the conditions above are met, the report will cancel the entire quantity on the orderline.

When the report cancels the orderline, a cancel segment is added as the first segment. The cancel reason is set to Vendor, the quantity is the orderline quantity, cancelled date is set to the current date, and the mailed date is set to NEVER. The quantity in all fundings/distributions are set to 0. If there are any claims, the claim status is set to canceled.

**Warnings Tab Added to the Book X12 Invoices Report to Validate Invoice Lines for Amounts and Quantities**

The Book X12 Invoices (Bookinvoicex12) report has been enhanced with the Warnings tab. The options on the Warnings tab can print warning messages in the finished report output when invoice lines cannot be validated because of errors in amounts, quantities, or both.

**Warn When the Difference Between Invoice Amount and Order Amount Exceeds % and $**

Use the Warn When the Difference Between Invoice Amount and Order Amount Exceeds % and $ option to print warning messages in the report output when the difference between the amount invoiced for an item and the discounted price of the item (from the orderline) exceeds a threshold. A percentage threshold, monetary amount threshold, or both a percentage and a monetary amount threshold can be set.

• If just a percentage threshold is set, a warning message displays in the report output only when the difference between the amount invoiced for an item and the discounted price of the item exceeds the specified percentage.

• If just a monetary amount threshold is set, a warning message displays in the report output only when the difference between the amount invoiced for an item and the discounted price of the item exceeds the specified amount.

• If both a percentage threshold and a monetary amount threshold are set, a warning message displays in the report output only when the difference between the amount invoiced for an item and the discounted price of the item exceeds the specified percentage and the specified amount.

For each invoice line that does not pass validation, the amount warning message in the report output includes the invoice ID and line number, library, amount invoiced, order ID and line number, fiscal cycle, and the discounted orderline price.
**Example**

**WARNING:** The difference between order price and invoice price exceeds the threshold.

<table>
<thead>
<tr>
<th>Invoice ID/line</th>
<th>Library</th>
<th>Invoice Price</th>
<th>Order ID/line</th>
<th>Fiscal Cycle</th>
<th>Order Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>INV15 /0001</td>
<td>MAIN</td>
<td>$31.00</td>
<td>PO-805 /1</td>
<td>2007</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

**Note:** If this option is selected but no thresholds are set, the setting is ignored and invoice lines are not checked for percentage or amount difference errors.

**Note:** Invoice lines that use the ADJUST link type are not validated for amount differences.

**Warn When the Invoice Quantity Exceeds the Received Quantity**

Use the Warn When the Invoice Quantity Exceeds the Received Quantity option to print warning messages in the report output when total quantity invoiced is greater than the quantity received on the order line.

For each invoice line that does not pass validation, the quantity warning message includes the invoice ID and line number, library, invoice line quantity, order ID and line number, fiscal cycle, quantity ordered, quantity received, and the quantity invoiced.

**Example**

**WARNING:** The quantity invoiced is greater than the quantity received.

<table>
<thead>
<tr>
<th>Invoice ID/line</th>
<th>Library</th>
<th>Invoice line quantity</th>
<th>Order ID/line</th>
<th>Fiscal Cycle</th>
<th>Quantity ordered</th>
<th>Received quantity</th>
<th>Invoiced quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>INV16 /0001</td>
<td>MAIN</td>
<td>2</td>
<td>PO-806 /1</td>
<td>2007</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

**Create Late Order Claims Report Now Sorts the Report Output**

Previously, the Create Late Order Claims (Claimlate) report simply output claim records in the order in which they were created. This made it difficult for users to find which orders were claimed.

Now, this report outputs claims sorted by library, fiscal cycle, order ID, and orderline. Also, each library's claims are printed in its own section.

**Transaction Set Limit Increased to 999 Invoices for the Book X12 Invoices Report**

When the Book X12 Invoices (BookinvoiceX12) report was run, the following message displayed if the report tried to process a file with more than 199 transaction sets (invoices).

Too many transaction sets in the functional group.

200 transaction sets processed

The report has been changed so it can process a file with up to 999 invoices in one file.
Corrections

List Funded Orders Report Not Honoring Output Options

Previously, the List Funded Orders (Fundorderlist) report did not honor the Fund Order Output options the user selected.

- No matter what the user selected for Page Break options, the report ignored the selection.
- If the user selected the output option Totals for Each Primary Group, the totals were not printed.

Both issues have been corrected.

Book X12 Orders Report Not Printing Vendor Number

After running the Book X12 Orders (Bookorderx12) report, a user noticed that the vendor number (VN) was not printing to the X12 file. The occurred only in Version GL3.1.

This has been corrected.

Fundorderlst Report Does Not Generate .Pipe File

The List Funded Order Lines report was not generating pipe-delimited output when the option to generate pipe delimited output was selected.

This has been corrected.

When pipe-delimited output is specified, the report (listed in the Fixed Format Manager Helper) creates a pipe-delimited file (YYYYMMDD_xxxx.pipe - where xxxx is the printid).


Previously, SirsiDynix Symphony wizards and reports were enhanced to handle the new 13-digit ISBNs. However, the Book X12 Acknowledgements (Bookx12POA) report had not been updated. This has been corrected.

Print Cancellation Notices Report Updates The Date Cancel Mailed for All Orderlines Selected by the Report

When multiple orderlines on the same order were cancelled and subsequently included in the Print Cancellation Notices (Cancelntc) report, the Date Cancel Mailed field for only the first orderline was updated when the Count as a Notice Mailed option was selected in the report. For all subsequent orderlines on the same order, the Date Cancel Mailed field remained set to NEVER. The next time the Print Cancellation report ran, these orderlines were included again in the report results.
The Print Cancellation Notices report has been corrected so that if the Count as a Notice Mailed option is selected, the Date Cancel Mailed field for all of the orderlines included in the report results will be updated.

**Invoice Line Selection Corrected**

Previously in the WorkFlows Java client, the Invoice Line Selection tab displayed a drop-down list for the Status field, with the values CLAIM_ONLY, COMPLETE, COMPLEX, PARTIAL, and PARTIAL_CLAIM to select from. However, when a user selected one of these values, WorkFlows would sometimes display the following message:

*INVALID DATA TYPE*

Now, the Status field contains a Number Range gadget (similar to the WorkFlows C client Invoice Line Selection tab) that allows the user to select a status number, 0-4.

All invoice lines selected by the report have the payment or receipt status represented by the selected status number.

- **0** selects only invoice lines that are COMPLETE. These invoice lines include those that are fully received, funded, and paid.
- **1** selects only invoice lines that are PARTIAL. These invoice lines include those that are not received and/or paid in full.
- **2** selects only invoice lines that are COMPLEX. These invoice lines include those that are connected to an order line with more than one funding segment that is not received and/or funded in full. (A Multiple Funding segment that is split into a number of funds, either by percentage or amount, only counts as one funding segment.)
- **3** selects only invoice lines that are PARTIAL_CLAIM. These invoice lines include those that are only partially received, and a claim segment was created for the remainder.
- **4** selects only invoice lines that are CLAIM_ONLY. These invoice lines include those that are never received, and a claim segment was created.
Acquisition Load Group Reports

Enhancements

Title Control Processing Options Added to Reports

The Load tab in the following reports in the Acquisition Load report group has been enhanced with various title control processing options and fields for the SirsiDynix Symphony 3.2 release.

- Load Bibs with Order Info (Biborderload)
- Load Bibs for Selection (Selectbib)
- Load Bibs with Selections and Decisions (Selectbibemb)

Following subsections of this release note describe the options and fields that have been added or enhanced under Title Control Processing on the Load tab of each report.

Key Matching Options

The following Key Matching options and fields under Title Control Processing on the Load tab are used to match incoming records based on the title control key.

Match On Options

One of the following options may be selected to specify the requirements that must be met for a record to be considered a match.

- **Match on Title Control Number** considers the incoming record a match only if the control number matches a title control number found in the Title Control Number Source for Incoming Items field. This option is the default selection. The following message displays in the finished report log when this option is selected.

  Bibliographic records will be matched by flexible key.

- **Match on Title Control Number and Indexed MARC Tag** considers the incoming record a match if the title control number of a library catalog record matches one of the specified Title Control Number Source fields in the imported record, and if at least one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index. The following message displays in the finished report log when this option is selected.

  Bibliographic records will be matched by flexible key AND the text index.
- **Match on Title Control Number or Indexed MARC Tag** considers the incoming record a match if the title control number of a library catalog record matches one of the specified Title Control Number Source fields in the imported record, or if one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index. The following message displays in the finished report log when this option is selected.

Bibliographic records will be matched by flexible key OR the text index.

**Indexed MARC Tag Number**

This field specifies the MARC tag values to check for a match in addition to the title control number, if desired. If this field is used, SirsiDynix Symphony checks the catalog for a MARC tag match on the first Indexed MARC Tag Number value. If no match is found, the second Indexed MARC Tag Number is checked, and this pattern continues until either a match is found, or all Indexed MARC Tag Numbers have been checked.

**Note:** The Indexed MARC Tag Number field is available only when the Match on Title Control Number and Indexed MARC Tag option or the Match on Title Control Number or Indexed MARC Tag option is selected.

**Bibliographic Record Processing Options**

The following Bibliographic Record Processing option and field under Title Control Processing on the Load tab are used to remove certain entries or headings from matching incoming records.

- **Remove Entries Listed in the file "Junktag"** removes entries that are not used in completed catalog records in the library. The junktag file in the /Unicorn/Custom directory lists any unused entries that are to be stripped from imported records. If the Remove Entries Listed in the file "Junktag" check box is selected, the entries are automatically, completely removed from the new bibliographic record created by the report. If the check box is cleared, all entries in the imported record will be loaded.

**Note:** When a bibliographic record that matches an existing database record is merged, no junktags processing takes place.

**Caution** The removed entries cannot be restored.

**Remove Subject Headings** replaces the Remove Medical Subject Headings (MeSH) option. The new Remove Subject Headings option specifies one or more subject headings to be removed from the matching record, based on the 6XX second indicator values, before it is loaded into the catalog.
Option to Identify Vendor by Customer Number Embedded in the Bibliographic Record Added to the Load Bibs with Order Info Report

Previously, the Load Bibs with Order Info (Biborderload) report would process a file of bibliographic records that contained 9XX ordering information and associate one vendor ID with all of the flat order records that were written to the output file. However, a vendor may create many customer numbers (also called “account numbers”) for each library to identify processing options for materials that are ordered.

Example

A customer number specified for a title on an orderline may indicate to the vendor that the title should be delivered to the library with a Mylar cover, a barcode, and an LC call number with the prefix REF.

The Load Bibs with Order Info report has been enhanced to take a specified customer number and automatically determine the correct associated vendor ID. The report adds the vendor ID to the orderline in the flat order record that is created.

The following fields have been added or changed on the Order Options tab in the Load Bibs with Order Info report.

- The Customer Number Tag Number and Subfield fields have been added.
- The Vendor ID field has been relabeled as Default Vendor ID.
- The Order ID option labels have been relabeled, but the options function exactly as they did in previous versions of the report.

Customer Number Tag Number and Subfield Fields

The Customer Number Tag Number and Subfield fields have been added to the Order Options tab of the Load Bibs with Order Info report. These fields are optional.

If the customer number tag and subfield are not supplied in the Customer Number Tag Number field and Subfield field, the vendor ID specified in the Default Vendor ID field is used for every order created.

When the customer number tag and subfield are supplied in the Customer Number Tag Number field and Subfield field, one of the following happens when the report runs.

- If the customer number matches a vendor ID in the database, the matching vendor ID is used for the created order.
- If the customer number matches multiple vendor IDs in the database, the vendor ID specified in the Default Vendor ID field is used for the created order. One order per title is created, regardless of the setting selected in the Order ID field.
- If the customer number does not match any vendor ID in the database, the vendor ID specified in the Default Vendor ID field is used for the created order. One order per title is created, regardless of the setting selected in the Order ID field.
• If the customer number is missing in the bibliographic record, the vendor ID specified in the Default Vendor ID field is used for the created order. One order per title is created, regardless of the setting selected in the Order ID field.

If the customer number tag number is supplied, the subfield must also be supplied. Likewise, if the subfield is supplied, the customer number tag number must be supplied.

**Note:** SirsiDynix reserves the 999 tag for a special use in the 9XX record loading process; order information cannot be housed in the 999 tag.

**Note:** If a MARC tag has been specified for the customer number, and the record being imported into the database is a match for an existing database record, the MARC tag carrying the customer number will be merged into the database record.

**Note:** Data specified in the Customer Number Tag Number and Subfield fields will be mapped into a flat order record, according to the flat order format for 9XX ordering. Refer to the online help for information.

**Default Vendor ID Field Relabeled**

The Vendor ID field on the Order Options tab of the Load Bibs with Order Info report has been relabeled as Default Vendor ID. The new label correctly identifies the supplied vendor ID as the default vendor ID to use in the order if the customer number is not supplied, matches multiple vendor IDs in the database, or does not match any vendor IDs in the database.

**Note:** The Default Vendor ID field is required to run the Load Bibs with Order Info report.

**Order ID Options Relabeled**

The Order ID options on the Order Options tab of the Load Bibs with Order Info report have been relabeled to more accurately describe how order IDs are put into the flat order record. The functioning of the options are essentially the same as in previous versions of the report.

• The Auto-generated Order ID, One Orderline Per Bib Record option has been relabeled as Auto-generate Order ID(s); Create One Orderline Per Bib Record.

• The Auto-generated Order ID, One Order Per Bib Record option has been relabeled as Auto-generate Order IDs; Create One Order Per Bib Record.

• The Order ID Read From Bib Record option has been relabeled as Read Order ID From Bib Record.
Load Bibs with Order Info, Load Bibs for Selection, and Load Bibs with Selections and Decisions Reports Now Allow Shadowing Bibliographic Records

In the WorkFlows Java client reports, the Load Bibs with Order Info (Biborderload), Load Bibs for Selection (Selectbib), and Load Bibs with Selections and Decisions (Selectbibemb) reports now have a selection for shadowing the incoming and merged bibliographic records. On the Load tab, users can select the Shadow Loaded Records check box. If this check box is selected, catalog records loaded by these reports will be shadowed during the load process.

Corrections

Update Discount Prices Report Runs with Blank Vendor IDs Field

Previously in the Update Discount Prices (Updatediscount) report, the report failed to schedule if the Vendor IDs field on the Vendor IDs tab was left blank.

This has been corrected. The report now schedules even if the Vendor IDs field is blank.

Block Over Expenditure Option Added to Fund Cycle Selections

In reports that contain the Fund Cycle Selection tab, the Block Over Expenditure selection option was missing, and users could not select fund cycles for the reports based on the setting of the Block Over Expenditure flag. The Block Over Expenditure selection option has been added to the Fund Cycle Selection tab so fund cycles can be selected for reports based on the setting of the Block Over Expenditure flag in the fund cycle record.

Corrections Made to the Segment Information for the Load Bibs with Order Info Report and the Load Bibs with Selections and Decisions Report

In the Load Bibs with Selections and Decisions (Selectbibemb) report and the Load Bibs with Order Info (Biborderload) report, the following segment information did not load correctly.

- When the Load Bibs with Selections and Decisions report was run, the number of distributed copies was not loaded into the flat ASCII selection list records. Instead, the number of funded copies was incorrectly being assigned as the number of distributed copies for each selection line.

- When the Load Bibs with Order Info report was run, the number of distributed copies was not loaded into the flat order record file. Instead, the number of funded copies was incorrectly being assigned as the number of distributed copies for each segment.

- In both the Load Bibs with Selections and Decisions report and the Load Bibs with Order Info report, the Segments Information gadget did not correctly save the specified subfield in its Holding Code Subfield field. The subfield specified in the Quantity Funded Subfield field would incorrectly be copied into the Holding Code Subfield field.
The following changes have been made to the reports.

- The Load Bibs with Selections and Decisions report has been changed to correctly load the number of distributed copies for each selection line into the flat selection list file.
- The Load Bibs with Order Info report has been changed to correctly load the number of distributed copies for each segment into the flat order record file.
- The Segments Information gadget has been corrected so the subfield specified in the Holding Code Subfield is saved correctly in the segments record.

**Note:** If the Load Bibs with Selections and Decisions report and/or the Load Bibs with Order Info report is a regularly-scheduled report, the report must be rescheduled for the report corrections to take effect.

Order Map Message No Longer Displays in the Logs for the Load Bibs for Selection Report and Load Bibs with Selections and Decisions Report

When the Load Bibs for Selection (Selectbib) report or the Load Bibs with Selections and Decisions (Selectbibemb) report was run on a system that had an Order Map policy that contained an order map line with a description that exceeded 30 characters, the report would stop processing and display the following text in the report log.

**:ORDDISTMAP

This has been corrected so the Load Bibs for Selection report and the Load Bibs with Selections and Decisions finish running properly.

Administration Group Reports

Enhancements

**New Report Sorts Offline Transactions into One File for Processing by the API Server**

The Sort Offline Transactions (Sortstand) report consolidates and sorts offline transactions that were recorded by Offline WorkFlows in multiple libraries. This report produces the standtrans.srt file, which contains all of the sorted offline transactions for the libraries. Library system administrators can manually break this file into multiple files for simultaneous processing by the API server.

The Sort Offline Transactions report is in the Administration report group in the WorkFlows Java client, and in the Housekeeping report group in UnicornEcole.

**Note:** This report is typically used only by library consortia and very large library systems that find the Load Offline Transactions (Loadstand) report does not process the volume of collected offline transactions efficiently enough for library needs. This report should be run only with the guidance of SirsiDynix Client Care.
List Policies Report Enhanced to Include Tax and Tax Structure Policy Information in Report Output

The List Policies (Listpol) report has been enhanced to include information for a library’s Tax policies and Tax Structure policies in the report output.

**Note** The List Policies report includes Tax and Tax Structure policy information in the report output only in libraries that are configured to use the Invoice Tax feature.

The following report sample shows how Tax policies are listed in the List Policies report output.

```
*TAX
  NAME       DESCRIPTION
  1. NONE
  0.00
  2. GST     Canadian Goods and Services Tax
  0.50
  3. QST     Quebec sales tax
  5.00
```

The following report sample shows how Tax Structure policies are listed in the List Policies report output.

```
*TAX MAP
  NAME       DESCRIPTION
  1. NONE       Used when entire invoice is exempt from taxes
                 NONE        0
                 TAX RATE2  EXEMPT INCLUDES TAX RATE1
                 ^            0     0
                 TAX RATE3  EXEMPT INCLUDES TAX RATE1 & 2
                 ^            0     0

  NAME       DESCRIPTION
  2. QUEBEC    Combined GST and QST charged in Quebec
                TAX RATE1  EXEMPT
                GST        1
                TAX RATE2  EXEMPT INCLUDES TAX RATE1
                QST        1     1
                TAX RATE3  EXEMPT INCLUDES TAX RATE1 & 2
                ^            0     0
```
Barcode Validation Not Working With Modified Barcode Formats

If using barcode validation and an active barcode format with strip character(s) defined for it, then the Unicorn system might contain either modified or unmodified barcodes in the user or item database.

Programs were modified to first lookup item and user records by the modified barcode. If the record is not found by the modified barcode, then the original barcode (un-striped) is used for the database lookup.

An Administration report, Re-Synchronize Valid Barcodes (Resyncbarcodes), was created to list and/or update affected barcodes. This report will report valid barcodes in the system that contain extra barcode character(s) and/or digit(s) stored in the database record. If the report is run to update the database, then the reported barcodes will be modified in the item or user database to remove the extra character(s) and/or digit(s).

 Corrections

Load Users Report Appending Need to Know Values

The Load Users report (Userload) was not loading the need to know values and the access restrictions correctly for sites using the Accountability module. If a patron had existing need to know or access restrictions, the report caused the existing patron to have multiple need to know values or multiple access restrictions instead of replacing the old need to know values and access restrictions with the new ones.

This has been corrected.

User PINs not Loaded or Incorrectly Updated

When the Load user report was run, if the incoming record had a PIN specified, the existing user record was updated or a new user record was created with an automatically generated PIN instead of the PIN specified in the incoming record. Also, when the Load User report was run in update mode, if the incoming user record had a blank PIN, the existing user record's PIN was replaced by an automatically generated PIN, instead of being left as is. Both of these issues have been corrected.

Load Users Report Can Load Birth Year Data into the User Record Birth Date Field

The Load Users (Userload) report would not load user records from a flat ASCII text file if a user record contained a user birth year instead of a full birth date. The birth year was being converted to a value of NEVER, so the birth date field could not be read correctly by the report.

The Load Users report has been changed so that if a user record contains a birth year instead of a full birth date, the birth year data is loaded into the birth year field with a January 1 as the birth date month and day.
Example

If the flat ASCII text user record contains a birth year of 1969, the data is loaded into the user record birth date field as January 1, 1969.

List Invalid User IDs and List Invalid Item IDs Reports Corrected

The List Invalid User IDs (Invuseridlist) and List Invalid Item IDs (Invitemidlist) reports failed to list invalid barcodes that contained an incorrect check-digit.

Example:
The CLSI item barcode of 39097000130798 contains an invalid check-digit. The last digit “8” of the barcode is the check-digit position for this CLSI barcode format. The valid item barcode would be 39097000130790 where the “0” is the valid check-digit. This barcode was not reported by the List Invalid Item IDs report.

The reports have been corrected.

Scan History Log Report Did Not Report on Multiple Search Strings

When entering multiple search strings in the search string box of the Scan History Log (Logscan) report, transaction information was only being returned for the last search string entered. Any additional search strings entered into the search string box were ignored.

This has been corrected.

Unable to Run Scan History Logs Report on HP-UNIX System After System Upgrade

After upgrading the library’s Hewlett Packard UNIX system from Patch Cluster 5 to Patch Cluster 5A, a user noticed that she was unable to run the Scan History Logs (Logscan) report. It appeared that the report program would loop until the system ran out of disk space.

This has been corrected, and was also previously corrected in patch cluster 5D.

Unable to Run Backup Daily Files Report on Linux Systems

When a user ran the Backup Daily Files (Dailybackup) report on a Unicorn system running on Linux, the report would finish in error. The report script that merges the history files was not running properly.

This has been corrected. The Backup Daily Files report now runs successfully on Linux systems.
List Onshelf Items with Holds Report Honors Hold Priority in Libraries That Use Traditional Holds

In library systems that use traditional holds instead of Demand Management, the List Onshelf Items with Holds (Pullonshelfhld) report was not honoring the hold priority. Instead, it was filling holds based on when they were placed.

Example

John Doe places a hold for an onshelf item. Later, the library staff places a hold for Professor Jones, and makes her hold the first hold in the hold queue. When the List Onshelf Items with Holds report ran, it pulled the onshelf item to fill John Doe’s hold instead of Professor Jones’ hold.

The List Onshelf Items with Holds report has been changed so that when this report is run in libraries that use traditional holds, the report correctly determines the next hold to fill based on the hold priority.

List Titles Used/Unused Report Not Giving Any Results

The List Titles Used/Unused report (Titleuselst) did not display any results, even when run with no selections. This has been corrected.

List Titles Used/Unused Report Transaction Selections Corrected

In the WorkFlows C client reports, the List Titles Used/Unused (Titleuselst) report contained two sets of command selection options under Transaction Selection, found on the Selection Criteria tab. In the first Command field, a user could select commands using a Policy List gadget. In the second Command field, three radio buttons displayed: Bill User, Pay User B, or Both. This second Command field did not appear in the WorkFlows Java client version of the report.

It was determined that the second command selection options (Bill User, Pay User B, or Both) did not fit the purpose of the List Titles Used/Unused report, and so were removed from the WorkFlows C client report.

Unable to Select Interface as a Column or Row Output Selection in Transaction Statistics Report

When running the Transaction Statistics (Transtat) report, if a user clicked the Output Options tab, and used the Display Choice for Transaction Statistics gadget to select Interface as a column or row selection, but then clicked OK in the gadget, the selection reverted to whatever was the default column/row output option.

This has been corrected.
Transaction Statistics Report Produces Output for Zip Codes Up to 14 Characters

The Transaction Statistics (Statistics) report was not printing any results when the zip code used to select data for the report was longer than 11 characters. Even though the Zip Code field of the report had been changed to allow users to specify zip codes up to 14 characters in length, the Transactions Statistics report would not print results if the zip codes were more than 11 characters long. At UnicornEcole sites, which often use a teacher’s surname in the Zip Code field to select information for that teacher, the report did not produce results for teachers with surnames longer than 11 characters.

The Transaction Statistics report has been changed to use the specified Zip Code text (up to 14 characters) to select data and produce the requested statistics output.

Command Selection Impossible in French WorkFlows C Client Transaction Statistics Report

In the Transaction Statistics report in the French-language WorkFlows C client, any attempt to make a selection by Command resulted in the message

Erreur lors de la définition des options. Données d'entrées invalides:
sel-transaction : command : Retourner un document

This has been corrected.

Transaction Statistics Not Showing All Results

Transaction Statistics reports were not outputting results for item types, departments, or user categories when the count was 0, despite being configured to report regardless of whether there was usage.

This has been corrected.

Transaction Statistics reports have been modified to list zero counts in the report output when configured to report regardless of usage.

Transaction Statistics Report Finishes with Error When Several User Profiles Selected

Previously in the Transaction Statistics (Statistics) report in the Administration group reports, if a large number of user profiles are selected, the report finishes with an ERROR status.

This has been corrected.

Unable to Select Station Login ID in Transaction Statistics Report

In the WorkFlows C client, in the Transaction Statistics (statistics) report the station login ID could not be selected in the column or row output options.

This has been corrected.
Message No Longer Displays When Multiple User Profiles Are Selected in the Transaction Statistics Report

When the Transaction Statistics (Statistics) report was set up with more than one user profile selected on the Transaction Selection tab and saved as a template report, the template report could not be scheduled, copied, or modified. The following message displayed any time the user tried to schedule, copy, or modify the template report.

**UNABLE TO COMPLETE REQUEST**

The Transaction Statistics report has been corrected so the message no longer displays when it is saved as a template report that has more than one user profile selected on the report's Transaction Selection tab.

Message No Longer Displays When the Transaction Statistics Report Runs with the Station Login ID As Its Only Selection

The following message would display in the report log of the Transaction Statistics (Statistics) report when the report was run with one or more station IDs selected on the Transaction Statistics Selection tab as the only report selection.

** internal error: illegal category - 7

The report has been changed so the message no longer displays when the report runs.

Unable to Run List Policies Report on Single Library Systems

On single library systems, when users ran the List Policies (Listpol) report, the report would finish in error and display the following message in the report log.

**code file has too many lines

This has been corrected.

Add, Delete, Update User Report Corrected

In some instances, sites noticed that users could not always be searched the day after the user records were edited or created. This occurred after loading new users with the Load Users (Userload) report. It was found that the final report was ending just a few seconds before the Add, Delete, Update User (Aduusertext) report was launched. But, Load Users starts the dynamic indexing program in the background before it finishes, and the dynamic indexing was not complete before Add, Delete, Update User Records started. This caused some records to be skipped and, consequently, not be indexed.

This has been corrected. The Add, Delete, Update User Records report cannot be run if the user dynamic indexing program is currently running. When dynamic indexing is complete, the report will run.
Consolidate Daily Logs Report Displayed Erroneous Message

Previously, after the Consolidate Daily Logs (Consolidate) report was run, the message “There are no files to consolidate” appeared erroneously in the report log.

