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Introduction

The SirsiDynix Symphony Release Notes for SirsiDynix Symphony 3.2.1 contains information about significant enhancements and corrections included in SirsiDynix Symphony 3.2.1.

This document is arranged as follows.

• General changes, which can not be easily categorized
• Changes to the WorkFlows Java and WorkFlows C clients
• Changes to SirsiDynix Symphony modules, arranged alphabetically by module. Within each module, changes that pertain to multiple wizards or reports are arranged in a General section, followed by sections arranged alphabetically by wizard name or report group. Some modules or products, such as the e-Library, contain only enhancements and corrections sections.

Typically in each section, or for each wizard or report group, release notes are grouped first by enhancements, then by corrections.

Icons may display next to the heading for a release note to indicate whether the software change pertains to the WorkFlows Java client, the WorkFlows C client, or both.

When available, these notes contain an internal tracking number used by SirsiDynix to identify software changes. The number displays in parentheses after the text of the note.

There are two other related documents available for this release on the SirsiDynix Client Care website (http://clientcare.sirsidynix.com): the SirsiDynix Symphony Administrator Notes and the SirsiDynix Symphony API Notes. The administrator notes are intended to help the system administrator identify the changes that may require additional configuration and are a subset of this document. 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.

The SirsiDynix Symphony API Notes are intended for customers who have received API training from SirsiDynix. This document is passworded. Clients who have had API training may contact SirsiDynix Client Care to obtain the current password.
General

Corrections

Webserver Stops Unexpectedly

In some instances, the Webserver would be stopped unexpectedly. This could happen when starting a Web session for the e-Library. Internal programs were not properly releasing floating station numbers, which would eventually shut down the Webserver.

This has been corrected.

(UNI-13162)
WorkFlows Client

General

Enhancements

Character and Language Fields Added to the Symbol Table for the ALA Character Set of Diacritics and Symbols

The Symbol Table has been enhanced with two new fields that can assist the user in identifying characters when the ALA Character Set of Diacritics and Symbols set is selected in the Select Code Set field.

- The Character field contains a list of all of the diacritic marks and symbols in the ALA Character Set of Diacritics and Symbols set. This field assists the user since it can be used to quickly identify specific characters on the table. The name of the character to be inserted into a field or text box can be identified and selected from the Character list, and the selected character is highlighted in the displayed character table.

- The Language field contains a list of languages that use diacritic marks and special characters found in the ALA Character Set of Diacritics and Symbols set. When a language is selected in the Language list, all of the characters that typically occur in that language are highlighted in the displayed character table.

Note: The Character field and Language field are available only when ALA Character Set of Diacritics and Symbols is selected in the Select Code Set field.

(UNI-9086, UNI-9089)

Online Help Displays Correctly for WorkFlows Client Using HTTPS to Connect to the SirsiDynix Symphony Server

If the WorkFlows Java client accessed the SirsiDynix Symphony server using Hypertext Transfer Protocol over Secure Socket Layer (HTTPS), the online help files for the WorkFlows client would not display. This has been corrected.

(UNI-12323)
Corrections

Characters Entered Using the ALA Character Set of Diacritics and Symbols Display Correctly When Records Are Retrieved from MARC8 Servers

If the WorkFlows Java client was connected to an ASCII SirsiDynix Symphony server, and the ALA Character Set of Diacritics and Symbols set was used in the Symbol Table to enter diacritics and special characters, the data was not saved correctly. In places where a special character was inserted into the record, a question mark (?) displayed. This problem was noticed particularly when entering Navajo diacritics, Vietnamese diacritics, and some diacritics on Latin characters.

When diacritics and special characters are entered using the ALA Character Set of Diacritics and Symbols set, the characters are saved as Unicode characters. When data is saved on an ASCII SirsiDynix Symphony server, the character translation file is used to map Unicode characters to MARC8 characters. When data is retrieved from a MARC8 server, the character translation file is used to find the Unicode character to display. If a special character was not saved in Unicode correctly, the character translation file could not find the correct mapping to the corresponding MARC8 character. When a record on a MARC8 server was displayed using the WorkFlows Java client, the special characters did not display correctly in the record.

The diacritics and special characters are entered using the ALA Character Set of Diacritics and Symbols set are now saved correctly. When a record containing the special characters is retrieved from a MARC8 server for display in the WorkFlows Java client, the special characters display properly.

(UNI-9774, UNI-12534, UNI-12958, and UNI-13027)

Changing the Desktop Theme Caused Display Issues and the Client to Freeze

Previously, if a user changed the Desktop Theme of the workstation with the WorkFlows Java client open, the WorkFlows toolbars, buttons, labels, and more displayed incorrectly. Also, in some instances, the user was unable to open any wizards; WorkFlows stopped responding. The user had to close and restart WorkFlows to proceed.

This has been corrected.

(UNI-6765)
Characters with Diacritics Display Correctly When Switching Between MARC-8 and Unicode SirsiDynix Symphony Servers

If the WorkFlows Java client switched between connecting to a Unicode SirsiDynix Symphony server and a MARC-8 SirsiDynix Symphony server, an intermittent problem occurred in which characters with diacritics did not display correctly. When the WorkFlows Java client was connected to a MARC-8 server and then the user connected the client to a Unicode server, the client did not correctly start its MARC-8 to Unicode conversion to display the characters with diacritics properly.

The WorkFlows Java client has been changed so that if the user switches between a MARC-8 SirsiDynix Symphony server and a Unicode SirsiDynix Symphony server, the client runs its MARC-8 to Unicode converter to correctly display characters with diacritics.

(UNI-13380)

Corrections to the Symbol Table Characters and Labels

The following incorrect characters and labels in the Symbol Table have been identified.

- Lowercase r with circle below and macron was displaying and output as r with dot below and macron.
- Lowercase u with tilde and macron was displaying and output as u with diaeresis and macron.
- The label for lowercase y with breve was displaying as “y with hook and breve.”
- The label for lowercase z with breve was displaying as “z with hook and breve.”
- The very last symbol in the table was labeled as “y with hook with grave” instead of “y with grave.”
- Capital ligatures starting with I were not in correct alphabetical order (IA, IE, IO, IG, IN, IQ, IU).

All items in the list have been corrected in the Symbol Table.

(UNI-9111)
Custom Toolbars Created in the WorkFlows C Client and Moved to the WorkFlows Java Client Can Be Modified or Removed

If a custom toolbar created in the WorkFlows C client contained a custom wizard group, the wizard group displayed as a blank box on the toolbar when the toolbar was moved to the WorkFlows Java client. The custom wizard group could not be modified or removed with the Toolbar Management wizard on the Utility toolbar.

The custom toolbar conversion has been corrected so that custom wizard groups display correctly on custom toolbars moved from the WorkFlows C client to the WorkFlows Java client. The converted toolbars can be modified with the Toolbar Management wizard.

(UNI-14046)

Formatting Issues When Printing to Firefox from WorkFlows

In the WorkFlows Java client, if the user set the default print application to Firefox (set in the File/Print Setup menu) and clicked the Print wizard in a wizard that had a print template, such as the Call Number and Item Maintenance wizard, the record would open in Firefox, but it would be difficult to read. All of the text was jumbled together. However, if the user set the default print application to Word or to Internet Explorer and clicked the Print wizard, the record would display correctly in the print application.

This has been corrected.

(UNI-14275)

Policy Descriptions Displayed in WorkFlows C Client Verify Lists

In the WorkFlows C client, policy descriptions were displaying in the verify lists even though the configuration was set to display policy names only.

This has been corrected. The policy names will now display appropriately in the verify lists when configured to do so.

(UNI-13944)
Item Search and Display

Enhancements

Added Ability to Display Title and Item Accountability Information

The Item Search and Display wizard can now display accountability information for a title. This option appears on systems configured for Accountability only. In wizard properties, the new Show Title Accountability property appears on the Defaults tab. If the user selects this property, the Accountability tab will appear for titles that have an accountability record. This tab will appear after the Call Number/Item tab in the detailed display.

Also, when the Viewer is turned on and the Configure Options for Item Search helper is configured to display title accountability, the Accountability tab will also appear in the lower section of the wizard window for accountable titles.

The Accountability tab will display these fields: Classification, Access Restriction, and Need to Know. Since titles can have multiple access restriction and need to know assignments, these fields may be repeated.

The Item Search and Display wizard also displays item accountability information in the Call Number/Item tree in the left pane of the Call Number/Item tab. The item accountability classification data appears after the location data, as in the following example.

Water, air, and soil pollution  
- TD172.W36 - MAIN  
  124950-1001 - 1 - BOOK - STACKS - SECRET  
  124951-1001 - 2 - BOOK - STACKS - SECRET

Note: This item accountability display will always appear for accountability items; it is not based on the Show Title Accountability default property.

(UNI-11437)

Corrections

Hourglass Remains When “No Information Available for This Record View” Message Displays

Previously in the Item Search and Display wizard, if the wizard properties included the Configure Options for Item Search helper configured not to include shadow records, the following message appeared.

No information available for this Record View.

However, the hourglass image remained on the screen when it should not have. In addition, the client was not completely unresponsive since the Close option worked for the wizard.

This has been corrected.
(UNI-12579)
Academic Reserves

General

Corrections

Alt Circ Rule for Reserve Items Not Displaying

Previously, if the Auto Restart Checkout on Item ID Error property was selected for the Checkout wizard, a User ID was keyed in to the checkout screen and Enter was pressed afterwards, and a multi-piece Item ID was scanned for reserve, the Alt Date Due prompt did not display as it should. If the property was cleared the Alt Date Due prompt did display as expected.

This has been corrected.

(UNI-10895)

Loan Periods Not Shortened When Standard Loan Conflicts with Upcoming Reservation

Previously, when an item with an upcoming advanced reservation was charged to a different patron, the loan period was not shortened to take into account the upcoming reservation, based on the Early Return Time attribute defined in the Reservation Profile policy.

This has been corrected.

(UNI-13839)

Create Reserve Wizard

Corrections

Booking Profile Default Not Saved to Reserve Record

In the Create Reserve wizard, even though the user had selected a default Booking Profile in wizard properties, when the reserve record was created and saved, the Booking Profile was not saved to the record.

This has been corrected.

(UNI-11701)
Renew Reserve Wizard

Corrections

Unable to Type Override for Unseen Renewal Limit

In the Renew Reserve wizard, if a user attempted to renew a reserve item that was linked to a circulation rule that limited the number of unseen renewals, the following message displayed in a Renew Reserve Error dialog box.

Override required to exceed unseen renewal limit

However, there was no text box for the user to type an override. This has been corrected.

A new default property, Item Seen, was added to the Renew Reserve wizard properties. The Item Seen property determines whether the Mark Item as Seen check box is selected by default in the Renew Reserve window. If the Mark Item as Seen check box is selected, the renewal is recorded as a “seen” renewal, meaning the item is physically present at the time of renewal. By default, the Item Seen check box is selected. If this check box is cleared, the renewal is recorded as an “unseen” renewal, meaning that the library staff member has not seen the item (renewal by phone or e-Library renewal). If an unseen renewal occurs, it will update the unseen renewal counter.

In the wizard, the Renew Reserve window now displays the Mark Item as Seen check box. If this check box is cleared, when a user tries to renew a reserve item that has reached the unseen renewal limit, the Renew Reserve wizard will display a Renew Unseen Item Override dialog. In this dialog, the user can type an override in the Renew Unseen Item Override field, then click the Override & Renew button to proceed with the renewal. Or, the user can click the Do Not Reserve button, and the reserve item will not be renewed.

(UNI-12460)
Accountability

General

Enhancements

Accountability Module Added to WorkFlows Java Client

The Accountability module was added to the WorkFlows Java client for SirsiDynix Symphony 3.2.1. The Accountability module can provide the library with the following capabilities.

- Restricting the circulation and viewing of catalog information
- Creating and tracking receipts for controlled materials
- Creating inventories of controlled materials by location and individual users
- Reclassifying documents according to the assigned regrade date and designated reclassification
- Tracking the destruction of classified information

Any document containing classified information as determined by the library’s security guidelines falls under the category of accountable material. Generally, libraries use the Accountability module to restrict certain users to a particular classification of material.

The module includes new Accountability wizards, configuration and policy wizards, and reports.

Accountability Wizards

The new Accountability wizard toolbar includes the following wizards.

- Add Accountability — The Add Accountability wizard allows accountability operators to assign classification, access restrictions, and need to know restrictions for both a title and an associated item.
- Delete Accountability — The Delete Accountability wizard allows accountability operators to remove title and item accountability specifications on records, leaving the catalog, call, and copy records in the catalog.
- Display Accountability — The Display Accountability wizard allows accountability operators to display title and item accountability information.
- Modify Accountability — The Modify Accountability wizard allows accountability operators to modify classification, access restrictions, and need to know restrictions for both a title and an item.
Additionally, the following circulation, cataloging, and general wizards are delivered on this toolbar.

- Check Item Status
- Copy User
- Display User
- Help
- Item Search and Display
- Modify User
- Print
- Remove User
- User Registration

**Special Features for Accountability Wizards**

The new Accountability wizards now include the Item Search functionality for searching accountability title and item records. Additionally, the wizards include the Call Number/Item tree on the Item Information tab, allowing users to easily display and select specific item accountability records.

A new behavior property in the Delete Accountability wizard allows the accountability operator to automatically reset the classification to an unclassified value within the wizard workflow.

