SirsiDynix Symphony Library
Management System

SirsiDynix Symphony 3.2

System Administrator Notes
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The SirsiDynix Symphony Administrator Notes for SirsiDynix Symphony 3.2 are a subset of the entire set of release notes for SirsiDynix Symphony 3.2. Since this version of SirsiDynix Symphony includes a large number of enhancements and corrections, the administrator notes are intended to help the system administrator identify the changes that may require additional configuration. For many software changes, supplemental information is included in this document to alert SirsiDynix Symphony administrators to tasks that might need to be performed as part of staging the new version at your site, such as the following list.

- Creating or checking new policies
- Creating or checking new WorkFlows properties
- Examining e-Library or Web2 page changes in light of any customized pages at your site
- Adjustments to user access policies
- Other administrative tasks, such as rescheduling reports to take advantage of new options

The supplemental administration information is only available in the SirsiDynix Symphony Administrator Notes. The SirsiDynix Symphony release notes contain details about all significant enhancements and corrections, including changes that do not require any administrative action. Sites that wish to restrict information related to system administration tasks may choose to distribute only the SirsiDynix Symphony release notes to non-administrative users.
Upgrading to SirsiDynix Symphony 3.2

Sites running Unicorn GL 3.1 and Unicorn GL 3.0 may use the Software Delivery Service on the http://clientcare.sirsidynix.com website to upgrade to SirsiDynix Symphony 3.2. Sites running a version of Unicorn prior to Unicorn GL 3.0 should contact your customer account manager to discuss your options.

The Software Delivery Service contains detailed information and procedures for upgrading to SirsiDynix Symphony 3.2. The instructions found there are more complete than those detailed in these notes, and may contain information that was added after this document was published. Depending on the version you are upgrading from, the features used at your site, and your operating system, not all of the following information will be pertinent to your site. An overview of the upgrade process follows.

Getting Ready for SirsiDynix Symphony 3.2 Multimedia Tour

The Getting Ready for SirsiDynix Symphony 3.2 Multimedia Tour is an interactive introduction to the new features of SirsiDynix Symphony 3.2.

The Tour discusses the upgrade process, from pre-upgrade planning through post-upgrade procedures, and also includes an upgrade checklist to help make your upgrade go smoothly.

The minimum requirements for viewing the Tour are a PC with a sound card, 133 MHz Pentium processor, 32 MB RAM, and a 256-color monitor at 800x600 resolution. A standards-compliant browser, such as Internet Explorer version 6.0, Netscape version 7.02, or Mozilla Firefox 2.0 is highly recommended. You will also need to have Macromedia's Flash Player installed (this is a free download, and is normally installed with later browsers).

The Tour is available as a link from the Software Delivery Service. It can be downloaded as a self-extracting zip file to your PC. If network bandwidth is an issue at your site, it is also possible to order the Tour on CD at no additional cost.
Review the Post-Upgrade Steps

Proper planning and sharing of information with library staff is essential to having a successful upgrade to SirsiDynix Symphony 3.2. Before obtaining the upgrade file, the SirsiDynix Symphony administrator should examine the upgrade instructions in their entirety, and should plan to allot enough time to complete the upgrade and all post-upgrade steps before making the system available. After obtaining the upgrade file and running the upgrade script, the SirsiDynix Symphony administrator must perform additional tasks, such as running an authority report and some database rebuild reports, updating your C WorkFlows client, updating the WorkFlows Java™ client, and preparing the webserver.

Verify the Server and Client Requirements

A link is provided to the server and client requirements for SirsiDynix Symphony from the Software Delivery Service. Before beginning the upgrade, ensure that your site meets the memory and disk space requirements and that the level of your operating system is supported in this version. Sites upgrading from Unicorn GL3.0 or GL3.1 will not encounter a significant increase in the disk space needed for SirsiDynix Symphony 3.2, unless the site is also implementing Unicode or migrating to the Oracle database from the Informix option.

WorkFlows Java Client for PCs Requires JRE 6

The SirsiDynix Symphony 3.2 server upgrade includes a version of the WorkFlows Java client that requires Java™ 2 Platform, Standard Edition Runtime Environment 6.0 (JRE 6, also called Java version 6 by Sun Microsystems). For more information about JRE 6, refer to Sun Microsystems’ Java site at http://www.java.com/en/download/index.jsp

When you update to the new SirsiDynix Symphony 3.2 client for Windows, you will automatically install the new Java Runtime Environment (JRE 6) on your Windows workstation.

In order to use the SirsiDynix Symphony client for the Macintosh, J2SE 5.0 must already be an available Java Application Runtime setting, though it does not have to be the default. To verify if J2SE 5.0 is available on your Mac, navigate to Applications/Utilities/Java. You should see a folder for J2SE 5.0. If you do not see this folder and you are on Mac OS X version 10.4 or higher, you should be able to download J2SE 5.0 from the Apple support website.

The SirsiDynix Symphony 3.2 upgrade includes WorkFlows Java Client version 3.2.0.1971.5 for Windows and Macintosh.
Verify Your Version of Oracle

Sites that are using the Oracle database system must verify your Oracle version before running the upgrade. SirsiDynix supports Oracle 10.1 at release 10.1.0.5 or higher, and Oracle 10.2 at release 10.2.0.2 or higher. Oracle 9i continues to be supported for non-Unicode sites at release 9.2.0.6 or higher.

To verify your Oracle version, log on as sirsi. Then connect to Oracle by typing `sqlplus [oracle login]/[oracle login password]` and pressing Enter. (The SirsiDynix default would be "sqlplus sirsi/sirsi"). At the SQL prompt type the following command:

```
select COMP_ID, version from dba_registry;
```

You should then see an output that looks something like this.

```
<table>
<thead>
<tr>
<th>COMP_ID</th>
<th>VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CATALOG</td>
<td>10.2.0.2.0</td>
</tr>
<tr>
<td>CATPROC</td>
<td>10.2.0.2.0</td>
</tr>
</tbody>
</table>
```

At the SQL> prompt, type `quit` and then press Enter. Note the Oracle release number. If you are on a version of release 10.1 that is lower than 10.1.0.5 or a version of release 10.2 that is lower than 10.2.0.2, please upgrade Oracle before you schedule the upgrade to SirsiDynix Symphony 3.2.

Oracle Tablespaces

If your site is not using the default tablespaces delivered with SirsiDynix Symphony, you will need to add new entries to the `/Unicorn/Config/oraclespace` file. These entries should be added immediately before running the upgrade. For more information, refer to the note in the upgrade instructions on the Software Delivery Service.
Additional Considerations for Oracle Sites

Certain configurations like the ones listed below may require the assistance of your Oracle DBA to ensure a successful upgrade.

- The SirsiDynix Symphony-related tablespaces are not set to autoextend. This may increase the possibility of an upgrade failure if a tablespace runs out of room.

- The rollback segment is not set to autoextend. Again, this may increase the possibility of an upgrade failure if the rollback segment runs out of room.

- You do not use the SirsiDynix Symphony default tablespaces. If this is the case, you will have to have an accurate / Unicorn/ Config/ oracle.space file which is updated to include any new tables required by the current SirsiDynix Symphony release. If the oracle.space file is not current, the upgrade will fail.

- All remote sites, and local sites for which the oracle logon is something other than the sirsi default logon, require a / Unicorn/ Config/ oracle.logon file which contains the following three fields:

  [oracle user]|oracle user password|remote database name used for database connection|

Oracle Listener Must Be Running

Before you perform the SirsiDynix Symphony 3.2 upgrade, verify with your Oracle DBA that the Oracle listener is running. Without the listener, the SirsiDynix Symphony 3.2 upgrade will fail. Sites that use a remote Oracle with their SirsiDynix Symphony server will probably already have the listener running.

However, the listener may not be running at sites where Oracle is on the same box as the SirsiDynix Symphony server. Users at sites with a local Oracle can verify whether the listener is running. To do this, log in as sirsi. Then type **tnsping localhost** at the command line. If the listener is running, the resulting display shows “OK” on the last line. If the listener is not running, the resulting display includes the phrase “No listener.”

To start an inactive listener when Oracle is local, log in as sirsi and then log into the oracle account by typing **su - oracle**.

You will be prompted for the oracle password. Type the oracle password and press Enter. Then, type **lsnrctl start** to start the listener.

The listener will start. Type **exit** to exit the oracle prompt.

This may require assistance from your Oracle DBA to ensure that the listener is configured and operating properly.
Verify Language Settings in the Environment Policies

The SirsiDynix Symphony 3.2 upgrade will set a new language field in the patron record based on the language setting in the environment policy tied to the patron's profile. Before you do the SirsiDynix Symphony 3.2 upgrade, please verify ahead of time that the environment policies contain the desired language setting.

Enhancements to Invoice Wizards Invalidate 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. If the library uses the InfoVIEW client for acquisitions work and also processes invoices through SirsiDynix Symphony, the library must upgrade to WorkFlows.

SVA Activity

If your site uses the Sirsi Voice Automation (SVA) module, on the day you do the upgrade, please make sure that SVA calls have completed and that you have run the failed calls report for that day. It is important that the failed calls report finishes or you could risk losing failed notices for the day.

Downloading the Upgrade File

The download time averages 30 minutes to an hour, but may vary substantially due to network speed and traffic. Oracle sites should plan for a longer download time, due to the large file size (approximately 1-2 GB).

Note: Unicorn can be running while the download takes place.

Follow the instructions on the Software Delivery Service for downloading the upgrade files. The specific commands to use vary by operating system, so they will not be described in this document.
Performing the Upgrade

Play it safe. Perform a full system backup of your current Unicorn system before installing this upgrade. Be sure to remove the media when your backup is complete and verified.