Example:
The following is a sample report log that displays the “There are no files to consolidate” message, but lists files that have been consolidated.

UNICORN report initialization routine GL3.1 started on Tuesday, October 3, 2006, 2:53 PM
Performing run side report initialization.
UNICORN report initialization routine finished on Tuesday, October 3, 2006, 2:53 PM
Report Log for Consolidate Previous Month's Logs
Report 'consolidate' scheduled as 'consolidate'
A monthly log file containing all daily logs to date.

There are no files to consolidate.
200610 batch logs have been consolidated.
200610 hist logs have been consolidated.
200407 hist logs have been consolidated.
200408 hist logs have been consolidated.
200507 hist logs have been consolidated.

And, after running the report, the user noticed the log files were indeed consolidated.
14 -rw-r--r-- 1 sirsi staff 6200 Oct 3 14:54 200606.hist.Z
110 -rw-r--r-- 1 sirsi staff 56212 Oct 3 14:54 200607.hist.Z
164 -rw-r--r-- 1 sirsi staff 83061 Oct 3 14:54 200608.hist.Z
288 -rw-r--r-- 1 sirsi staff 135348 Oct 3 14:54 200609.hist.Z
44 -rw-r--r-- 1 sirsi staff 22471 Oct 3 14:53 200610.hist
30 -rw-r--r-- 1 sirsi staff 15055 Oct 3 14:58 20061003.hist

This has been corrected.

Report Runs with Errors When Library Closed

Previously errors occurred with the Statistics Log (Statlog) report if there had been no activity at the library for a period of time (for example, if the library was closed for a day).

This has been corrected.

Statistics Log Report Errors After Patch Cluster 5

Previously on systems that had downloaded Patch Cluster 5, the Statistics Log (Statlog) report ended in error because of a segmentation fault and the loss of transaction data.

This has been corrected, and was also previously corrected in patch cluster 5A.
Statistics Log Report Truncating Transactions

Previously in the Statistics Log (Statlog) report, truncated transaction statistic lines were found in the /Unicorn/Logs/Stat/YYYYmm.stat[Z] files, thus causing problems with reports that use these files.

This has been corrected.

Transactions Replace the Contents of the ostandlog File Each Time the Load Offline Transactions Report Runs

The Load Offline Transactions (Loadstand) report was appending offline transactions to the Unicorn/Standalone/ostandlog file on the server instead of replacing the previous transactions in the file. As a result, if the ostandlog file had to be processed again for any reason, the old transactions had to be deleted manually first.

The Load Offline Transactions report has been corrected to replace any previous offline transactions in the Unicorn/Standalone/ostandlog file every time the report runs.

Re-synchronize Valid Barcodes Report Barcode Format Selection Gadget Corrected

In the Re-synchronize Valid Barcodes (Resyncbarcodes) report, the gadget on the Barcode Formats tab didn't display default barcodes selected in the Barcode policies. In a previous version of Unicorn, a change was made to this gadget to allow users to type values for the Barcode Formats field. This was to correct problems in the List Invalid User IDs and List Invalid Item IDs reports where the selected barcode formats were not being saved as users moved from tab to tab in the report selections.

Now, the gadget on the Barcode Formats tab presents only valid policy values, and users can no longer type barcodes in the gadget. Corrections were also made to the List Invalid User IDs (Invuseridlist) and List Invalid Item IDs (Invitemidlist) reports so that selected barcodes are saved when the user moves to other report selection tabs.

Mixed Barcode Formats Incompatible in Barcode Format Gadget

Previously, some barcode formats were incompatible when they were mixed in a single system, causing errors in the Barcode gadget from the Barcode Format tab in the List Invalid Item IDs (Invitemidlist) and List Invalid User IDs (Invuseridlist) reports.

This has been corrected.
Duplicate User Records No Longer Display in User Searches After More Than 999 User Records Are Loaded

Duplicate user records were displaying in search results after more than 999 user records were loaded and added to the User Dynamic Database index. The user keys for the 1000th record and higher were not being processed correctly.

The user key processing has been changed so that all of the user keys are processed properly when more than 999 user records are loaded and added to the User Dynamic Database index.

Transaction Statistics Report Not Created Pipe-Delimited Files

Previously if Print Separate Reports for Each Library and Generate Pipe-Delimited Output were selected as the output options for the Transaction Statistics (Statistics) report in the Administration Group reports, the pipe-delimited files were not created for each individual library.

This has been corrected.

Authority Group Reports

Corrections

Imported Authority Records File Name Displays as Selection in the Authority File List in the Load Authority Records Report

After a file of authority records was imported, the user had to exit and restart the Workflows Java client before the name of the imported file displayed as a selection in the Authority File list in the Load Authority Records (Loadauthimp) report.

The report has been changed so that after a file of authority records are imported, the imported file name displays in the Authority File list.

Unable to Load Authority Records with Subfield 5

The Load Authority Records (Loadauthimp) and Authority Database Overlay (Loadauthbatch) reports both offer the option to check for a subfield 5 on overlay. When this option was selected, the reports would error with the message:

Segmentation Fault (core dumped)

This has been corrected.
No Error Logging in Load Authority Records Report

Previously in the Load Authority Records (Loadauthimp) report, no error logging occurred when the authority record file could not be opened.

This has been corrected.

Rebuild Authority Thesauri Report Gave Error 111 on Thesaurus

In the Rebuild Authority Thesauri (Rebldthesauri) report, the following error would display.

error 111 on thesaurus

This error could also occur when browsing Unicorn.

This has been corrected.

Load Authority Records Report Truncated Headings in Report Log on Oracle Systems

The Load Authority Records report (Loadauthimp) was not outputting the full text of the updated headings in the report log. This happened only on Oracle systems.

This has been corrected.

Bibliographic Group Reports

Enhancements

New Export MARC Holdings Report

The Export MARC Holdings (Marcholdexp) report can be used to create a file of MARC holdings records, or a blended file of MARC holdings and their associated bibliographic records, to be exported to another catalog or database. For instance, this report can assist SirsiDynix libraries in uploading their local data records in OCLC’s WorldCat database. Records may be selected by their common characteristics such as MARC holdings library, MARC holdings location, format, item type, and more.

The Export MARC Holdings report is in the Bibliographic report group.

This report contains the following tabs.

- Basic
- Item IDs
- MARC Holdings Selection
- Item Selection
• Call Number Selection
• Title Selection
• Serial Control Selection
• File Format Options

**Note:** See the tab topics in the WorkFlows Java client online Help for more information about the selections on these tabs.

**Caution:** If no selections are made on these tabs, the entire database will be marked for export.

On the File Format Options tab, the user can select to output the file in MARC format or flat ASCII format. On Unicode systems, the user has the option to export MARC holdings in MARC-8 (the default) or Unicode (UTF8) format. Additionally, the user can elect to print the exported records to the report log or not print the records. By default, the records are not printed to the report log.

The file of holdings records created by this report is found in the `/Unicorn/Xfer/Marcholdings` directory on the server.

At a minimum, any MARC holdings records added to the file will include the Leader, Directory, 001, 008, and 852 fields. The user can identify other fields to be included in the output. The user can also copy a standard control number from the bibliographic record, such as the OCLC number, to the MARC holdings records and identify to which entry this number should be written.

The user has the option of including MARC bibliographic records with the associated MARC holdings records.

After running the report, the user can review the selected MARC holdings records in the report output. Then, the file can be exported to the destination database. For example, the user can send the file by FTP to OCLC.

**Improved Processing for the Extract Deletions for OCLC Report**

The Extract Deletions for OCLC (Oclcdeletions) report has been enhanced as follows to improve its function. This report produces a file of extracted MARC records that can be sent to OCLC, which will use the file to update the library's holdings in the OCLC WorldCat database.

• Previously, when item deletions in multiple libraries left zero copies of a title, the report would extract the same MARC record repeatedly, once for each library. The report has been changed to extract a single MARC record if all copies of a title have been removed from multiple libraries.
• If item deletions in multiple libraries left zero copies of a title, the report would create a comma-separated list of the libraries' OCLC codes in the 852 tag in the extracted MARC record. However, OCLC requires that each library code be in a separate subfield a in the 852 tag. The report has been changed so it creates the list of the libraries' OCLC codes in the 852 tag in the required format, as shown in the following example of a list of three libraries' OCLC codes.

.852. LIB1|aLIB2|aLIB3

• If the report found that multiple libraries shared the same OCLC code, and if only one of the libraries deleted all of its call numbers/items for a title, the report did not make the distinction between the libraries. Even though other libraries still owned copies of the title, the MARC record was extracted, the shared OCLC code was written to the subfield a in the 852 tag, and the record was added to the file of records to send to OCLC. The report has now been changed to look for copies of a title in other libraries that share an OCLC code before extracting the MARC record. Refer to the "How OCLC Code Assignments Affect This Report" section in this note for more information and specific examples.

• If a library deleted a title with no copies, the report printed "Missing or invalid OCLC number" messages in the report output and extracted the MARC record. The report has been changed so when titles with no copies are deleted, the report does not print a message in the report log, and the MARC record is not extracted.

• If the bibliographic record did not contain a correctly-formatted OCLC control number, but other standard numbers could be used for matching (010, 020, or 022 entries), the record was not extracted. The report has been corrected so that in this case, a record is extracted, and a message similar to the following is printed in the report log.

Title control #nnnn - Missing or Invalid OCLC number.

• If a bibliographic record did not contain a correctly-formatted OCLC control number, and did not contain other standard numbers for matching (010, 020, or 022 entries), the report printed "Missing or invalid OCLC number" messages in the report output and extracted the MARC record. The report has been corrected so that in this case, a record is not extracted, and a message similar to the following is printed in the report log.

Title control #nnnn - Missing or invalid OCLC number or other standard matching numbers. Record not extracted.

• The new version of the report also modifies the report output so it is consistent with other import/export reports. The listing of exported records has been moved from the report log to the report output. This format allows the user to work with the log and record listing separately, if desired.

Refer to the fully revised Extract Deletions for OCLC Report topic in the SirsiDynix Symphony WorkFlows online help for complete information about the enhanced workings of this report.
**Note:** The Extract Deletions for OCLC report requires that all of the Library policies contain an OCLC code. Contact the library system administrator about defining an OCLC code for the library. If any library does not have an OCLC code, the report will not run, and a message similar to the following will display in the report log for each library that does not have an OCLC code.

**Missing OCLC Library code: MAIN**

### How OCLC Code Assignments Affect This Report

The Extract Deletions for OCLC report now requires that all Library policies contain an OCLC code. When the report runs, it first checks each Library policy for an OCLC code. If a Library policy does not have an OCLC code defined in the OCLC Code field, the report stops and lists the library or libraries with missing OCLC codes in the report log.

When a library deletes all of its call numbers/items for a title, the report checks for libraries in the system with the same OCLC code. If any libraries share the same OCLC code, these libraries are also checked to see if they have call numbers/items for the title. The report may or may not extract a MARC record, as described in following examples.

**Example 1: Libraries That Use the Same OCLC Code**

The Arrowood Library OCLC holding code is HSV4, and the Moyers Library OCLC holding code is also HSV4. If the Arrowood Library deletes all of its call numbers/items for Gone with the Wind, but the Moyers Library still has call numbers/items for the same title, the Extract Deletions for OCLC report will not extract a MARC record for Gone with the Wind. To OCLC, there is no distinction between the Arrowood and Moyers libraries; they are both HSV4.

In continuing the Arrowood and Moyers libraries example, this time both libraries delete all their call numbers/items for Gone with the Wind. The Extract Deletions for OCLC report will extract a MARC record for the title, and the 852 tag will contain a single subfield a with HSV4. Remember that to OCLC, the Arrowood and Moyers libraries are both HSV4.

**Example 2: Consortia That Use One OCLC Code For All Libraries versus Consortia That Use Different OCLC Codes for Each Library**

Library consortia may choose to assign one OCLC code to all of its libraries, or specify different codes for each library. How the OCLC codes are assigned will affect how the Extract Deletions for OCLC report will operate for the consortia.

The Southern Library System has three libraries. The library system has an OCLC code of SLS1, and decides to assign this code to the Lee, Davis, and Jackson libraries. The Lee and Jackson libraries own copies of The Summons. If the Jackson Library deletes all of its call numbers/items for The Summons, the Extract Deletions for OCLC report will not extract a MARC record for the title because the Lee Library has the same OCLC code and still has copies of the title.

If the Southern Library System assigns different OCLC codes to each library, the report results differ from when the same OCLC code was used for each library. The Southern Library System has an OCLC code of SLS1, the Lee Library has an OCLC code of SLSa, the Davis Library has an OCLC code of SLSb, and the Jackson Library has an OCLC code of SLSc. All three libraries own copies of The Summons. If only the Jackson Library deletes all of its call numbers/items for The Summons, the Extract Deletions for OCLC report will extract a MARC record for the title, and the 852 tag will contain a single subfield a with SLSa. If all three libraries delete their call numbers/items for The Summons, the report will extract a MARC record for the title, and the 852 tag will contain three subfield a’s with SLSa, SLSb, and SLSc.
New List Inventory in XML Format Report

The new List Inventory in XML Format (InvxmlList) report is an XML version of the List Inventory by Item Number (Invlist) report that uses the same selection, sorting, and print output options. The difference is that the List Inventory in XML Format report will output report results in XML format, which can be loaded into a third-party spreadsheet application, such as Microsoft Excel.

Corrections

Two Missing Copy Processing Options Added to the Copy Processing Gadget

The Copy Processing gadget used in the Load Bibliographic Records (Bibload), Load Other MARC Types (Loadbib), and Reload Bibliographic Records (Bibreload) reports did not display the following two options even though their corresponding character selections could be entered into the Copy Processing field of the reports.

- Create and Update Copies Using Holdings Statements
- Ignore Holdings Statements & Create ONE Copy Only when Creating a Title

The Copy Processing gadget has been changed to display all of the available copy processing options correctly.

Unable to Run List Entries from Catalog Report on Unicorn for Oracle Systems

Previously, users were unable to run the List Entries from Catalog (Entrylist) report on Unicorn for Oracle systems. The report would run in error and display the following message.

Error - OCI_ERROR ORA - 00972: identifier is too long

This has been corrected.

Print Call Number on Pocket Option in the Spine-Labels for Specific IDs Report Did Not Save

In the WorkFlows Java client, when scheduling the Spine-Labels for Specific IDs report (Spineid), the Print Call Number On Pocket option would not save to a template.

This has been corrected.

Text Type Elements not Displaying in Print Custom Labels Report

When viewing the Print Custom Labels report, the WorkFlows Java client did not display the Text type element defined in the label template. This has been corrected.
Print Custom Labels Report Allows More Entries for Template Item ID

Previously in the Print Custom Labels (Printlabels) report, only 59 Item IDs could be saved in a template. The Item ID field was set to a maximum of 1,000 characters.

This has been corrected. The Item ID field maximum field size has been increased to 100,000 characters, allowing roughly 5,263 Item IDs to be entered.

Print Custom Labels Report Failed Because of Missing Subfield

Previously when the Print Custom Labels (Printlabels) report attempted to use subfield data that did not exist in the record, the report failed.

This has been corrected.

Print Custom Labels Report Truncates Call Numbers Containing 2 or More Consecutive Spaces

The Print Custom Labels report (Printlabels) was incorrectly outputting the call number.

This has been corrected.

Print Custom Labels Report Would Not Generate Output

In certain circumstances, the Print Custom Labels (Printlabels) report would not generate any output. This occurred when the label template contained lines without any elements. Now, the report will produce labels, even if the template contains lines with no elements.

Records to Change Count in Edit Bibliographic Data Globally Report Incorrect

Previously in the Edit Bibliographic Data Globally (Globaledit) report in the Bibliographic group reports, if the Update Database option was not selected on the MARC Edit tab, the resulting messages displayed incorrectly, as follows.

0 bibliographic MARC record(s) modified.
0 tag(s) would have been deleted.

The Edit Bibliographic Data Globally report has been updated so that if the Update Database option is not selected, the messages display correctly, as follows.

2 bibliographic MARC record(s) would have been modified.
2 tag(s) would have been deleted.
Edit Bibliographic Data Globally (Globaledit) Report Didn’t Recognize Special Characters

In the Edit Bibliographic Data Globally (Globaledit) report, if a special character was entered in the search string field it was being translated to a question mark. This returned inaccurate results in the report.

This has been corrected. The special characters are now being converted correctly for the report to run successfully.

Remove DISCARD Items Report No Longer Deletes Log File

Previously in the Remove DISCARD Items (Remdiscard) report in the Bibliographic group reports, the log file states that items not deleted would be stored in the notdeleted file. However, the file itself was deleted once the Remove DISCARD Items report was completed.

This has been corrected. The new file will be in the format notdeletedXXXXX, where XXXXX is the process ID. this file is stored in the /rpttemp directory.

URL Checker Report Not Reporting Records To Adjust

The URL Checker Report was not reporting records to adjust. Also, the report was not populating the fields with a default alphabetic range when including URLs by alphabetic range.

This has been corrected.

The URL Checker Report now allows you to see records that need to be adjusted without actually adjusting them.

URL Checker Report Failing to Update the 856 Subfield u in Catalog Records

The URL Checker Report option “If a "Referral URL" is found, update the 856 subfield u?” was not updating catalog records but was reporting "error 111 on catkey = 0" for every record that should have been updated.

This has been corrected.

Required Selection Eliminated from Remove Items by Location Report

Previously in the WorkFlows Java client, the Remove Items by Location report required a selection to be made in the User ID tab before the report could be scheduled. This has been corrected so that selecting a User ID is now optional.
List Bibliography Report Pipe-delimited Output Corrected

In the List Bibliography (Bibliography) report, a user selected the Generate a Pipe-delimited File option for report output, and then under Title Information, selected entries for printing. But, some of these entries were not included in the records selected by the report. When the report finished, the user viewed the report results in a Microsoft Excel spreadsheet and noticed that the records did not line up appropriately in the columns by the entries selected. The user also noticed peculiar labels appearing in the output, such as CATALOG>, MARC>, and so on.

The first issue has been corrected. The List Bibliography report will correctly align the report output in the selected entries' columns, even when the records selected by the report do not contain these entries. The peculiar labels appearing in the pipe-delimited output actually mark the start and end of records and will remain in the report output. Some sites use these labels for their custom reports.

French Report Name Changed for the 30-Character Report Name Limit

The List Inventory by Item Number (Invlist) report name, when translated into French, was “Inventaire Par Numéro de Document” and exceeded the 30-character report name limit. (A character with a diacritic counts as two characters.) As a result, the report would not run, and the following message displayed.

Nom du rapport demandé Erreur dans la dimension de la zone

The French name of the List Inventory by Item Number report has been changed to “Inventaire Par No de Document,” and the report runs correctly.

Item Statistics Report Rejected Items Because of “Missing Item Type”

When running the Item Statistics (Itemstat) report and after selecting separate output per library for the report, a user noticed that the report log displayed a message such as the following.

1859 transactions rejected because of a “missing item type”

If the user ran this report without selecting separate output per library, this message did not appear. Since all items must have an item type (it is a required field), this message was erroneous.

It was determined that the separate output per library selection contained extra pipe characters in the call number field of an item, and this interfered with the report's ability to obtain statistics on the selected items.

This has been corrected.
Extract Deletions for OCLC Report Wasn’t Password Protected

The WorkFlows help file indicated that the Extract Deletions for OCLC (Oclcdeletions) report was password protected. This was not the case.

This has been corrected. The Extract Deletions for OCLC report is now password protected.

Circulation Group Reports

Enhancements

New Report Added to Print Patron Credit Account Statements

The Patron Credit Account Statement (Acctstatement) report has been added to the Circulation report group to produce statements showing the opening balance, deposit and withdrawal transactions, and closing balance in patron credit accounts for the specified time period. For each transaction listed in the statement, the date and time, the user access that processed the transaction, workstation at which the transaction was made, transaction reason, transaction type, amount, and current balance (as of each transaction). Item information and/or bill information is listed with the transaction if the transaction is associated with an item and/or a bill. The report can produce statements that are printed on paper and mailed to patrons, or sent electronically to patrons.

Note: The Patron Credit Account Statement report is available only if the library has enabled the Patron Credit Accounts feature.

The Patron Credit Account Statement report can be set up to select patron accounts by balances, a date range in which accounts were created, and/or a date range in which accounts were last updated. Statements can be produced just for open, closed, or suspended credit accounts.

The report options can be used to customize what information displays in the statements and how the information displays. The Transaction Date Range option specifies the range of dates that will be used to determine which transactions will be listed in the statement.

The report results may be sorted by user ID, group ID, user name, or zip code. User ID is the default sort. Address labels for mailing printed statements may also be printed using the Produce Mailing Labels check box on the Produce.

The Patron Credit Account Statement report can be configured to generate its output as a pipe-delimited file. The pipe-delimited file can be opened using a third-party application, such as a spreadsheet application.
New Tab Added to the Assumed Lost Report to the Support Patron Credit Accounts Feature

The Patron Credit tab has been added to the Assumed Lost (Assumedlost) report to support the use of the Patron Credit Accounts feature. With this tab and its Payment Type and Credit Reason selections, the report can be configured to automatically pay assumed lost item bills using funds from patron credit accounts.

The Payment Type field specifies the type of payment to be used for paying assumed lost item bills automatically from patron credit accounts, such as CREDITACCT (credit account). The listed payment type policies are defined with the Payment Type wizard. By default, the Payment Type selection is delivered blank.

The Credit Reason field specifies the reason for withdrawing funds from patron credit accounts to pay assumed lost item bills automatically. Only Withdrawal type credit reasons display in the Credit Reason list, such as AUTOPAY. The listed credit reason policies are defined with the Credit Reason wizard. By default, the Credit Reason selection is delivered blank.

To use the automatic payment feature for assumed lost item bills generated by the Assumed Lost report, make selections in the Payment Type and Credit Reason fields.

Note: Assumed lost item bills can be paid automatically from a patron credit account only if the account is open, the balance is sufficient to pay the bill in full, if the Credit Rule policy is configured to allow lost item bills to be paid automatically, if the station library is in the owning item’s bill maintenance libraries list, and if the report user’s library is in the patron maintenance library list of the library where the user has a patron credit account. If any of these conditions are not met, the Assumed Lost creates the lost item bill and adds it to the user record as the report does in library systems that do not use patron credit accounts.

Option to Display Totals by 5-Digit Zip Code Added to the Circulation by Zip Code Report

Previously, the Circulation by Zip Code (Zipcodecirc) report would only print totals for charges and renewals for every individual zip code found in the user records selected by the report. The report has been enhanced with the Total by 5 Digit Zip Code option to print charge and renewal totals based on the first five digits of the zip codes in the selected user records.

If the Total by 5 Digit Zip Codes option is not selected, the report prints the number of charges and renewals for every individual zip code.

If the Total by 5 Digit Zip Codes option is selected, the report prints the number of charges and renewals based on the first five digits of the zip code.
Example

User records contain the zip codes 44423, 44444, and 44444-1234. If the Total by 5 Digit Zip Codes option is not used, the report prints circulation totals for each of the three zip codes. If the option is used, the report prints a circulation total for the zip code 44423, and a circulation total for the 44444 and 44444-1234 zip codes combined.

The Total by 5 Digit Zip Code option is not selected by default so the Circulation by Zip Code report works as it has in previous Unicorn releases.

In the Workflows C client, the Total by 5 Digit Zip Code option is on the Output Options tab, which was added to the Circulation by Zip Code report.

In the Workflows Java client, the Total by 5 Digit Zip Code option is on the Total by 5 Digit Zip Code tab, which was added to the Circulation by Zip Code report.

Print Shipping Records Report Added for Books by Mail Functionality

A new report, Print Shipping Records (Printshippack) has been added to the Workflows Java client Circulation group reports to enable Books by Mail users to create packing lists in batch. Lists can be created for one or several tracking numbers associated with Books by Mail packages.

Library Address on Notice Option Added to Circulation Mailer Report

A new Library Address on Notice option has been added to the Circulation Mailer tab of the Circulation Mailer (M1rcirc) report in Circulation Group Reports.

If this option is selected, the Library Address will be added to the notice. If the option is not selected, the Library Address will not be added to the notice.

The Library Address on Notice option is selected by default.

New Link Order Holds Report

If a call number was removed while the call number was linked to an orderline with holds linked to its distributions, it resulted in item database errors. The system has been modified to prevent the removal of the call number if it is linked to an orderline that has holds linked to its distribution. A new report called Link Order Holds (Linkorderholds) has been added to the Circulation group of reports. This report allows staff to run orderlines through a program that links on-order holds to items. The Link Order Holds report will take holds currently linked to a distribution and link the holds to items. Once the holds are linked to items, the removal of a call number linked to an orderline is no longer blocked and the hold queue position will appear in Display User.

SirsiDynix recommends that this report be run nightly for customers that utilize the On Order Title Holds functionality.
This report contains the following tabs

- Basic
- Order Selection
- Order Line Selection

**Note:** See the tab topics in the WorkFlows Java client online Help for more information about the selections on these tabs.

**Corrections**

**Recall Notice on Charged Items Report Correctly Calculates Recall Due Dates When Library Closed Dates Occur During the Recall Grace Period**

The Recall Notice on Charged Items (Recallntc) report was incorrectly including closed dates when calculating the recall due date if the library was closed for any dates during the recall grace period, and the library policies were configured not to accrue fines for library closed dates. As a result, the recall due date printed on the recall notice was different from the recall due date for the item in the user record.

The Recall Notice on Charged Items report has been corrected so that if any library closed dates occur during the recall grace period, and if the library policies are configured not to accrue fines for days the library is closed, the library closed dates are not included in the calculation of the recall due date. The recall due date printed on the notice will be the same as the recall due date listed in the item record.

**Circulation Mailer Report Correctly Prints Notices For Patrons with Multiple Notices at Libraries**

When the Circulation Mailer (Mlrirc) report was run with the Print Separate Reports for Each Library option selected, the notices for patrons with multiple notices in the same library could be separated incorrectly.

**Example**

*Sally Smith, who is a patron at the Sunset Library, has holds, bills, and overdue items at the Carraway Library. She also has overdue items at the Blair Library. When the Sunset Library runs the Circulation Mailer report using the Print Separate Reports Per Library, the report should print one mailer with the hold, bill, and overdue notices for the Carraway Library, and one mailer with the overdue notice for the Blair Library. However, the report would print individual notices for the holds, bills, and overdue items at the Carraway Library, and a notice for the overdue items at the Blair Library.*

The Circulation Mailer report has been corrected to honor the setting of the Print Separate Reports for Each Library option. If this option is selected, patrons with multiple notices at libraries will receive a circulation mailer for all the notices at each library.
Circulation Mailer Report Prints Line of Text Following a Line with the Maximum Number of Characters

The Circulation Mailer (Mlrcirc) report was not printing the line of body text following a line of 38 characters, which is the maximum character limit for each body text line in the circulation mailer. The report has been changed to correctly print up to five lines of body text with a maximum of 38 characters in each line.

Item Price and Home Location Field Added to Pipe-Delimited Output for the Circulation Mailer Report

The item price field for overdue items and the home location field for bills were missing from the pipe-delimited key file for the Circulation Mailer (Mlrcirc) report. As a result, pipe-delimited output files produced by this report's Generate Pipe Delimited Output option did not include the item price or home location if that information was available.