**Changes to the Item Search and Display Wizard**

The Item Search and Display wizard can now display accountability information for a title. This option appears on systems configured for Accountability only. In wizard properties, the new Show Title Accountability property appears on the Defaults tab. If the user selects this property, the Accountability tab will appear for titles that have an accountability record. This tab will appear after the Call Number/Item tab in the detailed display.

Additionally, when the Viewer is turned on and the Configure Options for Item Search helper is configured to display title accountability, the Accountability tab will also appear in the lower section of the wizard window for accountable titles.

**Changes to Checkout and Renew Wizards**

New accountability behavior properties have been added to the Checkout, Renew Item, and Renew User wizards: Require Override for Permitted Charge, Allow Permitted Charge Without Override, Allow Permitted Charge without Acknowledgement. The new behavior properties give the accountability operator the ability to streamline or even eliminate the accountability verification and override process, as long as the patron’s security level matches the item’s security level, and the charge is permitted. These behavior properties only appear on systems configured to use Accountability.
Accountability Configuration Wizards

The following Accountability configuration wizards are available on the Configuration toolbar.

- Citizenship — The Citizenship policy contains information about the citizenship of users.
- Clearance — The Clearance policy contains information about clearance levels for users and classification levels for items.
- Need to Know — The Need to Know policy contains information about need-to-know restriction levels.
- Note — The Note policy contains information about note types that identify item information, such as an audit trail of changes to a document to be shared with other accountability operators.
- Restrict — The Restrict policy contains information about access restriction levels.

Accountability Global Configuration Policies

The Item Search indexes that display in the accountability wizards can be customized. In the Catalog Search Fields policy, the SirsiDynix Administrator can select the search indexes to be used by the accountability wizards. The Catalog Search Fields policy can be accessed from the Searching tab in the Global Configuration wizard.

Global Configuration policies are available for controlling the display of user accountability information, such as birth place, citizenship, and social security number, in the circulation wizard windows. These policies only display on systems configured to use Accountability. SirsiDynix System Administrators can access these policies in the Global Configuration wizard on the User Accountability tab.

Accountability Reports

The Accountability group of reports is used only by libraries that have the Accountability module. The Accountability reports accomplish the following tasks.

- Change the contract numbers for all of the items or users under accountability for a government contract project that may have ended before the project was complete.
- Move all items from one project library or project site to another.
- Make batch changes to the database to maintain the dates, certification, transmittal and destruction of documents.
- Print certificates of destruction and dispatch receipts for users.
- Track acknowledgement of receipt.

Note: Accountability reports are available only to staff who are accountability operators.
Changes to Load Bibliographic Records Report

On a system configured for accountability, it is now possible to assign title and item accountability in batch to bibliographic records as they are loaded. When running the Load Bibliographic Records (Bibload) report, users can make accountability assignment selections on the Load tab of this report. The Load tab displays the following options.

- **Create Accountability Based On Title Information Entry** - If this option is selected, the user identifies the entry ID that contains the title and item accountability information. As bibliographic records are loaded, title and item accountability records will be created with the accountability data found in this entry.

- **Create Accountability Based On Default Data** - If this option is selected, the user selects default values for the Classification field and other accountability fields. As bibliographic records are loaded, title and item accountability records will be created with the selected defaults.

- **Do Not Create Accountability** - If this option is selected, no title or item accountability records will be created for the loaded bibliographic records.

(UNI-9580, UNI-9581, UNI-9582, UNI-9583)

Display1 Accountability Wizard

Corrections

**Display1 Accountability Not Working in WorkFlows C Client**

After upgrading to SirsiDynix Symphony 3.2, the Display 1 Accountability wizard was not working in the WorkFlows C client. If a user clicked the Display1 Accountability wizard icon on the Accountability toolbar, only an empty window with the OK and Close buttons displayed.

This has been corrected.

(UNI-12714)
Acquisitions

General

Enhancements

New Sum Funded Quantities Feature Added to Order Wizards and Tools

A new field, Sum Distribution Quantities, appears on the Orderline tab when creating or modifying an order. The user can select this check box to sum funded quantities and automatically calculate the orderline quantities. This feature is useful when the user is ordering many copies of a title and does not want to be concerned with adding up the funded quantities to calculate the total quantities.

When this check box is selected, the total Quantity field on the Orderline tab is unavailable. After typing values for Unit Price, Parts in Set, and so forth, when the user clicks Continue, the user will see that the Funded Quantity field on the Segments tab is also unavailable. But as the user adds distributions and distribution quantities, the Funded Quantity fields will be automatically updated, as well as the Quantity field on the Orderline tab.

New Recalculate Funding and Orderline Quantities Helper

A new helper, Recalculate Funding and Orderline Quantities, was added to the order wizards and tools. If the user starts an order, but then decides to use Sum Distribution Quantities, he can use this helper to update and synchronize the Quantity, Funded Quantity, and Distribution Quantity fields. This helper is also useful when using Modify Order to modify orderline quantities.

(UNI-11253)

Title Control Number and Catalog Key Added to Title Information in the Invoicing Tree

Since the Title Control Number and Catalog Key are searchable title identifiers, these fields have been added to the Invoicing tree interface to provide more distinct information about the ordered title. The Invoicing tree is available through invoice helpers in the following wizards.

- Receive Orders (Add Invoice helper and Add Invoice Lines helper)
- Add Invoice (Add Invoice Lines for Orders helper)
- Add Invoice Lines (Add Invoice Lines for Orders helper)

The Title Control Number and Catalog Key fields appear in the Viewer pane (to the right of the Invoicing tree) just below the Orderline ISXN field.

(UNI-9970)
Corrections

Fund ID Displays Correctly in the Overencumbered/Overspent Fund Message

If a fund becomes overencumbered or overspent, the following message displays.

Status Alert!: Fund over encumbered/spent
[Fund ID]

The fund ID was being truncated after the first 12 characters.

The overencumbered/overspend fund message has been corrected so the full fund ID displays. Fund IDs may have up to 20 characters.

(UNI-12476)

Unable to Modify an ADJUST Link Invoice Line

If an ADJUST link invoice line had been saved without a fund selected, a user was unable to modify the invoice line and add the fund information. Instead, the wizard displayed the following message.

Too many copies invoiced.

The user had to remove the invoice line and recreate it. This occurred when using either the Modify Invoice wizard or Add Invoiceline wizard.

This has been corrected.

(UNI-13350)

Invoices Cannot Be Locked If Invoice Lines Are to Be Paid With a Fund That Does Not Permit Payment

If an invoice or invoice line was to be paid with a fund that had the Paying Allowed attribute set to No, the invoice could be locked with the Lock Invoice helper. The Lock Invoice helper has been changed so invoices that are to be paid with funds with the Paying Allowed attribute set to No cannot be locked.

(UNI-12302)
Display of Tax Exemption Fields Corrected for Invoice Lines Viewed with the Display All Invoice Lines Helper

In various invoice wizards, the setting of tax exemption fields displayed correctly when an individual invoice line was viewed with the Display Invoice Line tool. However, if the Display All Invoice Lines helper was used to view all of the invoice lines in the invoice, the setting of the tax exemption fields for each invoice line did not display correctly.

The Display All Invoice Lines helper has been corrected so the setting of the tax exemption fields displays correctly for each invoice line in the invoice.

(UNI-12430)

Changes to SmartPort Helper Properties Were Not Saved

Previously, changes to the SmartPort helper properties were not being saved. The SmartPort helper is available from the order wizards, Add Basic Order, Add Dated Order, Add Recurring Order, and Add Orderlines.

For instance, in the Add Basic Order wizard properties, the user clicked the SmartPort helper button on the Behavior tab, changed some of the helper properties, such as Wizard Startup and the Match on Title Control Number field selections. Then, the user clicked OK. When the user returned to the wizard in the same client session, the SmartPort helper property changes were gone; they had reverted to the default selections.

This has been corrected.

(UNI-13963)

Modify Orderline Tool Removed From Create Invoice Lines for Order Helper

Previously, when using the Create Invoice Lines for Order helper, a user selected an orderline for creating an invoice line and then selected the Modify Orderline tool. After the user made changes to that orderline and clicked Save, the Add Invoice Lines: Create Invoice Lines for Order window displayed blank Order and Orderline tabs. The Modify Orderline tool was clearing the order information upon closing.

This has been corrected. The Modify Orderline tool has been removed from the Create Invoice Lines for Order helper.

(UNI-12581)
Add Invoice Wizard

Corrections

Message No Longer Displays When Starting the Add Invoice Wizard

If the Add Invoice wizard was started without changing any of the wizard property settings or by using the Session Settings wizard in Acquisitions, the following message displayed when the Add Invoice button was selected.

![link public flag rim Required field missing](image)

The Add Invoice wizard has been corrected so the message no longer displays when the Add Invoice button is selected.

(UNI-12301)

Add Ordered Items to Catalog Wizard

Enhancements

Ability to Print Labels When Adding Ordered Items to the Catalog

Users can now print item labels when adding ordered items to the catalog. The Add Ordered Items to Catalog wizard now includes the Print Preview Labels and Print Labels helpers. To make these available, users can select the helpers on the wizard properties Helpers tab.

Also, users have the option of automatically printing item labels as items are loaded. The user can select the Print Labels for Items Added to the Catalog property in the wizard properties. This option allows for printing labels for multiple items in one step. The user can select to print the labels automatically without preview or to preview the labels before printing.

Notes:

- If the Print Labels for Items Added to the Catalog property is selected, there is no opportunity to edit the resulting call numbers before labels print.
- Changes made in the Print Preview step will be made to the item label only and will not be saved to the database. If the user anticipates the need to change the call number or other information for the loaded items, he should consider using the Print Preview Labels and Print Labels helpers instead.
- When using the auto-printing feature, the Print Preview and Print window will open each time the Add/Update Items button is clicked, and item labels will be printed for every new item on the screen. The user will not have the option to pick and choose which label to print. It is best to utilize the Print Preview Labels and Print Labels helpers after all new items have been created to print all the labels, once changes have been completed.

(UNI-11256)
Class Scheme Field Added for Users to Specify the Call Number Classification for Items

The Add Ordered Items to Catalog wizard has been enhanced with the Class Scheme field. If the Base Call Number field for the ordered item is modified, the Class Scheme field becomes active. A classification scheme for the base call number can be selected from the Class Scheme field.

Once the user selects items to add to the catalog and clicks Add/Update Items, the classification scheme selected for the base call number cannot be modified. However, a classification scheme can be specified for each item in the distribution by selecting the desired classification scheme in the item's Class Scheme field. When the user clicks Add/Update Items to add the items to the catalog, the call number and class scheme for each item are recorded.

(UNI-11254)

Corrections

Current Location Set to AVAIL_SOON for Created Items if Wizard Properties are Selected

In the Add Ordered Items to Catalog wizard, if the wizard properties are set such that the created items are to have the location of “available soon” (AVAIL_SOON), the items could be created with a current location from the holding code instead of AVAIL_SOON. The problem occurred only if the user selected the Add/Update Items button before selecting the Add Item check box for each item being received, then selected the Add Item check box for each item to receive before selecting the Add/Update Items button again.

The Add Ordered Items to Catalog wizard has been corrected so the created items will have a current location of AVAIL_SOON if the wizard properties are set so the wizard will assign AVAIL_SOON to created items.

(UNI-12543)

Information Display Refreshes When an Orderline With Many Copies is Added or Updated

The Add Ordered Items to Catalog wizard was not refreshing the information display when Add/Update Items was selected, and an orderline had enough copies to require the display of 500 or more lines of information. The wizard has been corrected so the information display shows all of the information for a selected orderline with many copies.

(UNI-14645)
Display Invoice Wizard

Corrections

Invoice Tax Lines With the Tax/Adjust Link Type Display in the Invoices Tab

If an invoice tax line was linked to an orderline using the Tax/Adjust link type, the invoice tax line did not display in the list of invoice lines on the Invoices tab in the Display Invoice wizard.

The Display Invoice wizard has been corrected so invoice tax lines linked to orderlines using the Tax/Adjust link type display in the Invoices tab.

(UNI-12417)

Modify Fund Budget Wizard

Corrections

Unable to Modify Fund Budgets When Currency Used a Comma as a Decimal Point

On systems configured to use a comma for a decimal point or any other currency punctuation that did not match the default locale for the WorkFlows Java client, users were unable to use the Modify Fund Budget wizard to increase or decrease fund budgets.

Example:

A user tried to adjust a fund budget amount by £100,00. But, after the user clicked Adjust Selected Fund Budgets, the wizard displayed the following message.

Invalid Amount Entered: £100,00

However, if the user typed 100 (the amount with no punctuation), the budget amount was correctly adjusted.

This has been corrected. Now, the wizard will use the native currency policy of the system rather than the currency of the default locale for the client. The wizard will accept the currency punctuation used by the native currency.

(UNI-13353)
Modify Order Wizard

Corrections

Message Contains the Fund ID of an Overencumbered Fund in a Multi-Funded Orderline

If a multi-funded orderline's encumbrance was modified in an order using the Modify Order wizard such that at least one of the funds became overencumbered, and the fund's Block Over Encumbrance flag is set to Yes, the modifications to the orderline amount were still saved and the segments could not be updated. Although an overencumbrance message displayed, the message did not contain the fund ID of the overencumbered fund, and the orderline could not be retrieved for correction. If the user was shown a message about unbalanced segments, the user was not given an opportunity to modify the segments because the order was saved in an unusable state and could not be modified.

The Modify Order wizard has been corrected so that if a multi-funded orderline's encumbrance is modified and one of the funds becomes overencumbered, the message warning about the overencumbrance contains the overencumbered fund's fund ID. The wizard continues to process the orderline after the user closes the error message. The user can then modify the segments of the order as needed.