Follow the instructions on the Software Delivery Service for running the upgrade script. The specific commands to use vary by operating system, so they will not be described in this document.

After you finish running the upgrade script and complete all post-upgrade steps, make another backup using media different from the ones used for the pre-upgrade backup.

Post-Upgrade Steps

To complete your upgrade, there are several steps which must be performed before releasing the system for use.

Unicorn/Bincustom

Immediately after completing the upgrade, and prior to running the SirsiDynix Symphony servers please take a moment to rename any SirsiDynix Symphony programs from the /Unicorn/Bincustom directory on the SirsiDynix Symphony server. If there are any files in /Unicorn/Bincustom which have the same name as a newly upgraded file in /Unicorn/Bin, the copy in /Unicorn/Bincustom should be renamed.

Update the Ecole stamp file (UnicornEcole sites only)

If you are a UnicornEcole site using the WorkFlows C Client, you will have to manually update the stamp file in the /Unicorn/Workflows/Ecole directory on the server. Specific instructions for this task vary by operating system, and are included in the Software Delivery Service instructions.

Setting Up User Access Policies

Ensure that the Admin and Sirsi user have access to all wizards in the WorkFlows C client. Specific instructions for this task vary by operating system, and are included in the Software Delivery Service instructions.

Note that the upgrade automatically gives the Admin and Sirsi user access to all wizards in the WorkFlows Java Client. No manual steps are required. However, you may have to add access to new Workflows Java wizards to other user access policies once you have the Workflows Java Client installed or upgraded on your PC. To do this, use the Global Wizard Access Policy from the Configuration Toolbar. This wizard is located under the Access Control Policies group of wizards.
Upgrading Your WorkFlows C Client

After upgrading your server, it is also necessary to upgrade your WorkFlows C client. The Software Delivery Service has specific instructions for performing this task.

Installing/Updating the WorkFlows Java™ Client

After upgrading your server, it is also necessary to upgrade your WorkFlows Java client. The Software Delivery Service has specific instructions for performing this task. If your site has never used the WorkFlows Java client but wishes to begin using it with this release, there are also instructions on how to install the client.

In addition to installing/updating the WorkFlows Java client on workstations, please do the following.

1) The online help files for the WorkFlows Java Client are already installed on your SirsiDynix Symphony server, but you must perform additional steps to extract them to the proper location so they can be viewed by the client. A link to specific instructions displays as part of the post-upgrade steps in the Software Delivery Service.

2) On workstations running the WorkFlows Java client, SirsiDynix recommends setting the virtual memory association equal to twice the amount of physical memory, at minimum. Please work with your PC administrator to check the virtual memory setting on each workstation running the WorkFlows Java Client, and increase the memory if necessary.

Running the Authority Reports

If you are upgrading from Unicorn GL3.0, after the upgrade run the Rebuild Authority Thesauri (Rebldthesauri) report, which is in the Authority group of reports. Sites that do not have the Authority group of reports should contact Client Care for help in running this report. Users will not be able to search until this report has run.

Running the Rebuild Heading Display Databases Report

If you are upgrading from Unicorn GL3.0, after the upgrade completes run the Rebuild Heading Display Databases (Rebuildheaddsp) report. This report simply changes the case of cross-references from upper case to mixed case. This report for Unicorn GL3.1 was created so that this enhancement could be implemented without requiring the Rebuild Heading Databases report to be run, and should decrease the amount of time needed to complete the post-upgrade reports.
Running the Rebuild Text Database Report

If you are upgrading from Unicorn GL 3.0, after the upgrade completes run the Rebuild Text Database (Rebuildtext) report. Running this report will index all ISBNs twice, once in the 10 digit format and once in the 13-digit format. In addition, sites that use materials booking will not be able to do group bookings until this report is run.

Run the Rebuild User Database Report

After the upgrade completes, run the Rebuild User Database (Reblusertext) report. Running this report will index allow you to take advantage of the new multiple user ID functionality in SirsiDynix Symphony 3.2.

Reschedule Specific Previously Scheduled Reports

After the upgrade completes, if your site has previously scheduled any of the following reports, you may need to reschedule them as a result of new options being added. Review the Reports section of this document for more information.

• Book X12 Invoices
• Serials X12 Invoices
• Bibliographic Database Overlay
• Load Bibliographic Records
• Load Bibs with Order Info
• Load Bibs for Selection
• Load Bibs with Selections and Decisions

Update your Z39.50 Gateway Destinations

Starting in version GL 3.1, it was required that your Z39.50 gateway destinations contain a value for "Character code." If this field is blank, the default value of UNICODE will be used, which may be totally inappropriate for the site to which you are connecting. If you are upgrading from Unicorn GL 3.0, please make sure your Z39.50 gateway destinations contain the appropriate "Character code" values. Otherwise, searching may not return correct results.

Preparing the Webserver

After finishing a SirsiDynix Symphony upgrade, run prepare_web on your SirsiDynix Symphony server. This serves two functions. First, for sites who are running iBistro/iLink/Webcat on the same server as their SirsiDynix Symphony system, it provides the values that will later be used when the setup_webcat script is run. Second, for all sites, it provides instructions for the WorkFlows Java Client to retrieve its help files.
Download and Updating Your Hyperion Client

As of Unicorn GL3.1, SirsiDynix no longer provided a separate Hyperion staff client. Instead, a Hyperion toolbar is available in the WorkFlows Java client.

Download and Updating Web2

If your site is using Web2, after you have upgraded your SirsiDynix Symphony server to 3.2, you may wish to obtain the 3.2 Web2 server. To download the latest Web2, use the following procedure.

1) Connect to the SirsiDynix Software Delivery Service ftp server by typing `ftp ftp.sirsi.com`, then press Enter.
2) At the login prompt, type `symphony`, then press Enter.
3) At the password prompt, type `upgrades`, then press Enter.
4) A successful login message should display and then an ftp> prompt.
5) At the ftp prompt, type `cd Web2` and then press Enter.
6) At the ftp prompt, type `bin` and press Enter to change to binary transfer mode.
7) Now type `get Web2_3.2.exe` and press Enter to transfer the upgrade file from the ftp server to your Web2 server.
8) After the transfer successful message displays and the ftp prompt returns, type `bye` and press Enter to close the ftp connect.
9) Type `exit` and press Enter to close the command prompt window and proceed with the upgrade.

Optional Post-Upgrade Steps

Recreate Local Toolbars for WorkFlows Java Client

Sites that have customized toolbars for the WorkFlows C client may wish to convert their custom toolbars for use in the WorkFlows Java client. This would be appropriate if your library has custom C client custom toolbars, and you have not already created Local Toolbars on the server for the WorkFlows Java client. Two scripts are available to be run from a command line on the SirsiDynix Symphony server. One script can be used to convert all the custom toolbars, and the other is used for converting just one toolbar at a time.

Instructions for running the conversion scripts are provided in the optional post-upgrade steps section of the Software Delivery Service.
Running the Rebuild Heading Databases Report 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. Running the Rebuild Heading Databases report is optional, but some sites will improve browsing performance if they run the report. Note that running this report requires that a large temporary tablespace be built for Oracle to sort the keys during this process, so the report output should be viewed to see if there were any problems building these indexes. If the indexes are not built, SirsiDynix Symphony will still run properly, but browsing speed will be slower.

Notify SirsiDynix Upon Completion

Note: Review the steps identified in the “Post-Upgrade Steps” and the “Optional Post-Upgrade” sections of the Software Delivery Service instructions once the upgrade is complete.

As a quality control measure, the SirsiDynix Symphony upgrade attempts to send email notification to SirsiDynix of your new version number. Keeping your site’s version number current in the Calls System assists SirsiDynix’s Client Care Center and Upgrades departments in serving you. If for some reason you feel that this automatic email notification may be blocked at your site (by a firewall, for instance), please email the SirsiDynix Client Care Center if you have email support, or call the Client Care Center at 1-877-401-9534, and let us know about your upgrade.
ANSEL to UTF-8 Conversion Script Lists Records That Cause Errors in CJK Databases

As bibliographic records were being converted from American National Standard for Extended Latin Alphabet Coded Character Set for Bibliographic Use (ANSEL) format to 8-bit Unicode Transformation Format (UTF-8), the records that caused errors in Chinese, Japanese, and Korean (CJK) databases were not being identified and listed in the conversion script output. The conversion script has been changed to output the bibliographic records that cause errors in CJK databases when converting the bibliographic records from ANSEL to UTF-8.

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.

SirsiDynix Symphony Administrator Notes

Previously, when the user logged into the WorkFlows Java client, an existing custom.jar file containing customized wizards and/or report screens would be overwritten if a newer custom.jar file had been placed in the Unicorn/ Clients/ Custom directory. As a result, users could not schedule reports in the WorkFlows Java client.

The WorkFlows Java client has been changed so that when a user logs into the client, and a newer custom.jar file is detected in the Unicorn/ Clients/ Custom directory, the new custom.jar file is temporarily renamed as new_custom.jar. The new_custom.jar file is downloaded to the client machine, and the WorkFlows client finishes the login procedure. The next time the user starts a WorkFlows Java client session, the new_custom.jar file is renamed to custom.jar. With this new procedure, the WorkFlows Java client always uses a valid customized Jar file, and users are able to schedule reports correctly.

Note: If the new_custom.jar file that is renamed to custom.jar contains changes to customized report screens, the WorkFlows Java client must be restarted before the user can see the new customized report screens.
Item Search and Display Wizard

Enhancements

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.

SirsiDynix Symphony Administrator Notes

Running the Rebuild Heading Databases report is optional, but some sites will improve browsing performance if they run the report. Note that running this report requires that a large temporary tablespace be built for Oracle to sort the keys during this process, so the report output should be viewed to see if there were any problems building these indexes. If the indexes are not built, SirsiDynix Symphony will still run properly, but browsing speed will be slower.