The Item Price field and Home Location field have been added to the pipe-delimited key file for the Circulation Mailer report so the item price and home location, as applicable, will be written to the pipe-delimited file generated by the report.

Selecting Some Options to Both in Circulation Mailer Report Template Cause Error

Previously in the Circulation Mailer (Mlrcirc) report, an error occurred if you saved a template with the following options set to Both.

- Overdue on the Charge Selection tab
- Available on the Hold Selection tab
- Bill Paid in Full on the Bill Selection tab

This has been corrected.

Circulation Mailer not Sorting by User ID

The Circulation Mailer (Mlrcirc) report output has been modified to support sorting by User ID when "User ID on notice" is marked in the Circulation Mailer tab.

Item Library Selection Used in the Circulation Mailer Report

The Circulation Mailer (Mlrcirc) report was not using the specified item library in the Library field when selecting item records for the report. As a result, the circulation mailers were being printed for items that belonged to other libraries in addition to the selected library or libraries.

The Circulation Mailer report has been changed to use the library or libraries specified in the Library selection field when selecting item records.
Address Wrapping Enabled in Circulation Mailer Report

Previously in the Circulation Mailer (Mlcirc) reports, the address portion of the report output was being truncated for long addresses.

This has been corrected. If a line of an address field is longer than thirty (30) characters, the remainder of the address is wrapped to the next line.

Email Sent to ADMIN User for All Notices

Previously, when the Overdue Notice or Hold Pickup Notice reports were run on UNIX sites and notices were emailed to users, a copy of the notice was also sent to library staff at user ADMIN. The sender Email field information, as defined in the user record, was being placed in the mail to line along with the user addresses.

This has been corrected.

Bill Tax Summary Report Displays Formatted Report Results in Libraries Using Oracle Databases

The Bill Tax Summary (Billtaxsummary) report was not displaying the finished, formatted report in libraries that use Oracle databases when the Format Report option was selected.

The report has been corrected so that if a library using Oracle databases selects the Format Report option to display the report results as a formatted report, the finished, formatted report displays.

List Onshelf Items with Holds Report Displays Correct Information for Traditional Holds

If the List Onshelf Items with Holds (Pullonshelfhld) report was run in a library using Traditional Holds and not Demand Management, the information listed for each hold did not display correctly. For example, the title of the item displayed in the User ID field. The report has been corrected so the information displays properly in each field for the listed holds.

List Onshelf Items with Holds Report Sorts Output by Shelf Location, Then by Call Number if Sorting Option is Selected

The List Onshelf Items with Holds (Pullonshelfhld) report was no longer sorting output by call number within shelf location, if the user selected that sorting option for the report output.

The report has been changed to correctly sort the report output first by shelf location then by call number, if the user selects that sorting option for the report output.
List Onshelf Items with Holds Report Checks the Hold Available Item Libraries Attribute When Selecting Items to Fill System Range Holds

The List Onshelf Items with Holds (Pullonshelfhld) report's pull list would include available items from libraries that did not allow holds from other libraries on their available materials. When a system range hold was placed, the Hold Available Item Libraries attribute of the Library policy was not checked to see if the hold was permitted.

The Hold Available Item Libraries attribute of the Library policy is now checked when users place system range holds. If the library does not permit other libraries to place holds on its available materials, the List Onshelf Items with Holds report will not select any items in the library to fill holds for the other libraries.

List Onshelf Items with Holds Report Runs with Errors on Windows Systems with Traditional Holds Configured

Previously, on Windows systems with traditional holds configured in Unicorn, the List Onshelf Items with Holds (Pullonshelfhold) report finished in error, never getting past the point of selecting hold records.

This has been corrected.

List Onshelf Items with Holds Report Displayed the Print Separate Reports for Each Library Tab on Single Library Systems

On a single library system, the List Onshelf Items with Holds (Pullonshelfhold) report displayed the Print Separate Reports for Each Library tab. This tab should not display for this report on single library systems. This has been corrected.

Reports Produce Recall Notices When Recall is Selected for Notice Type

In certain Circulation reports that include the Notice Type selection, the reports would always select overdue charges to produce overdue item notices even though the Notice Type selection was set to Recall to select recalled items and produce recall notices.

The following reports have been changed to correctly produce recall notices when the Recall option is selected for the Notice Type field.

- Hold Overdue Notices (Hoverdue)
- New Overdue Notices (Noverdue)
- Overdue Notice (Overdue)
- Recall for Reserve Notices (Recallrsvntc)
- Recall Notice on Charged Items (Recallntc)
Correct Library Address Prints as the Return Address on Cancelled Hold Notices

Cancelled hold notices created by the Expire Holds (Expireholds) report, the Expire Available Holds (Expshlfholds) report, or the Notice for Cancelled Holds (Holdcancelntc) report did not list the correct library address as the return address when the Print Separate Reports for Each Library option was not selected. When the Print Separate Reports for Each Library option was not selected in these reports, the hold priority configuration setting was not being checked. As a result, the wrong library address could be printed as the return address.

Example

The Caudle Library has set its hold priority configuration setting to be the pickup library. When the library ran the Expire Holds report without selecting the Print Separate Reports for Each library option, the return address on the cancelled hold notices was that of the user library. Each notice should have had the return address of the pickup library.

The Expire Holds, Expire Available Holds, and Notice for Cancelled Holds report have been corrected so that when the Print Separate Reports by Library option is not used to print the hold cancellation notices, the return address library is based on the hold priority configuration setting.

User Category 3, 4, and 5 Selections Added to the Assumed Lost Report

The Assumed Lost (Assumedlost) report did not include the User Category 3, User Category 4, and User Category 5 user selection options. These user selection options have been added to the Assumed Lost report selections.

List Charges by Homeroom/Zip Report Sorts and Displays User Lists Correctly

The List Charges by Homeroom/Zip (Homeroomchg) report was not correctly sorting users by homeroom when the homeroom started with numeric characters followed by a hyphen. When the incorrectly-sorted lists were used to group users by homeroom, some user records were left out of the lists for each homeroom.

The report has been corrected to sort properly by homeroom, and then separate the list of users into complete user lists for each homeroom.
Message No Longer Displays in Report Log of the Create Circulation Notices in Batch Report

When the Create Circulation Notices in Batch (Ntccirc) report was run, the report processing did not finish correctly, and the following message displayed in the report log.

**Extra arguments**

The report has been corrected so the report finishes properly, and the message no longer displays in the report log.

Circulation List Report Output Can Be Viewed Correctly at Libraries Using Oracle Databases

When a list type report in the Circulation report group (such as the List Users with Bills, Charges report) was run by a library that uses Oracle databases, the report results could not be viewed. If the user tried to view just the report output, the following message displayed, and the report output would not display.

file empty

The Circulation report group's list reports have been corrected so that when they are run by libraries using Oracle databases, the report output can be viewed.

Notice Reports Printed Incorrect Library Address

For certain notice reports, the option to combine notices was printing the incorrect library's return address.

This affected the following notice reports.

- Assumed Lost Report (Assumedlost)
- Circulation Mailer (Mlrcirc)
- Final Bill Notice (Finalbill)
- Generalized Bill Notices (Bill)
- Hold Overdue Notices (Hoverdue)
- Hold Pickup Notices (Pickup)
- New Overdue Notices (Noverdue)
- Overdue Notices (Overdue)

This has been corrected.
Notify User Via Phone Report Defaults to PAPER

Previously on the Workflows Java client, the Notify User Via Phone (Notifyviaphone) report in the Circulation Group of reports defaulted to PAPER even when the report template was configured to default to EMAIL.

This has been corrected.

Assumed Lost Report With Print Separate Report Per Library Truncates Library Name

The Assumed Lost Report was did not print the entire library name when choosing to print the separate reports for each library.

This has been corrected.

Pipe-delimited Output Included Data Even When Selection Was Not Made in the Report

In the Generalized Bill Notices report, a user noticed that although she elected not to have the user’s bills totaled on the notice, the totals appeared in the pipe-delimited output files (but not in the text files). Previously, reports were programmed to print all fields to the pipe-delimited output files, but they did not differentiate whether or not the field data was to be printed to these files. Now, when creating a pipe-delimited output file, the report will determine what gets printed to the file—either an empty pipe character (|) when a field is not selected, or data plus the pipe character when the field is selected.

Hold Notices Not Separated by Hold Priority Configuration Setting

Previously, the hold notices reports were ignoring the configuration setting for hold priority library (set either by pickup library or by user library) when printing the library return address on the notice. Also, the reports were failing to separate the start of each new notice. This only occurred when the user elected to not print separate notices for each library.

Now the hold notices reports check the hold priority library configuration setting to determine which library return address should be printed on the hold notice—either pickup library or user library.

Bill Reports Didn’t Produce Results on Oracle Systems

On sites running Oracle, the List Bills (Billlist), List Users with Bills (Billuser) and Generalized Bill Notices (Bill) reports were producing no results if a selection was made in the Total Balance Owed field.

This has been corrected.
Users Received Emailed Bill Notices From Another User’s Account

In certain circumstances, the Generalized Bill Notices (Bill) report would email bill notices to the wrong users, and some of these bills contained incomplete item and user information. This occurred only if a user’s account contained a bill balance of zero ($0). When the report was run, if it encountered a $0 bill, the report would not correctly start and end the subsequent notices. As a result, users would receive notices for other users.

This has been corrected.

Assessing Lost Fee of $0.00 Causes Generalized Bill Notices Error

Previously, the Generalized Bill Notices (Bill) report in the Circulation Group reports assigned a zero balance to the lost/damaged bills amount (amount due: $.00) to the wrong user.

This has been corrected.

Generalized Bill Notices Report Running Too Long

Previously, the Generalized Bill Notices (Bill) report was running longer than expected on Oracle systems. The calculation of bill balances was impacting report run time.

This has been corrected. Structured Query Language (SQL) is now used to calculate bill balances.

Collection Exchange Group

Corrections

Misleading Error Messages in List - Exchange Items Report

The List - Exchange Items report log previously included lines such as the following that seemed to indicate a problem with the data.

59 bad item record(s) encountered.
9914 bad input record(s) encountered.

In this case, the messages were for items that didn’t have any exchange information associated with them. The sequence of the tools used in the report caused these messages to display. Since these messages are not significant, they are now being suppressed from the report log.
Exchange Records Created By Report Had Status of InExchange

Previously, if exchange item records were created by the Maintenance - Add Exchange Item Records (Xadditems) report, they were created with a status of InExchange. In contrast, exchange item records created manually correctly have the status of Home.

The report was corrected and will now create exchange item records with a status of Home.

Debt Collection Group Reports

Corrections

Collections Update Report Did Not Require Mode Selection

In the Collections Update report (Collectupdate) in the Debt Collection group of reports, the Update Database records selection didn't require that either the Append or Update selection be made. This meant that the user records were not being updated appropriately.

This has been corrected. The report now requires a selection, with Update being the default.

Collections Information Report Displays Message if Required Fields Are Left Blank

In the Collections Information (Collectiondata) report, if the Date Due field and/or the Minimum Amount of Fees Due field were left blank, the report would finish in error. If a date was not specified in the Date Due field to select specific item charges, the following message displayed in the report error log.

Required argument not specified: -d

If the Minimum Amount of Fees Due field was left blank in the Debt Collection selections the following message displayed in the report error log.

Required argument not specified: -m

Both the Date Due field and Minimum Amount of Fees Due field are required to run the Collections Information report. The report has been changed so that if either or both of these fields are left blank, a message displays when the user tries to schedule or run the report. The user is required to enter information in these fields before the report can be scheduled or run.
**Collections Synchronization Report Displays Correct Status, Report Log, and Report Output**

When the Collections Synchronization (Collectionsync) report ran, its processes completed correctly, but the report status would be listed as ERROR. The report produced no report log or report output.

The Collections Synchronization report has been changed so the report status displays as OK when the report finishes processing correctly, and the report log and report output are produced.

**INACTIVE Charges Are Excluded When Evaluating Users for Collection Agency Referral**

Previously, if the Debt Collection reports were run to include the value of charged items when considering users for collection referral, INACTIVE charges (such as when an item is reported by the user as lost) were being included in the charged item value. Any INACTIVE charges should have been excluded when considering users for referral to a collection agency.

The Debt Collection reports have been corrected so that the value of INACTIVE charges on a user's record are not considered when the reports are run to include the value of charged items when evaluating users for referral to a collection agency.

**Director’s Station Group Reports**

**Corrections**

**Extract Director’s Station Data (Extractved) Report Underreported Country of Publication and Language**

When data was extracted from Unicorn using the Extract Director’s Station Data (Extractved) report to build statistical information from the MARC 008 fixed fields in bibliographic records, if fill characters existed in the 008 this caused records containing country of publication and language codes to be skipped in statistical counts.

This has been corrected.
EDI Group Reports

Enhancements

EDI Reports Now Print More Invoice Information in Error Log Files

For the EDI reports that send/receive X12 invoice files, more information is now printed to the error log files. The invoice date and invoice number are now printed to the log file when an invoice fails to load. This will help the user determine which invoice data needs to be corrected.

Corrections

Unable to Run EDI File Receipt Report—Windows Server Systems Only

On a Windows Server system, a user was unable to run the EDI File Receipt (Edireceive) report to retrieve X12 invoices from a vendor. When the report was run, it indicated that no EDI files existed, even though the user knew files were available on the ftp server. The report log displayed the following message.

```
File OUT101C44623545.INT:
mktemp: cannot create temp file ftp_: File exists
   Downloaded to .x12.
```

The program for receiving EDI files was unable to create the temporary files necessary for running this report on Windows systems.

This has been corrected.

EDI File Receipt Report Now Requires Both Fiscal Cycle and Created in Fiscal Cycle Fields

Previously, the EDI File Receipt (Edireceive) report did not require selections for the Fiscal Cycle field and Created in Fiscal Cycle field. If a user did not make selections for both fields, the report would not run. Now, both the Fiscal Cycle and Created in Fiscal Cycle fields are required fields. Users must make selections for these fields or a system message will appear. In the WorkFlows Java client, users make these field selections on the Fiscal Cycle tab. In the WorkFlows C client, users make these field selections on the Selection Criteria tab.
Hyperion Group Reports

Corrections

List Resources Information Report Incorrect for Locked Status

Previously, the List Resources Information (Orgunitlist) report gave incorrect information for resources with a status of locked.

Status: 6

This has been corrected.

Rebuild Content Database Report Fails on Windows Oracle Systems

The Rebuild Content Database report failed to complete and logged a report status of ERROR on Oracle systems running on Windows servers. The report log contained the following system message.

BuildCDB (BUILD) Fatal Error: Cannot run Clarit indexing utility

This has been corrected so that the report runs correctly on Oracle systems running on Windows servers.

Info Desk Group Reports

Corrections

Add Items to Item List Report Unable to Select Titles without Copies

A user running the Add Items to Item List (Additemlist) report selected a Type of Order on the Information Desk tab and made selections only on the Order Line Selection and Title Selection tabs. On the Title Selection tab, the user selected Number of Copies On Order > 0. When the report was run, no titles without copies were selected. This prevented the user from creating lists such as "Items on Order."

This has been corrected. Changes were made to the report to make the Item Selection tab unavailable when the user selects the Order radio button on the Information Desk tab. Additionally, the report will not make item selections when the Order Type is selected.
MARC Import Group Reports

Enhancements

Title Control Processing Options Added to Load Bibliographic Records Report

The Load tab in the Load Bibliographic Records report in the MARC Import report group has been enhanced with various title control processing options and fields for the SirsiDynix Symphony 3.2 release. Following subsections of this release note describe the options and fields that have been added or enhanced under Title Control Processing on the report’s Load tab.

Key Matching Options

The following Key Matching options and fields under Title Control Processing on the Load tab are used to match incoming records based on the title control key.

Match On Options

One of the following options may be selected to specify the requirements that must be met for a record to be considered a match.

- **Match on Title Control Number** considers the incoming record a match only if the control number matches a title control number found in the Title Control Number Source for Incoming Items field. This option is the default selection. The following message displays in the finished report log when this option is selected.

  Bibliographic records will be matched by flexible key.

- **Match on Title Control Number and Indexed MARC Tag** considers the incoming record a match if the title control number of a library catalog record matches one of the specified Title Control Number Source fields in the imported record, and if at least one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index. The following message displays in the finished report log when this option is selected.

  Bibliographic records will be matched by flexible key AND the text index.

- **Match on Title Control Number or Indexed MARC Tag** considers the incoming record a match if the title control number of a library catalog record matches one of the specified Title Control Number Source fields in the imported record, or if one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index. The following message displays in the finished report log when this option is selected.

  Bibliographic records will be matched by flexible key OR the text index.
Indexed MARC Tag Number

This field specifies the MARC tag values to check for a match in addition to the title control number, if desired. If this field is used, SirsiDynix Symphony checks the catalog for a MARC tag match on the first Indexed MARC Tag Number value. If no match is found, the second Indexed MARC Tag Number is checked, and this pattern continues until either a match is found, or all Indexed MARC Tag Numbers have been checked.

Note: The Indexed MARC Tag Number field is available only when the Match on Title Control Number and Indexed MARC Tag option or the Match on Title Control Number or Indexed MARC Tag option is selected.

Process Bibliographic Delete Status Options

The following Matching MARC Records that Contain a "d" in the Leader/05 Will Be options under Process Bibliographic Delete Status on the Load tab have been added.

If no matching record exists for an incoming record with a status of "d" (Leader/05), the report loads the incoming record as a new record, as the report did in software versions prior to SirsiDynix Symphony 3.2.

If a matching record exists in the database for an incoming record, and the status of the record to be loaded is "d," one of the following processing options can be selected.

- **Deleted** removes the matching record(s) from the database and does not load the incoming record.

  Note: If the Deleted option is selected, the title and all call numbers/items will be deleted from the SirsiDynix Symphony database. However, if an item has a status that would prevent it from being deleted (for example, the item is charged), the records will not be deleted.

  Note: The Load Bibliographic Records report does not write information to the history logs. If the Delete option is selected, any deleted records are not written to the history log.

- **Listed** displays the matching record(s) from the database to the report log and does not load the incoming record.

- **Ignored** ignores the matching records, does not list the matching record(s) to the report log, and does not load the incoming record.

- **Loaded** ignores the record status "d," and loads the incoming record as a new record.
Bibliographic Record Processing Options

The following Bibliographic Record Processing option and field under Title Control Processing on the Load tab are used to remove certain entries or headings from matching incoming records.

- **Remove Entries Listed in the file "Junktag"** removes entries that are not used in completed catalog records in the library. The junktag file in the /Unicorn/Custom directory lists any unused entries that are to be stripped from imported records. If the Remove Entries Listed in the file "Junktag" check box is selected, the entries are automatically, completely removed from the bibliographic record after the incoming record has been merged with the matching database record.

  **Caution** The removed entries cannot be restored.

- **Remove Subject Headings** replaces the Remove Medical Subject Headings (MeSH) option. The new Remove Subject Headings option specifies one or more subject headings to be removed from the matching record, based on the 6XX second indicator values, before it is loaded into the catalog.

Messages in the Finished Report Log Show the Key Matching Option Used

The Load Bibliographic Records report has been enhanced to indicate which key matching option was selected in the report. The report will print one of the following messages in the report log, depending on the selected key matching option.

- If the Match on Title Control Number option is selected, the following text displays.

  Bibliographic records will be matched by flexible key.

- If the Match on Title Control Number or Indexed MARC Tag option is selected, the following text displays, and indicates that matching will be done using the OR operand.

  Bibliographic records will be matched by flexible key OR the text index.

- If the Match on Title Control Number and Indexed MARC Tag option is selected, the following text displays, and indicates that matching will be done using the AND operand.

  Bibliographic records will be matched by flexible key AND the text index.
Item Availability Options Added to the Postload Tab in the Load Bibliographic Records Report

The Item Availability options have been added to the Postload tab in the Load Bibliographic Records (Bibload) report. These options can be used to specify that newly-created items are not yet available at their home locations. Shelf-ready items drop-shipped to branches from a book vendor or in transit from the cataloging library can be made to display relevant information in the online public access catalog instead of available at their home locations.

**Note:** The Item Availability options replace the New Items Will Go Intransit From option that was previously available in the Load Bibliographic Record report’s Postload tab.

Users must select one of the following Item Availability options when running the Load Bibliographic Records report.

- **Make New Items Available at Their Home Libraries and Locations** makes the new items created by the report available at their owning libraries and locations; this option does not put items in transit. This option is selected by default.

- **Make New Items in Transit From** puts new items created by the report in transit to their owning libraries. When this option is selected, the name of the originating or “transfer from” library must be specified. Items owned by the “transfer from” library will not go in transit.

- **Make New Items Available Soon** assigns a special “available soon” location to all new items created by the report. The first Location policy with the AVAILABLE_SOON location type that the report finds is used as the location for the new items. The AVAIL_SOON policy is delivered and can be used as the special “available soon” location.

Automatic Addition to Call Number Load Rule in Load Bibliographic Records Report

The Load Bibliographic Records (Bibload) report requires that when a holdings entry (such as the 999) is used to add holdings, there must be a call number load rule for that entry, and it should be the last call number load rule listed. In the WorkFlows C client version of the report, when a copy processing option that references a holding statement is selected, the Copy Processing gadget automatically adds a call number load rule for that entry, and it is added as the last call number load rule. Previously, the WorkFlows Java client version of this report did not perform this automatic call number load rule processing. Now, it does.

**Example:**

On the Load tab under Call Number and Copy Processing, the Call Number Load Rules field currently displays the following.

LC, 050, , N
In the Copy Processing gadget, the user selects the Create and Update Copies Using Holdings Statement option and specifies the 999 entry ID. When the user clicks OK, the gadget adds the following statement to the Call Number Load Rules field.

LC, 999, a, Y

Now, the Call Number Load Rules field displays as follows.

LC, 050, , N/LC, 999, a, Y

For each selected entry, the classification will be LC (which can be edited) and the Occurrences will always be last.

Load Bibliographic Records Report Provides New Spine and Pocket Label Print Options

Previously, when printing spine or pocket labels from the Load Bibliographic Records (Bibload) report, only newly created items were being printed. If any items were updated by the report, no spine or pocket labels were printed for these items. Now, the report has new output options to print labels for only newly created items, or to print labels for new items and updated items.

When the user selects the Print Label option on the Spine and Pocket Label tab in the WorkFlows Java client (or under Spine and Pocket Label on the Output Options tab in the WorkFlows C client), the following options are available.

- Print Created Items
- Print Created and Updated Items

Copy Processing Gadget Enhanced in the Load Bibliographic Records Report

The Entry ID gadget in the Copy Processing gadget has been enhanced to allow one or more tags to be selected. The user can supply a list of tag numbers, in the desired order of search, from which to extract holding entry data in incoming MARC records. The Copy Processing gadget is in the Copy Processing field on the Load tab of the Load Bibliographic Records (Bibload) report.

Example

Bibliographic records may contain holdings data in subfields in 949, 977, and 999 tags. The user can use the Entry ID gadget to make the report search these tags in incoming records for holdings data. If the user specifies the tags in the hierarchical order of 949, 977, and 999, the report will first look for the 949 tag in the incoming records. If the 949 tag exists, the report processes all 949 tags as the holdings entry, and stops looking for any other holdings entries. If no 949 tags exist in the incoming record, the report looks for the 977 tag. If the 977 tag exists, the report processes all 977 tags as the holdings entry, and stops looking for any other holdings entries. If no 977 tags exist in the incoming record, the report looks for the 999 tag. If no 999 tags exist in the incoming record, the report stops trying to process holdings entries.

Note: The Load Bibliographic Records report expects the subfield data is the same in all holding entries.
Messages in the Finished Report Log for the Load Bibliographic Records Report Added to Show Subfields to Create Call Numbers

The Load Bibliographic Records (Bibload) report has been enhanced to indicate in the finished report log which subfields are actually used to create call numbers from the loaded bibliographic records. The report will print messages similar to the following in the finished report log.

- LC call number will come from the last tag 949.
- The call number will include only subfields a.

Corrections

Unable to Schedule or Save Load Bibliographic Records Report

When scheduling or saving a template of the Load Bibliographic Records report, if the user selected the Owning library/Call number option on the PostLoad tab, the report could not be scheduled or saved as a template. This has been corrected.

Maintenance Group Reports

Enhancements

New Purge Finished Reports Report

The Purge Finished Reports (Purgefinrpts) report is a maintenance report that will delete reports from the finished reports list that are a user-determined number of days old.

**Note:** This report is password protected.

The Purge Finished Reports report displays the following tabs.

- **Basic**—This tab lists the report name, a brief description, and the title and footer used on each page of the report.

- **Days Old**—On this tab, the user types a value for the Days Old field. The report will those reports that were created N number of days ago. The default number for the Days Old field is 10.

- **Update Option**—It is possible to run this report in a test mode without editing the database (which is recommended), so the user can determine how many reports will be removed from the finished reports list. By default, the Update Database Records check box is cleared, and the report runs in test mode.
New Report to Purge User ID Links to Item Records

The new Clear Previous User ID (Clearuser) report is used to purge the previous user ID from the item record after a defined amount of time, or based on item selections made in the report. This report has been added to the Maintenance report group.

Note: The Clear Previous User ID report is similar to the Privatized Datacode List (Private) report, but the Clear Previous User ID report only removes the user IDs from item records without removing the user IDs from the history logs. To remove the linked user IDs from the history logs as well as the item records, use the Privatized Datacode List report.

SirsiDynix recommends running the Clear Previous User ID report in test mode without editing the database so the user can determine how many item records will be modified by the report. When the user is satisfied with the test results of the report, the user can run the report again in update mode to actually update the database records.

Charge History Option Added to Edit User Characteristics Report

When running the Edit User Characteristics (Edituser) report, library staff members can now select the Charge History option on the User Editing tab.

A charge history is created for a patron when he or she checks out an item, and later checks it in. The list of items discharged for a patron are kept as a charge history until either the Purge Charge History report is run, or the user record is removed from the system.

This option allows the library staff to modify the charge history setting in the user records to the following values.

- **NOHISTORY** overrides the Save Charge History setting in the circulation rule, and does not keep history records for this user. This value is the default setting.

- **CIRCRULE** creates charge history records for this user based on the circulation rule's Save Charge History setting. If the Save Charge History check box is selected, charge history will be saved for this user when the user checks out an item that uses the circulation rule. If the check box is cleared, charge history will not be saved for the user when the user checks out an item that uses the circulation rule.

- **ALLCHARGES** overrides the Save Charge History setting in the circulation rule and creates charge history records for every checkout by this user.

Note: This option is useful only for libraries that use the Charge History feature.
Corrections

Expanded Birth Date field in Edit User Characteristics Report

Previously in the Edit User Characteristics (Edituser) report in the Maintenance group reports, the Birth Date field was only large enough for five characters, which was not sufficient for the correct operation of the report.

This has been corrected.

Added Translations for Status to Purge Shipping Records Report

Previously, the Purge Shipping Records (Purgeshippack) report contained a numeric value for the shipping status. Users were unable to determine what these numeric values meant. This has been corrected.

Example:

Previously, the Purge Shipping Records report log displayed the following line.

Shipping package will be selected if the status is 16.

The status now displays RECEIVED instead of 16.

Materials Booking Group Reports

Enhancements

Booking Notice Report Contents Are Now Sorted by Booking Start Date

The Booking Notice (Bookingnotice) report will now sort the contents of each booking notice by booking start date, in addition to the other sort selections made by the user. For example, if a user selects Sort By User Name, the notices will be sorted by user name, but the individual bookings will be sorted by Pickup Library/Start Date.