(UNI-12545)

Receive Orders Wizard

Enhancements

Title Control Number and Catalog Key Added to Title Information in the Receive Order Tree and Receive Orderlines Interfaces

Since the Title Control Number and Catalog Key are searchable title identifiers, these fields have been added to the Receive Orders wizard windows. These fields provide more distinct information about the ordered title.

When receiving orders using the Receive Order interface (Receiving tree), the bibliographic information appears in the Viewer pane, to the right of the receiving tree. The Title Control Number and Catalog Key fields appear just below the Orderline ISXN field.

When receiving orders using the Receive Orderlines interface, the bibliographic information appears on the Receiving tab. The Title Control Number and Catalog Key fields appear just below the Orderline ISXN field.

(UNI-9969, UNI-11253)
Corrections

Receiving Recurring Orders with Multiple Distributions Corrected

In the Receive Orders wizard, when receiving a multi-part orderline with multiple distributions for a recurring order, the new orderline created by the receipt process did not display a date received for each distribution. The distributions were not received, and a claim segment was generated.

This has been corrected. When receiving a multi-part recurring orderline, after the user enters the copies received for each distribution and clicks Receive Orderline, the receipt date for each distribution will be the current date.

(UNI-14798)

Review Vendor Invoices Wizard

Corrections

Negative Numbers No Longer Display for Invoice Lines and Lines Paid Columns

In the Review Vendor Invoices wizard, the Invoice Lines and Lines Paid columns on the Numbers tab could display negative numbers if a large number of invoices existed for the selected vendor. The wizard has been corrected so the numbers in the Invoice Lines and Lines Paid columns display the correct information.

(UNI-12616)

Transfer Budget Amount Wizard

Corrections

Source Fund Information Was Not Updated in Transfer Preview

In the Transfer Budget Amount wizard, if a user selected to preview the budget amounts before completing the transfer, the source fund information in the confirmation window was not updated after the transfer.

This has been corrected. The confirmation window will now display the updated source fund amount after the budget transfer is completed.

(UNI-12303)
Source Fund Encumbered Amounts Populated from Destination Funds in Preview Window

In the Transfer Budget Amount wizard, when using the Preview option, the source fund amounts (encumbered, cash balance, etc.) temporarily displayed the amounts from the destination funds. But, after the user clicked Transfer Budget Amounts, the source fund amounts displayed correctly.

This has been corrected. The correct source fund amounts now display in the Preview window.

(UNI-14591)
Authority Control

General

Corrections

Difficulty Browsing an Authority Index with an Unestablished Heading

When using either the Display Authority or Modify Authority wizard, there was a problem with browsing an authority index, such as LCSUBJECT ECT. The index would stop or get “stuck” as the user was browsing up or down the list of authority headings. This seemed to occur when an unestablished authority heading was at just the right place in the Page Up/Page Down process.

This has been corrected. Unestablished headings will not interfere with authority subject browsing.

(UNI-12574)

Modify Authority Wizard

Corrections

Unable to Modify Authority Records

Using the Modify Authority wizard, a user made a change to one of the MARC entries in an authority record, but after the user clicked Save, the wizard displayed the following message.

UNABLE TO COMPLETE REQUEST

This has been corrected.

(UNI-14038)
Cataloging

General

Enhancements

Greyed-out Text in MARC Record Read Only Displays Is Now Easier to Read

Previously in the cataloging wizards, the MARC record read-only displays (specifically bibliographic, MARC holdings, and authority records) were difficult to read. Now, the background color in the read-only displays takes on the color of the theme being used (such as light brown for Fall or light blue for Blue), and the lettering is black, which makes the text easier to read. This change affects the following wizards.

- Item Search and Display
- Call Number and Item Maintenance
- Add Items
- Edit Items
- Display Authority
- Delete Authority
- Review Titles

(UNI-11343)

New Title Accountability Property for Configure Options for Item Search Helper

The Configure Options for Item Search helper has a new property, Title Accountability, which appears on the Defaults tab under Display. This property only appears on systems configured for Accountability. If the user selects the Title Accountability display option and searches a bibliographic record that has a title accountability record, an Accountability tab will appear after the Call Number/Item tab in the View pane in the lower section of the wizard window. The Accountability tab will display these fields: Classification, Access Restriction, and Need to Know. Since titles can have multiple access restriction and need to know assignments, these fields may be repeated. The tab will not appear for bibliographic records that do not have accountability records.

(UNI-11436)
Add Subfield Delimiter/Code Helper Updated for Unicode Systems

**Note:** The Add Subfield Delimiter/Code helper was added to assist catalogers who catalog primarily in a non-Latin language.

In MARC21 alphabetical subfield codes are recorded as Latin characters a-z. If the cataloger is using a non-Latin keyboard to create or modify MARC records, they would have to switch to a Latin keyboard to enter the subfield code. The Add Subfield Delimiter/Code helper was added to enable catalogers to add a subfield delimiter/code without having to switch to a Latin keyboard.

To facilitate this, the following keyboard shortcuts were added to the Java WorkFlows client on a Unicode server.

- The helper can be selected from the Helpers listed on the main toolbar to eliminate using the mouse. For example, in Modify Title the keystroke shortcut Alt+L+E can be used to open the helper without using the mouse. In Add Authority, the keystrokes are Alt+L+N.
- Tab or Arrows highlight a subfield on the helper.
- Alt+F6 toggles cursor focus between the editor and the helper.
- Shift+Backslash enters a subfield delimiter.

An alternative to using the helper is to use Shift+Backslash to enter a subfield delimiter, and then hold down the Alt key and type an ASCII value to enter a subfield code using the numeric keypad.

**Note:** The following wizards use the Add Subfield Delimiter/Code helper for creating and modifying bibliographic, holding, and authority records.

Modify Title
Add Title
Duplicate Title
Add Authority
Modify Authority
Duplicate Authority

Now, additional client modifications have been implemented to make using the Add Subfield helper easier to use.

- The Enter key can be used to insert the subfield into the MARC field at the current cursor position.
- The Insert and Close next step button allows more flexibility when entering subfields.
- The last screen size and location of the helper is remembered, with correct cursor placement.

**Note:** The WorkFlows Java client remembers the most recent size and location of the helper in absolute terms—it is not configured per wizard or screen. Location and size are the same no matter the wizard or screen from which the helper is called.

(UNI-12718)
Corrections

Incorrect Policy Values Appeared in Catalog Wizards When Using Customized Policy Lists

Previously in the cataloging wizards that use customized policy lists, the first policy value in the customized list for various policies (such as Item Type, Location, Item Category 1, Item Category 2, Media Desk, Classification Scheme and Review Status) was displayed rather than the user-specified value. This occurred when the existing policy value was not included in the customized list of policies for the Library of the logged in user.

Now, the modify wizards will display asterisks (****) if the current value for the policy (such as Item Type) is not included in the customized policy list for the logged in user's Library.

(UNI-11691, UNI-11692, UNI-11693, UNI-11695, UNI-12216)

Control Record Date Modified Not Updated When MARC Holdings Updated

Previously in the WorkFlows C client, the Date Modified field on the Control tab of the bibliographic record updated under the following conditions.

- If a holding record was modified or a new holding record was added
- If a call number record was modified or a new call number record was added
- If a copy record was modified or a new copy record was added

However in the WorkFlows Java client, the Date Modified field was not automatically updated under these conditions.

This has been corrected, and the WorkFlows Java client functions the same as the WorkFlows C client in this regard.

(UNI-13140)

F6 Shortcut in Edit Item and Call Number and Item Maintenance Wizards

Previously in the Edit Item and Call Number and Item Maintenance wizards, if Modify was selected and an item was highlighted in the item tree, pressing the F6 key did not move the cursor to the right pane at the end of Item ID as it should.

This had been corrected.

(UNI-12947)
Problem Copying Text from Bib or Call#/Item tabs into Search Box

Previously in any Cataloging wizards that allowed you to copy text from the Bib or Call#/Item tabs (such as Modify Title and Add Title), if a portion of a string of text was copied from those tabs and a new search was initiated, the entire string of text was pasted into the Search box rather than the selected portion.

This has been corrected.

(UNI-13050)

Validate Headings Helper Propose Authority Initial Settings Dialog Appears Outside WorkFlows Window

Previously in the Validate Headings helper, the Propose Authority Initial Settings dialog appeared outside a WorkFlows window that is not displaying to full screen size.

This has been corrected. The Propose Authority Initial Settings dialog now appears inside the WorkFlows window if that window is displaying to full screen size.

(UNI-12160)

Autofill Feature Does Not Work with Cataloging Wizards on Microsoft Vista

Previously, if the Cataloging module was run on a Windows Vista operating system, the autofill feature for all policy controlled drop-down lists did not function correctly. Instead of the expected behavior (backspacing after a field is populated once results in the field being repopulated with the first value available in the drop-down list), backspacing did not return the user to the top of the drop-down list, and anything typed thereafter had no effect on the value of the field.

Example:

The following Library field options are available.

- BURGUNDY
- ORANGE
- PLUM
- RED

In the Modify User wizard, the user tabs to the Library field and types P. The field is populated with PLUM. If the user immediately backspaces, the user value of the field is not BURGUNDY, as expected, and anything typed in the field thereafter has no effect.

This has been corrected.

(UNI-13250)
Validate Headings Helper Selects 880 Tags for Authorization When Paired Fields Policy Enabled on Unicode Systems

On a Unicode server with the Paired Fields Global Configuration policy enabled, if a linked normal tag was set to be authorized, the Validate Headings helper was also erroneously selecting and presenting the linked 880 tag for validation. The 880 tags are not designed to be authorized in the catalog formats.

This has been corrected.

(UNI-14537)

Date Due of NEVER Not Translated on Call Number/Item Tab in French or Spanish Client

Previously on the Call Number/Item tab in several WorkFlows Java client wizards (including Modify Title, Edit Item, and Item Search and Display) on French or Spanish systems, the Date Due field displayed the value of NEVER in English.

This has been corrected.

(UNI-14245)

If 856 Tag Wrapped to a Second Line, WorkFlows Did Not Recognize Subfield u as a URL

If the length of the text in the 856 tag wrapped to a second line in the Item Search, Add Item, or Call Number and Item Maintenance wizards, then the subfield u of the 856 displayed in blue and was underlined, but it was not hyperlinked. The WorkFlows client did not recognize the |u as a URL.

This has been corrected. The |u in multi-line 856 tags are now recognized as “clickable” URLs.

(UNI-14268)

Unable to Enter Certain Special Characters in WorkFlows When Using International Keyboard Layouts

Sites that used Canadian Multilingual Standard keyboards could not enter certain special characters (specifically [ ] or <<<>>>) in the MARC editor of the cataloging wizards without additional characters appearing. For instance, if a user typed the square bracket open [, the pound symbol and square bracket displayed £].

Some International keyboards have an ALT Graph key (ALTGR), which is the same as pressing left CTRL + ALT on an American English keyboard layout.

When the keyboard is switched to an international layout, such as the Canadian Multilingual Standard, the right ALT key becomes the ALTGR key. Pressing ALTGR +9 on this keyboard produces a square bracket open [. These ALTGR
keys were conflicting with the diacritic and special character shortcuts in the WorkFlows Java client.

Because there could be keyboard shortcut conflicts with other international keyboard layouts, a new behavior property, Disable Diacritic Keyboard Shortcuts, was added to the following cataloging and authority wizards and helper that use the MARC editor.

- Add Title
- Duplicate Title
- Modify Title
- Add Authority
- Duplicate Authority
- Modify Authority
- Validate Headings helper

When this behavior property is selected, the keyboard shortcuts used by the Symbol Table’s code set ALA Character Set of Diacritics and Symbols will be disabled.

(UNI-13760, UNI-15450)

**Blank Dialog Boxes Displayed When Viewing Call Number/Item or MARC Holdings tabs**

In any wizard that contained a Call Number/Item or MARC Holdings tab, a blank error dialog box displayed (red box with the X and OK buttons). Also, the Call Number/Item tab was not complete; the Viewer and Editor panes were empty. This situation only occurred if an item record for this title was linked to an inactive hold for a user that no longer existed in the user database. The user database error was interfering with the item record’s holds display (active and inactive), and so interfered with the tab displays.

This has been corrected. An inactive hold on an item can now be displayed even when the user record is removed from the database. User data will be empty in this instance.

(UNI-13623, UNI-13620)

**Global Item Modification Wizard**

**Corrections**

**Start with Item Search Helper Property in Change Item ID Helper Cannot Be Turned Off**

Previously in the Global Item Modification wizard, the Start with Item Search Helper property for the Change Item ID helper could not be turned off, and
launching the Change Item ID helper always resulted in the Item Search helper appearing first.

This has been corrected.

(UNI-2195)

Label Designer Wizard

Enhancements

New Label Template for Printing Valid Barcode IDs

The new Create Valid Barcode IDs report generates a sheet of barcodes for the selected custom barcode format. These barcodes are printed on a label sheet. The labels are defined using the Label Designer wizard. To support this barcode label printing feature, a new Barcode label template was created. This label template includes the Barcode ID and Text configuration elements.

Note: The report and new label template are used with Barcode Validation.

In the Barcode label template, the user can configure a barcode label element using the Label area of the Label Designer window.

- Barcode — In the Value box, select Barcode ID from the drop-down list.
- Text — In the Text box, type the information that should display on the label (maximum number of characters is 50).