Corrections

Search Sort on Item Search and Display Wizard Defaults to Twenty Characters

In the hit list resulting from the Item Search and Display wizard, 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.
Acquisitions

General

Enhancements

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 invoice 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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony 3.2 upgrade will examine existing invoices and set the Created in Fiscal Cycle field from the first line on the invoice that contains a fiscal cycle.

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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony Administrator should evaluate the delivered settings in the Acquisitions Session Settings wizard property and make changes if desired.
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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony Administrator should evaluate the delivered settings in the Create Invoice Lines for Order wizard property and make changes if desired.

Fiscal Cycle Field Added to Invoice Records in WorkFlows C Client

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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony 3.2 upgrade will examine existing invoices and set the Fiscal Cycle field from the first line on the invoice that contains a fiscal cycle.
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.
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 Invoice Line, 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 Invoice Line, Pay Invoice Line, and Reverse Payment of Invoice Line tools are unavailable. The Display Invoice Line, 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 Invoice Line and Modify Invoice Line tools are unavailable. The Display Invoice Line, 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 Invoice line tool is unavailable.

• Delete Invoice Wizard – If the date locked is set, and the alert, “This invoice is locked” displays, WorkFlows will display an error message when the user attempts to remove a line from a locked invoice, or if the user attempts to remove 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.

**SirsiDynix Symphony Administrator Notes**

System administrators will need to review the new invoice wizard behavior properties and determine how these properties should be set. Library staff who have permission to run the new Lock Invoices report will need to be given the report password. System administrators should review User Access policies and set the user access for the Unlock Invoice wizard, as appropriate.
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.

SirsiDynix Symphony Administrator Notes

Even though the invoice commands do not work for the InfoVIEW client, it is not recommended that the SirsiDynix Symphony administrator remove these commands from the user access policies. The commands can be used by the WorkFlows C client.

Caution: If the library uses the InfoVIEW client for acquisitions work and also processes invoices through SirsiDynix Symphony, the library must upgrade to WorkFlows.

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 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 be 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)

SirsiDynix Symphony Administrator Notes (WorkFlows Java Client)

The Modify Fund wizard and the Modify Fund Budget wizard in the WorkFlows Java 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.

Do any of the following, depending on what behavior the library wants when modifications to the fund budget amount causes the fund to become overencumbered or overspent.

- In the Modify Fund wizard, select the Allow Modification of Budget Amount check box in the wizard Behavior properties to allow a user to modify the Budget Amount field. This check box must be selected for the error or warning messages to display in this wizard.

- To display the “Fund over encumbered/spent” error message and not save changes to the fund record, use the Modify Fund wizard to select the Block Over Encumbrance check box and the Block Over Expenditure check box on the wizard's Fund Cycle Information tab for each fund that is to display the error message.

- To display the “Fund over encumbered/spent” warning message and save changes anyway to the fund record, use the Modify Fund wizard clear the Block Over Encumbrance check box and the Block Over Expenditure check box on the wizard's Fund Cycle Information tab for each fund that is to display the warning message.
SirsiDynix Symphony Administrator Notes (WorkFlows C Client)

The Modify Fund wizard and the Adjust Fund Budget wizard in the WorkFlows C client have been enhanced to display the following error message when a fund cycle budget amount is edited such that the fund becomes overencumbered or overspent.

Fund over encumbered/spent (fund ID)

Modifications to the fund are not saved; the user must enter the correct the fund cycle budget amount for the fund to be modified.

To display the “Fund over encumbered/spent” error message and not save changes to the fund record when modifications to the fund budget amount with the Adjust Fund Budget wizard cause the fund to become overencumbered or overspent, use the Modify Fund wizard to select the Block Over Encumbrance check box and the Block Over Expenditure check box on the wizard’s Budget Cycle tab for each fund that is to display the error message.

Note: If a fund is already overencumbered or overspent, selecting the Block Over Encumbrance check box and the Block Over Expenditure check box in the Modify Fund wizard will cause the “Fund over encumbered/spent” error message to display, and changes to the fund settings are not saved. The check boxes for the fund can be selected only if the Adjust Fund Budget wizard is first used to change the budget amount such that the fund is not overspent or overencumbered.

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.

**SirsiDynix Symphony Administrator Notes**

Access to this new wizard is delivered to users who have access to the Modify Fund Budget wizard. If additional users need access to this wizard, the administrator will need to modify the appropriate User Access policies.

## 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.

**SirsiDynix Symphony Administrator Notes**

System administrators should review User Access policies and set the user access for the Unlock Invoice wizard, as appropriate.
Authority Wizards

General

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.
Cataloging Wizards

General

Enhancements

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\ Print Preview, 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.
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.

SirsiDynix Symphony Administrator Notes

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 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.

In addition, examine the delivered values for the Display of 880s on Search Hit List policy in the Global Configuration wizard and determine if you want 880s also to display on the WorkFlows search hitlist.

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.

SirsiDynix Symphony Administrator Notes

To configure the Unicode server to sort the 880 tags in correct numeral order in MARC records, the Enable Paired Field Functionality attribute must be selected in the Paired Fields policy on the Cataloging tab of the Global Configuration wizard.
SmartPort Wizard

Corrections

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.

SirsiDynix Symphony Administrator Notes

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 for each Z39.50 destination.

To modify the search name labels in a Z39.50 gateway, do the following.

1) On the Configuration toolbar, click the Name Mapping wizard in the OPAC Configuration group.

2) Select one of the destinations, such as LC, and click Modify.

3) Select a Search Name, such as AUTHOR, and click Modify.

4) Click the Search Name helper (house icon), and select a search name from the list, such as AUTHOR, and click Modify.

5) In the Label box, type the translated label, such as “Auteur” for the French translation of “Author.”

6) Click Save to save the label change.

7) Click Save to save the Name Mapping, and click Save again to save the change to the Z39.50 destination.

Administrators will need to change each label in each search name, and make these changes for each Z39.50 destination, as desired.
Circulation

General

Enhancements

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.

SirsiDynix Symphony 3.2 Administrator Notes

During the SirsiDynix Symphony 3.2 upgrade, the Language field in the user record will be populated with the Language attribute value from the Environment policy linked to the user record. Since all user records are linked to an Environment policy (via the User Profile policy), all user records will be populated with a default language value. To change this value, use the Modify User wizard.

During the upgrade, the /Unicorn/Notices/[Language policy name] directories will be created for the languages configured to be available on the system—not necessarily all languages specified in policies. Should the library decide to add new languages, the administrator will need to create the appropriate language directories and supply the translated notice text. The notice text files must be named the same as the default text files found in the /Unicorn/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 default notice file from the /Notices directory.

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.

SirsiDynix Symphony Administrator Notes

The Circulation Rule policy has been enhanced with the Unseen Renew Limit attribute. The Unseen Renew Limit attribute controls how many times a user (with a particular User Profile) may consecutively renew an item of a particular Item Type without presenting the item at the library for renewal. This attribute is used with the Renew Limit attribute, and can contain a number between 0 and 25,000.

Note: Since the Renew Limit value is the total number of times the item can be renewed, the Unseen Renew Limit value should always be less than or equal to the Renew Limit value.

Note: When an item is renewed as an unseen renewal, and the next renewal is a seen renewal, the unseen renewal counter is reset to 0. The unseen renewal counter is used to determine if the number of consecutive unseen renewals has reached the Unseen Renewal Limit value.

Modify the Operator policy to include the Renew Unseen Item override in the Overrides list of the selected policy.
Copy User Wizard

Enhancements

New Property Added to Copy User Wizard

In the WorkFlows Java client, the Auto-generated Auto ID Behavior property has been added to the Copy User wizard.

This new property which 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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony Administrator should evaluate the delivered settings in the Copy User wizard property and make changes if desired.

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 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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony Administrator should evaluate the delivered settings in the Mark Item Lost wizard property and make changes if desired.
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.

**SirsiDynix Symphony Administrator Notes**

Before the library can begin using the SirsiDynix Symphony Online User Registration program, the SirsiDynix Symphony administrator must edit the delivered configuration file and support files.

The Online User Registration Configuration File (oureg.cfg) customizes Online User Registration for the library system. This file is located in the /Unicorn/Config directory. SirsiDynix delivers a sample configuration file named oureg.cfg.deliv in the /Unicorn/Config directory. SirsiDynix recommends copying the sample configuration file renaming the copy to oureg.cfg for the library system's use. For more information about customizing the Online User Registration program, see the Online User Registration Configuration Guide.

**Note:** The User Access policy specified in the USER_ACCESS entry in the oureg.cfg file must have the Create User Online (yC) and Activate User Online (yA) commands in its access list for Online User Registration to create and activate new user records.

The Online User Registration support files perform validation functions. Some files will require periodic maintenance. The support files reside in the /Unicorn/Oureg directory. SirsiDynix delivers sample support files in the /Unicorn/Oureg/Deliv directory. SirsiDynix recommends copying the sample support files to the /Unicorn/Oureg directory and modifying them for the library system's use. The support files include the following.

- act_usr.txt – The electronic mail message text that the system sends when a user has been activated
- bad_email.txt – A list of fraudulent email addresses
• fake_names.txt – A list of fraudulent user names
• geographic_area.txt – A list of valid states or other geographic information
• highgroup.txt – A list of valid Social Security Number ranges. This list is downloaded from an online source.
• new_user.txt – A list of user IDs to be assigned to new users
• nickname.txt – Lists of names that are to be considered the same or equivalent

For more information about the support files, see the Online User Registration: Configuration Guide.