This new sort will be useful for patrons that have a large number of bookings. For instance, academic libraries may receive requests for a semester’s worth of bookings from faculty. If the notices are sorted by booking start date, faculty can more easily verify the list of bookings against their original booking requests.
Improved Remove Bookings Report Output

The Remove Bookings (Rembooking) report output was enhanced to create report results that list the booking information for each removed booking record and the bibliographic information for the deleted booking.

**Example: Enhanced Remove Booking Report Results**

<table>
<thead>
<tr>
<th>USER NAME</th>
<th>USER ID</th>
<th>PATRON START</th>
<th>PATRON END</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moore, Alex</td>
<td>ALEXM</td>
<td>1/16/2003,12:00</td>
<td></td>
</tr>
<tr>
<td>BKG1-3</td>
<td>BKG1-4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arthur Miller's Death of a salesman [Videorecording] / a Roxbury and Punch production; Private conversations on the set of Death of a salesman / a Punch Production.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hoffman, Dustin, 1937-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extended Information--</td>
<td>None--</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jackson, Lee</td>
<td>LEEJ</td>
<td>3/25/2003,12:00</td>
<td></td>
</tr>
<tr>
<td>BKG1-5</td>
<td>BKG1-6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VIDEO</td>
<td>copy:1</td>
<td>MAIN</td>
<td></td>
</tr>
<tr>
<td>Leading with persuasion [Videorecording] / Video Visions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jackson, Dan.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extended Information--</td>
<td>None--</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Almond, Karen</td>
<td>KARENA</td>
<td>4/30/2003,12:00</td>
<td></td>
</tr>
<tr>
<td>BKG1-7</td>
<td>BKG1-8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VIDEO TAPE</td>
<td>copy:1</td>
<td>MAIN</td>
<td></td>
</tr>
<tr>
<td>Clemons, Julie.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extended Information--</td>
<td>None--</td>
<td></td>
<td></td>
</tr>
<tr>
<td>White, Lisa</td>
<td>LISAW</td>
<td>1/15/2003,12:00</td>
<td></td>
</tr>
<tr>
<td>BKG1-9</td>
<td>BKG1-10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>791.437 W52W</td>
<td>copy:1</td>
<td>MAIN</td>
<td></td>
</tr>
<tr>
<td>West side story [videorecording] / United Artists.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bernstein, Leonard, 1918-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extended Information--</td>
<td>None--</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tomlin, Roy</td>
<td>ROYT</td>
<td>3/5/2003,12:00</td>
<td></td>
</tr>
<tr>
<td>BKG1-13</td>
<td>BKG1-14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>791.437 W52W</td>
<td>copy:1</td>
<td>MAIN</td>
<td></td>
</tr>
<tr>
<td>West side story [videorecording] / United Artists.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bernstein, Leonard, 1918-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extended Information--</td>
<td>None--</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Added Booking ID and Job ID to List Bookings Report Output

The List Bookings (Bookinglist) report output was enhanced to include the booking ID and job ID for each listed booking.

**Example: Improved Booking List Report Output**

```
Booking List
Produced Monday, September 17, 2007 at 11:55 AM

<table>
<thead>
<tr>
<th>USER NAME</th>
<th>USER ID</th>
<th>PATRON START</th>
<th>PATRON END</th>
</tr>
</thead>
<tbody>
<tr>
<td>White, Chet</td>
<td>CHET</td>
<td>11/9/2004,14:00</td>
<td></td>
</tr>
<tr>
<td>BKGl-167</td>
<td>BKGl-168</td>
<td>BOOKING</td>
<td></td>
</tr>
<tr>
<td>VIDEO</td>
<td>copy:1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cage, John. Selections.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Wiseman, Bernie | BERNIE | 8/31/2005,10:00 |            |
| BKGl-513        | BKGl-514| BOOKING      |            |
| VIDEO MASTER, PROGRA | copy:1 | MAIN         |            |

| Bowman, Alex | ALEX | 8/31/2005,13:30 |            |
| BKGl-515     | BKGl-516| BOOKING      |            |
| VIDEO MASTER, PROGRA | copy:1 | MAIN         |            |
```

Selection by User ID Added to Booking Notice Report

In the Booking Notice (Bookingnotice) report, library staff can now select bookings by user IDs. Academic libraries may want to select by user IDs to provide historical lists of bookings for faculty members. Faculty can use these lists for course preparation.

The User IDs tab was added to the Workflows Java client version of the Booking Notice report. Library staff can select user IDs on this tab.
My Circulation Group Reports

Corrections

List Checkouts by Homeroom Does Not Run

Previously, if the List Checkouts by Homeroom/ZIP (Hrchargesall) report in the My Circulation group reports attempted to run with a Date Due in the Charge Selection tab of ANY or NEVER, the following system message appeared in the report log.

**Data must be all digits -dNEVER2359.

This has been corrected.

Homeroom Checkouts by Due Date Report Output Not Correct

When running the Homeroom Checkouts by Due Date (Homeroomchg) report, users would see unexpected output in the report log. For example, the report would correctly indicate that 8 out of 8 users printed, but then state that 1 of 1 charge record printed.

This has been corrected. The report log now only indicates the number of users printed; this is more useful information.

My Copies Group Reports

Corrections

Selection Criteria Tab Fields Now Display Correctly

Several reports in the My Copies report group displayed blank Selection Criteria tabs, and users were unable to schedule the reports. The following reports were affected.

- Count Copies by Item Category1 Report (Invcountbyict1)
- Count Copies by Item Category2 Report (Invcountbyict2)
- Count Copies by Item Type Report (Invcountbyityp)
- Count Copies by Pub Year Report (Invcountbypbyr)

These reports now display the selection fields on the Selection Criteria tab.
My Statistics Report Group

Corrections

Transaction Date Range Gadget Didn’t Work in Custom Circ Count by Item Loc Report

In the WorkFlows Java client, the Transaction Date Range gadget in the Custom Circ Count by Item Loc (Statslocncustm) report didn’t work. Any attempt to enter a date range using this gadget only saved the first date in the date range.

This has been corrected.

Weekly Circulation Report Produced Two Weeks of Statistics

The Weekly Circulation Statistics Report (Statsuct1wkly) was producing two weeks of statistics rather than one.

This has been corrected.

Oracle Group Reports

Corrections

Analyze Oracle Tables Report Not Running at Some Sites

The Analyze Oracle Tables (Analyze) report used an SQL*Plus routine which may not be available at all sites using Oracle. For some customers, the report would not run.

The Analyze Oracle Tables report has been changed to use the sirsisql program, which is SirsiDynix's free-form SQL program, so the report will run at all sites using Oracle.

Outreach Group Reports

Enhancements

Purge Specific History Report Has Additional Selections

The Purge Specific History Report has additional selections that will allow users to make selections based on Outreach History status, Outreach Interest and User Record fields.
New List User Histories Report

The new List User Histories (Outreachusrhst) report has been added to the Outreach group of reports. This report provides a listing of outreach users' history records based on selection criteria.

The List User Histories report displays the following tabs.

- Basic
- User Selection
- User Status Selection
- Outreach User Selection
- Outreach History Selection

By default, the List User Histories report output is sorted by user name, and histories are sorted by title.

Note: See the Workflows Java client Help file for more information about the selection options on these tabs.

Reserves Group Reports

Corrections

Copy Number No Longer Displays in the List Reservations Report

The output of the List of Reservations (Resvationlist) report included an empty column labeled “Copy #.” This column and column header have been removed from the List of Reservations report because reservations are placed on a title, not a specific copy number.

Remove Reserve Records Report Finishes and Removes Records Correctly

When the Remove Reserve Records (Remreserve) report was run, the report would finish in error, would not remove reserve records, and displayed the following message repeatedly in the report log.

** input line incorrect

The Remove Reserve Records report has been corrected so the report will select and remove reserve records, and the message no longer displays in the report log.
Read Only Data Modified Message in Reserve Usage by Call Number Report

Previously in the Reserve Usage by Call Number (Rsvuselst) report in the Reserves group reports, the following system message appeared when Type on the Transaction Selection tab was set to Request/Response.

```
Read only data had been modified: seltransaction: Type.
```

This has been corrected.

Reserve Usage by Call Number Report Would Not Select Interface Transactions

When running the Reserve Usage by Call Number (Rsvuselst) report, a user made the following selections.

- On the Compare Database tab, the user selected the Compare Database box.
- On the Transaction Selection tab, in the Interface box, the user clicked the gadget and selected WorkFlows.

When the report finished, the user viewed the report results and noticed a "Broken pipe" message in the report log, and saw that no transactions were selected or printed. No matter what interface the user selected (such as WorkFlows, Online Catalog, or NCIP) the same message appeared in the log, and no results printed.

This has been corrected.

Serials Group Reports

Enhancements

Serial Claim Notices Report Now Prints ISSN on Serial Claims

The Serial Claim Notices (Serclaimntc) report now includes the ISSN for the serial title in the serial claim. The SISAC ID on the Basic tab of the serial control record contains the ISSN for the title. The report will print this ISSN on the claim, immediately following the Name field.

**Example: Serial Claim Notice with ISSN**

```
Journal of physical education, recreation & dance.  
American Alliance for Health, Physical Education, Recreation, and Dance.  
vendor subscription ID:     copies claimed: 1
vendor title number:   numeration: V. 70 NO. 5
                        name: MAY/JUN 2007
                        ISSN: 0730-3084
Claim reason: Receiving insufficient number of copies
```
Prediction as Late Report Now Sorts the Report Output

Previously, the Prediction as Late (Issuelate) report simply output claim records in the order in which they were created. This made it difficult for users to find which late issues were claimed.

Now, this report outputs claims sorted by library, then by title, then by control ID. In addition, the library description is printed.

Serial Controls without Predictions Report

Workflows now has a report that serials receivers can run to identify serial control records in specified libraries that have no more expected issues.

The report is in the Serial report group.

The report contains the following tabs:

- Basic
- Serial Control Selection
- Sorting Tab

Default selections include automatically predicting issues and title/author sorting.

New Delete Received Issues Report

The Delete Received Issues (Remrecissues) report allows the user to remove serial issues in batch. This report assists in deleting older issues that are no longer a part of the library's physical collection.

Note: This report is password protected.

The Delete Received Issues report is found in the Serial report group and includes the following tabs.

- Basic Tab
- Receipt Selection
- Prediction Selection
- Serial Control Selection
- Vendor Selection Tab
- Vendor Cycle Selection Tab
- Update Option

Make selections on these tabs as required to identify the serial issues to be removed. For more information about the selections on these tabs, see the Workflows Java client Online Help.
When the report is run, the selected records will be removed from the database and will be listed in the report output alphabetically by title, then in ascending order by prediction.

**Caution:** When this report is scheduled to remove the serial issues, it will do so without further prompting, and so it is recommended that users run this report in test mode first. On the Update Option tab, clear the Update Database Records check box to run this report in test mode. A list of records to be removed will be printed in the report output. It is also recommended that users run the report to actually remove serial issues after a full system backup.

On the Receipt Selection tab, the Date Received defaults to :ME-24 (also known as since the beginning of the system and 24 months before the report run date) and number of copies received as >0. This is to ensure that the report will not select predictions that haven't been received yet.

On the Prediction tab, the Any Copies Received has been set to Yes and cannot be modified. The Any Copies Expected defaults to both and Any Copies Claimed defaults to No. Setting the Any Copies Claimed to No prevents deleting issues with claims attached.

**Note:** If MARC holdings were updated when the removed issues were received, users will need to correct the MARC holdings manually. Additionally, if items were created when these issues were received, users will need to remove the items manually.

### Serials X12 Invoices Report Now Supports Coverage Note

The Serials X12 Invoices (Serinvoice12) report has been enhanced to support the Coverage Note field in invoice line extended information. The coverage note is used to differentiate the coverage dates of a subscription when there are multiple orders for the same title.

New SirsiDynix Symphony systems will include the Coverage Note field in the delivered Invoice Line Extended Information Format policy. For existing sites, SirsiDynix Symphony Administrators will need to modify the appropriate format policies to include the Coverage Note field.

### Print Serials Issue Labels Report Added

The Print Serial Issue Labels (Printserlabels) report, which prints labels for serial issues in batch, has been added to Serials Group reports. This new report is modeled on the existing Print Custom Labels (Printlabels) report in the Bibliographic group of reports.

The starting point in the selection criteria for the Print Serial Issue Labels report is prediction, or issue, specific. With this report users can produce labels for both expected and received issues. These labels can be used for the following purposes.

- Labels for recently received issues
• Labels for expected issues, such as a batch of labels for bound periodicals in a collection

• Label sets for magazines

Note: This report uses the Label Designer wizard on the Cataloging toolbar to create templates. There is no default Serials template delivered, so staff should create at least one label template configured with Check In data. In the Label Designer, the only Type that is valid for the Print Serials Issues Labels report is Check In. Other values (for example, Bibliographic) do not display on the finished labels.

Corrections

Various Corrections Made to the Serial Controls Not Linked to Vendors Report

The Serial Controls Not Linked to Vendors (Serctlnovendor) report had the following problems.

• The report was not finishing when selections were made in any of the report’s selection fields. The following message displayed in the temporary report processing file.

  Can't call method "pred_enum_first" on unblessed reference at x/sirsi/ORACLE/Unicorn/Rptscript/Runs/serctlnovendor.pl line 144, <PRED> line 1.
  Broken Pipe

• If the serials control was linked to a vendor cycle record, but the predictions and claims are linked to a different vendor cycle record, the serial control record was correctly listed in the report output, but no reason or explanation for the inclusion was given.

• If a serials title ended with a number, the report added zeroes to the left of the number.

  Example
  If the serials title was “Take 5,” the report displayed the title as “Take 000005.”

• The report was not printing the individual claim records or prediction records that had a different vendor than the serials control record.

The following corrections have been made to the Serial Controls Not Linked to Vendors report.

• The report has been corrected so that the report finishes processing and displays in the finished reports list.

• If the report detects a possible mismatch of the links between the serials control, predictions, claims, and vendor cycle records, the serials control and the reason for its inclusion in the report display in the report output.

• The report correctly displays serials titles that end in a number.

• The report prints the individual claim records and prediction records that have a different vendor than the serials control record.
Serial Controls Not Linked to Vendors Report Prints Correct Information

The Serial Controls Not Linked to Vendors (Serctlnovendor) report was printing the following incorrect information in the report output.

- The Mismatched Predictions section would only list the first prediction that was mismatched, instead of all of the mismatched predictions.
- The Mismatched Claims section would list mismatched claims even though the title had no claims.

The Serial Controls Not Linked to Vendors report has been changed so the report correctly prints information about mismatched predictions and mismatched claims, as applicable.

List Serials Predictions Report Not Printing Predictions

After upgrading to Unicorn Version GL3.1, a user noticed that if a serial control record did not contain vendor/vendor cycle information, the List Serial Predictions report would not print predictions for that record. In Version GL 3.0, the report printed the predictions.

The report was selecting only those predictions where the serial control had a vendor link, and thereby failing to select serial controls which had no vendor link.

This has been corrected.

Sirsi Voice Automation Reports

Corrections

SVA Remove Report Returned Error on Oracle Systems

The SVA Remove report was displaying the following system message when run on Oracle systems.

**SQL execution failed(delete from communication where status in (3,1,4,6,))!**

This has been corrected.

Checks for Duplicate Helpers Added to SVA Group Reports

Previously, in SVA group reports on the WorkFlows Java client, the Notices helper incorrectly displayed multiple times in reports with multiple notice selections, sometimes enabled and sometimes disabled.

This has been corrected.
Text Group Reports

Corrections

Rebuild Text Database Report No Longer Ends Abnormally with OK Status

The Rebuild Text Database (Rebuildtext) report was finishing with a status of OK although the BRS loads or reorgs might have failed and the report contained Load Terminated Abnormally messages.

The report has been changed so that it will finish with a status of ERROR if any of the BRS load processes ends with Load Terminated Abnormally messages.

Add, Delete, Update Databases Report Running with Status of “Error” on Unicorn for Oracle Systems

After upgrading to Unicorn Version GL3.1, sites running Unicorn for Oracle noticed that the Add, Delete, Update Databases (Adutext) report would run with a status of “error.” The authority checking program was not running properly. This has been corrected.

Rebuild Authority Thesauri Report Gave Error 111 on Thesaurus

In the Rebuild Authority Thesauri (Rebldthesauri) report, the following error displayed.

error 111 on thesaurus

This error could also occur when browsing Unicorn. This has been corrected.
UnicornEcole Reports

Corrections

UnicornEcole Circulation Reports Included Items with Wrong Due Date

Some reports from the My Circulation and All Circulation groups were selecting records with the wrong due date. Even though the user made a selection for materials with a due date after May 1st, items with due dates before May 1st were selected. Additionally, the report log initially displayed “before May 1st” as the selection, but further down in the log displayed “after May 1st” as the selection. This occurred in the following reports.

- List Users with Overdues
- List Users with Checkouts
- List Overdues by Homeroom
- List Checkouts by Homeroom

This has been corrected.

Users Group Reports

Corrections

Update Select User Delinq Stat Report Runs Faster in Libraries That Upgraded to Unicorn GL3.1

When Unicorn was upgraded to GL 3.1, the Update Select User Delinq Stat (Userdelinq) report ran more slowly than in previous versions of Unicorn. The report has been changed to run significantly faster.

Count Users by Department or Birthyear Report Runs Correctly When Users are Selected by Birth Date

The Count Users by Department or Birthyear (Checkuser) report would display the following message instead of finishing properly when the report was set up to count users by birth date.

Invalid input data: User_field:user field:BIRTHDATE

The Count Users by Department or Birthyear report has been changed to do the following when the report is configured to count users by birth date.
• If Birth Date is selected on the report’s Breakdown of Users By tab, and no date selection is specified in the Birth Date field on the report’s User Selection tab, the output displays the number of users by birthyear. The following report output sample shows the number of users by birthyear.

<table>
<thead>
<tr>
<th>BIRTHYEAR</th>
<th># OF USERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1948</td>
<td>[10]</td>
</tr>
<tr>
<td>1953</td>
<td>[13]</td>
</tr>
<tr>
<td>1959</td>
<td>[15]</td>
</tr>
<tr>
<td>1962</td>
<td>[31]</td>
</tr>
</tbody>
</table>

• If Birth Date on the report’s Breakdown of Users By tab, and a date selection is specified in the Birth Date field on the report’s User Selection tab, the output displays the number of users by birth date.

<table>
<thead>
<tr>
<th>BIRTHYEAR</th>
<th># OF USERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/1/1953</td>
<td>[1]</td>
</tr>
<tr>
<td>8/14/1970</td>
<td>[1]</td>
</tr>
<tr>
<td>9/5/1975</td>
<td>[1]</td>
</tr>
</tbody>
</table>

User Profile Now a Required Field in Remove Users Report

The User Profile field is now a required field in the Remove Users (Remuser) report. This field is located on the User Selection tab. A library staff member must select at least one User Profile when running this report. Previously, when this field was not required, a staff member could leave the field blank and inadvertently remove all users from the user database.
Request

General

Corrections

Current User Carries Over to Display User From Request Wizards

If a user request was viewed in one of the Request wizards, and the user switched to the Display User wizard to search for the user record, the user just viewed in the request wizard was not carried over as the Current user in the Display User wizard.

The request wizards have been changed so that if a request is viewed in the wizard, the user associated with the request is carried over as the Current user to the Display User wizard.

Create Request Wizard

Corrections

Item Selected in Gadget Lost in Create Request

In the WorkFlows C client, when a user selected a title for the Create Request wizard by using the Item Lookup gadget on the wizard’s Basic tab, the item information was not saved. When the gadget was closed, the Item ID and Call Number fields were still empty.

This has been corrected.

Basic Tab Displays When the Create Request Wizard Starts

At the start of the wizard, the Create Request wizard was displaying the Request tab instead of the Basic tab. The user always had to click the Basic tab first to select the request type and enter the User ID, then click the Request tab to supply the request details.

The Create Request wizard has been changed so the Basic tab always displays first when the wizard starts.
Create Request Wizard Not Clearing Information Appropriately

In the Create Request wizard, if a user created a request record immediately after using the Display Order wizard, the Library and Fiscal Cycle fields from the order record populated the new request record, even though this information was not needed for the request. This occurred when using the WorkFlows client only.

The Create Request wizard was not clearing out information appropriately before starting. This has been corrected.

Default Request Type Status Was Not Applied

Previously, the Create Request wizard was not applying the default request status users selected in wizard properties. The Request Type policy specified in wizard properties already contains a request status value, so it is not necessary for the user to also select a request status in the properties. To correct this, the Request Status property was removed from the Create Request wizard Defaults property page.

Display Request Wizard

Corrections

Basic Tab Displays Correctly When Modifying a Displayed Request Record

If the Display Request wizard properties were set to allow users to modify a displayed request record, the Modify button was activated in the wizard. However, if the Basic tab of the request record was selected after the Modify button was selected, the WorkFlows client would not respond for a while. Then, the Basic tab would display, but the tab was blank.

The Display Request wizard has been corrected so the Basic tab displays correctly when it is selected after the user chooses to modify the displayed request record.
Modify Request Wizard

Corrections

**Unable to Assign a Request Status if Description Exceeds 24 Characters**

Previously, if a user attempted to assign a request status to a request, and the Request Status policy had a description that exceeded 24 characters, the status could not be changed. This has been corrected.

The Modify Request wizard has been enhanced with the Next and Previous buttons so the user can quickly move between request records in a list of requests.

- The Next button displays the next request record in the list of requests.
- The Previous button displays the next request record in the list of requests.

**Typed Information Continues to Display in Modify Request Wizard Fields**

If the user typed invalid information in a Modify Request wizard field instead of using a gadget or a list selection to make a valid selection, the field would be cleared if the user exited the wizard without first correcting the invalid information. When the user started the Modify Request wizard again, the modified field would be blank.

The Modify Request wizard has been changed so that if the user did not correct invalid information in a field before closing the wizard, the information still displays in the field the next time the wizard is started.

**WorkFlows Java Client Hangs in Modify Request**

The WorkFlows Java client was hanging when certain requests were selected from the Modify Request hit list to view the Request ID glossary. This was caused by requests that contained more data in the REPLY field.

This has been corrected.
SIP2/NCIP Servers

General

Enhancements

Checkout Overrides Option Added to SIP2 Configuration

A new configuration option has been added to the SIP2.cfg file. The option CHECKOUT_OVERRIDES has multiple settings. For each port, this option can be set so that the self check machine will automatically override for materials that are in transit, lost or missing, have trapped holds, or are checked out to another user.

Example:

Following is a CHECKOUT_OVERRIDES setting to override for in transit materials, lost or missing materials, or trapped holds.

CHECKOUT_OVERRIDES|INTRANSIT,LOST_MISSING,OUTSIDE_HOLD|

When the configuration option is set in this way, the SIP software will automatically override for materials that are in transit, lost or missing, or have a trapped hold. In addition, if the SirsiDynix Symphony configuration is set to allow materials to be checked out that are already checked out to another patron, you may add the CHECKEDOUT option as well.

Note: Recirculating items are still handled as before; the item will be checked out again (recirculated) according to the parameters of recirculating items.

Ability to Restrict Checkout on Items with Fees Added

Previously, fees were added automatically to a patron record if the materials being checked out via SIP had a fee associated with them in Unicorn.

Now, those fees are not added to the patron record automatically. If a fee is associated with materials checked out via SIP, the following message displays.

Charge of this item has an associated fee.

The patron must have further assistance from library staff in order to check out this item.

Note: If the library indicates that they do not want to allow checkout of items with fees (via sip2.cfg), patrons cannot check out these items. This applies to item renewals as well.
Support for Multiple IDs Added to SIP2

A new option in the sip2.cfg file allows support for multiple user IDs. The following information has been added to the file.

```
SUPPORT_MULTIPLE_IDS|Y|
```

The absence of this line or the inclusion of this line with a value N for No indicates to the SIP2 Server that support for multiple patron ID functionality is not allowed.

Support for Alternate ID and Previous IDs in Patron Information Message

A new option in the sip2.cfg file allows support for returning a patron’s alternate ID and previous IDs in a patron information message. The following information has been added to this file.

```
RETURN_ALTERNATE_PATRON_IDS|Y|
```

If the value of the option is Y for Yes, for each alternate ID and/or for previous IDs, a PJ field is returned in the patron information response (64) message.

New NCIP Translation File for Location Conversion

A translation file has been created that allows customers that are using another system (such as an ILL system) convert locations created for the first system to locations suitable for SirsiDynix Symphony use. The following information is contained in the new file.

```
# Copyright (c) 2006 SirsiDynix. All Rights Reserved.
#
# This flat file is used for translating NCIP location names to
# Unicorn location names. Format is the following
# NCIP Location Name, Unicorn Location Name(LOCN), Unicorn Library
# Name(LIBR)
#
# Comment lines start with # character
# example translation line
# CITRUS, STACKS, CENTRAL
```

This translation file will also help libraries determine which pickup location will be used when holds are created by NCIP.
NCIP Accept Item Message and Autogeneration of Item ID

NCIP has been updated to allow the Accept Item message to generate automatically an Item ID for a new item record added to the database. A new Boolean element called <AutoGenerateItemID> has been added to the sirsi-ncip-settings.xml file. The element is delivered set to False; set to True to allow Item IDs to be generated automatically.

```xml
<AddItemDefaults>
  <AutoGenerateItemID>false</AutoGenerateItemID>
</AddItemDefaults>
```

NCIP Changes for Authenticate User

Previously, name information <Surname> in the authenticate user response resided in the <StructuredPersonalUserName> element, as follows.

```xml
<UserOptionalFields>
  <NameInformation>
    <StructuredPersonalUserName>
      <Surname>Blough, Joseph</Surname>
    </StructuredPersonalUserName>
  </NameInformation>
</UserOptionalFields>
```

Now name information <Surname> in the authenticate user response reside in the <UnstructuredPersonalUserName> element, as follows.

```xml
<UserOptionalFields>
  <NameInformation>
    <UnstructuredPersonalUserName>Blough, Joseph</UnstructuredPersonalUserName>
  </NameInformation>
</UserOptionalFields>
```

Patron Information Response Now Includes Currency Type

The SIP server patron information (64) response is now sent with the BH (currency type) segment. The information for this segment is retrieved from the system's configured Currency type.

Authentication PIN Required Option Added to NCIP

The entry of a PIN is now optional by port in the NCIP sirsi-ncip-settings.xml file. A new element, has been included, as follows.

```xml
<AuthenticationInputElement>
  <PIN required="true"/>
</AuthenticationInputElement>
```

This element defines whether the password/PIN should be validated via the AccessControl API call. In addition, a new option Authentication PIN Required has been added to the Basic tab.
If an authenticate user message is received and this setting is turned off (false), an authenticate user message is sent without a PIN. If an authenticate user message is received and this setting is turned on (true), an authenticate user message must be sent with a PIN.

The delivered value is true.

**NCIP Place Hold with Request Item Message by Using OCLC Number**

An option has been added to NCIP to place a hold with the request item message by using OCLC number.

In the RequestItem message, the option to specify criteria for describing the bibliographic record for hold placement uses the following elements.

```xml
<BibliographicItemIdentifierCode>
  <Value>OCLC</Value>
</BibliographicItemIdentifierCode>
```

If `<Value>` is set to OCLC, NCIP searches by OCLC number in the general keyword index.