(UNI-12582)
Configuring Elements Optimized For Printing Multiple Item Labels

Using the WorkFlows J ava client to print large numbers of labels for one title has been optimized. In the label template, some Call/Copy type elements have been optimized for printing. Elements in the list that are followed by an asterisk are the optimized elements. Consider selecting only these elements when printing a large number of item labels, and particularly when selecting an auto-printing feature in the Add Ordered Items to Catalog wizard.

(UNI-11256)

Corrections

Label Designer Properties Window Displayed When It Should Not

In the Label Designer wizard properties, a user selected Display Property Page: Never. But, after the user modified the default label template using the Label Designer helper, the wizard property reverted back to Display Property Page: Wizard Startup. The property page would display when the user started the wizard again, when it should not. If the user closed and restarted WorkFlows, the property would revert to the original setting, Display Property Page: Never.

This has been corrected.

(UNI-12024)

Label Designer Tuncates Call Number on Spine Label

When attempting to print a label based on a template created in the Label Designer wizard and no splitting rules were provided, only the first part of the call number appeared because the call number split before a point (.) followed by an alpha character, even if there was room for more of the call number on one line of the spine label.

Example:
The call number PZ7.R79835DAR07 2007 prints as follows.

PZ7
.R79835DAR07
2007

If no splitting rules are applied and a call number does not fit within an available width, the expected behavior in the Label Designer is to attempt to split the call number keeping lines as long as possible and with the following hierarchy.

- Point followed by alpha character takes precedence over space if both are present.
- Space takes precedence over point followed by number.

If splitting rules are applied and one or more split lines still do not fit, the same rules apply for each individual portion of the split call number.

(UNI-13728)
Label Designer Not Printing Correct Number of Pieces

Previously, the cataloging label printing helpers and the Print Custom Labels report were not printing the actual number of pieces for an item, even though the Number of Pieces value (of the Call/Copy Element) was added to the label template in the Label Designer wizard. It was determined that the Number of Pieces value was actually printing the number of copies. The Label Designer wizard has been corrected.

(UNI-14367)

Modify Title Wizard

Corrections

Label Designer Helper Was Not Printing the 260, 300, and 500 Entries

Previously, the Label Designer helper in the Modify Title wizard was not printing the 260, 300, and 500 entries. The BRIEF template does not include these entries, but FULL and TEMPLATE do.

It was determined that the Entries Template selected in the drop-down list of the Default/Editor Display properties for the Modify Title wizard controlled what information displayed when using the Label Designer helper. BRIEF is the default template. But, this default was applied even when the user cleared the Add Empty Entries check box and the Entries Template box was unavailable (greyed-out).

This has been corrected. The Label Designer helper no longer relies on the Entries Template selected in the Modify Title wizard properties. The MARC record is retrieved with the FULL template.

(UNI-12295)
Review Titles Wizard

Corrections

Review Titles Wizard Record Displays “Item Not Found in Review Catalog” Message

Previously in the Review Titles wizard, if the Review Status was set to a value for which there was only one item, the following message appears when a search was conducted for that item.

Item not found in review catalog.

This has been corrected.

(UNI-11595)

SmartPort Wizard

Enhancements

SmartPort Helpers Added to WorkFlows Java Client

In the WorkFlows Java client, in the SmartPort wizard, the Saved Files option did not contain the Print, Import, and Export helpers that were available in the WorkFlows C client.

This has been corrected. The Saved Files option in SmartPort now contains the Print, Import and Export helpers.

(UNI-14848)

Corrections

Properties and Capture Record Windows Displayed Library Field for Single Library System

In the SmartPort wizard, the Properties window and Capture Record window (the window that allows the user to set matching options and more) displayed the Library field, even though the system was a single library system. This has been corrected.

(UNI-10922)

SmartPort Search Stops Responding When Searching Multiple Databases

When searching multiple databases, if the SmartPort search was performed using an index that was not supported by the first database (the database...
highest up in the list), the search stopped responding. The wizard displayed a message that a particular search index was not supported, but the search process did not finish. The Search Results area did not display the search results information. If the search was performed using an index that was supported by the first database, but not the second (third, fourth, and other databases), then the search was completed, rather the search results from the first database appeared.

This has been corrected. Now, all supported indexes are considered in the SmartPort multi-database search, no matter where the database falls in the database list.

(UNI-11708)

Transfer Title, Call Numbers, or Copies Wizard

Corrections

Shadowed Item Transferred to Same Call Number of Unshadowed Item Affected Item Display in e-Library

In the Transfer Titles, Call Numbers, or Items wizard, when an item on a separate call number in a shadowed location (such as MISSING) was transferred to another call number where the item is not shadowed, the item that was not shadowed no longer displayed in the e-Library. The shadowed item was affecting the display of the unshadowed item.

This has been corrected.

(UNI-13396)
General Enhancements

New Accountability Behavior Properties for Checkout and Renewal Wizards

New accountability behavior properties have been added to the Checkout, Renew Item, and Renew User wizards. These new behavior properties only appear on systems configured to use Accountability.

- Properties were added to control the charge override process
- A property was added for printing accountability receipts

New Properties to Control Charge Overrides

The accountability checkout and renewal processes are mediated processes that require the accountability operator to validate the patron's credentials and compare them with the classification level, access restrictions, and need to know restrictions for the materials before checking them out or renewing them. Typically, the accountability operator must provide an override before checking out/renewing the materials.

New behavior properties give the accountability operator the ability to streamline or even eliminate the accountability verification and override process, as long as the patron's security level matches the item's security level, and the charge is permitted.

The following properties appear under Accountability on the Behavior tab of the Checkout, Renew Item, and Renew User wizard properties.

- Require Override for Permitted Charge – If the charge or renewal is permitted (the user's security level and item security level match) an Accountable Item Override window will open. The accountability operator must type an override code in the Checkout Permitted Override box for the charge to continue. This option is selected by default.

- Allow Permitted Charge without Override – If the charge or renewal is permitted (the user's security level and item security level match), an Accountable Item Override window will open, but the Checkout Permitted Override prompt will not display. The accountability operator will acknowledge the accountability information, then click the Checkout Item next step button in this window.
• Allow Permitted Charge without Acknowledgement – If the charge or renewal is permitted (the user's security level and item security level match) the Accountable Item Override window will not open, and the Checkout Permitted Override prompt will not display. The accountability operator can continue with the normal checkout or renewal work flow.

New Property for Printing Accountability Receipts

Accountability operators can now print accountability receipts from the Checkout, Renew Item, and Renew User wizards. Also, operators can control which fields appear on these receipts using the Receipt Fields gadget.

The Print Accountability Receipts property appears under Charge Printing on the Behavior tab of the Checkout, Renew Item, and Renew User wizard properties. If the accountability operator selects this property, a receipt will print for each charged item. The operator can click the Print Accountability Receipts button to customize the receipt header, receipt fields, and receipt footer.

(UNI-11446, UNI-14236)

Configuration Option to Check Out or Renew Items For the Full Loan Period Instead of Truncating the Loan Period Based on User’s Privilege Expiration Date

Previously, if a user whose library privileges were about to expire checked out or renewed an item, the item’s loan period would be truncated automatically so the item would be due on the day the user’s privileges expired. SirsiDynix Symphony has been enhanced with a configuration option in which a library can loan items for the full checkout or renewal period even if the due date is after the user’s library privileges expire.

(UNI-12325)

Hold Wrapper Slip Printing Added to Circulation Wizards

Various circulation wizards have been enhanced to print hold wrappers. A hold wrapper is typically a slip of paper printed with user, hold, and/or item information, and is wrapped or folded around the spine of an item to be placed on a self-service holds shelf. Self-service holds allow patrons to go to the library’s holds pickup shelf to find their available holds.

Libraries can customize what information prints on a hold wrapper, and how the text is to appear (horizontally, vertically, font, font style, and font size). Since the information printed on the hold wrapper is visible to all patrons browsing the holds shelf, the library can limit the number of characters that are printed for the user ID and/or user name to protect the patron’s privacy.

If the WorkFlows workstation has a receipt printer, and if wizard properties are configured to print hold wrappers, a hold wrapper prints when a hold becomes available at the pickup library.

(UNI-6209)
Added Ability to Print Date Formatting Description on Circulation Receipts

Users can now print a date formatting description on circulation receipts including: date due slips, hold slips, patron credit receipts, payment slips, reshelving slips, transit slips, charge receipts, and hold wrappers. In the receipt printing properties, the optional Allow Date Formatting Description property specifies whether descriptive text prints on the receipt to explain the date format that the library uses. The Date Format Description box is a free-text field where the user can type up to 40 characters of descriptive text.

Example:

*Patrons may be confused as to whether the date notation of 12/11/2007 means December 11, 2008, or November 12, 2008. The user can type Month/Day/Year in the Date Format Description box so the date information will display similar to the following on the receipt.*

Pickup by:
12/11/2008
Month/Day/Year

(UNI-13955)

New Override for Item Has Available Holds Block at Check Out

The Operator policy now includes a new override code which can be used when an “available” hold is being charged to a user that is not the user for which the item is on hold. This override is called the “Available Hold Block Override.”

This new override is available for the following wizards (and transactions).

- Checkout
- Ephemeral Checkout
- Mail Items
- Renew Items
- Renew User
- SIP2 transactions
- NCIP transactions

Previously, the Holds Block override and “Item has holds” message were used for items that had not been trapped to fill a hold (sitting on the shelf in the stacks) as well as items that had been trapped to fill a hold (sitting on the holds shelf). This allows sites to prevent items on the hold shelf from being charged to another patron and still allow items found in the stacks that have outstanding holds to be checked out with an override.
Now, when checking out or renewing an item, if a library staff member attempts to check out an item to a user, and that item is being held for another user, the message “Item has available holds” will display. The staff member can then type the override code for the Available Hold Block Override and proceed with the checkout or renewal. Self-check systems and NCIP transactions can be configured to provide this override automatically.

The Holds Block override can still be used in these wizards (and SIP and NCIP transactions) to override holds for items that have not been trapped to fill a hold.

(UNI-14875)

Unable to Register New User or Modify User ID with an ID Listed in the Barcode Exempt Policy

On a system configured to use Barcode Validation, a library staff member attempted to create a new user record with a “custom” (non-valid) user ID. This “custom” ID was included in the Barcode Exempt policy. But, even though the ID should have been exempt from validation, the New User Registration wizard would not accept it. Instead, the wizard displayed the following message.

Invalid user ID; zero length

This also occurred in the Modify User wizard when a staff member tried to modify a user ID to an ID listed in the Barcode Exempt policy.

The New User Registration and Modify User wizards have been corrected. They now honor the valid exempt IDs listed in the Barcode Exempt policy.

(UNI-15085, UNI-15140)

Corrections

User Search Helper Properties Screen Does Not Refresh Correctly

Previously, if the User Search helper was selected from wizard properties once, and then was selected again immediately after the first action, selecting a search type radio button did not cause the screen to refresh with a Sort By option.

This has been corrected.

(UNI-12951)

Add Option to Print List of Routings with Print User Helper

A new option, List of Routings, has been added to the Print User helper. If the current user is linked to routing lists, you can print all routings for the user.

(UNI-13121)
WorkFlows C Client Was Counting Renewals as “Unseen”

Previously in the WorkFlows C client, the Checkout, Renew User, and Renew Item wizards were counting all renewals as “unseen” renewals. This was incorrect. Unseen renewal functionality is only available for the WorkFlows Java client. These wizards have been corrected. All renewals in the WorkFlows C client will be counted as seen renewals only.

(UNI-13863)

User Credit Account Was Issued a Refund for Cancelled Lost Bill

Previously, SirsiDynix Symphony was issuing a replacement fee refund to a user’s credit account if a library staff member paid the user’s lost item bill with a payment type of CANCEL. This should not occur since the user never paid the fee. Refunds should not be issued for bills paid with a payment type of either CANCEL or FORGIVEN.

This has been corrected.

(UNI-13962)

Checkout Wizard

Enhancements

Enhanced Processing for Checking Out Multiple-Piece Items

The Checkout wizard has been changed to process multiple-piece items according to the setting of the Multi Circ attribute that has been added to the Item Type policy.

- If the Multi Circ attribute is not selected in the multiple-piece item's Item Type policy, and the Number of Pieces field contains a value in the item's item record, the "Item has associated materials" override displays. Type the override code and click Override & Checkout Item. The multiple-piece item is checked out and counted as a single checkout transaction in circulation statistics.

- If the Multi Circ attribute is selected in the multiple-piece item's Item Type policy, the following prompt displays when the item is scanned or selected for checkout.

  Item has multiple circulating pieces.

Type the number of pieces (up to 99) in the Number of Pieces field, and click Checkout Item. The multiple-piece item is checked out and counted as one checkout transaction for each piece in circulation statistics.

(UNI-12311, UNI-11447, UNI-12155, and UNI-12692)
New Property to Allow Checking Out Multiple IDs at One Time

A new property, Cache Item IDs, was added to the Checkout wizard behavior properties. Cache Item IDs allows library staff members to scan multiple IDs in the Item ID field using an RFID scanner. The staff member can use the scroll bar to view all scanned IDs. These IDs will be cached in the Item ID field until the staff member clicks the Checkout Item to User button. WorkFlows will then send each item ID to the server for checkout. Overrides that display can be handled individually, and after an override is handled, WorkFlows will continue to send the remaining IDs. By default, the Cache Item IDs property is disabled.