**Items Can Be Renewed Using Review My Account**

The e-Library 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.

**Sirsidynix Symphony Administrator Notes**

The delivered ibistro.env file and ilink.env file have been enhanced with the new USE_RENEW_REVIEW environment variable and definition. The USE_RENEW_REVIEW environment variable controls whether Checkouts/Select Items to Renew area displays on the Review My Account page. The Checkouts/Select Items to Renew area lists the user’s current checkouts, and allows the user to renew items.

• If the USE_RENEW_REVIEW environment variable is set to 0, the Review My Account page displays a read-only list of the user’s current checkouts in the Checkouts area. The user will not be able to renew items in the list of checkouts. This setting is the delivered default.

• If the USE_RENEW_REVIEW environment variable is set to 1, the Checkouts/Select Items area displays on the Review My Account page. In this area, a list of the user’s checkouts displays. The user may choose to renew some or all of the items in the list.

This enhancement affects the following e-Library files.

• Unicorn/Webcatcommon/Pages_deliv/Elib_revC/25.pg
• Unicorn/Webcatcommon/Pages_deliv/Elib_revC/renew_review.h
• Unicorn/Webcatcommon/Pages_deliv/Elib_revB/25.pg
• Unicorn/Webcatcommon/Pages_deliv/Elib_revB/renew_review.h
• Unicorn/Webcat/Config/ibistro.env
• Unicorn/Webcat/Config/ilink.env
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.

SirsiDynix Symphony Administrator Notes

The following variables have been added to the e-Library environment file (ibistro.env or ilink.env).

```
# Allow payment of bills with AXIS Internet Payments
AXIS_PAYMENT|0| #cgiopac
# AXIS' URL
AXIS_URL|| where to send the request to in the first place
# AXIS return URL - where the AXIS response is directed
AXIS_RETURN_URL|| the return url is used to pass the user back to the appropriate receiving system
# AXIS back URL - if user hits back on AXIS payment screen
AXIS_BACK_URL|| - the back url is used on the Card Details page 'back' button
# AXIS fund code
AXIS_FUND_CODE|| fund code generated by authority
# AXIS fund name
AXIS_FUND_NAME|| fund name generated by authority
# AXIS reference number
AXIS_REFERENCE_NUMBER|| reference number generated by authority
# AXIS reference number two
AXIS_REFERENCE_NUMBER_TWO|| reference number two generated by authority
```

**payconfig File Updated to Accept AXIS Bill Payment Type**

The following variable was added to the /Unicorn/ Webcat/ Config/ payconfig file. This allows the administrator to establish the payment type that will be used for all bill payments made in iBistro/iLink using Axis Capita payments.

```
axis_payment_type_kind||
```

If the field is present, it is used for AXIS payments. If it is not present, the payment_type_kind defaults to CARD. For reports, if the administrator wants all of the Axis Capita payments to have a payment type of AXCAP, she should create a new Payment Type policy, then add the following line to the payconfig file.

```
axis_payment_type_kind|AXCAP|
```
Note: Payment Type policies are created using the Payment Type wizard in the Circulation Configuration group.

Updated e-Library Pages

The following e-Library revB and rev C pages were modified for this enhancement: 25.pg, js_functions.h.

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 item at the library counter for the third renewal. The users may then renew the item 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>The princess diaries</td>
<td>Cabot, M.</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></td>
<td></td>
<td></td>
<td>$4.00</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
Harry Potter and the Deathly Hallows
Rowling, J. K.
PZ7 .R79835 HAL 2007 2007(3645.2)
Due: 9/3/2007, 23:59
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.

SirsiDynix Symphony Administrator Notes

To display unseen renewal information in Review My Account, and Renew My Materials, the following policies and settings must be configured.

- In the WorkFlows Java client, the Renew Limit and Renew Unseen Limit attributes must be configured in the Circulation Rule policy.
- The USE_RENEWED e-Library environment variable must be set to 1 for renewal information to be displayed.
- The USE_UNSEEN_RENEWED e-Library environment variable is a new variable. The variable must be set to 1 for unseen renewal information to display. If it is set to 0, unseen renewal information does not display.

Two additional variables have been created for the unseen renewals feature, and may be customized.

- The UNSEEN_RENEWALS_LABEL variable specifies the text of the field label for unseen renewals in Review My Account and Renew My Materials. The delivered value is “Unseen renewals”.
- The UNSEEN_RENEW_LIMIT_ERROR_MSG variable specifies the text of the message that displays to the user when the user cannot renew the materials unseen any more times and must bring the items to the library for renewal. The delivered value is “Renewal limit reached for materials unseen by staff.”
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.

SirsiDynix Symphony Administrator Notes

New environment variables have been added to ibistro.env and ilink.env that allow a special Interest Level link to appear in the rootbar. Unlike other rootbar selections, Interest Level does not come from the gateway, so it must always be the last element on the rootbar, and cannot be rearranged.

The environment variable, INTEREST_LEVELS_CONFIG, controls the display of the Interest Level page. Set this to 1 to display the page. Other new variables have been added that allow the default values on the page to be set.

# Interest Levels: Searching by Reading Grade / Interest Age / Interest Grade
# 2012.pg
#display Interest Levels on the rootbar
INTEREST_LEVELS_CONFIG|0|
INTEREST_LEVELS_TITLE|<$interest_levels:c>|#rootbar title
# offer sort on interest levels page
USE_INTLVL_SORT|1|
# use interest level by reading grade (521/0_)
USE_SOPT_INTLVL_BY_READGRADE|0|
READING_GRADE_LABEL|<$intlvl_by_readgrade:u>|# field label for reading grade
# use interest level by interest age  (521/1_)
USE_SOPT_INTLVL_BY_INTAGE|0|
INTEREST_AGE_LABEL|<$intvl_by_intage:u>|# field label for interest age
# use interest level by interest grade  (521/2_)
USE_SOPT_INTLVL_BY_INTGRADE|0|
INTERESTGRADE_LABEL|<$intlvl_by_intgrade:u>|# field label for interest grade
#
Keyword Index and Format Policy Updates for Interest Levels

For the Interest Level searches to work correctly in the e-Library, the SirsiDynix Symphony administrator may need to update the Keyword Index and MARC format policies.

Add the following Keyword Index policies.

- Name: READ_GRADE
  - Description: Reading grade level
  - Type: Searchable
  - Internal Name: NM05
  - Sort Index: READ_GRADE

- Name: INTEREST_A
  - Description: Interest age level
  - Type: Searchable
  - Internal Name: AL03
  - Sort Index: INTEREST_A

- Name: INTEREST_G
  - Description: Interest grade level
  - Type: Searchable
  - Internal Name: AL04
  - Sort Index: INTEREST_G

Make the following 521 Display Variation change for all formats

- Indicator1: 0
- Indicator2: ANY
- Precedence: ADDITION
- Keyword Index: READ_GRADE
- Keyword Index Subfields: Include a
- Leading Article: NONE

- Indicator1: 1
- Indicator2: ANY
- Precedence: ADDITION
- Keyword Index: INTEREST_A
- Keyword Index Subfields: Include a
- Leading Article: NONE

- Indicator1: 2
- Indicator2: ANY
- Precedence: ADDITION
- Keyword Index: INTEREST_G
- Keyword Index Subfields: Include a
- Leading Article: NONE

Note: No special processing is needed for these once the extra keyword variation is added for value searching. The catalog does need to be re-indexed after a halt and run of the workstation server.

New and Modified e-Library Pages

The following new e-Library revB and rev C pages were added for this enhancement: 2012.pg, buttons2012.h.

The following e-Library revB and rev C page was modified for this enhancement: rootbar.h..
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.

SirsiDynix Symphony Administrator Notes

For the Reading Programs search to work, the MARC bibliographic records must contain 526 data for Accelerated Reading and Reading Counts that appear like the following.

|aAccelerated Reader AR|bUG|c4.6|d4.0|z8213 - No Quiz Available
|aReading Counts!|b650|c4.7|d9|zQ00459 - No Quiz Available

These tags are converted to numerically searchable data in the 595 tag as follows.

|aAccelerated Reader AR|l46|p10040
|aReading Counts!|l47|p10090

For the Lexile Score search to work, the 521 (with indicator 8) data must appear like the following.

|a650|bLexile

Additionally, the 521 subfield a (score) is specially indexed.
New Environment Variables

New environment variables have been added to ibistro.env and ilink.env that allow a special Reading Programs link to appear in the rootbar. Unlike other rootbar selections, Reading Programs does not come from the gateway, so it must always be the last element on the rootbar, and cannot be rearranged.

The environment variable, READPROG_CONFIG, controls the display of the Reading Programs page. Set this to 1 to display the page. Other new variables have been added that allow the default values on the page to be set.

```
# Reading Programs / Lexile scores -- 2011.pg
# display Reading Programs on the rootbar
READPROG_CONFIG|0| # default should be 0
# pulldown list of reading programs
# 0 # hidden search using SEARCH_READPROG default
# 1 # list includes ACCELERATED READER and READING COUNTS
# 2 # no reading program searching - Lexile scores only
USE_SOFT_READPROG|0|
# default value for reading program # ACCELERATED READER or READING COUNTS
SEARCH_READPROG|ACCELERATED READER|
# display the Sort by option on Reading Programs
USE_READPROG_OPT_SORT_BY|0|
# use one of these three reading program options for Reading Level
# PM5 # search reading level +.5/-.5
# PM3 # search reading level +.1/-.2
# EXACT # search exact reading level only
READPROG_RANGE|PM3|
# show fields for Lexile score searching on reading programs page
USE_SOFT_LEXILE|0|
# if USE_SOFT_READPROG is either 0 or 1 AND USE_SOFT_LEXILE is 1, then
# determine which is the default search by setting one of the radio buttons on.
READPROG_RADIO|0|
LEXILE_RADIO|0|
# Lexile label
LEXILE_LABEL|Include Lexile scores between|
# Lexile range label 1
LEXILE_RANGE_LABEL1|(minimum) and|
# Lexile range label 2
LEXILE_RANGE_LABEL2|(maximum)|
# Lexile explanation text
LEXILE_RANGE_EXPLAIN|Minimum score is 0; maximum is 1700|
```

Updating Index and Format Policies to Support Reading Programs

For the Reading Program and Lexile searches to work correctly in the e-Library, the SirsiDynix Symphony administrator may need to update the Keyword Index and MARC format polices.
For Reading Program 526 Data: Add the following Keyword Index policies.