**In Transit Circulation Items Flagged Automatically**

The following capabilities have been added to NCIP.

- Allow the NCIP settings file to determine if the materials created by the accept item message should be put in transit if the material is owned by a location other than the NCIP server user.
- For AcceptItemMsgDefaults, CheckInItemMsgDefaults, and ItemCheckedInMsgDefaults in the NCIP settings file, if the AutoTransitItem attribute is set to true, the materials are put in transit if the item library and the NCIP user library are not the same. If AutoTransitItem is set to false, the materials are not set to in transit.
- Allow customers to take things out of transit when the check out item message is sent via NCIP. Customers can then either choose to allow the materials to stay in transit or transit materials in to fulfill the ILL hold that was placed via NCIP.

**Item Checked Out Message Now Has Default User ID**

A default user ID has been added to the NCIP item checked out message so that, if the request fails because the identified user is not in the user database, the default user ID can be used for the checkout.
SIP Patron Address Variables Added

The SIP2 server has been enhanced to allow users to determine which patron address fields to send as a patron information response. Only those pieces of information that are provided in the address record are sent.

The following variable in the sip2.cfg file is used to indicate whether default fields will be used to retrieve patron information, or whether user-defined fields will be used.

CUSTOM_PATRON_ADDRESS|Y|

If the variable is set to Y, user-defined fields are used. If the variable is set to N, default fields are used.

In the sip2.tbl file, the following lines can be set to define the fields to be used for patron street address, patron e-mail address, and patron telephone number. The first two fields in each line are constant (ADDRESS_TYPE|LINE_X| ), but the third field is variable.

ADDRESS_TYPE|LINE_ONE|STREET|
ADDRESS_TYPE|LINE_TWO|CITY,STATE|
ADDRESS_TYPE|LINE_THREE|ZIP|
ADDRESS_TYPE|LINE_FOUR||
ADDRESS_TYPE|EMAIL|EMAIL|
ADDRESS_TYPE|PHONE|HOMEPHONE,WORKPHONE,DAYPHONE|

Note: For the EMAIL and PHONE lines, the first valid and populated entry is used; for example, if no there is no HOMEPHONE, the PHONE field attempts to use WORKPHONE.

Ability to Block Delivered SirsiDynix Symphony Users Added

Delivered SirsiDynix Symphony users that are not meant to be authorized in SIP2 can now be placed in the new sip2.tbl file in one or both of the following ways.

- Included in the file as a list.
  REJECTED_USER|USER1, SIRSI, SELFCHK|

- Included individually in the file.
  REJECTED_USER|USER2 |
  REJECTED_USER|USER3 |
  REJECTED_USER|USER4 |

Duplicates are ignored.

Note: Since the intent of this list is to screen unauthorized users rather than validate authorized users, the user IDs to be rejected are not validated.
NCIP Can Now Return User’s Name in Surname/Given Name Format

The NCIP settings file now contains an option to allow sites to determine if the user name is returned in the surname/given name combination or in the unstructured format in the NCIP response. Sites using the III interface for the InnReach software will need to use the unstructured format.

New Patron’s Library Field Added

An AQ Segment has been added to contain the patron's registering library in the 64 response message.

New Author Field Added to SIP2 Checkin Response Message

A new Author field (EA) has been added to the SIP2 checkin response message so that authors’ names display.

Corrections

NCIP Backup Script Fails

Previously with the NCIP backup script, the halt and run sequence within the script failed to complete.

This has been corrected.

SIP Message Now Returns Correct Check In Time

Previously, when an item was checked in with a return date in the 09 SIP message, the time returned was always recorded after 23:59. Such time recording resulted in large fines for hourly items. In the sipserver program, when the return date was translated, the return time portion was not being sent to the API checkin request.

Now, when an item is checked in, the time reflects the contents of the return date field of the 09 SIP message. In the sipserver program, when the return date is translated, the return time portion is sent to the API checkin request.

Talkingtech i-tiva Summary Information Sent Correctly

Previously in the sipserver program, if the date format is set to IT for Talkingtech’s i-tiva, the same information was erroneously sent for the EnvisionWare interfaces in the Hold Summary (AS), Overdue Summary (AT), and Fine Summary (AV) segments of the Patron Information (64) response. i-tiva was using the summary information given in 64 responses to populate the Item ID field of the Item Information (17) request. Therefore, when i-tiva dates were used, the summary fields that included other information with the item IDs needed to have the excess information removed.

In addition, in the 64 response for hold and overdue summaries, the date(time) formats printed the time portion incorrectly.
Now, the AS, AT, and AV segments only include additional summary information beyond the item ID if the date type is set to any value but IT.

In addition, the hold and overdue summaries were modified such that the date and time were printed correctly.

**SIP2 Functions with Floating Items**

Previously, SIP2 did not work properly when discharging floating materials.

This has been corrected.

**SIP2 Server Not Working With Oracle System**

Previously, Oracle customers were experiencing connectivity issues with the SIP2 Server.

This has been corrected.

**SIP Patron Counts Use Blanks Rather Than Digits**

Previously in SIP2, the SIP patron counts of 0 in the patron information message (64) were sometimes populated with blanks rather than digits, especially for patrons that were BLOCKED.

This has been corrected.

**Item Information and Hold Messages Used Incorrect Expiration Date**

Previously with the SIP2 server, if a hold was available, the Hold Pickup Date was the original expiration date instead of the available expiration date. This also occurred with the Expiration Date in the Hold message.

This has been corrected.

**SIP2 Incorrectly Renews Claims Returned Items**

Previously in SIP2, if an item is marked Claims Returned and the Renewal command is used, the item was incorrectly renewed by the user.

This has been corrected. If an item is marked Claims Returned and the Renewal command is used, the item is not renewed and a message appears in SIP2 indicating that the item is marked Claims Returned.

**Item Information and Hold Messages Used Incorrect Expiration Date**

Previously with the SIP2 server, if a hold was available, the Hold Pickup Date was the original expiration date instead of the available expiration date. This also occurred with the Expiration Date in the Hold message.

This has been corrected.
NCIP and Accept Item Add Item Defaults

Previously on the NCIP server, when an <AcceptItem> message was sent and the message did not include call number information, <AcceptItemMsgDefaults> was being saved incorrectly.

This has been corrected.

Due Date in the Item Information Is Now Recall Due Date, if Present

Previously, the SirsiDynix SIP2 server only returned the original due date in the Date Due field in the item information response, even if a recall due date was present. This was misleading to users if they knew the items were recalled but the self-check servers would not display the actual or recall date due.

Now, the SirsiDynix SIP2 server item information response will include the recall due date in the Due Date field, if the item was recalled.

SIP 64 Response Has Extra Spaces

The AS, AT and AV fields for the 64 patron information response message were sometimes showing extra spaces (between the pieces of the field).

This has been corrected.

SIP2 64 Response Returned Invalid Patron Information

When a patron authenticated with the SIP2 server (63/64 message) but was not in the user database, the SIP2 server correctly told the patron that he or she was not authenticated, but the server continued to display the previous patron's name information. This has been corrected.
Serials Control

General

Enhancements

Ability to Load Publication Patterns Using the 891 CONSER Entry

The Create Serial Control and Modify Serial Control wizards now support loading publication patterns using the 891 CONSER Publication Pattern entry in bibliographic records. When the user creates or modifies a serial control record, and the bibliographic record contains an 891 entry, SirsiDynix Symphony will analyze the subfields of the 891 and present a list of matching publication patterns to select. When the user selects a matching publication pattern, the Patterns tab of the control record is automatically populated with the chronology and numeration values, as well as the publication cycle information.

Additionally, the SirsiDynix Symphony SERIAL catalog format was enhanced to include the 891 CONSER Publication Pattern entry, and a special entry type was created to support the internal processing SirsiDynix Symphony performs during the load pattern work flow in serial control wizards.

Note: The 891 CONSER Publication Pattern Load feature is available for the WorkFlows Java client only.

Using the CONSER Publication Pattern Load Feature

To use the CONSER Publication Pattern Load feature, the user will need to select the Prompt to Load Bibliographic Pub Pattern Data When Available behavior in the Create Serial Control wizard properties and the Replace Patterns helper default properties. The Replace Patterns helper properties are set on the Helper tab of the Create Serial Control and Modify Serial Control properties.

When a user creates a new serial control record (or modifies an existing record), if the bibliographic record contains an 891 entry, SirsiDynix Symphony will evaluate the subfields of the entry and match them to chronology type maps and publication cycle maps defined in SirsiDynix Symphony policies. CONSER chronology type maps and publication cycle maps are delivered with the GL3.2 upgrade, however, SirsiDynix Symphony administrators can add new maps, if required. SirsiDynix Symphony will display the publication pattern matching results in the Load Pattern window.
When the Load Pattern window opens, the user does following.

1) In the Load Pattern window, the message “Pattern data is available in the MARC bibliographic record” displays, and below, a table of the 891 entries of the bibliographic record displays. The matching chronology type and publication cycle for each 891 entry appear in panes in the lower half of the Load Pattern window. As the user selects (highlights) each 891 entry, the chronology type and publication cycle lists are updated.

2) The user selects the 891 entry with pub pattern data that best represents the chronology and publication cycle for the serial control.

3) The user clicks Load Bib Entry Pattern Data, and the Patterns tab of the serial control record will automatically be populated with the chronology type and publication cycle values.

4) There may be two exceptions to this process.
   - If an 891 entry can be matched to multiple chronology types or publication cycles, the matching values will be listed in the CONSER Chronology Type and CONSER Publication Cycle panes. In these panes, the user can select (highlight) the values that best represent the chronology and publication cycle for the serial control. Clicking Load Bib Entry Pattern Data populates the Patterns tab with chronology type and publication cycle values.
   - If there is no 891 that adequately represents the publication frequency for the serial, the user clicks Select Frequency Pattern Template, and the Select a Pattern Template window opens. This window displays matching pattern templates defined in serial control policies. The user can select a pattern template and click OK to load the pattern. Clicking Return to Bib Entry List cancels the process. The pattern does not load, and the wizard returns to the list of 891 entries in the Load Pub Pattern window.

Notes:
   - If at any time the user clicks Close in the Load Pub Pattern window, the wizard will attempt to match the Frequency fixed field in the bibliographic record. If there is no matching template, the Select a Pattern Template window will open, and the user will be able to select a pattern template defined in serial control policies.
   - After loading an 891 pub pattern, if the user decides that it was not the correct 891 entry to load, the user can click the Patterns tab, then the Replace Patterns helper, and select a different 891 entry to load.
   - Even though the 891 tag loads a publication pattern into SirsiDynix Symphony, it may not be complete. The user should review the pattern and make additions or adjustments, if needed.
   - For more information about how SirsiDynix Symphony maps the 891 CONSER tag entries, see “FAQs: Mapping the 891 Tag (CONSER Captions and Patterns Tag) in SirsiDynix Symphony” in the WorkFlows Java client online Help.
New Options for Sorting Received Serial Issues

Users can now sort the received serial issues on the Received tab in either ascending or descending order, and sort by the enumeration, date received, or date expected.

The Received tab now displays the following sort options.

- Order of Issues – Click either the Ascending or Descending radio button.
- Sorted By – Click either the Enumeration, Date Received, or Date Expected radio button.

These options also appear in the following serial control wizard default properties.

- Check In
- Create Control
- Display Control
- Modify Control
- Remove Control

Load Pub Pattern Data Behavior Property Added to Replace Patterns Helper

A default property has been added to the Replace Patterns helper. The Prompt to Load Bibliographic Pub Pattern Data When Available property allows the user to control whether or not the Load Pattern work flow is available when using the helper. If the property is selected, the Load Pattern window will display in the helper when a bibliographic record has an 891 Pub Pattern entry (or entries). If the property is cleared, the helper will not present the Load Pattern option.

The SirsiDynix Symphony administrator can control whether or not the Replace Patterns helper will appear in the Create Serial Control or Modify Serial Control wizards. On the Helpers tab in the wizard properties, the administrator can select or clear the Replace Patterns Helper check box to make the helper available or unavailable.

To set the Replace Patterns helper properties, the administrator should click the Replace Patterns helper button on the Helpers tab in the Create Serial Control and Modify Serial Control wizard properties.

Corrections

Prediction Information not Displaying

Prediction information, such as enumeration, chronology, and copies expected, was not displaying in the platforms and glossaries in the Expected and Received tabs. This has been corrected.
MARC Holdings Record Link not Displaying

In the MARC Holdings tab of the Item Search and Display wizard, a list of holdings records attached to a title displays. If a holdings record is also linked to a serials control record, the control ID should be listed, but the control ID was not displaying. This has been corrected.

Enumeration Pattern not Printed

When printing a serial control record in the WorkFlows Java client, the enumeration pattern was not printed. There is a section in the print template for enumeration but it was not populated. This has been corrected.

Error Message in Make This Pattern a Template Helper

Previously, the following message displayed when the Make This Pattern a Template helper was used with a bibliographic record that had a blank Frequency fixed field.

Error getting Frequency policy

This has been corrected.

MARC Holdings Tab Does Not Display When Multiple Holdings Records Attached

Previously in the WorkFlows Java client Serial Control wizards, the MARC Holdings tab did not display in some cases when multiple holdings records were attached to the control.

This has been corrected.

Extra Text Displayed in Make This Pattern a Template Helper

In the WorkFlows C client, the Make This Pattern a Template helper displayed extra text in the last Subdivision section. The value “1” appeared in the Label box and “ALL_LIBS” appeared in the Limit box. When the user tried to save the template, the following system message displayed.

Policy does not exist [SERIAL_LABEL:1]

When the user attempted to remove the unwanted subdivision, the following message displayed.

Error in field size

This has been corrected.
Unable to Create Routings for User IDs of Over Fourteen Characters

Previously in serials control wizards Create Routing functionality, the routing could not be created if the associated User ID used more than fourteen characters.

This has been corrected. The User ID field size for Create Routing has been increased to the SirsiDynix Symphony User ID maximum size.

Current Setting in Call Number and Item Maintenance from Serial Checkin

Previously in the WorkFlows Java client, if an issue of a serial was checked in and an item record was automatically created, the user cannot open the Call Number and Item Maintenance wizard to view the item that was just created. The Call Number and Item Maintenance wizard "remembered" the Current title, but not the Current item.

This has been corrected.

Check In Issues of a Serial Wizard

Enhancements

Last Expected Issue Warning Added to Issue Received Dialog

A new mechanism that allows review and generation of new predictions during serials check in when the last expected issue is received has been added to the Received Issue dialog in the Serials Check In wizard.

Under the following conditions, the Check In: Issues Received dialog includes a new warning message.

• There are no more expected issues
• The Serial Control record is set to allow automatic prediction

Example:

1. The serials receiver opens the Serials Check In wizard, searches for a title, and selects a serial control record. The serial control record displays the next expected issue in the Next Issue tab.

2. The serials receiver clicks Check In Now. The Check in: Issue Received dialog appears to show the receiver the issue that was just checked in. The following warning message displays in the dialog, indicating that there are no more expected issues.

Warning!
You have received the last expected issue associated with this Serial Control record. There are no more expected issues.
3. The serials receiver may select the Review, Generate Predictions, New Search, or Close buttons.

- If the serials receiver selects the Review button, the Check In: Issue Received dialog closes and the Serials Check In wizard opens for that serial control record. The Control tab is set as the focus. If the Check In wizard properties are set to allow Modify Control, the receiver may select the Modify Serial Control helper to review the pattern information and generate predictions.

- If the serials receiver selects the Generate Predictions button, the Check In: Get Expected Issue Info dialog appears. The receiver may generate new predictions.

4. The user is returned to the Check In wizard with the Next Issue tab as the focus. The next expected issue appears in the tab.

**Audible Alert When Serials Receiver Checks in Last Expected Issue**

A new property in the Check In wizard allows for an audible alert to coincide with a warning during serials checkin when the receiver checks in the last expected issue linked to the serial control record and the record is set to allow automatic prediction.

The new option on the Check In wizard properties, Play Sound When Last Expected Issue Is Received, is in a new Sounds property section on the Behavior tab. The property controls whether or not a sound plays and what sound file is the default when it does play (currently disrout.wav). The property is enabled by default.

**Example:**

The serials receiver opens the Serials Check In wizard, searches for a title, and selects a serial control record. The serial control record displays the next expected issue in the Next Issue tab. The serials receiver clicks Check in Now. The Check In: Issue Received dialog appears to show the receiver the issue that was just checked in. A warning message displays in the dialog, indicating that there are no more expected issues. As the dialog appears, an audible alert plays automatically.

**Note:** Sound files are located in the \Program Files\ Sirsi\ J wfGL 3\ Sound directory on the PC.
Corrections

MARC Holdings Not Updated Correctly When Checking In Special Issues

Previously in the Check In Issues of a Serial wizard, when users received serials using the Different Issue and then Special Issue next step for serial controls with MARC holdings, the issues received would not generate the corresponding 867 and 868 tags (textual holdings statements).

The system was ignoring the settings in the Special Issue next step where the user designated whether the issue was a basic or special issue, and if it was special issue, whether it was a supplement or index.

The Different Issue/Special Issue next step has been corrected. Now, an 867 or 868 will be created instead of an 863 tag when the user works through the Special Issue next step path and clicks the Special or Index radio buttons.

Note: In the WorkFlows Java client, if the user attempts to save a duplicate special supplement or index using the same enumeration, the wizard will display the following message:

Enumeration: XXXX
Issue already received

The value “XXXX” is the duplicated enumeration.

Check in of Claimed Issue Followed by Check in of Combined Issue with Receipt Comment Yields Error Message

Previously in the Serials Checkin wizard, the system message “Serial claim not found” was incorrectly generated by the following sequence of steps.

1) Check in a claimed issue.
2) Select Different Issue and select Combine Issues.
3) After selecting the issues to combine, type in a receipt comment on the Receive Combined Issue screen.
4) Click the Check In button on Receive Combined Issue.

This has been corrected.

Combine Issues Settings not Carried Over into Combine Issues Helper

When the Combine Issues Options in the Default properties of the Check In wizard were defined, they were not carried over into the Combine Issues helper during serials checkin. The Combine Issues Options should establish the settings for the Combine Issues helper. This has been corrected.
Cursor Focus not Set in Item ID Field

When creating copies when checking in issues, if the user did not automatically create the issues, but instead wanted to manually enter the item ID numbers, the cursor was not resting in the Item ID field and it was necessary to click on this field before entering or scanning item IDs. This has been corrected.

Special Instructions Displaying when Empty

Previously, an empty special instructions pop-up window displayed if the Display Notes Before Checkin behavior property is turned on and there were no special instructions in the prediction. This has been resolved.

Serial Control without Enumeration Created 866 in Marc Holdings Record

When checking in a regular issue for a serial control record without enumeration, an 866 was created in the Marc Holdings record.

This has been corrected.

Unable to Check In Issues of a Serial Control Record

In the WorkFlows Java client, the Check In wizard was unable to check in issues of a particular serial control record. This was due to a $ being present in the extended information, which caused the system to try and resolve a label.

This has been corrected.

Create a Serial Control Wizard

Enhancements

Load Pub Pattern Data Behavior Property Added

A behavior property has been added to the Create Serial Control wizard. The Prompt to Load Bibliographic Pub Pattern Data When Available property allows the SirsiDynix Symphony administrator to control whether or not the Load Pub Pattern work flow is available when using the wizard. If the property is selected, the Load Pattern window will display in the wizard when a bibliographic record has an 891 CONSER Pub Pattern entry (or entries). If the property is cleared, the wizard will not present the Load Pub Pattern option.
Ability to Control Display of Replace Patterns Helper and Set Helper Properties

The SirsiDynix Symphony administrator can now control whether or not the Replace Patterns helper will appear in the Create Serial Control wizard. On the Helpers tab in the wizard properties, the administrator can select or clear the Replace Patterns Helper check box to make the helper available or unavailable. Additionally, if the administrator clicks the Replace Patterns helper button, he can set the new helper property that supports loading serial publication patterns from 891 CONSER Pub Pattern entries.

Corrections

Unable to Predict Issues for a Serial Control with Alpha Enumeration

When attempting to predict issues for a serial control record when the pattern contains an alpha enumeration, the following error message occurred.

You haven't entered the next expected numeration

This has been corrected.

Unable to Use a Period in a New Name Label

In the Create Serial Control wizard, if a user clicked the gadget next to the Label field on the Patterns tab, and typed a new label name, the gadget would not allow the user to type a period at the end of the name. If the user created a Name Label policy in the corresponding serial control configuration wizard, he could include a period as the last character of the label name.

The gadget in the Label field now allows users to type a period in the label name, only if it is the last character of the name.

Modify Control Wizard

Enhancements

Delete Issues Tool for Received Tab in Modify and Create Control

A new Delete Received Issue(s) tool appears on the Received Issues tab in Modify Control and in the modify state of Create Control of a serial control when the Modify Control wizard Behavior properties have Delete Received Issues selected. This property is disabled by default.

Click this tool and a table of received issues for this control appears. In the Selected column, select the check box(es) next to the received issue(s) that you wish to delete, then click Delete Issue(s). You can also select the Delete All Issues check box and click Delete Issue(s) to delete all received issues.
There are now two ways to remove received issues on the Received tab.

- Unreceive Issues on the Received tab, then Remove issues from the Expected tab.

Directly Delete Received Issues.

**Ability to Control Display of Replace Patterns Helper and Set Helper Properties**

The SirsiDynix Symphony administrator can now control whether or not the Replace Patterns helper will appear in the Modify Control wizard. On the Helpers tab in the wizard properties, the administrator can select or clear the Replace Patterns Helper check box to make the helper available or unavailable. Additionally, if the administrator clicks the Replace Patterns helper button, she can set the new helper property that supports loading serial patterns from 891 CONSER Pub Pattern entries.

**New Icon for Unreceive Issues Tool Button**

The icon for the Unreceive Issues tool button was modified to reflect the concept that the issue is now returned to the Expected tab. The functionality of the tool has not changed. Library staff who will not have access to the new Delete Issues tool should be reminded that the icon is different, but the functionality is exactly the same.

The icon previously used for the Unreceive Issues tool button (which displayed as a sheet of paper with red X) is now used for the new Delete Issues tool button. Library staff who have access to the new Delete Issues tool should be reminded that the “red X” icon represents the delete functionality.

**Corrections**

**Unable to Modify Serial Control when Title Selected from Browse List**

In the Modify Serial Control wizard, a user selected a title, modified a serial control, and selected the Title List button. After selecting a title in the browse list, the user clicked Modify Control, but the wizard displayed the message

No items found perhaps because of options

This has been corrected.
Outstanding Claims Didn’t Display on Claims Tab in the Modify Control Wizard

When the number of Claims on the Claims tab in the Modify Control wizard was greater than the "Number of issues per browse screen" property setting, the Outstanding Claims option displayed no claims, even when there were claims present. This occurred when the first 11 issues had been received normally and following issues checked in with insufficient claims.

This has been corrected.

MARC Holdings Record Changed in the Serial Control Record Links to Old Order Record

Previously in the Modify Control wizard, if the MARC Holdings record was edited, information on the Subscription tab's Fiscal Cycle, Order ID, and Line Item Number fields were changed to match an older order in some situations.

This has been corrected.
General

Corrections

Difficulties Starting SVA Service and Keeping a Connection to the Server

Previously, a site was having difficulties getting the Sirsi Voice Automation (SVA) service to start and stay started. SVA was not communicating correctly with the Netstarter service. SVA was performing a validation check for the command sequence number that it received back from the Netstarter service, and when the sequence number did not match, the connection was terminated. It was determined that this validation check was not required, and has now been removed.
Standalone/Offline

General

Corrections

Standalone and Offline Java Clients Charged Fines

The global configuration policy was set to Discharge Already Charged Items With Override. When an item was checked out in offline mode (using the standalone or offline WorkFlows Java clients) that was already charged, the previous charge would be cleared from the first user once the offline transaction was loaded. However, the first user was charged a fine. This was incorrect because the global configuration setting Discharge Already Charged Items With Override will not post fines after automatically discharging overdue items that were previously charged.

This has been corrected. The standalone and offline WorkFlows Java clients no longer charge fines in this situation.

Offline Discharge Wizard

Enhancements

Clear Date of Discharge Property Added to Offline Discharge Wizard

A new property has been added to the Offline Discharge wizard

Clear date of discharge

If the property is NOT selected, the current date will be recorded in the transaction log. All checkins will get a discharge time of 23:59. If the property is selected, the date of discharge is not recorded in the transaction log. When the file is loaded, the items discharge date is the transaction date and time in the log file.
System Configuration

General

Enhancements

Ability to Move and Copy Multiple Map Lines in Order-sensitive Policies

Previously, users were able to cut and paste only single map lines in order-sensitive policies such as the Circulation Map policy. Now, users can cut and paste multiple map lines, as well as copy map lines to create new policy maps.

The following policies have been enhanced with the cut/copy and paste features.

- Circulation Map
- Credit Rule (a new Version GL 3.2 policy)
- Default Price
- Fee Map
- Hold Map

To move map lines in a map policy, do the following.

1) Select a map line (or map lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2) Select Cut. The map line will appear highlighted and in italics.
3) After the map line is cut, select a new position in the map, and highlight a map line.
4) Right-click, and select either Insert Row Before or Insert Row After from the shortcut menu. The cut map line will be inserted either before or after the current map line.

To copy map lines in a map policy, do the following.

1) Select a map line (or map lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2) Select Copy. The map line will appear highlighted and in italics.
3) After the map line is copied, select a new position in the map, and highlight a map line.
4) Right-click, and select either Insert Row Before or Insert Row After from the shortcut menu.
5) A dialog box will open, prompting the user to type a new policy name (or names for multiple lines) for the duplicate policy.

6) Click Save, and the duplicated map line will be inserted either before or after the current map line.

If the user clicks Close, the map line is not copied.

**Exact Search Button Added for Order Sensitive Policies**

For order sensitive policies, such as the Circulation Map and Hold Map policies, an Exact Search button has been added. When this button is clicked, the search process goes through the list of policies from the bottom and finds the policy that exactly matches the selections made.

**USMARC Catalog Format Values Updated**

The SirsiDynix Symphony USMARC catalog formats have been updated and include the following types of changes.

- New catalog entry IDs
- New catalog entries
- New entry labels
- Modified catalog entries

**New Catalog Entry IDs**

New catalog entry IDs have been added: 031, 258 and 662.

The new entry IDs have the following values.

- **Name:** 031
  - **Description:** 031
  - **Purpose:** Catalog
  - **Type:** Simple Entry ID

- **Name:** 258
  - **Description:** 258
  - **Purpose:** Catalog
  - **Type:** Simple Entry ID

- **Name:** 662
  - **Description:** 662
  - **Purpose:** Catalog
  - **Type:** Simple Entry ID

**New Catalog Entries**

New catalog entries have been added: 031, 258 and 662.

The new entries have the following values.

- **Entry ID:** 031
  - **Valid Subfields:** Include a,b,c,d*,e,g,m,n,o,p,q*,r,s*,t*,u*,y*,z*,2,6
Valid Indicator1: NONE
Valid Indicator2: NONE
Label: $<cat_usmarc_031v1>

Entry ID: 258
Valid Subfields: Include a,b,6
Valid Indicator1: NONE
Valid Indicator2: NONE
Label: $<cat_usmarc_258v1>

Entry ID: 662
Valid Subfields: Include a*,b*,c*,d,e*,f*,g*,h*,2,4*,6
Valid Indicator1: NONE
Valid Indicator2: NONE
Label: $<cat_usmarc_662v1>

New Entry Labels

The following new entry labels have been added.