(UNI-14167)

Corrections

User Information Replaced When Checking Out Multi-piece Items

If the Discharge Already Charged Items Without Override global configuration option was configured, when a library staff member checked out a multi-piece item without first discharging it from the previous user, the item would be charged to that previous user instead of the current user. The previous user information would replace the user originally displayed in the Checkout wizard, and, typically, library staff would not catch this before charging the item.

It was determined that the multi-piece override was not properly clearing the previous user information (which was consulted for the clear charge process) before proceeding with the checkout. This has been corrected.

(UNI-12398)

Checkout Wizard’s Renewal Step Missing Alert for Due Date Shortened to User’s Privilege Date

When renewing items in the Checkout wizard, if the due date for the renewal was shortened because the user’s privilege expired, the wizard did not display an alert that this happened. Other circulation wizards display an alert in this instance.

Now, the following alert message displays in the Checkout wizard’s renewal process when a due date is truncated to the user’s privilege expiration date. The library staff member must acknowledge this alert and click OK to continue.

Charge, loan period shortened to user privilege expiration date.

(UNI-12663)

After Loan Alert, Item ID from Previous Transaction Not Cleared from Item ID in Checkout Wizard

Previously, if Cancel is selected from a User Has Previously Had a Copy of This Title on Loan alert, and then Check Out to New User is selected, the Item ID field in Checkout is not cleared from the previous transaction.
This has been corrected

(UNI-12330)

**Mark Item Missing Wizard Override/Mark Item Missing/Cancel Hold Does Not Cancel Hold**

Previously, if the Checkout wizard property Proxy Checkout with Cancel Hold is selected, and the Mark Item Missing wizard is used to mark an item missing and cancel a hold, the item was correctly marked as missing, but the hold was not cancelled.

This has been corrected.

(UNI-13141)

**Previous Loan Alert Does Not Display If Item Retrieved By Current Item Button**

Previously in the Checkout wizard, if the Hide Current Item property was cleared and the Display Previous Loan Alert property was checked and item information was displayed using the Current item button, the item was checked out without the previous loan alert display.

This has been corrected.

(UNI-13142)

**Barcode Validation Settings Wizard**

**Enhancements**

**New Barcode Validation Settings Wizard For Circulation and Cataloging Wizards**

For systems that are configured for custom Barcode Validation, libraries may use the Barcode Validation Settings wizard to define barcode subformats (as defined in the Barcode Validation policy) to be used for abbreviated barcode search and input, and also auto-generation of user and item IDs.

The Barcode Validation Settings wizard allows the user to do the following.

- **Define the default barcode prefix for item and user IDs** - The prefixes defined must follow the validation rules set in the barcode subformats defined for the library. By defining the prefix for user and item IDs, library staff members may enter only the significant digits of the barcode to retrieve the user or item record. Library staff may also include an x or ? wild card character for the check digit to auto-calculate the check digit on-the-fly using the defined barcode validation rules (defined by the barcode subformat).
Example:

Barcode 326050024312 could be entered as just 5002431x or 50024312.

Note: The ability to enter abbreviated user and item barcodes is supported only in the circulation wizards and the cataloging wizard, Global Item Modification. The circulation helpers, including User Search and Item Search and Display, are not affected by this change.

• Define the barcode subformats used by the library to validate the barcodes – The selected barcode subformats are used to determine how the check digit is calculated. The defined barcode subformat is also used to auto-generate IDs when creating user or item records. (This occurs only if auto-generated ID properties are configured in the circulation wizards, such as New User Registration and Add Brief Title, and the cataloging wizards, such as Add Title and Add Items. Also, a custom autoids file must be configured in the /Unicorn/Autoids directory on the server.) The list of available barcode subformats is limited to the subformats defined in the Barcode Validation policy for the system.

• Define the character used as a wildcard for the check digit – This is the digit the library staff member enters for the check digit. This allows the system to auto-calculate the check digit using the rules defined in the selected barcode subformat. For example, the site could enter a portion of the barcode with wildcard for the check digit and the client will calculate the remaining portion of the barcode.

Note: For more information see “FAQs: Barcode Validation Settings” in the WorkFlows Java client online Help.

Click the Barcode Validation Settings wizard to specify the barcode validation settings. These settings will stay in effect for the circulation and cataloging wizards during the client session. These settings can also be saved to the properties file for use in the next client session.

The wizard’s Behavior tab displays the following fields.

• Default Barcode Prefix — In the User ID field, type the library's barcode prefix for user IDs. In the Item ID field, type the library's barcode prefix for item IDs. The prefix defined for user IDs and item IDs needs to follow the selected barcode subformat policy for the library.

• Barcode Format — From the drop-down lists, select the barcode subformat for user IDs and item IDs. Only the subformats defined in the Barcode Validation policy for the system will display in the drop-down list. The Barcode Validation policy defines which subformats are used for barcode validation.

• Check Digit — Indicate the wildcard character to be used for the check digit. Click either the ? or x radio button.

(UNI-12466)
Bill User Wizard

Corrections

Patron Credit Amount for Paid Bills Corrected

In the Bill User wizard, if a library staff member paid a patron's bill with the payment type Creditacct (which should pay the bill from funds in the patron's credit account), and clicked Pay Now, the bill would display as paid in the list and would also display as paid in the User Display wizard. But, when the staff member reviewed the patron's credit history transactions, the patron credit account balance was incorrect. The balance was higher than expected.

Example:

A $0.50 payment with funds from the patron's credit account was being recorded as 0.0050 in the patron credit account database and displayed as $0.01 in the client. Instead of $0.50 being deducted, only $0.01 was deducted from the overall credit balance.

This has been corrected.

(UNI-15170)

Display User Wizard

Corrections

Show Charge History Tab Property Setting Was Not Saved

In the Display User wizard properties, a user cleared the Show Charge History Tab behavior property (do not display the Charge History tab). But, when the user exited and reopened the wizard, the property setting was not saved. The Show Charge History check box was selected again in the properties, and the Charge History tab displayed in the wizard.

This has been corrected.

(UNI-13964)
Mail Items Wizard

Enhancements

*Added Ability to Auto-generate a Tracking Numbers in the Mail Items Wizard*

For sites that do not use pre-assigned tracking numbers, the Mail Items wizard now provides the ability to assign auto-generated tracking numbers.

A new behavior property, Auto Generate Tracking Numbers, was added to the wizard to allow the system to assign auto-generated tracking numbers. If this property is selected, the term “AUTO” will appear in the Tracking Number field. The auto-assigned tracking number will display after the system has determined a new package is being added.

(UNI-12467)

Corrections

*Mail Items Wizard Was Missing Item Type Limit Override*

In the Mail Items wizard, if a patron reached the item type checkout limit, the wizard displayed the following message.

*User can’t charge out any more of this item type.*

But the wizard did not present the item type override next steps that are available in other circulation wizards.

This has been corrected. When a patron has reached the item type checkout limit, the Mail Items wizard now displays the following item type override next step buttons.

- Override & Checkout Item
- Do Not Checkout Item

(UNI-12662)

*Incorrect Due Date Displayed in Mail Items Wizard*

Previously, the Mail Items wizard displayed incorrect due dates for an item charged and mailed to two different patrons. This occurred when the item was discharged from one patron’s shipping package (with patron A’s calculated due date), and then charged to a new patron’s shipping package (with patron B’s calculated due date). The Mail Items wizard would display patron B’s due date for patron A’s shipping package.

This has been corrected.

(UNI-10421)
Modify Due Dates Wizard

Enhancements

Multiple Items Can Be Selected to Have the Same Due Date

The Modify Due Dates wizard has been changed so multiple items can be quickly selected and modified at once to have the same due date. The Modify Due Dates wizard window now includes the Select All check box, the Apply Same Due Date check box, and a Due Date field that becomes active only when the Apply Same Due Date check box is selected. The Due Date field includes the Calendar gadget, which can be used to select a new due date.

A selection check box has been added to the left of each item in the list of checkouts for the user. This check box allows users to select the items that will be modified to have the same due date.

Depending on the settings of the Select All check box, the Apply Same Due Date check box, and the item selection check boxes, the specified due date will be applied to some or all items charged to the user.

- To assign the same due date to all of the items currently checked out to the user, select the Select All check box, select the Apply Same Due Date check box, and specify the due date in the Due Date box.
- To assign the same due date only to selected items in the list of checkouts, clear the Select All check box. Select the check box for each item for which the due date is to be changed, select the Apply Same Due Date check box, and specify the due date in the Due Date box.
- To specify different due dates for items, clear the Select All check box. Select the check box for each item for which the due date is to be changed, and use the Calendar gadget in each item's Due Date field to specify the new due date.

(UNI-11032)

Corrections

Unable To Select a Charge To Modify After Using User Search Helper

In the Modify Due Dates wizard, after searching a user record with the User Search helper, the library staff member was unable to select the check box for the charge that she wanted to modify. The staff member first had to select (highlight) the entire line, then select the check box. This workflow required two mouse clicks to select the charge. If the staff member searched the user record using the Current button or if she typed the user ID, she was able to select the check box for the charge using one mouse click.

This has been corrected.
Modify User Wizard

Enhancements

New Wizard Property Controls the Display of the Web Auth ID Field

The display of the Web Auth ID field on the Privilege tab in the user record is now controlled with the setting of the Show Web Auth ID check box in the Modify User wizard properties. If the Show Web Auth ID check box is selected, the Web Auth ID field is visible in the Privilege tab of the user record.

Pay Bills Wizard

Corrections

More Glossary for Pay Bills Wizard Shows Item Is Both Checked Out and Renewed

Previously, if a library charged a fee for the checkout of an item, the resulting bill included an identical Date Charged and Date Renewed value when the fee glossary was selected. The Date Renewed, in this case, should default to NEVER.

This has been corrected.

Remove Item Hold Wizard

Corrections

Hold Counter Issue in Remove Item Hold Wizard Corrected

In the Remove Item Hold wizard, after removing a hold for one item, if the user did not fully clear the item ID data in the wizard window before removing a hold for another item, the hold counters for the previous item could be corrupted and possibly result in negative numbers.

This has been corrected. Now, after a hold is removed, the wizard completely clears the item information before the user types another item ID.
Renew Privilege Wizard

Corrections

User Status for a BLOCKED User in the Renew Privilege Wizard Displays with a Preceding + in the User Status Header

Previously in the Renew Privilege wizard, if Global Config is set to display either brief or expanded user information in the User Status header, BLOCKED user status displayed as +BLOCKED in the header.

This has been corrected. The user status for a BLOCKED user now appears in the header without +.

(UNI-2324)

Renew User Wizard

Corrections

Renew User Wizard Displayed Incorrect Number of Holds in Renew This Item? Window

Previously, when using the Renew User wizard with the behavior property Review Items before Renewing selected, an incorrect number of holds for items sometimes displayed in the Renew This Item? window. This occurred when one of the items to be renewed had a hold. For this item, the number of holds correctly displayed as “1,” but the hold counts for the subsequent items displayed as “1” even though the items did not have holds attached.

This has been corrected.

(UNI-12331)
User Lost Card Wizard

Corrections

Typing AUTO in the User ID Field Did Not Auto-generate an ID on a System Configured for Barcode Validation

On a system configured to use the Barcode Validation feature, in the User Lost Card wizard, if a library staff member typed AUTO in the New User ID field, the system would not auto-generate a user ID. But, if the system was not configured for Barcode Validation, the wizard would auto-generate an ID when the staff member typed AUTO in this field.

This has been corrected. The User Lost Card wizard will auto-generate a user ID when: 1) the system is configured for Barcode Validation, 2) there is a format selected for user IDs, 3) there is a /Unicorn/Autoids/userid file on the server, and 4) the staff member types AUTO in the New User ID field.

(UNI-13948)
Collection Exchange

General

Enhancements

Sites Using Collection Exchange Can Now Upgrade to SirsiDynix Symphony Version 3.2.1

Sites that were planning to upgrade to SirsiDynix Symphony version 3.2 but were prevented from doing so because they were using the Collection Exchange module may now upgrade to version 3.2.1.

Corrections

Unable to Exchange an Item When Another Item of the Same Title Had a Hold

Previously, if an item had holds associated with it, a user was unable to exchange other items of the same title. The following message displayed, even though the item in question did not have a copy-level hold.

Holds are associated with this item

If the user removed the copy-level hold on the item, the other items could be exchanged. The Collection Exchange wizards were not correctly checking the type of hold before exchanging items.

This has been corrected. Now a copy-level hold on any item does not affect whether the other items on that title may be exchanged.

(UNI-12329)

Unable to Shadow Individual Items on Systems Configured for Collection Exchange

On systems using Collection Exchange, the cataloging wizards that allow for editing items did not display the Shadow Item, Permanent, and Circulate options, only the Shadow Call Number option was available. Without these item information options, it was not possible to shadow one copy associated with a call number.

This has been corrected.

(UNI-13681)
Manage Sets Wizard

Corrections

Set Name Drop-down List Disappeared After Opening the Search by Set Name Helper, then Cancelling

In the Manage Sets wizard, if a user opened the Search by Set Name helper, then clicked Cancel, the Set Name drop-down list would disappear.

This has been corrected.

(UNI-897)

Set Name Disappeared After Using Item Search Helper

In the Manage Sets wizard, after typing a name in the Set Name field, a user clicked the Item Search helper to locate an item. But, when the user closed the helper, and returned to the Manage Sets wizard window, the set name disappeared.

This has been corrected.