* Name : READPROG
  * Description : Reading Program
  * Type : Searchable
  * Internal Name : NM02
  * Sort Index : READPROG

* Name : RPSORT
  * Description : Reading Points
  * Type : Searchable
  * Internal Name : NM03
  * Sort Index : RPSORT

* Name : RLSORT
  * Description : Reading Level
  * Type : Searchable
  * Internal Name : NM04
  * Sort Index : RLSORT

Make the following changes to the 526 Entry ID policy.

-----------------   Subfield Punctuations   ---------------
* Entry ID : 526
  * Type : Replace
  * Subfield : c
* Replacement String : Level=
-----------------   Subfield Punctuations   ---------------
* Entry ID : 526
  * Type : Replace
  * Subfield : d
* Replacement String : Points=

Make the following changes to the MARC format policy settings for the 595 tag.

* Entry ID : 595
  * Entry Number : 595
  * Valid Subfields : ALL
  * Valid Indicator1 : NONE
  * Valid Indicator2 : NONE
  * Entry Type : Local

-----------------   Display Variation(s)   -----------------
* Indicator1 : ANY
* Indicator2 : ANY
  * Label : Display Subfields : Exclude 0,1,2,3,4,5,6,7,8,9,=,?,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z
  * Send Unformatted : NO

Keyword Index Variation1
--------------------------
* Indicator1 : ANY
* Indicator2 : ANY
  * Precedence : ADDITION
  * Keyword Index : READPROG
* Keyword Index Subfields : ALL
  * Leading Article : NONE

Keyword Index Variation2
--------------------------
* Indicator1 : ANY
* Indicator2 : ANY
  * Precedence : ADDITION
* Keyword Index : RPSORT
* Keyword Index Subfields : Include p
  * Leading Article : NONE

Keyword Index Variation3
-------------------------
* Indicator1 : ANY
* Indicator2 : ANY
  * Precedence : ADDITION
* Keyword Index : RLSORT
* Keyword Index Subfields : Include l
  * Leading Article : NONE

For Lexile Scores from the 521 Tag with First Indicator of 8: Create the following Keyword index policy.

* Name : LEXILE
  * Description : Lexile
  * Type : Searchable
  * Internal Name : NM06
  * Sort Index : LEXILE
  * Z3950 Use Attribute : NONE

Add the following for 521 Keyword Variation to the MARC format only.

* Indicator1 : 8
  * Indicator2 : ANY
    * Precedence : ADDITION
    * Keyword Index : LEXILE
  * Keyword Index Subfields : Include a,b
    * Leading Article : NONE

Modify the 521 Display Variation in the MARC format only.

Display Variation6
------------------
* Indicator1 : 8
  * Indicator2 : ANY
    * Label : Lexile score
    * Display Subfields : Include a,b
    * Send Unformatted : NO

Note: No special processing is needed for the Lexile scores in the 521_8 tag once the extra keyword variation is added for value searching. The catalog does need to be re-indexed after a halt and run of the workstation server, and after a subscription service, such as Follett adds the Lexile data into the MARC records.

Index Reading Program Data Report

The Index Reading Program Data report processes the catalog records for Reading Program searches. This report must be run nightly, prior to the Add, Delete, Update databases report. The Index Reading Program Data report is found in the IBistro group reports for SirsiDynix Symphony systems and the Housekeeping group reports for SirsiDynix Symphony K-12 systems.

New e-Library Pages: New e-Library revB and rev C pages were added for this enhancement: 2011.pg, buttons2011.h, js_functions.h, readprog_exact.h, readprog_pm3.h, readprog_pm5.h.

The following e-Library revB and rev C page was modified for this enhancement: rootbar.h.
Optional Local Enhancements

To emphasize reading program catalog data, the following optional enhancements can be made.

- In the MARC format, set the 526 entry to List Field Rank #4 so Reading Program data displays in the catalog hitlist.

- In the MARC FULL entry synonym list, add the 526 entry so reading program data displays in the RevC pages Catalog Record tab, and/or replace one or more of the current pieces of the RevC pages Item Information tab to display 526 data and 521 data.

  The following modification will display 526 data.

  \texttt{ITEMINFO\_OPTION2\|526|}

  The following modification will display 521 data.

  \texttt{ITEMINFO\_OPTION2\|526|}

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.

SirsiDynix Symphony Administrator Notes

A new variable, USE\_KEEP\_ALL\_BUTTON, was created for the e-Library for the environment file (ibistro.env, ilink.env, or k12.env). When this variable is set to 1, the Keep All in this Page button will appear in the search hit list page. By default, this variable is set to 0, hiding this new Keep All in this Page button.

This enhancement is available in the Elib\_revC, Elib\_revB, and K12 pages sets. The following pages are affected by this change: 4.pg, js\_functions.h.

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.
SirsiDynix Symphony Administrator Notes

The following environment variable was added to ibistro.env and ilink.env to allow the SirsiDynix Symphony administrator to control the Best Sellers or Recommended Reading hit list and single item view options.

USE_BSRR_LIBRARY_HERE|1|

If this value is set to "1," the Best Seller and Recommended Reading lists will display holdings only for the station library of the current user. The “Copies available” statement will not display on the Best Seller and Recommended Reading hit lists. By default, USE_BSRR_LIBRARY_HERE is delivered with the value “0,” indicating that holdings for all libraries will display.

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.

SirsiDynix Symphony Administrator Notes

By default, SirsiDynix Symphony is configured not to change hold levels. To enable this feature, contact SirsiDynix Client Care. By default, group range holds will continue to be based on the station library of the user placing the hold. To change the configuration so that group range holds are based on the pickup library and the pickup library's library group, contact SirsiDynix Client Care.

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.

**SirsiDynix Symphony Administrator Notes**

The Other Resources link to 360 Search displays if the CENTRAL_SEARCH_URL is defined. The following variable was changed in ibistro.env and ilink.env environment files.

```bash
# EITHER SingleSearch or CentralSearch may be configured. Use this text in the
# link OTHER_RESOURCES_LABEL|$<other_resources>|
# SirsiDynix SingleSearch
#    launches a new window that allows patrons to search multiple designated
#    resources all at once.
# URL to be used for SingleSearch requests
SINGLE_SEARCH_URL||
# user id for the SingleSearch requests
SINGLE_SEARCH_USERID||
# password for the SingleSearch requests
SINGLE_SEARCH_PASSWORD||

# SirsiDynix CentralSearch
#    launches a new window that allows patrons to search multiple designated
#    resources all at once.
# URL to be used for CentralSearch requests
CENTRAL_SEARCH_URL||
# hash to be used for CentralSearch requests
CENTRAL_SEARCH_SSLIB_HASH||
```
The logic is as follows: if the Single Search URL is not empty and the 360 Search URL is empty, then make a link that sends the current search term to the Single Search URL; conversely, if the 360 Search URL is not empty and the Single Search URL is empty, then make a link that sends the current search term to the 360 Search URL.

Also, a new environment variable, CENTRAL_SEARCH_PROXY_ACCESS, was added to the ibistro.env and ilink.env environment files. This variable allows the SirsiDynix Symphony administrator to make 360 Search available to any login/environment, regardless of whether the login is personal or shared. It is understood that by implementing this environment variable, the library is validating user logins by other methods.

```
CENTRAL_SEARCH_PROXY_ACCESS|0|
```

The 360 Search pages display the following conditional.

```
<!-- logged in as PERSONAL user or configured for proxy -->
<SIRSI_Conditional IF Session="ACCESS_TYPE^0" OR
 Environ="CENTRAL_SEARCH_PROXY_ACCESS^1">
```

Note: The following Elib_revB pages were modified: 15.pg, 3.pg, 76.pg, disttop.h, hitstop.h, search_label.h, search_other.h.

The following Elib_revC pages were modified: 15.pg, 16.pg, 17_item_services.h, 22.pg, 3.pg, 4.pg, 55_item_services.h, 6.pg, 76.pg, otherssearches.h, search_other.h.

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 WEBSERVER 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 WEBSERVER 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 WEBSERVER’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.
SirsiDynix Symphony Administrator Notes

A new variable, HOLD_STATION_LIBRARY_USER, was created for the e-Library for the environment file (ibistro.env or ilink.env). When this variable is set to 1, and a user does not log in and places a hold on an item, the library associated with the user ID placing the hold will be searched and will be used as the workstation library. When this variable is set to 0 (zero), the e-Library will work as before and the WEBSERVER login’s library will be used as the workstation library. By default, the HOLD_STATION_LIBRARY_USER environment variable will be set to 0.

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.

SirsiDynix Symphony Administrator Notes

The following environment variable was added to ibistro.env and ilink.env to define the number of seconds to wait on content to be retrieved.

The default is 5 seconds.

OPAC_CONTENT_WAIT|5|

The following Elib_revB page was modified: one_enrich.h.

The following Elib_revC pages were modified: one_enrich.h, viewtop.h.

Search Hit List and Item View Can Display Alternate Graphic Representation Information

The e-Library 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.