<table>
<thead>
<tr>
<th>Entry</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>031</td>
<td>Musical incipits</td>
</tr>
<tr>
<td>258</td>
<td>Philatelic issue</td>
</tr>
<tr>
<td>662</td>
<td>Hierarchical subject</td>
</tr>
</tbody>
</table>

Modified Catalog Entries

The following catalog entries have been modified.

<table>
<thead>
<tr>
<th>Entry</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>016</td>
<td>Valid indicator 1 includes SPACE, 7</td>
</tr>
<tr>
<td>017</td>
<td>Valid subfields include d,i</td>
</tr>
<tr>
<td>026</td>
<td>Subfields a, b, e not repeatable</td>
</tr>
<tr>
<td>041</td>
<td>Valid subfields include g*</td>
</tr>
<tr>
<td>046</td>
<td>Valid subfields include 2</td>
</tr>
<tr>
<td>048</td>
<td>Valid indicator 2 includes SPACE, 7, valid subfields include 2</td>
</tr>
<tr>
<td>052</td>
<td>Valid subfields include d*,2</td>
</tr>
<tr>
<td>088</td>
<td>Valid subfields include z*</td>
</tr>
<tr>
<td>100</td>
<td>Subfield 1 is not repeatable</td>
</tr>
<tr>
<td>260</td>
<td>Subfields e,f,g are repeatable</td>
</tr>
<tr>
<td>342</td>
<td>Valid subfields do not include y</td>
</tr>
<tr>
<td>490</td>
<td>Valid indicator 1 includes 0,1</td>
</tr>
</tbody>
</table>
Note: These USMARC catalog format enhancements and modifications are delivered for new SirsiDynix Symphony systems only. Existing sites will need to modify their USMARC catalog formats to reflect these changes. For information about modifying formats and format entries refer to the WorkFlows online help topic FAQs: Working with Format Policies.

Catalog and Authority Formats Updated with Latest Changes from Library of Congress

SirsiDynix Symphony cataloging and authority formats have been updated with the latest changes from the Library of Congress. The following format updates are for new SirsiDynix Symphony systems only.

Catalog Format Changes

In the catalog formats, new subfield codes and indicators were added, and a non-repeatable field was changed.

<table>
<thead>
<tr>
<th>Entry</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>505</td>
<td>Valid indicator 1 does not include SPACE</td>
</tr>
<tr>
<td>521</td>
<td>Subfield a is repeatable</td>
</tr>
<tr>
<td>533</td>
<td>Subfields b,c,f,m,n are repeatable</td>
</tr>
<tr>
<td>534</td>
<td>Subfields f,k,n,x,z are repeatable</td>
</tr>
<tr>
<td>535</td>
<td>Subfields b,c,d are repeatable</td>
</tr>
<tr>
<td>561</td>
<td>Valid indicator 1 includes SPACE,0,1</td>
</tr>
<tr>
<td>583</td>
<td>Valid indicator 1 includes SPACE,0,1</td>
</tr>
<tr>
<td>630</td>
<td>Valid subfields include e*,4*</td>
</tr>
<tr>
<td>650</td>
<td>Valid subfields include 4*, subfield e is repeatable</td>
</tr>
<tr>
<td>651</td>
<td>Valid subfields include e*,4*</td>
</tr>
<tr>
<td>654</td>
<td>Valid subfields include e*,4*</td>
</tr>
<tr>
<td>711</td>
<td>Valid subfields do not include o</td>
</tr>
<tr>
<td>752</td>
<td>Valid subfields include f*,g*,h*,2, subfields a,c are repeatable</td>
</tr>
<tr>
<td>780</td>
<td>Valid subfields do not include p</td>
</tr>
<tr>
<td>785</td>
<td>Valid subfields do not include p</td>
</tr>
<tr>
<td>786</td>
<td>Valid subfields include v</td>
</tr>
<tr>
<td>856</td>
<td>Valid indicator 1 includes SPACE</td>
</tr>
</tbody>
</table>
New Content Designators — Subfield Codes

- \$f - Standardized terminology for access restriction in 506 (Restrictions on Access Note)
- \$j - Relator term in 111 (Main Entry -- Meeting Name)
- \$j - Relator term in 611 (Subject Added Entry -- Meeting Name)
- \$j - Relator term in 711 (Added Entry -- Meeting Name)
- \$j - Relator term in 811 (Series Added Entry -- Meeting Name)
- \$r - Distance from earth in 034 (Coded Cartographic Mathematical Data)
- \$u - Uniform Resource Identifier in 852 (Location)
- \$x - Beginning date in 034 (Coded Cartographic Mathematical Data)
- \$y - Ending date in 034 (Coded Cartographic Mathematical Data)
- \$z - Name of extraterrestrial body in 034 (Coded Cartographic Mathematical Data)
- \$2 - Source in 034 (Coded Cartographic Mathematical Data)
- \$2 - Source of code in 047 (Form of Musical Composition Code)
- \$2 - Source of term in 506 (Restrictions on Access Note)

Additionally, the subfield 8, Field link and sequence number (R), was added to many bibliographic entries.

New Content Designators — Indicators

- 047 2nd indicator (Source of code): # (MARC musical composition code)
- 047 2nd indicator (Source of code): 7 (Source specified in subfield \$2)
- 506 1st indicator (Restriction): # (No information provided)
- 506 1st indicator (Restriction): 0 (No restrictions)
- 506 1st indicator (Restriction): 1 (Restrictions apply)

Changes in Repeatability

- 047 - Form of musical composition code was changed from Not repeatable (NR) to Repeatable (R)

Authority Format Changes

In the authority formats, a new field and new subfield codes were added.

New Content Designators — Field

- 034 - Coded Cartographic Mathematical Data
  - Added a new Entry ID policy for 034
  - Added the 034 entry with all its indicators and subfields to all authority formats

New Content Designators — Subfield Codes

- \$j - Relator term in 111 (Heading -- Meeting Name)
- $j - Relator term in 411 (See From Tracing -- Meeting Name)
- $j - Relator term in 511 (See Also From Tracing -- Meeting Name)
- $j - Relator term in 711 (Established Heading Linking Entry -- Meeting Name)

**MARC Community Information Format Changes**

- $j - Relator term in 111 (Main Entry -- Meeting Name)
- $j - Relator term in 611 (Subject Added Entry -- Meeting Name)
- $j - Relator term in 711 (Added Entry -- Meeting Name)

**MARC21 Holdings (BIBHOLD) Format Change**

Added field of 506 (Restrictions on access note)

**Dynamic Indexing Log Files Now Written to a User-defined Path on the Server**

Previously on UNIX and Linux versions systems, the dynamic indexing scripts wrote their log files to the same / tmp directory on the server. If a server was configured to run multiple Unicorn systems, the log files in the / tmp directory could be overwritten.

Now, SirsiDynix Symphony administrators can define in the / Unicorn/ Config/ upath file the /rpttemp directories to which the report log files should be written for each system. This will prevent logs from multiple SirsiDynix Symphony systems on the same server from overwriting one another.

**Prepare_webcat and setup_webcat Scripts Can Now Write Temporary Files to User-defined Paths on the Server**

On systems that run more than one instance of Unicorn, users noticed problems when running several instances of the prepare_webcat and setup_webcat scripts for the different Unicorn systems during a Unicorn upgrade. These scripts stored temporary files to the /tmp directory on the server, and it was possible to overwrite these files since the file names were not unique to each instance of Unicorn.

Now, the prepare_webcat and setup_webcat scripts check to see if the site is a multiple SirsiDynix Symphony system, and if so, they will write the temporary files to the /rpttemp directories defined for each system in the /Unicorn/ Config/ upath file. If the site is not a multiple SirsiDynix Symphony system, the scripts will write temporary files to the /tmp directory, as before.

**Data Type Attribute of the Entry Description in Format Policies No Longer Validated**

The Data Type Attribute of the Entry Description in Format policies will no longer be validated to check if the data is alphabetic, alphanumeric, numeric or printable. This is regardless of how the global configuration for Record Editor Validation is set.
Corrections

Entry ID and Course Term Policies Now Allow Forward Slash (/) Character in Policy Names

For most policies, special characters are not allowed in the policy names. Special characters can interfere with report scripts that select policies by policy name. Some exceptions for special characters have been made to accommodate particular needs, such as the forward slash (/) between City/State in the User Address policies. Now, the Entry ID policies and Course Term policies will allow the forward slash character (/) in the policy names.

Note: The underscore (_) and dash (-) characters can be used in all policy names. To determine if a policy allows any other special characters in the policy name, see the policy topic in the WorkFlows client online Help.

Policies File Lock Wasn’t Removed in WorkFlows Java Client

A file named policies.lck gets created any time an administrator works with Unicorn policies. Once the policy wizard or WorkFlows is closed, however, the policies.lck file should be removed. Instead, the policies.lck file remained in place and caused the following error message in both the WorkFlows Java and C clients.

The records are currently in use. Please try again later

This has been corrected.

OCLC Connections Wizard Had No Field for Domain/IP Address

In the WorkFlows Java client, the OCLC Connections wizard was missing the field for domain/IP address. This was causing the remainder of the data, such as port number and login ID, to be placed in the incorrect positions.

This has been corrected.

Customize Policy List Wizard

Enhancements

Policy Lists for the Tax Policy and Tax Structure Policy Can Be Customized with the Customize Policy List Wizard

The Customize Policy List wizard has been enhanced with the addition of the Tax policy and Tax Structure policy on the wizard’s Acquisition Configuration tab. Using the Customize Policy List wizard, library system administrators can now control the Tax policies or Tax Structure policies that users can select in wizards and gadgets system-wide or by library. For instructions on customizing policy lists, refer to the online help for the WorkFlows Java Client.
Note: The Tax policy and Tax Structure policy display on the Acquisition Configuration tab in the Customize Policy List wizard only when the InvoiceTax feature is configured.

Corrections

Selection of the Excludes Selected Policies Option is Retained in the Customize Policy List Wizard

If a policy list was customized system-wide using the Customize Policy List wizard to exclude policies from policy lists, the Select All check box became selected even though the user selected only one policy to exclude. After clearing the Select All check box and saving the policy list customization, if the user displayed the modified policy list in the Customize Policy List wizard again, the Includes Selected Policies option would be selected instead of the Excludes Selected Policies option.

The Customize Policy List wizard has been corrected so the Select All check box will not be selected automatically when the user begins to select individual policies to exclude from system-wide policy lists. In addition, when the modified policy list is displayed in the wizard after the customization is saved, the Excludes Selected Policies option is selected because the policy list was customized to exclude certain policies from system-wide policy lists.

Customize Policy List Wizard Displays Policy Lists That Have Been Customized to Exclude Policies

When customizing a policy list with the Customize Policy List wizard to exclude policies, the policy list would no longer display in the list of policy lists once the customization was saved.

Example

In the Customize Policy List wizard, the Boyington Library administrator customized the User Profile policy list to exclude the STUDENT policy from any User Profile policy lists used by the Boyington staff. However, when the administrator saved the per-library customization to the User Profile policy list, the User Profile policy no longer displayed in the User Configuration tab of the Customize Policy List wizard.

The Customize Policy List wizard has been corrected so that if a policy list is modified to exclude policies from a library-specific policy list or a system-wide policy list, the customized policy list displays in the list of policy lists.

Customize Policy List Policies Couldn’t Use Exclude Option

In the WorkFlows Java client, the Customize Policy List wizard’s Excludes Selected Policies option didn’t work to exclude the appropriate policies.

This has been corrected.
Customize Policy List Wizard Correctly Saves Changes to System-Wide Policy Lists

Changes to policy lists were not being saved when the Customize Policy List wizard was used to customize policy lists for system-wide use. The Customize Policy List wizard has been corrected so the policy list modifications are saved, and the policy lists display properly for all libraries in the system.

Access Control Configuration

Enhancements

User Access Policy Wizard Folders and Wizards Sorted

Previously, the list of module folders and wizards on Access List tab of the User Access policies were not ordered in any particular manner. Now, the module folders and wizard lists are sorted alphabetically.

Access List for K12 Web Client Tab Added to User Access Wizard

The User Access wizard has been enhanced with the Access List for K12 Web Client tab, which is used to control user access to the folders, tabs, buttons, and reports available in SirsiDynix's K12 Web Client. The addition of this tab allows SirsiDynix Symphony administrators to grant access to the K12 Web Client by creating or modifying User Access policies in the WorkFlows Java client.

Note: SirsiDynix delivers K12 Web Client access lists for ADMIN, SIRSI, PUBLIC, CIRC, TECH, SCANNER, and WEBSERVER.

Corrections

Barcode Exempt Policy Wizard Does Not Allow More Than 10 Characters for New Policy Name for Copy

Previously in the Barcode Exempt policy wizard in the Access Control Configuration group, if Copy was selected, the New Policy Name text box only allowed the entry of 10 characters. However, the maximum number of characters should have been 20 characters.

This has been corrected.

Barcode Policy Labels Not Translating to French

Two labels in the Access Control configuration wizards, for the Barcode policy wizard and Barcode Format policy wizard, were not being translated into French.

This has been corrected.

When the user access list was updated in the WorkFlows Java client and the Update Wizard Accesslist for Previous Client check box was selected, the changes to the access list for the Outreach wizards, Request wizards, and the Finished Reports wizard were not made in the access list for the WorkFlows C client. In addition, changes made in the WorkFlows Java client to the access list for the Acquisitions wizards were not made to the Acquisitions commands access list for the WorkFlows C client.

If the user cleared the Update Wizard Accesslist for Previous Client check box and saved the modification, the change was not saved. When the user viewed the selected access list again, the Update Wizard Accesslist for Previous Client check box was selected.

The User Access wizard in the WorkFlows Java client has been corrected so the access list modifications for Outreach wizards, Request wizards, Acquisitions wizards, and the Finished Reports wizard are saved correctly to the WorkFlows C client access list when the Update Wizard Accesslist for Previous Client check box is selected. If the Update Wizard Accesslist for Previous Client check box is cleared, the User Access wizard will now correctly save the check box setting.

Request List Policy Changes Are Saved Correctly

If the Requests attribute in a selected Request List policy was modified, the changes were not saved when the user clicked Save. The Request List wizard has been corrected so that modifications to the Requests attribute are saved properly.

Operator Policies in French WorkFlows Java Client

An Operator policy was created in the English WorkFlows Java client. When the administrator switched to the French WorkFlows Java client and tried to work with the Operator policy, the overrides were unable to be modified.

The administrator was also unable to create an Operator policy with the desired override while in French WorkFlows Java client.

This has been corrected.
Acquisitions Configuration

Enhancements

Fund Library Authorization Wizard Added

The Fund Library Authorization wizard has been added to the Acquisition Configuration wizards. The Fund Library Authorization wizard defines policies to specify the libraries for which a fund cycle can be used to order materials, based on whether the fund cycle is authorized for the holding code library.

Note: Although the Fund Library Authorization wizard is available in single library systems and multilibrary systems, the policies defined by the wizard apply only in multilibrary systems. In single library systems, all funds are assumed to be authorized for use by the library.

The specified libraries in a Fund Library Authorization policy are compared to the libraries of the holding codes to determine if the fund cycle is permitted to be used to order materials for a library. If a fund cycle or fund cycles can be used to order materials for only one library, or for multiple libraries, a Fund Library Authorization policy must be defined for every unique combination of libraries. A Fund Library Authorization policy is not required to be defined for all libraries; an empty Library Authorization field in the fund cycle record indicates that the fund cycle is authorized for all libraries.

Examples

A fund cycle can only be used to order materials for the Education Library. The Fund Library Authorization policy named EDUCATION specifies only the Education Library.

A fund cycle can be used for the College Library and Institute Library, but not the Vocation Library or the Law Library. The Fund Library Authorization policy named ACADEMIC specifies the College Library and Institute Library.

New Invoice Taxes Policies

To support the new Invoice Tax feature, three new policy wizards have been developed. These wizards display only when the Invoice Tax feature is configured.

- Tax Wizard — Defines the attributes of the individual taxes applied to invoices.
- Tax Structure Wizard — Defines tax structures that allow multiple taxes to be combined on an invoice.
- X12 Library Tax Wizard — Maps an invoice library to a tax structure, so that when invoices are created using the X12 invoice loader (used by the Serials X12 Invoices and Book X12 Invoices reports), the correct tax structure is applied to the newly created invoice/invoice lines.
Tax Wizard

The Tax policy defines attributes of the individual taxes applied to invoices. A NOTAX policy is delivered, where there is no Tax 1, 2, or 3 specified. This policy is used when invoices are not subject to taxes.

The Tax Structure policy includes the following attributes.

- **Name** — This attribute uniquely identifies a specific Tax policy.
- **Description** — This attribute provides more information about the policy and its use by the library.
- **Percentage** — Type the tax percentage. This field can support up to two decimal places, such as 5.58%.

**Tax Structure Wizard**

The Tax Structure policy allows multiple taxes to be combined on an invoice. A tax structure can include up to three individual taxes, typically City, County, and State in the U.S. Tax policies are defined using the Tax wizard.

The user needs to keep in mind the following.

- Tax structure is defined at the invoice level.
- Tax exemptions are defined at invoice line level.

The tax structure applied to an invoice is stored in the invoice record. The tax structure will be prompted when an invoice is created, and a default property in the Add Invoice wizard will supply the default tax structure. The tax structure is required so that SirsiDynix Symphony can determine which taxes should be calculated on the invoice amount and which taxes should be calculated on a subtotal that includes the taxes calculated on the invoice amount.

A NOTAX policy is delivered, where there is no Tax 1, 2, or 3 specified. This policy is used when invoices are not subject to taxes.

The Tax Structure policy includes the following attributes.

- **Name** — This attribute uniquely identifies a specific Tax Structure policy.
- **Description** — This attribute provides more information about the policy and its use by the library.
- **Tax 1** — Select a Tax policy from the drop-down list. This value is required, and by default is calculated on the price of the item, exclusive of any other tax.
- **Allow Exemptions (Tax 1)** — Select this check box to permit invoice line exemptions for Tax 1.
- **Tax 2** — Select a Tax policy from the drop-down list. This tax cannot be specified unless there is a Tax 1 defined.
- **Calculate Tax 2 On a Total That Does Not Include Tax 1** — If this option is selected, Tax 2 percentage tax rates are applied to the invoice subtotal only.
Calculate Tax 2 On a Total That Includes Tax 1 — If this option is selected, Tax 2 percentage tax rates are applied to the invoice subtotal plus the Tax 1 amount.

Allow Exemptions (Tax 2) — Select this check box to permit invoice line exemptions for Tax 2.

Tax 3 — Select a Tax policy from the drop-down list. This tax cannot be specified unless Tax 1 and Tax 2 are defined.

Calculate Tax 3 On a Total That Does Not Include Tax 1 and Tax 2 — If this option is selected, Tax 3 percentage tax rates are applied to the invoice subtotal only.

Calculate Tax 3 On a Total That Includes Tax 1 and Tax 2 — If this option is selected, Tax 3 percentage tax rates are applied to the invoice subtotal plus the Tax 1 and Tax 3 amounts.

Allow Exemptions (Tax 3) — Select this check box to permit invoice line exemptions for Tax 3.

X12 Library Tax Wizard

The new X12 Library Tax wizard maps an invoice library to a tax structure, so that when invoices are created using the X12 invoice loader (used by the Serials X12 Invoices and Book X12 Invoices reports), the correct tax structure is applied to the newly created invoice/invoice lines. This wizard maps tax types specified in the X12 invoices to specific tax policies based on the library. Tax amounts in X12 invoices are defined in either of the following two segments.

- TXI, coded GS, LS, or TX – Each segment will create an invoice line linked to a tax/fund. This policy will supply the tax field for each tax/fund linked invoice line.

- SAC20 code H50 – Total tax can be specified in this segment. This policy will supply the tax field for each tax/fund linked invoice line coded this way.

The following tax codes are most commonly used by the book industry.

- CG – Federal Value-added Tax (GST) on Goods
- GS – Goods and Services Tax
- LS – State and Local Sales Tax
- PG – State or Provincial Tax on Goods
- TX – All Taxes
- VA – Value Added Tax
- ZZ – Mutually Defined

Important Note: If the Invoice Tax feature is configured on the library’s system, and the library plans to use X12 invoicing, X12 Library Tax policies must be defined. There should be an X12 Library Tax policy for each library that “owns” invoices, but no more than the number of libraries on the system. In centralized ordering systems, there may only be one X12 Library Tax policy.
The X12 Library Tax policy contains the following attributes.

- **Name** — This attribute uniquely identifies a specific X12 Library Tax policy.
- **Description** — This attribute describes how the policy is used by the library.
- **Library** — This attribute indicates the library that "owns" the invoices. Select a Library policy from the drop-down list.
- **Tax Structure** — This attribute maps a Tax Structure policy to the library that "owns" the invoices. Select only one Tax Structure policy from the drop-down list.
- **Tax 1 Mapping** — Use the gadget to select multiple tax type codes that map to the Tax 1 policy of the tax structure. Up to 20 codes can be selected. At a minimum, the user should consider mapping the most commonly used codes GS, LS, and TX. For available codes and code definitions, see “Valid Tax Codes for Invoice Taxes” in the WorkFlows Java client online Help.

**Note:** If there is only one tax in the tax structure, Tax 1, consider mapping the tax to TX and ZZ.

- **Tax 2 Mapping** — Use the gadget to select multiple tax type codes that map to the Tax 2 policy of the tax structure. Up to 20 codes can be selected. At a minimum, the user should consider mapping the most commonly used codes GS, LS, and TX. For available codes and code definitions, see “Valid Tax Codes for Invoice Taxes” in the WorkFlows Java client online Help.

- **Tax 3 Mapping** — Use the gadget to select multiple tax type codes that map to the Tax 3 policy of the tax structure. Up to 20 codes can be selected. At a minimum, the user should consider mapping the most commonly used codes GS, LS, and TX. For available codes and code definitions, see “Valid Tax Codes for Invoice Taxes” in the WorkFlows Java client online Help.

- **Tax – Service, Promotion, Allowance, or Charge Code Mapping** — This attribute defines the tax policy to be applied for total tax on the invoice. Select one tax policy from the drop-down list. The tax policies listed come from the tax structure previously selected in this wizard's Tax Structure attribute.
Tax Tab Added to X12 Invoices Reports

The Serials X12 Invoices (Serinvoicex12) report and the Serials X12 Invoices (Serinvoicex12) report have been enhanced with the Tax tab. The tab contains options for loading vendor-supplied tax amounts into linked invoice lines. The tab includes the following options.

- **Load Vendor Supplied Tax Amounts in Fund Linked Invoice Lines**
  loads the tax amount information from the vendor into Fund invoice lines linked to the fund specified in the Tax Fund ID field.

- **Load Vendor Supplied Tax Amounts in Tax/Fund Linked Invoice Lines**
  loads the tax amount information from the vendor into Tax/Fund invoice lines linked to the fund specified in the Tax Fund ID field. This option is selected by default.

- **Tax Fund ID**
  selects the fund to be specified on the invoice lines. This field is required.

**Note:** If X12 Invoicing is configured, the X12 Library Tax policy must be configured before the X12 invoice reports will load vendor-supplied tax amounts into invoice lines.

New Report to Lock Invoices Added to the Acquisition Report Group

The Lock Invoices report (Lockinvoice) in the Acquisition report group sets the date locked for selected invoices in batch. These invoices are considered finalized.

**Note:** The Lock Invoices report is password protected. Invoices that need proration or have underlinked lines cannot be locked using this report. For invoices that need proration, the report log will display a message and the invoice ID, library, and vendor ID for each invoice that cannot be locked. For invoices with underlinked lines, the report log will display a message and the invoice ID, library, vendor ID, and the line number of the underlinked line for each invoice that cannot be locked.

This report displays the following tabs.

- **Basic Tab** — Displays basic information about the report, such as Report Name and Description.

- **Invoice Selection Tab** — Allows the user to limit report results by invoice characteristics such as Date Created, Date Ready, Library, and Fiscal Cycle. The Library selection is required to run the report.

- **Vendor Selection Tab** — Allows the user to limit report results by vendor characteristics such as Library, Customer Number, and vendor Name. The Library Selection is required to run this report.
**New Ability to Print Fund Summaries for Invoice Reports**

A new option has been added to the invoice reports for printing fund summaries similar to the summaries that appear in the Save Funds Summary helper. On the Print Invoice tab in the List Invoices and List Invoices, Lines reports, a user can select the Fund Summary check box to print fund summaries.

Fund summary totals are also printed. For invoices, the total will be the sum of the invoice fund summaries.

**Note:** Fund summary amounts are always in the native currency.

Some ways to use this new fund summary option include the following.

- Run a List Invoices report to select a set of invoices (for example, created in October, or locked in October) and get a summary of how those invoices impacted the library's funds.

- Run a List Invoices, Lines report to select a set of invoice lines (for example, paid in October) and get a summary of how those invoice lines impacted the library's funds.

**Example: Sample List Invoice Report Output with Only Fund Summary Option Selected**

```
Invoice ID: INV-4                                 Vendor ID: BLACKWEL
Invoice control number: 13                  Created in: 2005
fund summary--

<table>
<thead>
<tr>
<th>Fund ID</th>
<th>Fiscal Cycle</th>
<th>Account Number</th>
<th>Amount Invoiced</th>
<th>Amount Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>HISTORY</td>
<td>2005</td>
<td>80165</td>
<td>$0.00</td>
<td>$44.97</td>
</tr>
<tr>
<td>SCIENCE</td>
<td>2005</td>
<td>80397</td>
<td>$0.00</td>
<td>$44.98</td>
</tr>
</tbody>
</table>
```

**New List Invoices for Vendor Report**

The List Invoices for Vendor (Listvendinv) report lists invoices by vendor and invoice totals for each vendor. A user can list vendor invoices by time periods, such as fiscal cycle, date created, or date invoiced. Also, the user can list vendor fund summary totals for the selected invoices.

This report contains the following tabs.

- **Basic Tab** – Displays basic information about the report, such as Report Name and Description.

- **Vendor Selection Tab** – Allows the user to limit report results by vendor characteristics such as Vendor Groups, Library, and Amount Unfunded/Invoiced.
• Invoice Selection Tab – Allows the user to limit report results by invoice characteristics such as Date Created, Library, and Fiscal Cycle. Additionally, the user can specify time periods for vendor invoices by selecting an invoice attribute, such as Created in Fiscal Cycle, or a date, such as Date Created, Date Invoiced, Date Paid, Date Ready, or Date Locked.

• Invoice Line Selection Tab – Allows the user to limit report results by invoice line characteristics such as Date Created, Library, and Date Paid.

• Sorting Tab - Allows the user to sort the report results, either by Invoice ID/Vendor ID or Vendor ID/Invoice ID.

• Print Invoice Tab – Allows the user to control what Invoice and Invoice Line information prints to the report output. Additionally, the user can select Fund Summary Totals, and the report will print a fund summary for each vendor

**Corrections**

**Ship To Field Missing in Order Map for Holding Distribution**

In the WorkFlows Java client, when adding a Holding Distribution in the Order Map policy, the Ship To field was not added.