(UNI-898)

Receive Items In Transit Wizard

Corrections

Item IDs Were Not Converted to Uppercase

In the Receive Items in Transit wizard, when a user entered item IDs, the IDs were not being converted to uppercase. This was inconsistent with how other WorkFlows wizards behave; the wizards do not allow lower-cased item IDs. This has been corrected.

(UNI-895)
Enhancements

Added Ability to Control Default Search Operator for Keyword Searches

Previously, keyword searches in the e-Library defaulted to retrieving records with SAME as the default operator between the search terms. For example, when searching an author, subject, title, or periodical title, the terms typed will retrieve records with all of the specified terms in the "same" record field, though not necessarily in the same sentence.

Now, SirsiDynix Symphony administrators can control which default operator is used for e-Library keyword searches by modifying a parameter in the e-Library environment files. The following operators can be selected: AND, NOT, OR, SAME, WITH, XOR, ADJ, or NEAR. ADJn or NEARn (where n represents a number of words, between 1 and 99) are not supported. By default, the SAME operator is used. This change is for keyword searches only. Like and exact searches ignore this environment file parameter.

(UNI-11450)

EnvisionWare eCommerce Can be Offered as an Online Bill Payment Option to Pay Library Bills

Libraries can now give their e-Library users the option of paying bills online with EnvisionWare eCommerce. If the library has enabled this option, the Pay Bill(s) with eCommerce button displays when a user displays a list of bills using the Review My Account option.

(UNI-11392, UNI-12741)

Added Ability to Link to Full Details from My Account Lists

When a user logs in to the e-Library and moves to the My Account/Review My Account or My Account/Renew My Materials page, there could be long lists of truncated title or author information for the items listed. Now, a Details link will appear next to the Title or Title/Author information. If the user clicks the Details link for an item, the Full Details of the record in the catalog will display. If the user clicks the Go Back button, he or she will be returned to the My Account page without the need to log in again.

SirsiDynix Symphony administrators can control whether or not the Details link will display by modifying a variable in the e-Library environment files. As delivered, the Details link will not display in the My Account lists.

(UNI-14604)
Added Ability to View Total Number of Holds for Requested Items in My Account Holds Lists

When a user logs in to the e-Library and moves to the My Account/Review My Account or My Account/Renew My Materials page and views her Holds list, the user can now see the total number of holds for the titles she has requested and determine her position in the holds queue.

Example:

Previously, in the Availability column of the Holds list, the hold queue could display as follows.

Your position in the holds queue: 1

Now, the hold queue could display as follows.

Your position in the holds queue: 1 of 499

SirsiDynix Symphony administrators can control whether or not the total number of holds will display by modifying a variable in the e-Library environment files. As delivered, the hold totals will not display in the My Account Holds lists.

Note: Additionally, this variable is only valid with Demand Management when using system level holds with no prioritization.

(UNI-14607)

Added Intransit Message to Holds List in My Account Pages

After a user logs in to the e-Library and moves to the My Account/Review My Account or My Account/Renew My Materials page and views his Holds list, he can now tell which items are in transit to the pickup library.

Example:

In the Availability column of the Holds list, the following message could display.

In transit for pickup at: MAIN

SirsiDynix Symphony administrators can control whether or not the intransit message will display by modifying a variable in the e-Library environment files. As delivered, the intransit messages will not display in the My Account Holds lists.

(UNI-14607)

Added Ability to View Item Types for Items Listed in the My Account Lists

After a user logs in to the e-Library and moves to the My Account/Review My Account page and views any of the My Account lists, she can now see the item type values for listed items. The value appears below the Title or Title/Author for each item. This is particularly useful if the user is working on a project and has checked out a number of books with similar titles in different media. This way, the user can tell which of the listed items are books, which are DVDs, and so forth.
SirsiDynix Symphony administrators can control whether or not the item type values will display by modifying a variable in the e-Library environment files. As delivered, the item types will not display in the My Account lists.

Note: Item type values will not display for Reserves Reservations.

(UNI-14605)

Using the e-Library with the EZproxy Single Sign On Feature

The Single Sign On feature has been implemented for libraries that use EZproxy to manage remote user e-Library access through a proxy server. If the library uses EZproxy to authenticate remote user logins with the SirsiDynix Symphony SIP2 server, and permits the use of cookies that retain login information, the EZproxy authentication and e-Library configuration can now be configured so remote users do not have to enter user IDs multiple times when using the e-Library or other products on the library's Web site.

The system administrator must create customized links that users are required to use for logging into the e-Library. The links are necessary for the e-Library to be used with EZproxy.

EZproxy must be customized for its use with the SirsiDynix Symphony SIP2 server and e-Library. Refer to the EZproxy documentation for information on customizing EZproxy.

Note: EZproxy stores a session cookie that is stored for the duration of the browser session and is read by the e-Library. Security issues could arise on shared workstations if users do not log out of EZproxy at the end of their e-Library sessions. System administrators should customize the e-Library to display the EZproxy logout screen when the user selects the Logout button. In addition, system administrators should customize the length of time that the EZproxy Single Sign On URL is valid in a session so a user cannot access a previous user’s e-Library information by using the Back button in the Web browser.

(UNI-14106, UNI-15199)

Configuration Permits Users to View Links to Check Out Electronic Books Purchased From BWI Without Having to Log Into the e-Library

If the e-Library was configured so that users could check out electronic books that were purchased from BWI, the URL links to check out the e-books would not display unless the users were logged into the e-Library. The e-Library configuration could not be set for a library to allow its users to see the URLs to the e-books without requiring the users to log into the e-Library first. In addition, if the e-Library was configured so that BWI e-books could not be checked out, but the library had e-books from BWI under a special arrangement, the URLs for the e-books would not display in the e-Library.

The e-Library has been changed so that if the e-Library is configured to allow users to check out electronic books that were purchased from BWI, the URLs to check out the e-books will display whether the users are logged into the e-Library or not. Also, the e-Library has been changed so that if the BWI e-books
cannot be checked out, but the URLs are permitted to be displayed, the URL links to the BWI e-books will display.

(UNI-6466)

**Hold Button No Longer Displays When All Copies Are in Non-Holdable Locations**

Previously, even if all copies of a title were in a current location that was non-holdable, the Hold button would display. Now, when the e-Library checks for the existence of available copies, it will also check to see if all copies are in non-holdable locations. If all copies of a title have a current location that is non-holdable, the Hold button will not display.

**Note:** This change only affects Demand Management holds.

(UNI-14863)

**Corrections**

**Ligature and Double Tilde Diacritics Not Supported by Arial Unicode MS Font Can Be Suppressed in the e-Library Display**

The Arial Unicode MS font cannot correctly display the left and right ligature and the double tilde. As a result, these diacritics display incorrectly in the e-Library and the WorkFlows Java client when the Arial Unicode MS font is used.

Since the Arial Unicode MS font is the recommended font when using the WorkFlows Java client, and is the best font in general to use when connecting to a Unicode server, SirsiDynix Symphony administrators can configure a variable to turn off the display of the left and right ligature and double tilde diacritics in the e-Library when the e-Library is used on a Unicode server.

**Note:** The variable does not change the display of the left and right ligature and double tilde diacritics in the WorkFlows Java client.

(UNI-13153)

**Message No Longer Displays When Using the e-Library with Internet Explorer in Its Kiosk Mode**

If the e-Library was used on the Internet Explorer browser in the browser’s Kiosk mode, the following message displayed when users selected options (such as Knowledge Portal) or links that would try to open new browser windows.

"new_win" is null or not an object
Do you want to continue running scripts on this page?

The e-Library has been corrected so the message no longer displays when the e-Library is used with the Internet Explorer browser running in its Kiosk mode.

(UNI-3440)
Reading Program Default Setting Honored

The Reading Program default setting (defined with the SEARCH_READPROG environment variable) was being ignored. The Reading Program value was always being set to Reading Counts.

The e-Library has been corrected so the specified environment variable setting is used for the Reading Program default setting.

(UNI-4125)

Unable to Place a Booking on Fixed Time Slot Items in the e-Library

Previously, the e-Library was unable to place bookings on items configured for fixed time slot bookings. For instance, when a user clicked the Booking button in the Full Details title display, and then clicked the Get Booking Date/Time button, the e-Library displayed the following message.

#baRequired field missing

The title the user selected had items that were set up for fixed time slots bookings. The e-Library did not display the Start Date field, and a start date is required input in order to retrieve the time slots available for booking.

Now, if an item is set up for fixed time slots bookings, after the user clicks the Get Booking Date/Time button, the e-Library will display the Start Date field. After the user enters a start date, the e-Library will display the time slots the item can be booked. The Start Date field will not display for items that don't use fixed time slots.

Note: If a title has some items that are configured for fixed time slots and some that are not, the Start Date field will always display. If the user selects an item that does not require fixed time slots bookings, then the start date will be ignored.

(UNI-12981)

Online User Registration Program Caused Starter Program to Stop Responding—SirsiDynix Symphony UNIX Systems

Previously, the Online User Registration program for the e-Library was causing the UNIX server's starter program to stop responding. When the oureg program was misconfigured, it was sending multiple messages to the starter which would eventually overwhelm the starter. These messages were not needed and have been removed.

(UNI-13842)
**Windows Oracle Z39.50 Searches Displayed System Message**

When a user performed a Z39.50 search in the e-Library on a Windows Oracle system, the e-Library page would display the following system message instead of a hit list.

*Tag start not in correct position*

This did not occur when the user made the same Z39.50 search using the WorkFlows SmartPort wizard.

The program used for the Z39.50 search was not handling Oracle/non-UTF8 (non-Unicode) correctly. This has been corrected.

(UNI-13951)

**Holdings Can Be Sorted By Library Policy Description on Oracle Database Systems**

If SirsiDynix Symphony was configured on an Oracle system to sort and display holdings by Library policy description, the holdings displays were sorted in the e-Library by the library user ID instead. The holdings display in the e-Library has been corrected to sort the holdings correctly on Oracle systems if SirsiDynix Symphony is configured to sort holdings by Library policy descriptions.

(UNI-14606)

**OK Button in Place Hold Window Corrected**

In the e-Library, after placing a hold for an item on the Brief Hit List page, a patron clicked the OK button in the hold confirmation window and was returned to the Search/Home page. The patron should have been returned to the Brief Hit List page she was previously viewing.

Additionally, when the patron used the place hold link from the Full Details page, after clicking the OK button in the hold confirmation window, she was returned to the Brief Hit List page. The patron should be returned to the Full Details page from which she had placed the hold.

Both issues have been corrected.

(UNI-14868)

**Webserver Stopped on Windows Server System Running e-Library Remotely**

After upgrading to version 3.2, the webserver would stop after a short period of inactivity (only 5-10 minutes) at sites running the e-Library remotely on a Windows Server system.

This has been corrected.

(UNI-15352)
Patron’s Name Didn’t Display when Placing Hold on a Multi-Volume Title

In iBistro, the patron’s name did not display on the hold confirmation screen when placing a hold on a multi-volume title. However, the patron’s name did display on the hold confirmation screen when placing a hold on a single volume title.

This has been corrected. The patron’s name will now display on the hold confirmation screen regardless of the number of volumes in the title.

(UNI-14029)

Ending an e-Library Session Could Leave Previous User’s Information Available in the Browser

On a public workstation, after a user logged into the e-Library’s pages, viewed his user information, then logged out of the e-Library, the next user on that workstation could use the history drop-down list or Back button and see the previous user’s information.

This has been corrected. The e-Library will no longer cache private information pages.

(UNI-14405)
Hyperion

Resource Manager Wizard

Corrections

Unable to Backspace or Clear Text and Save Record on Last Extended Metadata Field

When modifying a Hyperion resource's last extended metadata field, the user was unable to backspace over the text or clear the text, then save the record. The Resource Manager wizard would display the following message.

Please enter extended metadata value.

The user was not able to leave the field empty. Additionally, the user was unable to remove the field because the Delete button was unavailable (appeared in grey).

This has been corrected. Now, users can leave that last extended metadata field empty, but the field cannot be removed from the record.

(UNI-12064)
Materials Booking

Create Booking Wizard

Corrections

Unable to Create a Group Booking

After upgrading to Version 3.2, users were unable to create a group booking in the WorkFlows C client. In the Create Booking wizard, when the user tried to create a booking for a TV and ROOM (items that were grouped together), after she selected the start and end times in the booking calendar and clicked OK, the wizard displayed a “Command in progress” message and the client became unresponsive.

The program used by the Create Booking wizard was sending the wrong command, which caused the client to become unresponsive. It was also returning the list of resources twice. These issues have been corrected.

(UNI-14041)

Modify Booking Wizard

Corrections

Database Error When Replacing Item in Modify Booking Wizard

Previously in the Modify Booking wizard in Materials Booking, the following conditions caused a system message to appear.

- Replacing a booking with an item that already has existing bookings.
- The internal booking number of an existing booking matches the internal booking number of the booking to be modified.

The system message was as follows.

BOOKING database error -- unable to process request.

This has been corrected. The system now updates the internal booking number when an item is replaced to avoid booking key duplication.

(UNI-14195)
Offline

General

Corrections

**Offline Wizards Interpreted the Year 08 as 0008**

In the Offline wizards, if a user manually typed a date with double-digit year, such as 02/28/08, the wizards interpreted the date as 02/28/0008. When the user clicked the Calendar gadget in the date field, the gadget displayed the “February 8” calendar.

It was determined that the Offline wizards were not validating the date fields. Now, the Offline wizards will correctly interpret double-digit years, and all date fields will be validated.