SirsiDynix Symphony Administrator Notes

The delivered ibistro.env file and ilink.env file have been enhanced with the new DISP880FORM environment variable and definition. The DISP880FORM environment variable controls 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.
• If the DISP880FORM environment variable is set to 0, the catalog hit list and the detail view will display only normal entries and not 880 entries. This setting is the delivered default.

• If the DISP880FORM environment variable is set to 1, the catalog hit list and the detail view will display only the 880 entries and not the normal entries. However, if an entry does not have a linked 880 entry, the normal entry displays.

• If the DISP880FORM environment variable is set to 2, the catalog hit list and the detail view will display both the normal entries and the 880 entries.

This enhancement affects the following e-Library files.

• Unicorn/Webcat/Config/ibistro.env
• Unicorn/Webcat/Config/ilink.env
• Unicorn/Webcatcommon/Pages_deliv/Elib_revB/4.pg
• Unicorn/Webcatcommon/Pages_deliv/Elib_revB/viewtop.h
• Unicorn/Webcatcommon/Pages_deliv/Elib_revC/4_module_hitlist.h
• Unicorn/Webcatcommon/Pages_deliv/Elib_revC/view_item_info.h

**Alternate Graphic Representation Entries Can Be Made to Display With Linked Fields in the Full Record View**

The e-Library 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.

**SirsiDynix Symphony Administrator Notes**

The delivered ibistro.env file and ilink.env file have been enhanced with the new SORT880WITHASSOCIATED environment variable and definition. The SORT880WITHASSOCIATED environment variable controls how the full record display will show 880 entries that are linked to a field.

• If the SORT880WITHASSOCIATED environment variable is set to 0, the full record display will group all of the 880 entries together, and list the record fields in numerical order. This setting is the delivered default.

• If the SORT880WITHASSOCIATED environment variable is set to 1, the full record display will place the 880 entries directly following the record fields to which they are linked.
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 display even if the SORT880WITHASSOCIATED environment variable is set to 1.

This enhancement affects the following e-Library files.

- Unicorn/ Webcat/ Config/ ibistro.env
- Unicorn/ Webcat/ Config/ ilink.env

**New Environment Variable Controls the Display of Alternate Tag Names for 880 Tags**

The e-Library 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.

SirsiDynix Symphony Administrator Notes

The delivered ibistro.env file and ilink.env file now offer the new DISP880LINKLABEL environment variable and definition in the Catalog Single Item View area. The DISP880LINKLABEL environment variable controls whether the detail view of a catalog record with 880 tags will display the standard label, or the linked entry's alternate tag name.

- If DISP880LINKLABEL environment variable is set to 1, the appropriate label for the linked entry in the 880 tag displays. This setting is the delivered default.
- If DISP880LINKLABEL environment variable is set to 0, the generic 880 label of “Alternate Graphic Representation” displays for the 880 tag.

This enhancement affects the following e-Library files.

- Unicorn/ Webcat/ Pages_deliv/ Elib_revC/ view_march
- Unicorn/ Webcat/ Pages_deliv/ Elib_revB/ 5.pg
- Unicorn/ Webcat/ Pages_deliv/ Elib_revB/ 55.pg
- Unicorn/ Webcat/ Pages_deliv/ Elib_revB/ 17.pg
- Unicorn/ Webcat/ Config/ ibistro.env
- Unicorn/ Webcat/ Config/ ilink.env
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.

SirsiDynix Symphony Administrator Notes

The delivered ibistro.env file, ilink.env file, and k12.env file have been enhanced with the new LANG_DIR_HTML_TAG environment variable and definition. The LANG_DIR_HTML_TAG environment variable defines the HTML tag used to control the spacing of information in the brief record view for records that contain Alternate Graphic Representation (880 entries). The specified HTML tag is mainly used for displaying Unicode text that appears in a direction opposite of the direction in which the Web page is displayed (such as Arabic text read right to left on a Web page that is rendered in English text and would be read left to right).

By default, the LANG_DIR_HTML_TAG environment variable is set to p, which specifies that the <p> HTML tag is to be used when displaying lines of text in 880 entries.

Note: The specified HTML tag must use the directional (dir) attribute, and must be a tag that has an ending tag (such as the <q> HTML tag).

This enhancement affects the following e-Library files.

- /Unicorn/Webcat/Config/ibistro.env
- /Unicorn/Webcat/Config/ilink.env
- /Unicorn/Webcat/Config/k12.env
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.

SirsiDynix Symphony Administrator Notes

The e-Library has been enhanced as follows so international users can use PayPal to pay bills in the local currency.

- Any currency symbols entered in the e-Library payment form are removed. The e-Library checks the system’s configuration for the defined local currency symbol.

Note: The currency symbol is also removed for payments made with the AXIS Payment Management system.

- The delivered ibistro.env file and ilink.env file have been enhanced with the new PAYPAL_CURRENCY environment variable and definition. The PAYPAL_CURRENCY environment variable specifies the currency code that is to be included in PayPal payment requests. The following list shows the currency codes that are supported by PayPal. The default currency code is USD, for U.S. Dollars.

<table>
<thead>
<tr>
<th>Code</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUD</td>
<td>Australian Dollar</td>
</tr>
<tr>
<td>CAD</td>
<td>Canadian Dollar</td>
</tr>
<tr>
<td>CHF</td>
<td>Swiss Franc</td>
</tr>
<tr>
<td>CZK</td>
<td>Czech Koruna</td>
</tr>
<tr>
<td>DKK</td>
<td>Danish Krone</td>
</tr>
<tr>
<td>EUR</td>
<td>Euro</td>
</tr>
<tr>
<td>GBP</td>
<td>Pound Sterling</td>
</tr>
<tr>
<td>HKD</td>
<td>Hong Kong Dollar</td>
</tr>
</tbody>
</table>
The e-Library has also been enhanced with the PAYPAL_VERIFICATION_URL variable in the system.env file to allow the PayPal payment verification URL to be specified. The URL specified in the PAYPAL_VERIFICATION_URL variable is used to send the PayPal Instant Payment Notification (IPN) for verification. By default, the URL used to verify PayPal payments for users in the United States (http://www.paypal.com/cgi-bin/webscr) is specified.

**Note:** The PayPal payment verification URL must be specified in the system.env file. Specifying the URL in the ibistro.env file or the ilink.env file will have no effect.

This enhancement affects the following e-Library files.

- Unicorn/Webcatcommon/Pages_deliv/Elib_revB/js_functions.h
- Unicorn/Webcatcommon/Pages_deliv/Elib_revC/js_functions.h
- Unicorn/Webcat/Config/ibistro.env
- Unicorn/Webcat/Config/ilink.env
- Unicorn/Webcat/Config/system.env

**“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.

**SirsiDynix Symphony Administrator Notes**

The existing USE_BUYNOW_ICON environment variable in the e-Library environment files has been changed so libraries can offer their patrons a “Buy Now” link to purchasing sites of the libraries’ choosing. The environment variable can have one of the following settings.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUF</td>
<td>Hungarian Forint</td>
</tr>
<tr>
<td>JPY</td>
<td>Japanese Yen</td>
</tr>
<tr>
<td>NOK</td>
<td>Norwegian Krone</td>
</tr>
<tr>
<td>NZD</td>
<td>New Zealand Dollar</td>
</tr>
<tr>
<td>PLN</td>
<td>Polish Zloty</td>
</tr>
<tr>
<td>SEK</td>
<td>Swedish Krona</td>
</tr>
<tr>
<td>SGD</td>
<td>Singapore Dollar</td>
</tr>
<tr>
<td>USD</td>
<td>U.S. Dollar</td>
</tr>
</tbody>
</table>
A value of 0 turns off the "Buy Now" feature in the e-Library. This setting is the delivered default.

A value of 1 enables the "Buy Now" feature. This option is used with the BUYNOW_URL_PT1 and BUYNOW_URL_PT3 environment variables, which define the URLs for online bookstore Web sites.

This enhancement affects the following e-Library environment files in Unicorn/Webcat/Config:

- ibistro.env
- ilink.env
- k12.env
- webcat.env

This enhancement affects the following e-Library Unicorn/Webcatcommon/Pages_deliv/Elib_revB files:

- copyright.h
- 81.pg
- rsvviewtop.h
- viewtop.h
- viewtop2.h

This enhancement affects the following e-Library Unicorn/Webcatcommon/Pages_deliv/Elib_revC files:

- copyright.h
- 17_item_services.h
- 55_item_services.h
- 5_item_services.h
- 81.pg

This enhancement affects the following e-Library Unicorn/Webcat_common/Pages_deliv/K12 files:

- 81.pg
- rsvviewtop.h
- viewtop.h
- viewtop2.h
This enhancement affects the following e-Library Unicorn/ Webcat/ Pages_deliv/ WebCat files.

- copyright.h
- 17.pg
- 5.pg
- 55.pg

The Barnes & Noble icon (bnlogo.gif) has been removed from the following directories.

- English/ Other/ Misc
- English/ Other/ Miscib
- English/ Other/ Miscil
- English/ Other/ Misck12
- French/ Other/ Misc
- French/ Other/ Miscib
- French/ Other/ Miscil
- French/ Other/ Misck12
- Spanish/ Other/ Misc
- Spanish/ Other/ Miscib
- Spanish/ Other/ Miscil
- Spanish/ Other/ Misck12

**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.
SirsiDynix Symphony Administrator Notes

Libraries that allow users to use the e-Library remotely noticed considerable CPU usage on the library server by remote e-Library sessions. The server CPU usage was attributed to the resources needed for reading and resolving labels and messages for the remote e-Library session.

The delivered webconfig file has been enhanced with the WEBSESSION_TRANSLATE configuration option.