This has been corrected. The Ship To field is now added with the Holding Distribution.

**Cataloging Configuration**

**Enhancements**

**New 891 (CONSER) Entry Added to Serial Format**

The SERIAL catalog format has been enhanced with the 891 (CONSER) entry. If a serial record has an 891 Pub Pattern entry (or entries), SirsiDynix Symphony will analyze the subfields in the entry and maps the values to SirsiDynix Symphony serial control patterns. The new 891 entry includes the following values.

- * Entry ID : 891
- * Entry Number : 891
- * Valid Subfields : Include a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,u,v*,w,x*,y*,z*,3,8,9
- * Valid Indicator1 : 0,1,2,3,4,5
- * Valid Indicator2 : 0,1,2,3,4,5
- * Entry Type : NONE
- * Data Type : ANY
- * Minimum Size : 0
- * Maximum Size : 9999
- * Indicator1 Default : NONE
- * Indicator2 Default : NONE
- * Entry Default : NONE
- * Repeatable : YES
- * Required : NO
- *Editable : YES
* Entry Punctuations : NO
* List Field1 Rank : NONE
* List Field2 Rank : NONE
* List Field3 Rank : NONE
* List Field4 Rank : NONE
* Hypertext Searchname : NONE
* Load Subfields : ALL
* Export Subfields : ALL

Display Variation(s) -----------------
* Indicator1 : ANY
* Indicator2 : ANY
* Label : CONSER pub. pattern
* Display Subfields : ALL
* Send Unformatted : NO

**Note:** The 891 entry is added to the SERIAL catalog format for new deliveries only. Existing sites will need to add this entry to their SERIAL format. For information on how to add a format entry, see “How do I create a new entry (field) in a format?” in “FAQs: Working with Formats” in the WorkFlows Java client online Help.

**New CONSER Pub Pattern Entry Type**

Additionally, the new CONSER Pub Pattern Entry Type was created. This Entry Type is used only for the 891 entry which includes the CONSER publication pattern chronologies. This Entry Type supports the internal processing SirsiDynix Symphony performs during the load pattern work flow in serial control wizards.

**Catalog Format Authority Cascading Subfields Updated**

Some SirsiDynix Symphony catalog format entries have been updated with new authority cascading subfield values. When bibliographic headings are checked against the authority file, if no match is found, the heading's cascading subfields are dropped off, one at a time, in an attempt to match shorter and shorter versions of the heading against the authority file. The previous Unicorn catalog formats needed some enhancement of these cascading subfields.

The cascading subfield changes are as follows.

Entry ID : 100
Current Authority Cascade Subfields : e,w,?,=
New Authority Cascade Subfields : e,f,h,k,l,n,p,t,w,4,6,8,9,=,?

Entry ID : 110
Current Authority Cascade Subfields : w,?,=
New Authority Cascade Subfields : e,f,h,k,l,p,t,w,4,6,8,9,=,?

Entry ID : 111
Current Authority Cascade Subfields : w,?,=
New Authority Cascade Subfields : f,h,k,l,t,w,4,6,8,9,=,?

Entry ID : 130
Current Authority Cascade Subfields : w,?,=
New Authority Cascade Subfields : e,f,h,k,l,n,o,p,r,s,t,w,6,8,9,=,?
Entry ID : 600
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : e,f,h,k,l,m,n,o,p,r,s,t,v,w,x,y,z,3,4,5,6,8,9,=?

Entry ID : 610
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : e,f,h,k,l,m,n,o,p,r,s,t,v,w,x,y,z,3,4,5,6,8,9,=?

Entry ID : 611
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : f,h,k,l,s,t,v,w,x,y,z,3,4,5,6,8,9,=?

Entry ID : 630
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : e,f,h,k,l,m,n,o,p,r,s,t,v,w,x,y,z,3,4,5,6,8,9,=?

Entry ID : 650
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : e,h,v,w,x,y,z,3,4,5,6,8,9,=?

Entry ID : 651
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : e,h,v,w,x,y,z,3,4,5,6,8,9,=?

Entry ID : 655
Current Authority Cascade Subfields : w,v,x,y,z,?= 
New Authority Cascade Subfields : e,h,v,w,x,y,z,3,5,6,8,9,=?

Entry ID : 700
Current Authority Cascade Subfields : 4,e,w,?= 
New Authority Cascade Subfields : e,f,h,k,l,m,n,o,p,r,s,t,v,x,3,4,5,6,8,9,=?

Entry ID : 710
Current Authority Cascade Subfields : 4,w,?= 
New Authority Cascade Subfields : e,f,h,k,l,m,n,o,p,r,s,t,v,x,3,4,5,6,8,9,=?

Entry ID : 711
Current Authority Cascade Subfields : w,?= 
New Authority Cascade Subfields : f,h,k,l,s,t,w,x,3,4,5,6,8,9,=?

Entry ID : 730
Current Authority Cascade Subfields : w,?= 
New Authority Cascade Subfields : e,f,h,k,l,m,n,o,p,r,s,t,w,x,3,4,5,6,8,9,=?

Note: The new Authority Cascade Subfield values are delivered to new SirsiDynix Symphony systems only. Existing sites will need to update their catalog formats with these values.
Modifying Cascading Subfield Values

In the WorkFlows Java client, to modify the cascade subfields of a format entry, do the following:

1) On the Configuration toolbar, click the Catalog Format wizard in the Cataloging Configuration group.
2) Select a catalog format, such as MARC, and click Modify.
3) Click the Entries tab.
4) Select an entry, such as 100, and click Modify.
5) Click the Authority tab.
6) Select the authority variation in the List of Authority variations. The attribute values for this variation will appear.
7) Click the gadget in the Cascade Subfields box.
8) Using the Cascade Subfields gadget, click the Exclude radio button and select the subfields to be excluded.
9) Click OK to save the subfield changes.
10) Click Save to save the updated authority variation values for this entry.
11) Select another entry, such as 110, and follow the previous steps for modifying the Cascade Subfields.
12) When finished modifying the format entries, click Save.
13) Follow the previous steps to modify the other MARC formats, as required.

Marc Editor Help Wizard Enhancements

In the WorkFlows Java client, the following enhancements have been added to the Marc Editor Wizard. The additions/deletions of indicators and subfields are now recognized and display as follows:

- When the MARC Editor Help wizard is opened and a format selected, the help text for valid indicators and subfields are all displayed as read-only
- When the MARC Editor Help wizard is opened and a format selected, indicators and subfields that are obsolete are now included
- The text [Obsolete] is included in the appropriate indicators and subfields in the description column

When the Modify next step button is selected, the obsolete indicators and subfields continue to be displayed as read-only
Corrections

**Newly Created Browse Index Policies Caused Searching to Fail**

When a new Browse Index policy was created, after the next halt and run of Unicorn services no searching was possible. To correct, new headdsp databases needed to be manually created.

This has been corrected. Now the necessary headdsp databases are created automatically upon creation of the Browse Index policies.

**880 Tag Will Now Hyperlink**

The 880 tag subfield 6 indicates the entry that will be used for indexing. This change allows the value in the subfield 6 to also be used for hypertext searching. For example, if “245” is in the 880 subfield 6, the 880 will hyperlink like a title.

**Unable to Deselect Use Attribute**

When creating a Keyword Index policy, the Use Attribute was already selected and could not be deselected. This has been corrected.

**ISXN Keyword Index Policy Search Not Working**

A new keyword index policy called ISXN was created at a site. The keyword index policy was a synonym list that contained both the 020 and 022 indexes. Search options were created to use the ISXN keyword search in both WorkFlows and iLink. However, searching a known ISBN using this index didn’t retrieve the desired record. The only ISBN searches that did work using the ISXN keyword index was a search string that was truncated or contained an “X”.

This has been corrected. The ISXN search will now retrieve the desired record(s).

**Messages No Longer Display in Report Log When a Catalog Format Policy Has Two Browse Index Variations**

If a Catalog Format policy was configured to have two browse index variations for an entry, and the variations indexed different sets of subfields, messages similar to the following would display in the Add, Delete, Update (Adutext) report log when the report ran after call numbers or copies were added to catalog records.

```
**error number 111 on headdsp start, key=45230
**HEADDSP Database error--unable to process request
```

The heading program has been corrected so that if a Catalog Format policy is configured to have two browse index variations for an entry, the HEADDSP messages no longer display in the Add, Delete, Update report log.
Entries Not Indexed Because of Corrupted Settings Files

Previously, certain entries weren’t being indexed because the Indicator 1 and Indicator 2 fields in the keyword index variations were empty. Unless the Valid Indicators list for the indicator is blank in the entry description, the keyword variation indicator field is not considered a match unless it contains the correct indicator value or an asterisk (*) for “any value.” But, these indicator fields were empty, and when the Valid Indicators list was populated, the fields would not match. As a result, the files that store keyword index variation settings were corrupted, and as a result some entries that should have been indexed were not included.

If your site is experiencing this problem, contact SirsiDynix Client Care so that they can run a repair script for the files that store keyword index variations. Affected entries in any catalog records added or modified after the repair script has been run will be indexed. To correct already indexed titles, the Rebuild Text Databases report must be run.

Display Variations Did Not List All Valid Indicator Choices if * Was Listed

In the WorkFlows Java client, when adding a display variation in the Catalog Format policies, if an asterisk (*) was listed the pulldown list for indicator values, valid indicator values would not display.

This has been corrected. Valid indicator values will now display in the pulldown list even if an asterisk (*) is included in the list.

Circulation Configuration

Enhancements

New Credit Reason Wizard to Support Patron Credit Account Feature

In SirsiDynix Symphony, users may have money credited to an account by a library staff member at a workstation. Each time a patron account is credited, a credit reason is recorded with the transaction. This credit reason indicates the purpose of the credit. Recording the reason for a credit can prove useful to both the library staff member and the SirsiDynix Symphony administrator to determine why a credit was created, such as refund credit or deposit credit.

Using the Credit Reason wizard, you can define Credit Reason policies, such as REFUND, DEPOSIT, AUTOPAY, and so forth. The Credit Reason wizard is located on the Configuration toolbar in the Circulation Configuration group.
The Credit Reason policy includes the following attributes.

- **Name** — This attribute is used to define the policy name or name of the credit reason.
- **Description** — This attribute provides more information about the policy and its use by the library.
- **Type** — This attribute determines the type of transaction the credit reason is used for. There are two transaction types: Deposit and Withdrawal. Select a type from the drop-down list.
  - **Deposit** — This type of transaction adds money to a patron’s credit account. Examples of a Deposit type credit reason are REFUND or DEPOSIT.
  - **Withdrawal** — This type of transaction deducts money from a patron’s account. Examples of a Withdrawal type credit reason are AUTOPAY or CLOSEACCT.

**New Credit Rule Wizard to Support Patron Credit Account Feature**

The Credit Rule wizard to create a new Credit Rule policies. Credit Rule policies determine the basic rules regarding credit accounts. Credit rules are “mapped” to specific libraries and user profiles.

Credit rule policies are order-sensitive. Since SirsiDynix Symphony looks for “matching” credit rules from the bottom of the policy map up, the order of the credit rule map lines is important. Use the Cut and Insert Row Before or Insert Row After shortcut commands to order the map. This policy also has a Search feature that allows users to find a specific map line.

The Credit Rule policy contains the following attributes.

- **Name** — This attribute uniquely identifies a specific Credit Rule policy.
- **Description** — This attribute provides more information about the policy and its use by the library.
- **Library** — Select a Library policy value from the drop-down list. The Library policy helper is available for choosing from a list of library policies that have been defined for the system.
- **User Profile** — Select a User Profile policy value from the drop-down list. The User Profile policy helper is available for choosing from a list of User Profiles that have been defined for the system.
- **Bill Reasons that Can Be Paid Automatically from the Credit Account** — This attribute determines which fees/fines are automatically paid with funds from the patron’s credit account when they are created. For example, a patron may request that the library always pay OVERDUE fines with monies from his credit account. As overdue fines are created at checkin, the system will automatically pay these fines with money from the credit account as long as the credit balance is more than the amount billed. This takes into account the bill maintenance libraries. Use the Policy List gadget to select bill reasons.
Bill Reasons that Can Be Paid for by Credit Account — This attribute determines which bills can be paid for with monies from the credit account. Use the Policy List gadget to select bill reasons.

Maximum Credit Balance Amount — Type the maximum credit balance amount for this patron's account.

New Mail Rule Policy Added for Books by Mail Functionality

A new SirsiDynix Symphony policy wizard, Mail Rule, has been added to Circulation Configuration that allows libraries to determine which User Profiles and Item Types can be used in Books by Mail.

In the new Mail Rule policy wizard, an individual library lists the following:
- The User Profiles that can have items mailed to them

The Item Types that can be mailed

New Type Attribute for Payment Type Policies

A new Type attribute has been added to the Payment Type wizard. This attribute indicates the kind of payment “code,” which tells SirsiDynix Symphony how to handle the Payment Type policy. The following types are delivered:
- CANCEL — For payment types that cancel payment
- CASH — For cash payment types
- CARD — For credit card payment types
- CHECK — For check payment types
- CREDITACCT — For user credit account payment types
- DEBIT — For debit card payment types
- FORGIVEN — For payment types that clear or waive payment
- NONE — For payment types that don’t require special handling
- PAYPAL — For payment types that require Pay Pal online payment handling
- SAMFUND — For payment types that require Comprise Sam Fund online payment handling

Export Policies Helper Now Exports All Fields of Hold Map and Default Price Policies

Previously, the Export Policies helper exported Hold Map and Default Price policy map lines to .csv files (files that can be opened by spreadsheet applications, such as Microsoft Excel), but not all fields of these map lines were exported. However, the helper did export all map lines/fields of the Circulation Map policies. Now, the Export Policies helper also exports all map lines and all fields of the Hold Map and Default Price policies.
Configure Auto Cancellation of On-Order Holds Added to Global Configuration Wizard

In the WorkFlows Java client, the option to Configure Auto Cancellation of On-Order Holds has been added to the Circulation tab of the Global Configuration wizard. This option will have an effect only when the ability to place on-order holds is enabled on the server.

This option has the following attributes

Automatically Cancel On-Order Holds When Order For Material On Hold is Changed/Removed
Do Not Automatically Cancel On-Order Holds When Order For Material On Hold is Changed/Removed

The option Do Not Automatically Cancel On-Order Holds When Order For Material On Hold is Changed/Removed is selected by default.

New Delivered Payment Type Policy for Patron Credit Account Feature

A new CREDITACCT Payment Type policy is now delivered. This payment type allows the balance of the patron credit account to be used when paying user bills. All payment types, including CREDITACCT, are available for selection in the Pay Bill wizard. However, in the Credit User Account wizard, the CREDITACCT payment type is not available when crediting a patron’s account; all other payment types are available.

The CREDITACCT Payment Type policy is also assigned the type/kind attribute of CREDITACCT. This attribute or “code” indicates to SirsiDynix Symphony how to specially handle this payment type.

Order Hold Fill Policy Wizard Added for List Onshelf Items with Holds Report with Demand Management

For installations with Demand Management configured, a new Order Hold Fill policy wizard has been added to Circulation configuration policies. WorkFlows uses the Order Hold Fill policy wizard in conjunction with the List Onshelf Items with Holds (Pullonshelfhld) report and the Library Group policy wizard to determine the order of libraries from which items will be pulled to fill a hold.

A new Honor Order of Libraries in Group for Holds option has been added to the Library Group policy wizard. If this option is selected, the List Onshelf Items with Holds report honors the order of libraries listed in the Library Group policy defined in the Ordered Hold Fill policy when selecting items to fill holds.

Corrections

Billing Structure Wizard Not Saving Maximum Fee Value

Previously, the Billing Structure wizard was not saving the changes a user made to the Maximum Fee attribute. This has been corrected.
Circulation Rule Wizard Displayed Erroneous Message

When a user attempted to create a new circulation rule, the Circulation Rule wizard displayed the following system message.

**Must be Y or N**

But no Yes or No values were required. The message displayed because an internal value was set for the Save Charge History attribute, even though the system wasn’t configured to use the Charge History feature.

This has been corrected.

Fines Accrue Correctly After Billing Structure is Switched from a Graduated Fee Structure to a Flat Fee Structure

Overdue fines were not accruing correctly after the Billing Structure policy wizard was used to change the billing structure from a graduated overdue fee structure to a flat overdue fee structure. If the graduated fee structure contained a time limit on an accrual increment, the limit was not being cleared when the billing structure was changed to a flat fee structure.

**Example**

The Valley Library has a graduated overdue billing structure that accrues $0.00 in fines for the first three days the item is overdue, then accrues at the rate of $0.30 a day up to a maximum of $10.00 in overdue fines. The library decides it no longer wants to offer three days of fine-free overdue time. The library switches the billing structure to a flat overdue fee billing structure to accrue a $0.30 fine daily up to a maximum of $10.00 in overdue fines. After the billing structure change was made, the library noticed the fines accrued at the rate of $0.30 for three days, then the fines stopped accruing at $0.90, which was incorrect.

The Billing Structure policy wizard has been corrected so that when the billing structure is changed from a graduated overdue fee structure to a flat overdue fee structure, any time limits on an accrual increment in the graduated overdue fee structure are not used for the flat overdue fee structure.

Billing Structure Policy Didn’t Calculate Suspensions Correctly

In the Workflows Java client, a billing structure of the suspension type was being used, assigning three days suspension for every day the item was overdue. If a user returned the overdue item on the first day it was overdue, one unit of suspension (i.e. three days) was correctly assigned. But if the user returned the item on the second or a later day it was overdue, the number of suspension units assigned was consistently one less than it should have been. When returning the overdue item on the second day one unit (three days) was assigned instead of two, when returning it on the fifth day four units (twelve days) was assigned instead of five.

This has been corrected.
General Configuration

Enhancements

Libraries Field in Library Group Policy Character Limit Increased

Previously in the Library Group policy in General Configuration, the Libraries field that held the comma-separated list of libraries would not accommodate all required libraries if a very large number of libraries was entered.

This has been corrected. The character limit for this field was changed from 1683 to 11000.

Mailing Center Attribute Added for Books by Mail Functionality

The Library policy wizard has been modified to facilitate Books by Mail functionality. A new attribute, Mailing Center Library, was added to the Circulation tab. This attribute specifies the library from which Books by Mail items are processed and shipped.

Note: The Mailing Center Library list does not include an empty library or ALL_LIBS options.

Mail Hold Libraries Added for Books by Mail Functionality

The Library policy wizard has been modified to facilitate Books by Mail functionality. A new attribute, Mail Hold Libraries, was added to the Circulation tab and defines the mail hold libraries. This attribute includes a list of libraries from which items are pulled to fill holds that are set to be mailed.

Note: The Mail Hold Libraries attribute only appears if the system is configured for Books by Mail.

New Location Policy Added for Books by Mail Functionality

A new delivered Location policy, INSHIPPING, has been added to SirsiDynix Symphony to support Books by Mail Functionality. This new policy indicates that an item is being shipped to a destination.

New Location Type Added for “Available Soon” Items

The “available soon” (AVAILABLE_SOON) type has been added to the Type attribute list in the Location policy. The AVAILABLE_SOON type can be used to identify a Location policy that is used as the current location of items when they are created. WorkFlows will use the first-entered Location policy designated with the AVAILABLE_SOON type as the current location of created items.

The SirsiDynix Symphony delivery includes a new Location policy named AVAIL_SOON. This Location policy uses the AVAILABLE_SOON location type.
New Attribute Added to the Library Policy to Support Patron Credit Account Feature

The Patron Credit Maintenance Libraries attribute has been added to the Library policy to support the new Patron Credit Account feature.

In a multilibrary system, the Patron Credit Maintenance Libraries attribute in each Library policy specifies the libraries that are permitted to access the library's patron credit accounts to deposit funds, withdraw funds, issue refunds to, and close the credit accounts. This attribute determines whether one or more libraries will have access to a select group of libraries or all libraries. Library groups are defined using the Library Group wizard. A group named ALL_LIBS is delivered with SirsiDynix Symphony as the default and includes all libraries on the system. Use the Library Group Policy helper to create new library groups or modify existing groups, if needed.

Corrections

Couldn’t Enter NEVER in Days for Holds to Expire Field in Library Policy

In both the C and Java WorkFlows clients, the value of NEVER was unable to be entered in the Days for Holds to Expire field of the Library policy.

This has been corrected. The value of NEVER may now be entered.

Global Configuration

Enhancements

Configure WF Hit List Columns Added to Global Configuration

In the WorkFlows Java client, it is now possible to customize the fields that display in a hit list. This option is found in the Global Configuration wizard on the Searching tab and is called Configure WF Client Catalog Hit List Columns. The SirsiDynix Symphony administrator can add two more columns to the hit list, specify header text of the columns, and determine which MARC tags will display in the columns.

This option must be used in conjunction with the Ranking for hit list displays in the format policies. The following is an example of how to set the 260 (Publication, Distribution, etc. (Imprint)) field as the value for Column 3:

1) On the Configuration toolbar, select Catalog Format under Cataloging Configuration.

2) Select the format you wish to modify. In this example, choose MARC. Click Modify.

3) On the Entries tab, select the 260, and click Modify.
4) On the Display tab, in the area labelled Ranking for hit list displays, place a 1 in the Line 3 field. Click Save. Then click Save again in the Catalog Format window.

5) If desired, follow these steps for the remaining MARC-standard formats.

6) Close the Catalog Format:List Policies window.

7) Select Global Configuration under Common Tasks.

8) On the Searching tab, select Configure WF Client Catalog Hit List Columns and click Modify.

9) Select the check box for Column 3. Enter a Description for the value in Column 3, such as Publication Info. This description will be the column heading, and is REQUIRED. Click Save.

10) Close the Global Configuration–Select A Policy window.

11) As with all Global Configuration policy changes, this will take effect after a halt and run of the workstation server.

Notes:

- The first, second and final columns of a hit list are hard-coded for Title, Author and Publication year respectively. These column values cannot be modified.

- Changes made to the Ranking for hit list displays will affect both e-Library and WorkFlows wizards. In the example provided above, the 260 field will show as the third field in an e-Library hitlist.

- This option is for keyword searches only. It will have no effect on a browse result.

More detailed information about this feature can be found in the WorkFlows online help topic.

**Paired Fields Global Configuration Policy Added for 880 Linked/ Paired Tags Functionality**

A new configuration policy, Paired Fields, has been added to the Cataloging Tab of the Global Configuration policy to enable pairing of 880 tags for Unicode systems.

The following attributes have been included in the Paired Fields policy.

- **Disable Paired Field Functionality**: Click this radio button to so that the server will not return 880s immediately following the tag to which they are linked. This is the default setting.

- **Enable Paired Field Functionality**: Click this radio button to have the server return 880s immediately following the tag to which they are linked.
Note: WorkFlows paired field functionality is made available in the following Cataloging wizards in the MARC record editor.

- Item Search and Display
- Modify Title
- Call Number and Item Maintenance
- Add Items
- Edit Items
- Review Title

These Cataloging wizards will honor the Enable Paired Field Functionality configuration setting when displaying records in the MARC Editor.

New Global Library Hours Wizard For Globally Modifying Closed Days and Dates

The new Global Library Hours wizard is used to globally update library closed days and closed dates. In this wizard, the user can select the groups of libraries whose closed days/dates are to be modified, select the closed day/date values, and when user clicks Save, the Library policies of all selected libraries will be globally updated.

The Global Library Hours wizard displays the following attributes.

- Libraries — This attribute contains a list of the libraries whose policies will be globally modified with the selected closed dates and closed days values. The libraries presented in this list are the libraries that have been included the current station (login) library in the Library Hour Maintenance Libraries list of their Library policies. Use the Policy List gadget to select libraries.
  
  Example:

  If the MAIN and MADISON libraries belong to a library group, CENTRAL, and if MAIN defined the CENTRAL group to be its Library Hour Maintenance Library, both MAIN and MADISON can modify the closed dates/days of the MAIN library.

- Closed Dates — This attribute contains a list of dates on which the library is closed. No due date ever falls on a day the library is closed. If a due date would normally fall on a closed day it is moved forward to the first open day. Use the Closed Dates gadget to select the dates when the library is closed. Up to 64 closed dates may be selected. Ranges of dates, such as December 24-25, may be used as one closed date.

- Closed Days — This attribute sets the regular operating schedule for each library based on the days of the week that the library is open. Each day of the week, Sunday through Saturday, can be selected as Closed. No due date ever falls on a day of the week that the library is closed. If a due date would normally fall on a closed day, it is moved forward to the first open day.

Note: For more information about Library Hour Maintenance Libraries, see the note “New Library Policy Attribute for Maintaining Library Closed Days and Dates.”
Configure Hold Range for Mailing Policy Added for Books by Mail

A new policy, the Configure Hold Range for Mailing policy, has been added to the Global Configuration policy that determines if holds configured to be mailed via Books by Mail are changed to group range holds when the hold is placed.

The new Configure Hold Range for Mailing policy appears on the Circulation tab of the Global Configuration wizard. The following are options for this policy.

- **Allow User Selection for Range:** Enables Range options and allow the user to select ranges in the Place Hold wizard after a User ID and Item ID have been entered.
- **Always Use Group Range:** Deactivates the Range options and sets the range to Group when the Mail Item to User option is selected in the Place Hold wizard.

The default value for this policy is Allow User Selection for Range.

New Library Policy Attribute for Maintaining Library Closed Days and Dates

A new attribute was added to the Library policy to facilitate globally maintaining library closed days and closed dates values. The Library Hour Maintenance Libraries attribute specifies the group of libraries than can maintain this library's closed days and closed dates.

**Example:**

If the MAIN and MADISON libraries belong to a library group, CENTRAL, and if MAIN defined the CENTRAL group to be its Library Hour Maintenance Library, both MAIN and MADISON can modify the closed dates/days of the MAIN library.

Library Hour Maintenance Libraries will appear in the list of libraries that can be globally modified when using the new Global Library Hours wizard.

Corrections

Configure Maximum Fee Policy in Global Configuration Didn’t Consider Loan Period

When the Configure Maximum Fee Policy in the Global Configuration wizard was set to Maximum fee is based on discharge date and loan period, it was not taking the loan period into consideration. Instead, it was using the circulation rule.

This has been corrected.

Control Number Identifier Setting Ignored

Previously, the setting for the Control Number Identifier Global Configuration policy was being ignored in the WorkFlows Java client. This has been corrected.
Module Configuration

Corrections

Catalog Zserver Port Value Now Retrieved from Modules File — Windows Servers Only

On Unicorn for Windows servers, users could not change the Catalog Zserver port through the WorkFlows client. For example, when a user attempted to modify the port number using the Catalog Zserver wizard from 2200 to 2300, this new value was not saved. The Catalog Zserver port was still on 2200. To change the port number, the user had to manually modify the port value in the /Unicorn/Config/sockwrapper.cfg file.

This has been corrected. Now, the sockwrapper.cfg file reads the modules file in the /Unicorn/Config directory and retrieves the port information from this file. Users can now successfully modify the port number using the Catalog Zserver wizard.

OPAC Configuration

Enhancements

OCLC Institution Selections, International Standard Selections, and Other Selections Added to the Use Attribute List Gadget

The Use Attribute List gadget in the Name Mapping wizard has been enhanced with new entries that are available for selection. The new entries include entries that can be used to search the new OCLC Institution database, which contains Research Library Group (RLG) records that have been added to the WorldCat global catalog. The following list shows the entries that have been added to the Use Attribute List gadget for the Name Mapping wizard.