(UNI-13978)
Outreach

General

Corrections

Search For Field Restricted to 60 Characters in Create Interest and Create Template Wizards

Previously, the Search For field in the Create Interest and Create Template wizards was restricted to 60 characters. The Search For box could accommodate more characters, but the user could type no more than 60 characters. The WorkFlows C client wizards allow up to 100 characters in the Search For field.

The Search For fields in the Create Interest and Create Template wizards have been expanded. Users can now type a search string up to 100 characters.

(UNI-13351)
Pocket Circ

General

Corrections

PocketCirc Can Connect to Unicode Servers

Previously, the PocketCirc connection was refused if PocketCirc tried to connect to a Unicode server. PocketCirc has been changed so it can successfully connect to a Unicode server.

(SP-57)
Reports

General

Enhancements

Notice Reports Labels Now Print in Preferred Language

In a previous version of SirsiDynix Symphony, notice reports were enhanced to consider the patron's preferred language (indicated in the user record) and print the notice text in that language. However, the notice labels (such as Due date, Pickup by, and more) were still printed in the default language for the system. Now, the labels in the notice reports can be printed in the patron's preferred language.

(UNI-12502)

Increased Policy Name Selection to a Maximum of 500 Names

When running reports, users can make policy selections on the selection tabs using the Policy List gadget. Previously, the maximum number of policy names users could select in this gadget was 100. Now, users can select up to 500 policy names in the Policy List gadget.

(UNI-15268)

Corrections

Load Programs Not Storing Truncated Call Numbers on Oracle Systems

On SirsiDynix Symphony Oracle systems, the server programs that check for call number overflow, such as the catalogload program used by the Load Bibliographic Records report, were not truncating long call numbers (call numbers longer than the 40-character maximum) nor storing them in the 597 entry of the bibliographic records, as they would on other SirsiDynix Symphony platforms.

Now, the programs that check for call number overflow have been modified for Oracle systems. These programs now correctly check for long call numbers and truncate them when they surpass the 40-character limit. The full text of the call number is then stored in the 597 entry of the bibliographic record. When a call number is truncated, the report logs will display the following message, followed by the full text of the call number.

WARNING: ERROR IN CALL NUMBER SIZE

(UNI-12793)
Unable to Browse Forward or Backward in Browse Fund Gadget When Searching Account Number Index

When searching the Account Number index in the Browse Fund gadget, a user was unable to move forward or backward through the search list using the left browse and right browse buttons at the bottom of the gadget. When the user clicked either button, the gadget displayed the following message, regardless of where the user was in the list, and even though there were more funds to browse through.

Fund not found.

The Browse Fund gadget has been corrected.

(UNI-12296)

Reports Were Not Scheduled or Added to the Finished List on SirsiDynix Symphony for Windows Server Systems

On SirsiDynix Symphony for Windows Server systems, in certain circumstances, reports were not scheduling properly, nor were they added to the finished reports list when completed. It appeared that a copy of a report would finish, yet it seemed that one or more copies of that report were still running, even though they were not.

On Windows server systems, the process for locking files when updating the scheduling and finished report lists was not working properly. Also, extra temporary report files could be created. These issues have been corrected.

(UNI-14172)

Report Date Range Gadget for Message Field Not Always Correct

Previously in notice reports, the Date Range gadget for the Messages fields on the Charge Notice tab was not defaulting to the correct value. For instance, if a user changed the End Date for Message 1 to The Date This Report Will Be Run in the gadget, the Date field value would default to W0, time measured in weeks instead of days. The value should actually be D0, time measured in days instead of weeks. As a result, if there was an overdue reserve item that was due yesterday, it would not be included in the report.

This has been corrected. If the user selects The Date This Report Will Be Run in the gadget, the time measure field at the bottom of the gadget will appear in grey (become unavailable) so there can be no mismatch between the time measure (days versus weeks) for the beginning and end dates.

(UNI-14053)
Accountability Group Reports

Corrections

List Inventory Not Checked Out and List Misplaced Inventory Reports Did Not Display Message in Report Log When Scanner Transaction File Was Missing

Previously, when users ran the List Inventory Not Checked Out (Invnotcharged) report or List Misplaced Inventory (Invmisplaced) report, if the scanner transaction file created by the Load Personal Transactions report (scanner.dat) was missing, the report would not run, which is expected, since the transactions needed to run the report were not present. But, there was no indication to the user why the report had not run. Also, neither report would display in the Finished Reports list.

Now, if the scanner transaction file is missing, these reports will stop processing, a message indicating that the scanner transaction file was not found will print to the report log, and the report will be posted to the Finished Reports list.

(UNI-10628, UNI-10629)

Unable to Run Set Destruction Date Report

Previously, on a system configured for Accountability, a user was unable to run the Set Destruction Date (Setdestroyed) report. Zero records were selected or modified. It was determined that the system was missing the DESTROYED location policy with the location type DESTROYED. A policy with the location type DESTROYED is required for running the report.

Now, if a system is missing a policy with the location type of DESTROYED, the Set Destruction Date report will stop processing, return an error status, and print the following message in the report log.

Location policy DESTROYED is required.

(UNI-10487)
Acquisition Group Reports

Enhancements

**Distribution Selection Tab Added to the User Order/Request Notice Report**

The Distribution Selection tab has been added to the User Order/Request Notice (Acqnotice) report to give users the ability to select specific order distribution segments for the report. The Distribution Selection tab offers the following options to be used in selecting specific order distribution segments and producing user notices.

- Date loaded/delivered
- Date received
- Holding code
- Library
- Number of copies
- Parts/volumes
- Shipping list policy
- Distribution segment type

(UNI-2294)

Corrections

**Selected Purchase Order Remains Highlighted in the Fiscal Cycle and Purchase Order Gadget**

When the gadget in the Fiscal Cycle and Purchase Order field of the Print Specific Purchase Orders (Disppo) report was used to select purchase orders for printing, the insertion point (cursor) would move to the Search For field after a purchase order was selected. If the user was trying to select multiple purchase orders from a lengthy list, the user had to repeatedly move the insertion point from the Search For field, scroll the list of purchase orders, and highlight the next purchase order to select for printing.

The gadget has been changed so that when a purchase order is selected from a list of purchase orders, the purchase order stays highlighted so the user can continue to easily scroll through the list and select other purchase orders for the report.

(UNI-6189)
Rollover Dated Orders Report Finishes Correctly on Oracle Systems

On Oracle systems with a very large number of active users, the Rollover Dated Orders (Rolldatedord) report would sometimes not finish correctly. If the report was run at a time when the Oracle system was being used heavily by users, the report’s request to add an orderline extended information entry from the old fiscal cycle orderline to the new fiscal cycle orderline could fail, and the following message was written to the report log:

Record in use

The Rollover Dated Orders report has been changed so the report finishes correctly when the report is run on heavily-used Oracle systems.

(UNI-13602)

Message No Longer Displays in the Book X12 Orders Report When the Report Runs on Oracle Systems

When the Book X12 Orders (Bookorderx12) report was run by library systems that use Oracle databases, the following message displayed in the report log if at least one library selected for the report had a library user name of less than eight characters in its library user record.

**Value in field 2 is too short (1): [N1:1]

Library user names with less than eight characters would not be written to the Ship To element in the X12 order. Since the Ship To element is required in an X12 order, the orders for the affected library or libraries would fail.

The Book X12 Orders report has been corrected so the message no longer displays in the report log when the report is run in libraries that use Oracle databases. The library user names are now written correctly to the Ship To element in X12 orders.

(UNI-15274)
Acquisitions Load Group Reports

Corrections

Load Bibs with Order Info Report Created Auto Call Number with No Copy Attached

When the Load Bibs with Order Info (Biborderload) report was run with the Create Copies option selected, the report would create an auto-generated call number for an existing title, but it would fail to create the new copy. When the report loaded a new title, it would correctly create the auto-generated call number with one new copy.

This has been corrected. For existing titles, the Load Bibs with Order Info report now correctly creates the auto-generated call number with one new copy.

(UNI-9603)

Copies of Existing Titles Created Correctly by the Load Bibs with Order Info Report

The Load Bibs with Order Info (Biborderload) report was not creating a copy when a 9xx order record for another copy of an existing title but with a different holding code was loaded, and the Create Copies option was selected. As a result, the call number was created, but the copy was not created.

The Load Bibs with Order Info report has been corrected so copies of existing titles are created correctly when the Create Copies option is selected.

(UNI-9603)

Load Bibs With Order Info Report Unable to Create Copies When Barcode Validation Was Configured

On a system configured for Barcode Validation, the Load Bibs with Order Info (Biborderload) report failed to create copies for new bibliographic records. The report log displayed the following system message for each unloaded record.

Invalid item ID; format unknown

The report would create the auto-generated ID before creating the item, but validation for auto-generated item IDs first requires the item record to exist. Now, the report allows the server to auto-generate the item ID (which is validated) and then creates and edits the new item with the validated ID.

(UNI-13345)
Administration Group Reports

Enhancements

New Create Valid Barcode IDs Report

The Create Valid Barcode IDs (Createbarcodes) report is a report that generates a sheet of barcodes for the selected custom barcode format. These barcodes are printed on a label sheet. The labels are defined in the new Barcode label template using the Label Designer wizard.

Note: The report and new label template are used with Barcode Validation.

The Create Valid Barcode IDs report is in the Administration report group.

This report displays the following tabs.

- Basic Tab — This tab lists basic information about the report, such as report name.
- Barcode — On this tab, the user can select the barcode format, default barcode prefix, the number of barcodes to print, the starting barcode ID, and whether or not to print labels for existing barcodes.
- Label Template — On this tab, the user can select the Barcode label template. This template includes the Barcode ID and Text element options.
- Export File — On this tab, the user can type the location (file path) on the SirsiDynix Symphony server to where the list of barcode IDs should be written.

(Uni-12582)

Corrections

Transaction Statistics Report’s Workstation Transaction Selection Gadget Not Working Properly

In the Transaction Statistics (Statistics) report, if the user selected by workstation (named workstations) on the Transaction Statistics Selection tab, the report resulted in error and displayed the following message.

2007121162528 Values must be numbers -wCAFFCIRC1,CIRC1

The gadget for selecting workstations was not correctly converting the policy names into the policy numbers which are used internally for selecting the transactions.

This has been corrected.

(Uni-12706)
**User Statuses Display Correctly in the Transaction Statistics Report Output**

When the Transaction Statistics (Statistics) report was set up to print statistics by user status (OK, DELINQUENT, BLOCKED, BARRED, or other custom user statuses), a row of asterisks would print for each user status in the report output. This has been corrected so the report output displays the user statuses properly.

(UNI-14536)

**Report Does Not Count Number of Cataloging Transactions by User ID**

The following message would display in the report log of the Transaction Statistics (Statistics) report when the report was run with one or more station IDs selected on the Transaction Statistics Selection tab as the only report selection.

```
** internal error: illegal category - 9
```

The report has been changed so the message no longer displays when the report runs.

(UNI-13335)

**Hold Recall Without Modifying Hold Level Report Was Incorrectly Recalling Items**

In the Hold Recall Without Modifying Hold Level (Newrecallhold) report, items were being incorrectly recalled. The report was recalling items without regard to whether or not the recall loan period had been fulfilled (the item had been charged long enough to make it eligible for the recall). This meant that, in some cases, when there were multiple items on the title, the wrong item was fulfilling the recall, or an item was recalled when it wasn’t eligible.

Also, because of a sorting issue in the report, where multiple items could potentially fill a recall request, the item with the most renewals was not selected. The item with the most renewals should be the first item selected to fill the request.

These issues have been corrected.

**Untranslated Command Values Appeared in Command Gadget for Scan History Logs Report**

Previously in the Scan History Logs (Logscan) report, the gadget for the Command field on the Transaction Statistics tab displayed untranslated command values, such as CW. When the user attempted to select one of these values, the user could not run the report, and a message like the following displayed.

```
Invalid input data: seltransaction:Command:CW
```

This has been corrected. The command values have been translated, and when a user selects any one of these values, the report will run.
Bibliographic Group Reports

Enhancements

Set Items to DISCARD Report Has Confusing Warning Message

Previously if the Set Items to Discard (Setdiscard) report was run without any selections, many more items were set to DISCARD than the customer expected.

The warning message on the Basic tab for this report led staff to believe that no further selections were required, resulting in many items being set to DISCARD when they should not have been.

WARNING! This report will change the Current Location Status of MISSING copies to DISCARD. Perform this step in preparation for batch removal from your catalog all MISSING copies that you have decided will never be found.

To avoid this situation, the default Current Location has been set to MISSING under the Item tab.

Corrections

Extract Deletions for OCLC Report Was Not Reporting Items Removed by the Remove DISCARD Items Report

Previously, the Extract Deletions for OCLC (Oclcdeletions) report was not reporting on items deleted by the Remove DISCARD Items report. The program used by the Remove DISCARD Items report did not include the OCLC match key, and so the Extract Deletions for OCLC report could not find these deletions and report them to OCLC. The report program has been corrected; it now includes the OCLC match key.

No MARC Holding Setting Does Not Work in List Bibliography Report

Previously in the List Bibliography report, if the No MARC Holdings option was selected, the MARC holdings still appeared on the report.

This has been corrected.
List Bibliography Report Printing Only 10 Digits of Title Control Number to Pipe-delimited File

When running the List Bibliography (Bibliography) report, a user selected the option to save the report output to a pipe-delimited file and to include the title control number in the output. However, the output records only included the first 10 digits of the title control numbers, even though the title control numbers were longer.

This has been corrected.