- If the WEBSESSION_TRANSLATE option is set to 0, the e-Library will resolve labels and messages by making calls to the server for the translations. This setting is the delivered default setting.
- If the WEBSESSION_TRANSLATE option is set to 1, the e-Library will resolve labels and messages by reading the local copy of the labels and messages file. The e-Library session will write the translated labels and messages into the memory of the machine being used for the remote e-Library session so they can be accessed locally instead of having to make calls to the library server.

Patron Credit Balance Added to the Review My Account Display

In libraries that use the Patron Credit Accounts feature, a patron’s current credit account balance can be configured to display in the Review My Account display. If the credit account balance is configured to display, the amount displays in the summary information with the number of checkouts, holds, and bills for the user.

SirsiDynix Symphony Administrator Notes

In libraries that use the Patron Credit Accounts feature, a patron’s current credit account balance can be configured to display in the Review My Account display. If the credit account balance is configured to display, the amount displays in the summary information with the number of checkouts, holds, and bills for the user.

The PCREDIT_EMPTY_VALUE environment variable determines when the patron’s current credit account balance displays in the Review My Account display. The default delivered value is $0.00, which can be changed to the appropriate currency symbol and decimal punctuation.

- If PCREDIT_EMPTY_VALUE is set to $0.00 or the representation for a zero balance in the local currency, the current patron credit account balance displays in the Review My Account display only when the patron’s account balance exists and is greater than zero.
- If PCREDIT_EMPTY_VALUE does not contain any value, the current patron credit account balance always displays in the Review My Account display, even if the balance is zero.
Note: The PCREDIT_EMPTY_VALUE environment variable does not have any effect in libraries that have not configured the Patron Credit Accounts feature. Refer to "New Patron Credit Account Feature" in the Circulation section of this release notes document and the online SirsiDynix Symphony online help for information about the Patron Credit Account feature.

This enhancement affects the following e-Library files.

- Unicorn/Webcatcommon/Pages_deliv/Elib_revC/usertop.h
- Unicorn/Webcatcommon/Pages_deliv/Elib_revB/usertop.h
- Unicorn/Webcat/Config/ibistro.env
- Unicorn/Webcat/Config/ilink.env

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.

SirsiDynix Symphony Administrator Notes

If a site does not want to implement automatic patron login to the netLibrary Web site, the SirsiDynix Symphony Administrator will need to make a change to the e-Library environment file (ibistro.env or ilink.env).

Notes:

- The following Elib_revB custom pages were modified: 4.pg, 5.pg, 16.pg, 17.pg, 22.pg, 55.pg, rsvviewtop.h, viewtop.h, viewtop2.h.
- The following Elib_revC custom pages were modified: 16.pg, 22.pg, 4_module_hitlist.h, view_enrichments.h, view_march, viewtop.h.

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.

SirsiDynix Symphony Administrator Notes

The following Elib_revC page was modified: viewtop.h.
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.

SirsiDynix Symphony Administrator Notes

The following Elib_revC page was modified: disc_enrich.h.

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.

SirsiDynix Symphony Administrator Notes

The following Elib_revC and Elib_revB page was modified: js_functions.h.
Place Hold Button Missing from Full Record Display

After upgrading to Unicorn Version GL 3.1, 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.

SirsiDynix Symphony Administrator Notes

The following Elib_revC page was modified: 17_item_services.h.

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.

SirsiDynix Symphony Administrator Notes

The following Elib_revC page was corrected: 22.pg.

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 e-Library, 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.

SirsiDynix Symphony Administrator Notes

This correction affects the following e-Library files.

- Unicorn/Webcatcommon/Pages_deliv/Elib_revC/srch_options.h
- Unicorn/Webcatcommon/Pages_deliv/Elib_revB/srch_options.h
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 3.2.

- The Kids Click! URL delivered to UnicornEcole customers changed from http://sunsite.berkeley.edu/KidsClick/ to http://kidsclick.org/.

New customers installing SirsiDynix Symphony 3.2 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.

SirsiDynix Symphony Administrator Notes

In the WorkFlows C client, use the Gateway configuration wizard to change the URLs for the Cool Sites gateway element.

In the WorkFlows Java client, use the Gateway Database policy wizard to change the URLs for the Cool Sites gateway element.

Single Library Holdings Display Incorrect for Best Sellers and Recommended Reading Lists

Previously in the e-Library 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.

SirsiDynix Symphony Administrator Notes

e-Library custom pages affected: 81.pg, reconvertlist2.cmd
Web Server IIS 6.0 Cannot Process URLs

Previously in the e-Library 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.

SirsiDynix Symphony Administrator Notes
e-Library custom pages affected: 16.pg

Error on UnicornECOLE Best Sellers List

Previously in the e-Library on UnicornECOLE, when a Best Sellers list is selected, the first item in the hit list displays author and title, but there is an error in the cover display, as follows.

[P]Syntax error, line 146: Markup mismatch.

This has been corrected.

SirsiDynix Symphony Administrator Notes
e-Library custom pages affected: 81.pg

Configured Hold Information Prompts Display for Users with Personal User Access Type

If the e-Library 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 e-Library 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 e-Library 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 e-Library is configured to prompt for this information.
SirsiDynix Symphony Administrator Notes

If a library set the USE_MAIL_SERVICE (mail delivery method prompt), USE_SUSPEND_HOLD (hold suspension date prompt), and/or USE_HOLD_EXPIRATION_DATE (hold expiration date prompt) environment variables to 1 while the USE_HOLD_PICKUP_LIBR (pickup library prompt) environment variable was set to 0, the user would not see the prompts for the mail delivery method, hold suspension date, and/or the hold expiration date. Instead, the user would immediately see the completed hold screen and would never be prompted for the hold information. If the USE_HOLD_PICKUP_LIBR environment variable was set to 1, the user would be correctly prompted for the information when placing a hold.

The e-Library has been corrected so that if the USE_MAIL_SERVICE, USE_SUSPEND_HOLD, and/or USE_HOLD_EXPIRATION_DATE environment variables are set to 1, a user with a Personal user access type will be prompted to specify the mail delivery method, the hold suspension date, and/or the hold expiration date when placing a hold.

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.

SirsiDynix Symphony Administrator Notes

e-Library custom pages affected: /Elib_revC/othersearches.h
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

SirsiDynix Symphony Administrator Notes

The Materials Booking toolbar and wizards are delivered with the SirsiDynix Symphony 3.2 upgrade. Access to the booking wizards are delivered with the sirsi and admin logins. Administrators should review the wizard functions to determine who should have access to these wizards and modify the User Access policies as needed. Administrators should also review the new wizard properties and determine how these properties should be set.
Reports

General

Enhancements

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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony 3.2 release includes many bibliographic record loading enhancements. As a result, if any of the following reports in the MARC Import report group are scheduled and are configured to use the Remove Medical Subject Headings (MeSH) option on the Selection Criteria tab, the reports must be rescheduled after the upgrade to run correctly.

- 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.

### 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.

**SirsiDynix Symphony Administrator Notes**

**Note:** Custom user statuses must be defined in the User Standing policy before they can be selected with the gadget in the User Delinquency field.

Review custom or scheduled reports that contain a User Status Selection report tab to determine if the report settings need to be adjusted.
X12 Invoices Reports Enhanced with the Created in Fiscal Cycle Field

The Book X12 Invoices (Bookinvoicex12) report and the Serials X12 Invoices (Serinvoicex12) 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.

SirsiDynix Symphony Administrator Notes

The Book X12 Invoices (Bookinvoicex12) report and the Serials X12 Invoices (Serinvoicex12) report have been enhanced with the Created in Fiscal Cycle field. This field is required to run the reports.

Note: The Book X12 Invoices report and the Serials X12 Invoices report must be rescheduled after the SirsiDynix Symphony 3.2 upgrade is complete.

Acquisitions Group Reports

Enhancements

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)

**SirsiDynix Symphony Administrator Notes**

The following pipe-delimited files may be created, depending on which options are selected on the Print Invoice tab. The files are created in the Unicorn/ Rptprint directory on the library server. In each report name, XXXX is the four-letter report ID that corresponds to the report.

• fund_summary_XXXX.pipe
• inv_and_invline_XXXX.pipe
• inv_funds_XXXX.pipe
• invoice_totals_XXXX.pipe
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)

If any of the reports listed above is a regularly-scheduled report, the report must be modified and rescheduled to use the new options on the Print Invoice tab.

**Acquisitions Load Group Reports**

**Corrections**

**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.

**SirsiDynix Symphony Administrator Notes**

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.

**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.

**SirsiDynix Symphony Administrator Notes**

The 'character coding scheme' in the .000. entry of each flat record (the 8th position 000 | a) must have the value 'a' as in the following example.

`.000. |aamI 0c a`

**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.
SirsiDynix Symphony Administrator Notes

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.

The Sort Offline Transactions report produces the standtrans.srt file, which contains all of the sorted offline transactions for the libraries. The transactions are sorted by date, then by item ID in dictionary sort order. SirsiDynix Symphony administrators must manually divide the standtrans.srt file into multiple files for simultaneous processing by the API server.

*Note:* Since API server knowledge is required, consult SirsiDynix Client Care for guidance before running the report.

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.

SirsiDynix Symphony Administrator Notes

The Lock Invoices report (Lockinvoice) in the Acquisition report group sets the date locked for selected invoices in batch.

*Note:* The Lock Invoices report is password protected. Invoices that need proration or that have underlinked lines cannot be locked using this report.

Although the report is password-protected, system administrators should decide if further limiting of access to this report is needed.
Bibliographic Group

Enhancements

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 SLSc. 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.