- OCLC_INST_SYSNUM (OCLC Institution System Control Number)
- OCLC_INST_MASTNUM (OCLC Institution Master Number)
- SUBJECT_NAL (National Agricultural Library Subject Heading)
- IDEN_ISRC (International Standard Recording Code)
- IDEN_ISMN (International Standard Music Number)
- IDEN_ISRN (International Standard Technical Report Number)
- IDEN_DOI (Digital Object Identifier)
- SEARSSUBJ (Sears List of Subject Headings)
Reserve Configuration

Enhancements

**Reserve Desk Wizard Now Includes Roll Due Date Options**

A library had a loan period called “INLIBRARY” for items that were due back the day the item was charged at 23:59. After upgrading to Unicorn GL3.0, the library noticed that reserve items circulating with the INLIBRARY loan period were due back the following day at the time the reserve desk opened, rather than 23:59 the day before. But, non-reserve items with the same loan period were due the same day at 23:59, as expected.

To address this issue, the Reserve Desk policy has been enhanced with the following Roll Due Date options.

- **Forward/Backward** — Click either Forward or Backward to indicate whether the due date should roll forward or backward in time if the due date falls at a time the reserve desk or library is closed.
- **Number of Minutes** — If the Forward or Backward option is selected, type the number of minutes to roll the due date forward or backward. If Forward, the item will be due this number of minutes after the reserve desk opens again. If Backward, the item will be due this number of minutes before the reserve desk closes.

**Desk Hours Gadget Validates Specified Desk Closing Time**

The Desk Hours gadget was permitting a specified desk closing time to be earlier than the desk opening time. The gadget has been changed to validate the closing time before saving the specified desk hours. If the desk closing time is earlier than the desk opening time, the following message displays, and the user must enter a valid desk closing time.

- **Start date later than end date**

Serial Control Configuration

Enhancements

**Two New Policy Wizards to Support Loading Publication Patterns from 891 (CONSER) Entries**

To support the new feature for loading publication patterns from 891 CONSER Pub Pattern entries, two new policy wizards have been developed.

- **CONSER Chronology Type Map**
- **CONSER Publication Cycle Map**
CONSER Chronology Type Map Wizard

When the user creates or modifies a serial control record, the Load Pattern window may open for bibliographic records that have 891 CONSER Pub Pattern entries (if selected in wizard or helper properties to display). SirsiDynix Symphony analyzes the subfields in the 891 entry and matches the chronology captions to the CONSER Chronology Type Map policies. Matching chronology type maps are presented in the Load Pattern window for the user to select. Using this policy wizard, the user can create CONSER chronology type maps for all possible combinations of chronology captions.

The CONSER Chronology Type Map policy contains the following attributes.

- **Name**—This attribute uniquely identifies the CONSER Chronology Type Map policy.
- **Description**—This attribute provides more information about the policy and its use by the library.
- **Chronology Type**—Select a Chronology type for this map line from the drop down list. Use the Chronology Type Policy helper to create new chronology types or modify existing chronology types, if needed.
- **First Level of Chronology Subfield i**—Type the chronology caption found in subfield i, such as (year).
- **First Level of Chronology Subfield j**—Type the chronology caption found in subfield j, such as (month).
- **Third Level of Chronology Subfield k**—Type the chronology caption found in subfield k.
- **Fourth Level of Chronology Subfield l**—Type the chronology caption found in subfield l.
- **Alternative Numbering Subfield m**—Type the enumeration value found in subfield m.

**Note:** When creating Chronology Type Map policies, at least one chronology level is required. If the user tries to save an empty chronology map, WorkFlows will display a system message, and the user will be required to type at least one chronology level.

CONSER Publication Cycle Map Wizard

When the user creates or modifies a serial control record, the Load Pattern window may open for bibliographic records that have 891 CONSER Pub Pattern entries (if selected in wizard or helper properties to display). SirsiDynix Symphony analyzes the subfields in the 891 entry and matches the chronology patterns. For the subfield w, SirsiDynix Symphony will match values in this subfield to a CONSER Publication Cycle Map policy. A CONSER publication cycle map exists for each frequency code of subfield w, except k.
**Note:** There is no equivalent mapping for $wk in SirsiDynix Symphony. When a bibliographic record contains a $wk, this indicates that the publication is published more frequently than daily. If an incoming bibliographic record contains a $wk, it is suggested that you do the following.

- In the Create a Serial Control wizard, create a control record with a daily publication pattern, and create daily predictions.
- In the Modify a Serial Control wizard, create single issues (or perhaps multiple issues) for the same days.

The CONSER Publication Cycle Map policy contains the following attributes.

- **Name**—This attribute uniquely identifies the CONSER Publication Cycle Map policy.
- **Description**—This attribute provides more information about the policy and its use by the library.
- **Frequency Code**—Select the frequency code that works with this publication cycle type from the drop-down list. Use the Frequency Policy helper to create new frequency codes or modify existing frequency codes, if needed.
- **Publication Cycle**—To define the publication cycle, click the Publication cycle gadget and follow these steps.
  1) A calendar displays the current publication cycle. A description of the publication cycle appears below the calendar.
  2) Verify the issue's publication statement to determine the publication cycle: daily, weekly, monthly, or annually. For instance, a semimonthly and a bimonthly are both monthly cycles. An issue that is published weekly, except for June through August, is a weekly cycle.
  3) To modify the publication cycle or begin defining the title's publication pattern, click one of the following publication cycle types: Daily, Weekly, Monthly, Annually. Enter exceptions to the publication cycles using the Omit Issues By helper.
  4) When finished defining the publication pattern, click OK to save changes, or click Cancel to quit the policy without saving changes.

**Corrections**

**Chronology Type Policy Didn’t Save Chronology in Desired Order**

When creating a new Chronology Type policy in the Workflows Java client using the Display Serial Name List gadget, a incorrect sort order was being imposed on the policy list. The list was being sorted alphabetically rather than chronologically.

This has been corrected.
User Configuration

Enhancements

New User Group Responsibility Wizard

To support the new Family Card feature, a new policy, User Group Responsibility, was added to the User Configuration group. The User Group Responsibility policy is used to assign levels of responsibility to members in a group. This policy determines if group members share delinquencies and access to other group member's charges, holds and bills. This policy also determines if members can check out other members' holds.

The User Group Responsibility policy contains the following attributes.

- **Name**—This attribute uniquely identifies a specific User Group Responsibility policy.
- **Description**—This attribute provides more information about the policy and its use by the library.
- **Responsibility Level**—These attributes determine the level of responsibility for delinquencies.
  - SELF - The user is not affected by the delinquency of others in the linked group in which he or she may be included. However, the user would still be responsible for his or her own delinquencies.
  - LINKED - The user inherits delinquency status from the “worst-case” user who is included in the group.

  **Note:** The library staff member can include a mix of Self and Linked levels of responsibility to occur within a single group.

- **Responsibility Type**—The Responsibility Type attribute is used to indicate that transactions, such as checkouts, will be handled differently, or that special processing is needed.
  - Head - Links cards together for checkout purposes only. All checkouts for the group would belong to the user with policy type of HEAD. For example, students could check items out for a professor but all charges would be linked to the professor's user record.
  - None - No special type of processing is needed.

- **Access Level**—This attribute controls a group member's access to other group member's records, such as charges, holds, or bills. The access level is not dependent on the level of responsibility.
  - Display Charges - This option allows the user to see charges that belong to other members of the group.
  - Display Holds - This option allows the user to see holds that belong to other members of the group.
• Checkout Holds – This option allows the user to checkout items on hold for other members of the group. When the item is checked out to a user that has this access, the hold record is considered filled.

• Remove Holds – Allows member of group to remove holds for other members.

• Display Bills – This option allows the user to see bills that belong to other members of the group.

• Pay Bills – This option allows the user to pay bills for other members of the group.

• Allow Group Choice – This option controls whether a prompt displays in the Checkout, Place Hold, and Bill User wizards to determine if the transaction (charge, hold, or bill) is for the group or individual.

**Example: User Group Responsibility Policies**

The following are examples of User Group Responsibility policies.

**Parent**

Name: Parent
Description: Use when a family group is headed by a parent.
Library: Rockefeller
Level of Responsibility for Delinquency: LINKED
Access Level
  - Checkout holds: Y
  - Pay Bills: Y
  - Display Charges: Y
  - Display Holds: Y
  - Type: None

**Child**

Name: Child
Description: Use to identify linked children in family group.
Library: Rockefeller
Level of Responsibility for Delinquency: LINKED
Access Level
  - Checkout holds: Y
  - Pay Bills: Y
  - Display Charges: Y
  - Display Holds: Y
  - Type: None

**Spouse**

Description: Use when family group involves only spouses.
Library: Rockefeller
Level of Responsibility for Delinquency: SELF
Access Level
  - Checkout holds: Y
  - Pay bills: N
  - Display charges: Y
  - Display bills: N
  - Display holds: Y
  - Type: None

**Professor**

Description: Used for proxy borrower.
Library: HALL
Level of Responsibility: SELF
Access Level
  Checkout holds: Y
  Pay bills: N
  Display charges: N
  Display bills: N
  Display holds: N
Type: HEAD

**Student**

Description: Used for proxy borrower.
Library: HALL
Level of Responsibility: SELF
Access Level
  Checkout holds: Y
  Pay bills: N
  Display charges: N
  Display bills: N
  Display holds: N
Type: None

**New User Standing Policy Allows Custom User Status Options**

In the WorkFlows Java client, the new User Standing policy in the User group of policies allows the creation of custom statuses for use in user records. In addition, the User Standing policies allow customization of the message that appears when the statuses are triggered by circulation activity.

**Corrections**

**Outreach Route Wizard Attribute Values Disappeared**

When using the Outreach Route wizard to create a new Outreach Route policy, if a user typed a policy name and description, then clicked one of the radio buttons, either Days, Weeks, Months, or Delivery Dates, the policy name and description values disappeared. The policy data the user typed was not being saved before the wizard window refreshed to display the selected delivery date type field labels.

This has been corrected.
Utilities

General

Enhancements

Serveradmin Utility Log for Windows Systems Enhanced

The halt/initialize/run activities logged by the Serveradmin utility on SirsiDynix Symphony for UNIX systems can be found in the /serveradmin directory defined in the /Unicorn/Config/upath file. Sites running Unicorn on Windows systems requested that the halt/initialize/run activities be logged in the same way on their systems. Now, on SirsiDynix Symphony for Windows systems, the log file will be placed in the /sys directory that is defined in the /Unicorn/Config/upath file. The file name will be constructed as follows.

serveradmin [year] [month] [day].txt

Example:

D:\Sirsi\Unicorn\Logs\Sys\servadmin20060815.txt

Update Staff Client Management Wizard Now Appears on Utility Toolbar

The Update Staff Client Management wizard is now delivered on the Utility toolbar. The Update Staff Client Management wizard is used by SirsiDynix Symphony administrators to schedule the automatic update of staff clients.

Prompt Added to Require User to Save a Customized Toolbar on the Server

In the Toolbar Management wizard, if the user added, modified, or removed a toolbar in the Customized Toolbar Files pane and clicked Close to exit the wizard, the user was not prompted to save the toolbar changes on the server. As a result, the user may have thought the toolbar changes were saved on the server, but they were only saved to the \Documents and Settings\[userid]\Sirsi\Workflows\Toolcust directory on the local workstation.

The Toolbar Management wizard has been changed to display the following prompt if the user adds, modifies, or removes a custom toolbar in the Customized Toolbar Files pane of the wizard window.

Custom toolbar has been modified. Please save on the server before exiting.

The user must click the Save On Server wizard button to save the custom toolbar modifications on the server and in the \Documents and Settings\[userid]\Sirsi\Workflows\Toolcust directory on the local workstation. Then the user can click Close to exit the wizard.
The tar Utility Replaces the cpio Utility for Backups

Previously, the Unicorn backup utility was not backing up some large files, and displayed a message similar to the following in the backup log.

cpio: cpio: /dir/subdir/filename.dat: too large to archive in current mode

The cpio utility was unable to save files because of a file size limit.

The SirsiDynix Symphony backup utility has been enhanced so that the tar backup utility may be used instead of cpio. The file size limitation does not affect the tar utility as it did the cpio utility.

Corrections

Removing Printer From Printer List Caused Systemconfig Utility to Malfunction—Unicorn on Linux Systems

On Unicorn for Linux systems, if a Unicorn administrator used the Systemconfig utility to remove a printer from the Printer List policy, the utility would malfunction, and the printer would not be removed from the list.

This has been corrected.

Unicornadmin Incorrectly Displaying Report Server Status as HALTED

In the Unicornadmin utility, when the report server is running but not actually running a report, if the user selects STATUS to view the status of servers/stations/users/utilities, it correctly indicates that the report server is RUNNING. Previously, when the report server was running, and a report was actually running, STATUS incorrectly indicated that the report server was HALTED. This occurred on all Unicorn platforms.

This has been corrected.

“Invalid User Environment” Message in /Unicorn/Logs/error File

Previously, an “invalid user environment” message, like the following, would sometimes appear in the /Unicorn/Logs/error file.

20061113154350 ENVN:.  
20061113154350 mserver: Invalid user environment

A staff client connecting to the mserver service (the service that manages staff client connections) was sending an empty user ID/PIN field.

The mserver service has been corrected, and these messages will no longer appear in the /error file.
Windows Oracle Netstarter Does Not Run

Previously, the Windows Oracle netstarter did not build correctly, and when the program was run, it exited with the following system message.

`.FATAL!!! envhp not defined.`

This has been corrected.

**Note:** This problem only occurs with Windows operating systems.

## Holding Code Table for EDI Wizard

### Corrections

**Holding Code Table for EDI Wizard Unable to Handle a Large Number of Holding Codes**

In the Holding Code Table for EDI wizard, a user was unable to modify or display a Holding Code table containing 800 lines. When this wizard was originally designed, the holding codes were presented directly on screen. Now, the holding codes are presented in a table format, which can better handle a very large number of lines.

## MARC Export Utility Wizard

### Enhancements

**MARC Export Utility Wizard Property Allows Inclusion of Unicorn Catalog Key**

A new option has been added to the MARC Export utility wizard properties to allow the inclusion of the Unicorn catalog key in the extracted record. The Export Unicorn Catalog Key to MARC Tag option allows the user to select the entry in which the catalog key will be placed. By default, the entry selected is the 001 entry.

**Note:** If the Export Unicorn Catalog Key to MARC Tag option is used, the 'u' prefix is appended to the exported catalog key to identify the catalog key as a Unicorn catalog key. If the option is not used, the flexible key is written to the extracted record in the 035 entry.
Corrections

Wizard Properties Changed For Use on Unicode or Non-Unicode Systems

The MARC Export Utility wizard properties have been changed so the user can make the correct selections when using a Unicode server or a non-Unicode server.

The Format of the Output File wizard property now becomes unavailable if WorkFlows is connected to a Unicode server and MARC8 is selected in the Encoding Scheme property. Only the MARC record format can be used for Unicode systems when the MARC8 encoding scheme is selected. The flat record format cannot be used to export records to a non-Unicode format on a Unicode server.

The Encoding Scheme property displays only if WorkFlows is connected to a Unicode server since the property does not apply to a non-Unicode system.

Wizard No Longer Times Out During Export of Large Files of Records

The MARC Export Utility wizard was timing out when it tried to export large files of records (for example, the user wanted to export the entire MARC file). The wizard has been changed so it will export large files of records properly.

MARC Export Utility Wizard Can Now Handle Exporting a Large Number of Files

Using the MARC Export Utility wizard, a user was unable to export a large file of MARC records. In wizard properties, the user had accepted the default value of 10 records per file, which prompted the wizard to create hundreds of files on the system. However, the wizard could not export more than 676 files (each with 10 records), even though there were significantly more than 6760 records to be exported. The wizard was failing to create all of the output files required by the export.

Now, the MARC Export Utility wizard can create over 11,000 output files, which should be sufficient for exporting a large number MARC records.

Include [n] Records in Each File Field Size Increased

Previously, in the MARC Export Utility wizard properties, a user could only type up to three digits in the Include [n] Records in Each File text box. The WorkFlows C client allows users to type up to 10 digits in this field (How Many Records Per Volume field). Now, the WorkFlows Java client MARC Export Utility wizard allows users to type up to 10 digits (9999999999) to indicate the number of records to include in the exported files.
MARC Import Appending New File to Existing File Rather than Overwriting It

In the MARC Import Utility wizard, when importing a file of MARC records, if the file name already existed under /Unicorn/Marcimport, and the user chose to overwrite the existing file, the new file was appended to the file, rather than overwriting it. This occurred in both the WorkFlows C client and WorkFlows Java client.

This has been corrected.

MARC Order Import Utility Wizard

Corrections

WorkFlows Java Client Non-responsive When User Clicked Bib Error Files Tab

Previously, when using the MARC Order Import Utility wizard, if a user clicked the Bib Error Files tab to view the record load error files, the WorkFlows Java client was non-responsive. The user had to quit WorkFlows and restart the client to continue.

This has been corrected.

Scanner Utility Wizard

Corrections

Scanner Utility Wizard Available for Macintosh

The Scanner Utility wizard is now available for the WorkFlows Java client on Macintosh. Since the Intermec scanners used at some sites are not compatible with the WorkFlows Java client on Macintosh, the Scanner Utility wizard on a Macintosh instead allows raw text uploads into the /Unicorn/Scanner directory on the server. This will be useful for sites that have custom scanner load routines.
Update Staff Client Management Wizard

Enhancements

New Stamp File for Staggering Client Updates

The Update Staff Client Management wizard allows SirsiDynix Symphony administrators to stagger the automatic update of staff clients. SirsiDynix Symphony uses a stamp file mechanism to control updating staff clients. For staggered client updates, a new stamp file, stamp.staggered, was created. This file does not interfere with new stamp files delivered for SirsiDynix Symphony upgrades. The stamp.staggered file includes a Library policy names of the libraries to be included in the staggered client updates.

Now, when a WorkFlows Java client starts, global variables are downloaded, and the client checks to see whether or not the Update Staff Client by Specified Libraries global variable is indicated. If so, the stamp file that is created is stamp.staggered. Then, the server refers to the stamp.staggered file and attempts to match stamp values. If there is a match, the server will automatically update the client.

Notes:

- The staggered client update feature is only available when updating a Version GL3.1 client to a later version and when connecting to a server at Version GL3.1 or higher.
- To use this feature, the Update Staff Client by Specified Libraries global configuration policy must be configured.

Update Staff Client Management Wizard Appears on Utility Toolbar by Default

In a previous release of Unicorn Version GL3.1, users had to add the Update Staff Client Management wizard to the Utility toolbar. Now, this wizard is delivered to the Utility toolbar by default.

The Update Staff Client Management wizard is used by SirsiDynix Symphony administrators to schedule the automatic update of staff clients.
Web2

Enhancements

Review My Account Page Enhanced with User Credit Account Balance Information

User Credit Account functionality was added to SirsiDynix Symphony 3.2. This feature allows library users to pay bills, fines, privilege fees, and more from a credit or deposit account. Now, the Review My Account page in Web2 displays the Credit Account Balance field next to the display of the number of checkouts, holds, bills, and so on. If a library user has greater than $0.00 in his or her credit account, the account balance will display in this field.

Note: The following HTML snippet was added to the My Account page:

```
<!----WEB2_IF PATRON_FIELD=":credit_balance" GREATER="$0.00"-->
&nbsp;&nbsp;&nbsp;<!--WEB2_PATRON :credit_balance-->Credit balance
<!----WEB2_END_IF-->
```

The following Web2 files were modified.

- HTML_Sample\U_ENG_iFiles\MyAccount.html
- HTML_Sample\U_SPA_iFILES\MyAccount.html
- HTML_Sample\U_ENG_Standard\MyAccount.html
- HTML_Sample\U_FRE_iFiles\MyAccount.html

Perl Support for Single Sign On Servers

A Perl script supporting secure connections has been written to support LDAP authentication for other SSO servers. Currently, it supports the CAS 2.0 server, but it can be customized to support other SSO servers.

Web2 Client Supports User Group Membership Feature

Web2 has been updated to display Family Card (Group Membership) information. This feature requires that the SirsiDynix Symphony server be configured to use the Family Card feature, and that Web2 be configured to display the information.

Note: In the U_* folders in HTML_Sample, the following files were updated:

- RequestList.html
- FeeFineList.html
- HasNowList.html
- EditHoldList.html
- EditAllHolds.html
- PatronRequestEdit.html
- PayBillPPFPro.html
- MyAccount.html
- PatronHasNow.html
- PatronFeeFine.html
Web2 Now Applies Labels to Cross References

Previously, Web2 did not have the ability to apply labels (such as Search Also Under) to the display on the cross reference (XREF) screen. Web2 displayed the cross references with the macro WEB2_XREFS, which did not allow for different labels depending on the type of cross reference in the authority record.

Now, Web2 can add labels to the cross reference display. The WEB2_XREFS macro has two new parameters:

- USE_XREF_LABELS is a Boolean parameter with a value of either true or false. If the value is true, then the cross reference label for the entry is output to the display.
- LABEL_DELIMITER is a string parameter used as the delimiter string between the label and the entry display field.

The WEB2_AUTHORITY2_RELATED_ENTRY_FIELD macro has a new field value description called “label” that is used to display the related cross reference entry label.

Books By Mail on Web2

Books by Mail functionality has been added to Web2.

When a user selects Place Hold on an item, there is a new option, Mail Item to Me. When this option is selected, the item will be mailed to the user instead of going to a Pickup Library. The Delivery Method for mailing is selected via a drop-down list.

Once the hold item has been selected for Books by Mail, the user’s Holds listing in the My Account page displays the Delivery Method for the hold.

PayPal PayFlow Pro Added to Web2

The ability to Pay Bills from the My Account screen using PayPal PayFlow Pro has been added to Web2 on the SirsiDynix Symphony.

Sites may turn on PayPal and PayPal PayFlow Pro at the same time. The following label changes and button additions have been made:

- Pay Bill (PayPal)
- Pay All Bills (PayPal)
- PayPal Pay Bill (Credit Card)
- PayPal Pay All Bills (Credit Card)

The site must register with VeriSign and have an internet merchant account with a bank in order to use Paypal PayFlow Pro on Web2. It is recommended that the site use HTTPS protocol when performing PayPal PayFlow Pro transactions.
Corrections

Unable to Follow Cross-references in French and Spanish Web2 Clients

In French and Spanish language Web2 clients, cross-references were not working properly. When the user performed a keyword search from the home page that retrieved no hits, and a browse list with cross-references displayed, the user could not follow the cross-reference links. This has been corrected.

Note: The following Web2 files were corrected.

\HTML_Sample\U_FRE_iFile\AuthorityReDirect.html
\HTML_Sample\U_SPA_iFiles\AuthorityReDirect.html

The following Web2 file was added.

<!--WEB2_DEFINE authority_hitlist_screen VALUE=Authority.html-->

Place Hold Link Was Always Displaying

Even though Web2 was configured to not display the Place Hold link when there were available copies, the CallNumRecord.html page displayed the Place Hold link all the time. This has been corrected.

Note: The following Web2 files were corrected.

\HTML_Sample\U_ENG_iFiles\CallNumRecord.html
\HTML_Sample\U_ENG_Standard\CallNumRecord.html
\HTML_Sample\U_FRE_iFiles\CallNumRecord.html
\HTML_Sample\U_SPA_iFiles\CallNumRecord.html

MARC Holdings Data Displayed Incorrectly

Previously, MARC Holdings information from Unicorn Z39.50 servers displayed incorrectly. This has been corrected.

Note: The following Web2 files were corrected.

\HTML_Sample\U_ENG_iFiles\IncHoldings.html
\HTML_Sample\U_ENG_Standard\IncHoldings.html
\HTML_Sample\U_FRE_iFiles\IncHoldings.html
\HTML_Sample\U_SPA_iFiles\IncHoldings.html
\HTML_Sample\U_ENG_iFiles\HoldingsFormatUnicorn927.html
\HTML_Sample\U_ENG_Standard\HoldingsFormatUnicorn927.html
\HTML_Sample\U_FRE_iFiles\HoldingsFormatUnicorn927.html
\HTML_Sample\U_SPA_iFiles\HoldingsFormatUnicorn927.html

Title Record Display Corrected

There was a problem displaying all of the data in a single field of a Title Record when the field contained an empty subfield. This has been corrected.
Content Enrichment Needs Ten- and Thirteen- Digit ISBN Processing

Previously, Web2 sent only the first ten digits of the 020 field for Content Enrichment processing, however, the content display needed ten- and thirteen-digit ISBNs.

This has been corrected.

Added Ability to Limit Shadow Display

Previously in Web2, the shadow limit was set to No except for call number searches, set to Yes.

Now Web2 has a new variable, shadow_filter, with the following possible values.

- Yes
- No
- Both

The default value for shadow_filter is No.

Since default value is No and No was previously used in most places in Web2, the only pages that this change affects are the Power Search page and the Call Number Browse page.

Library Description Translation Not Displaying in Full Details Holdings

The following macro did not display library translations correctly.

```html
<!--WEB2_HOLDINGS_FIELD library_translation-->
```

Instead library translations displayed as follows.

```html
$<LIBR_desc_POLICY>
```

This has been corrected.

Cross References Not Working

In Build 504.7 of Web2 Cross References were not working correctly.

This has been corrected.

English Appears in French and Spanish Kept List

English appeared in the Kept List display in the French and Spanish iFiles.

This has been corrected.
**Browse Search See Also Links with Two Dashes Produce Incorrect Display**

Browse Search results from a See Also reference that contained two dashes in the text produced unexpected results.

This has been corrected.

**“Other Title Variation” Label Appeared in Full Record Display**

When using the Standard Web2 interface, the words “Other Title Variation:” incorrectly displayed on the full record screen when a record containing a 246 field was viewed. This has been corrected.

*Note:* The following file was modified.

Web2\HTML_Sample\U_ENG_Standard\OtherFields.html

**Web2 Unable to Display and Search Most Popular Subjects**

In a previous version of Unicorn, a change was made to the WorkFlows Most Popular Items report. The change added beginning zeros (padding) to dates in a field used for searching. Now, when the data from this report is input into the Web2 Content Manager, the wrong field is used for subject displays and the query field is incorrect.

This has been corrected. Now, the Web2 Content Manager will remove the zero-padding from the date field, and before displaying the Most Popular subjects, and will use the correct query field for searching Most Popular subjects.

**Unable to Place Holds in Web2 When Using SSO Server**

If Web2 was configured to use an SSO (Single Sign On) server, users were unable to submit holds. A message like the following displayed.

We are sorry, but your hold for [title] has not been successfully submitted. Please enter your correct PIN.

Web2’s WebLogin command was erasing the contents of the user's PIN information. The PIN information was needed by the hold programs to validate user access levels of public or less.

This has been corrected.

**Messages From Messages File With Diacritics Display Incorrectly**

Web2 was getting encoded API responses to exceptions in messages, causing incorrect characters to display.

This has been corrected.
Z39.50 Server

General

Corrections

Z39.50 Server Error

Previously, the Z39.50 server was failing because of an internal error.

This has been corrected, and the reporting process has been updated so that the
system error message in the log also includes an error number.

Catzserver Causing Core Dumping on Oracle Sites

When exiting, the catalog Z39.50 server (Catzserver) was causing core dumps
while trying to close databases.

This has been corrected.