SirsiDynix Symphony Administrator Notes

Defining the OCLC Code in the Library Policy

The Extract Deletions for OCLC report requires that all of the Library policies contain an OCLC code. If any library selected by the report 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

To define the OCLC code for a library, modify the library’s Library policy, and specify the library’s OCLC code in the OCLC Code field. In the Workflows Java client, the OCLC Code field is on the General tab in the selected Library policy.
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.

SirsiDynix Symphony Administrator Notes

In libraries that use the Patron Credit Accounts feature, system administrators should review the Patron Credit Account Statement report and its options to determine how to set up the report for use in the libraries.
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.

SirsiDynix Symphony Administrator Notes

The Patron Credit tab has been added to the Assumed Lost (Assumedlost) report to allow libraries to use the automatic payment of bills with patron credit accounts feature. To automatically pay bills with the Assumed Lost (Assumedlost) report, do the following.

- Define payment type policies with the Payment Type wizard.
- Define credit reason policies with the Credit Reason wizard.
- Specify the lost or assumed lost bill reasons as bill reasons that can be automatically paid with funds from patron credit accounts in the Credit Rule wizard.
- Set up credit accounts for patrons with the Credit User Account wizard.
- Make selections in the Payment Type and Credit Reason fields in the Assumed Lost report. If the Assumed Lost report is scheduled to run regularly, edit the report selections, and schedule the report again. The report must be edited and scheduled to use the newly-added automatic payment of assumed lost item bills feature with the report.
MARC Import Group Reports

Enhancements

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.

SirsiDynix Symphony Administrator Notes

Existing report templates and scheduled reports will be converted by the SirsiDynix Symphony 3.2 software upgrade for the new Item Availability options. Review the converted templates and reports, and make changes to the option settings, if desired.
Maintenance Group Reports

Enhancements

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.

SirsiDynix Symphony Administrator Notes

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.

- In the Workflows Java client, clear the Update Database Records check box on the Update Option tab to run the report in test mode.
- In the Workflows C client, set the Update Database Records option to No on the Output Options tab to run the report in test mode.

When the user is satisfied with the test results of the report, the user can select Update Database Records check box in the Workflows Java client or set the Update Database Records option to Yes in the Workflows C client before running the report again to actually update the database records.
Serials Group Reports

Enhancements

Serials X12 Invoices Report Now Supports Coverage Note

The Serials X12 Invoices (Serinvoicex12) 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.

SirsiDynix Symphony Administrator Notes

Existing sites will need to modify the Invoice Line Extended Information Format policy to include the Coverage Note field. For instructions on how to add a format policy, see “How do I create a new entry (field) in a format?” in “FAQs: Working with Format Policies” in the WorkFlows client online help.
SIP2/NCIP Servers

General

Enhancements

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 ItemChecked-InMsgDefaults 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.

NCIP Administrator Notes

The following information, including default values, was added to the sirsi-ncip-settings.xml file for NCIP.

```xml
<AcceptItemMsgDefaults>
  <AutoTransitItem>false</AutoTransitItem>
</AcceptItemMsgDefaults>

<CheckInItemMsgDefaults>
  <AutoTransitItem>false</AutoTransitItem>
</CheckInItemMsgDefaults>

<CheckOutItemMsgDefaults>
  <AutoUntransitItem>true</AutoUntransitItem>
</CheckOutItemMsgDefaults>

<ItemCheckedInMsgDefaults>
  <AutoTransitItem>false</AutoTransitItem>
</ItemCheckedInMsgDefaults>
```
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.

NCIP Administrator Notes

The following information has been added to the NCIP settings file for the ItemCheckedOut message. If the element <DefaultUserID> is defined to be a SirsiDynix Symphony user ID, then this value will be used to charge the item if the charge fails initially using the incoming user ID.

<ItemCheckedOutMsgDefaults>
  <DefaultUserID/>
</ItemCheckedOutMsgDefaults>
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 SirsiDynix Symphony 3.2 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 Unicorn” in the WorkFlows Java client online Help.
SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony administrator should determine who has access to the CONSER Publication Pattern Load feature, and for those users, set behavior properties the Create Serial Control and Modify Serial Control wizards to allow use of the Replace Patterns helper (which is set on the Helpers tab). And also, the administrator should 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 SirsiDynix Symphony administrator should review the two new policies for these features: CONSER Chronology Type Map and CONSER Publication Cycle Map. Lists of CONSER chronology type maps and CONSER publication cycle maps are delivered with the SirsiDynix symphony 3.2 upgrade, representing the common possible combinations of chronology captions and publication cycles. The administrator can add new maps, if required.

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.
System Configuration

General

Enhancements

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.

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)
System Configuration

SirsiDynix Symphony 3.2 Administrator Notes

- 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)

SirsiDynix Symphony Administrator Notes

These changes are for new SirsiDynix Symphony deliveries only. Existing sites will need to modify their catalog and authority formats accordingly. For information about modifying catalog and authority formats, see “FAQs: Working with Formats” in the Workflows Java client online Help.

To add new entries to a format policy, the administrator needs to first check the Entry ID policy list within a format to see if the entry is available. If not, the administrator will need to create a new Entry ID policy. This new entry ID should now be added to the format. To create an Entry ID Policy, use the Entry ID policy helper. See the Entry ID policy helper topic in the Help.
To add an entry ID to a format, see the “Entries Tab for the Format Policy” topic in the Help. This topic describes the fields required when adding an entry to a format policy. For each entry ID, sub-tabs such as Basic, Display, and Punctuation display fields to be completed based on the purpose of the format. After adding an entry to a format, the administrator will need to halt and run the workstation server for format changes to appear.

Access Control Configuration

Enhancements

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.

SirsiDynix Symphony Administrator Notes

In a User Access policy, clicking the Access List for K12 Web Client tab displays folders that represent the folders, tabs, buttons, and reports available in the K12 Web Client.

Clicking the plus sign next to a folder displays the available tabs and buttons for the folder. In the Report folder, clicking the plus sign next to the folder displays the available report groups and individual reports. Selecting the User Access policy name check box at the top of the access list selects all available folders, tabs, buttons, and reports. Selecting a folder check box automatically selects all of the tabs, buttons, or reports within that tab. Clear the check boxes for the folders, tabs, buttons, and reports to which the user not to have access.

When creating a new User Access policy, the administrator must first save the information on the Basic tab, select the new User Access policy from the policy list, and click Modify before making selections on the Access List for K12 Web Client tab.

**Note:** SirsiDynix delivers K12 Web Client access lists for ADMIN, SIRSI, PUBLIC, CIRC, TECH, SCANNER, and WEBSERVER.
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. 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.

**SirsiDynix Symphony Administrator Notes**

When creating a Fund Library Authorization policy, at least one library must be specified in the Libraries field. An empty Libraries field in the policy is invalid.

The library system administrator will need to review the User Access policies for the users who should have access to the Fund Library Authorization wizard.
Circulation Configuration

Enhancements

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.

SirsiDynix Symphony Administrator Notes

If the option to Configure Auto Cancellation of On-Order Holds is enabled, the server will make holds inactive if the modification or removal of a holding distribution makes the hold unfillable.

General Configuration

Enhancements

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.
SirsiDynix Symphony 3.2 Administrator Notes

SirsiDynix Symphony Administrator Notes

A new Location policy, AVAIL_SOON, is delivered with SirsiDynix Symphony. This policy is delivered with the following attribute settings.

- The Name attribute is set to AVAIL_SOON.
- The Description attribute contains the text “Available soon.”
- The Holdable attribute check box is selected.
- The Type attribute is set to AVAILABLE_SOON.
- The Shadow attribute check box is cleared.
- The Reshelving Period attribute is set to RESHELVE.
- The Reshelving Location attribute is set to AVAIL_SOON.

The Available attribute check box is cleared.

Global Configuration

Enhancements

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.
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.
SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony administrator should review the two new policies for the CONSER Publication Pattern Load feature: CONSER Chronology Type Map and CONSER Publication Cycle Map. Lists of CONSER chronology type maps and CONSER publication cycle maps are delivered, representing the common possible combinations of chronology captions and publication cycles. The administrator can add new maps, if required.

User Configuration

Enhancements

Upgrade Script Includes Active/Inactive ID Entries for Multiple User ID Functionality

SirsiDynix Symphony Administrator Notes

As part of the upgrade to SirsiDynix Symphony 3.2, Active ID and Inactive ID entries are added to the User Extended Information for multiple user ID functionality.

When the upgrade is finished, run the Rebuild User Database report. When active and inactive IDs are added for a user, these values are reflected in the user's extended information.
Utilities

General

Enhancements

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.

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony administrator must copy the delivered backup.cfg.deliv file in the Unicorn/Custom directory and rename the copied file as `backup.cfg`. The `backup.cfg` file must be modified to specify the programs to be used for the archive and block programs, the files to back up, and the exclude file filter.

MARC Export Utility Wizard

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.
Update Staff Client Management Wizard

Enhancements

**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.

**SirsiDynix Symphony Administrator Notes**

SirsiDynix Symphony administrators need to evaluate which users should have access to this wizard and add it to the Access List of the User Access policy for these users. The updated Utility toolbar will be downloaded to the user workstations when a client update is performed.
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:

```html
<!--WEB2_IF PATRON_FIELD":"credit_balance" GREATER="$0.00"-->
&nbsp;&nbsp;&nbsp;<!--WEB2_PATRON :credit_balance-->Credit balance
<!--WEB2_END_IF-->
```

SirsiDynix Symphony Administrator Note

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

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.

SirsiDynix Symphony Administrator 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
Corrections

“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.

SirsiDynix Symphony Administrator Note

The following file was modified:
Web2\ HTML_Sample\ U_ENG_Standard\ OtherFields.html