(UNI-14105)

Print Custom Labels Report Not Sorting on Item ID

Previously, the Sort option for Item ID was not functioning correctly in the Print Custom Labels (Printlabels) report.

This has been corrected.

(UNI-13986, UNI-15721)

Print Custom Labels Report Printed Library Name on Labels for Single Library Systems

Previously, on single library systems, the Print Custom Labels (Printlabels) report was printing the library name on the labels after the call number, even though the library was not included in the label template.

Example:

The call number was ABC 123, and the library policy name was MURPHY. The label printed as follows.

ABC
123
MURPHY

This was corrected.

(UNI-12828)
Booking Group Reports

Corrections

List Bookings Report Displays End Time in Start Time Position

Previously in the List Bookings (Bookinglist) report, the End Time for a booking appeared in the Start Time positions, leaving the End Time position blank while Start Time was not included at all.

This has been corrected.

(CUNI-13943)

Circulation Group Reports

Enhancements


The Cash Report Per Workstation (Cash) outputs the workstation transactions to the report log. Since many cash transactions could be recorded, the report log could get very large. Users wanted an option to hide the transaction logs in the report log.

Now, on the Count Selection tab of this report, there is a new selection option, Hide Transaction Logs. If the user selects this option, the cash transactions will not be written to the report log. If the user wants to see these cash transactions, he should clear this check box.

(CUNI-12675)

Circulation by Zip Code Report Now Includes Ability to Select Transactions by User Profile

The Circulation by Zip Code (Zipcodecirc) report now includes the option to select transactions by user profile. The User Profile field now appears on the Transaction Selection tab. Using the Policy List gadget in this field, library staff members can select to include or exclude user profiles from the circulation count.

Example:

If the report is run to count charges for users with the PUBLIC user profile, then the report output will include charge counts for all users with a PUBLIC profile, broken down by zip code. If the report is run to exclude the MISSING user profile from the charge counts, then the report output will include charge counts for all other users, broken down by zip code, except those with a user profile of MISSING.

(CUNI-6132)
Improved Processing of List Onshelf Items with Holds Report for SirsiDynix Symphony Oracle Systems

The hold selection program used by the List Onshelf Items with Holds (Pullonshelfhld) report has been enhanced for Oracle systems so that it will not unnecessarily review suspended holds with an end date later than the date on which the report is run. This enhancement will improve performance for sites with significant numbers of suspended holds.

(UNI-14375)

Hold Recall Report Recall Date/Time Due Now Updated from Circulation Rule

When running the Hold Recall (Holdrecall) or Hold Recall Without Modifying Hold level (Newholdrecall) report, the recall due date was created with a time due that matched the report run time. This was confusing to library patrons and could also cause issues with fines. The recall due date time should be the time due in the circulation rule (loan period) for the charge.

This has been corrected. The time due for the rush recall is now the time due in the circulation rule for the original charge.

Corrections

List Onshelf Items with Holds Report Not Selecting Items for One Library

After applying patch clusters 5, 5d and 5e (version GL 3.1) to Unicorn systems, when the List Onshelf Items with Holds (Pullonshelfhld) report was run for all libraries with separate output per library, the report was not selecting items for one library, even though many items qualified for selection.

It was determined that the report script was not correctly checking the Hold Map policy lines that had no libraries selected, and the map lines that affected the library in question were not applied appropriately. This has been corrected.

(UNI-12432)

List Onshelf Items with Holds Report Not Honoring Order Hold Fill Policy Settings

Previously, the List Onshelf Items with Holds (Pullonshelfhold) report was not honoring the Fill Order by Library Group option of the Ordered Hold Fill policy.

**Example:**

The Order Hold Fill policy for ROCKEFELLR library was set to NORTH, ALL_LIBS. The List Onshelf Items with Holds report should pull items for holds from the NORTH group of libraries first, then fill the remaining holds with items from the ALL_LIBS group. But that did not occur. The report was filling holds with items from the ALL_LIBS group first, then from the NORTH group.
This has been corrected. The report now honors the order of the library groups set in the Order Hold Fill policy.

(UNI-12641)

Circulation Mailer Report’s Pipe-delimited Files for Bills Only, Holds Only, or Bills and Holds Did Not Print Library Name

When scheduling the Circulation Mailer (Mlrcirc) report, a user selected to print only bills. Then, the user selected to generate pipe-delimited output. After the report was run, the pipe-delimited files began with the piped fields for the library’s address, but no library name was printed. This also occurred when the user elected to print only holds or both bills and holds. But, if the user selected the print charges option, the library’s name printed with the address fields.

The printing of the library address to the piped file has been corrected.

Additionally, the order of the fields in the pipe file has changed when the user selects the Library Address on Notice and Plain mailer options. The pipes with legend labels (such as “P = Pickup Item”) will be printed after all of the address piped fields, instead of alternating the address lines and the labels.

Example:

The following is an example of a pipe-delimited file result when the Library Address on Notice and Plain Mailer were selected.

Main Library|O = Overdue|101 Washington Street SE|P = Pickup Item|Huntsville, AL|B = Bills Owed|35801|USA|Patron ID:1000100000123|

With this change, the piped fields will now be in the following order.

Main Library|101 Washington Street SE|Huntsville, AL|35801|USA|O = Overdue|P = Pickup Item|B = Bills Owed|Patron ID:1000100000123|

(UNI-2551)

Circulation Mailer Output Was Not Formatted Correctly

At sites that upgraded to Version 3.2, the Circulation Mailer (Mlrcirc) report output was not formatted correctly. For example, when printing Lost notices, if a patron had more than four items lost, the form header was not printed on this patron’s mailer, and the mailers for the remaining patrons were unusable.

The Circulation Mailer report output has been corrected.

(UNI-15225)
Assumed Lost Report Printed Extra Piped Field

Previously when running the Assumed Lost (Assumedlost) report, if a user selected the Generate Pipe-delimited Output option, the report printed an extra piped field that was empty. In some reports, this field is reserved for the Closing Text option, should the user opt to print closing text for a notice. However, the Assumed Lost report is not a notice and does not contain a Closing Text option, and so this extra piped field is not needed.

This has been corrected.

(UNI-3293)

New Overdue Notices Report Pipe-delimited Output Corrected

When running the New Overdue Notices (Noverdue) report with the Generate Pipe-delimited Output option selected, the following two problems occurred:

- If the user cleared the Call Number check box on the Charge Notice tab (elected to not include the call number), the piped fields that would ordinarily contain the call number and item ID were omitted. Instead, the piped fields should be included in the output, but they should be empty.

- If the user cleared the Library Address on Notice check box on the Charge Notice tab (elected to not include the library address on the notice), the piped file contained insufficient empty fields; only three empty piped fields appeared.

The first issue has been corrected. The second issue is an expected behavior. Since the report does not know which address was selected as primary, it also does not know precisely how many address lines to leave in place of the missing address. The report assumes three address lines, and therefore, leaves only three empty piped fields.

(UNI-4558)

Hold Pickup Notices Report Pipe-delimited Output Contained Insufficient Number of Fields for Library Address

When running the Hold Pickup Notices (Pickup) report with the Generate Pipe-delimited Output option selected and with the Library Address on Notice check box cleared on the Hold Notice tab (elected to not include the library address on the notice), a user discovered that the piped file contained an insufficient number of empty fields for the library address. Only three empty piped fields appeared.

This is an expected behavior for notices reports as they create the pipe-delimited files. Since the reports do not know which address was selected as primary, they also do not know precisely how many address lines to leave in place of the missing address. The reports assume three address lines, and therefore, leave only three empty piped fields.

(UNI-4794)
Print Shipping Records Report Displayed Error Message—Oracle Systems Only

After a user created some mail hold items, trapped the holds, and mailed the items in a shipping package, the user decided to run the Print Shipping Records (Printshippack) report. On the Select Shipping Package tab, the user selected the Date Created as the current date. After running the report, the following message displayed in the report log. No shipping records were printed.

Error number 102 on shippack read, key=1, user=0

This occurred only when the report was run on Oracle systems. This has been corrected.

(UNI-12629)

Purge Charge History Report Displayed Two Date Due Fields for Selection

Previously, the Purge Charge History (Purgeloanhist) report displayed two Date Due fields on the Charge History Selection tab. Only one field is needed for due date selection. The extra Date Due field has been removed.

(UNI-12751)

List Purchase Alerts with Demand Management Report Displayed “Insufficient Memory” Message

When sites running SirsiDynix Symphony on Oracle attempted to run the List Purchase Alerts with Demand Management (Holdstocopies) report, the report would produce no results, but generated errors and displayed the following message.

sort: insufficient memory; use -S option to increase allocation

It was determined that there was not a memory allocation problem, but that the report Perl script was not correctly handling multi-byte UTF-8 (Unicode) characters.

This has been corrected.

(UNI-12327)

Recall Notice on Charged Items Report Set the Wrong Recall Notice Date (Date Library Was Closed)

In the WorkFlows C client, the Recall Notice on Charged Items (Recallntc) report was setting the recall due date to a date the library was closed. Instead, the report should set the due date to the next open date. This occurred when the Accrue Fine option in the Library policy was selected (fines accumulate for days the library is closed).

This has been corrected.
Collection Exchange Group

Enhancements

Author Added to Output for List - Suggestion Notice Report

Sites using the Collection Exchange module have requested that author information be included in the output for the List - Suggestion Notice (Xsuggestion) report. Now, the report output includes an Author column between the Call Number and Title columns and lists the authors for the suggested titles.

Corrections

List - Exchange Items Report Not Displaying Newly Created Titles

Previously, the List - Exchange Items (Xitemliblist) report was not displaying the titles of newly created collection exchange items. The titles displayed correctly in WorkFlows and in the e-Library, but were not listed in the report. After users modified the title records, then the titles would be listed in the report.

This has been corrected.

iBistro Group Reports

Corrections

Diacritic Characters Display Correctly in Hot Sites, Recommended Reading Lists, and Best Seller Lists

When the Update iBistro Content Lists (Updibistrolist) report ran in a library using a Unicode system, diacritic characters in the hot sites, recommended reading lists, and best seller lists did not display correctly. The report has been changed so that when it is run on a Unicode system, diacritics in the hot sites, recommended reading lists, and best seller display correctly in the e-Library display.

(UNI-13397)

(UNI-11726)

(UNI-12337)

(UNI-14741)
MARC Import Group Reports

Enhancements

Added Ability to Assign Accountability in Batch Using the Load Bibliographic Records Report

On a system configured for accountability, it is now possible to assign title and item accountability in batch to bibliographic records as they are loaded. When running the Load Bibliographic Records (Bibload) report, users can make accountability assignment selections on the Load tab. The Load tab displays the following options.

- Create Accountability Based On Title Information Entry – If this option is selected, the Entry ID field becomes available. The user selects the entry ID that contains the title and item accountability information. After these selections are made, and as bibliographic records are loaded, title and item accountability records will be created with the classification, bib classification, access restriction, need to know, and review date values found in this entry. The entry can contain multiple access restriction and need to know values. If the entry does not contain a classification value, or the classification is invalid, the bibliographic record will not be loaded but written to the error file, and a message will be written to the report log.

- Create Accountability Based On Default Data – If this option is selected, the Classification, Bib Classification, Access Restriction, Need to Know, and Review Date fields become available. The user must select a value for the Classification field; the other fields are optional. After these selections are made, and as bibliographic records are loaded, title and item accountability records will be created with the selected defaults. If the user does not select a default classification, the report will not run.

- Do Not Create Accountability – This option is the default selection. If this option is selected, no title or item accountability records will be created for the loaded bibliographic records.

Create Accountability Based On Title Information Entry

If Create Accountability Based On Title Information Entry is selected, the incoming records should contain an “accountability” entry with subfields containing the accountability information.

The “accountability” entry ID should contain the following subfields.

- |a Classification
- |b Bibliographic classification
- |c Access restriction
- |d Need to know
- |e Review date
If the entry does not contain a classification value, or the classification is invalid, the bibliographic record will not be loaded but written to the error file, and a message will be written to the report log.

**Create Accountability Based on Default Data**

If Create Accountability Based on Default Data is selected, the following fields appear.

- **Classification** – Select an accountability classification from the drop-down list. The values presented in this list are defined in the Clearance policy wizard. As bibliographic records are loaded, the title and item accountability records created will be assigned this default classification. This field is required. If a default classification is not selected, the report will not run.

- **Bib Classification** – Select a bib classification from the drop-down list. The values presented in this list are defined in the Clearance policy wizard. As bibliographic records are loaded, the title and item accountability records created will be assigned this default bib classification. If a default bib classification is not selected, the bib classification for these records will be set to the same value as the Classification field.

- **Access Restriction** – Select an access restriction from the drop-down list. The values presented in this list are defined in the Restrict policy wizard. As bibliographic records are loaded, the title and item accountability records created will be assigned this default access restriction. The review date for this access restriction will be set to the date selected in the Review Date field on this tab.

- **Need to Know** – Select a need to know from the drop-down list. The values presented in this list are defined in the Need to Know policy wizard. As bibliographic records are loaded, the title and item accountability records created will be assigned this default need to know. The review date for this need to know value will be set to the date selected in the Review Date field on this tab.

- **Review Date** – Use the Calendar gadget to select a review date. This review date will be assigned to the access restriction and need to know values. If a review date value is not selected, the review date will default to NEVER.

(UNI-11438)
Maintenance Group Reports

Corrections

Purge Finished Reports Report Log Output and Maximum Value for Days Old Field Corrected

Previously, in the Purge Finished Reports (Purgefinrpts) report, the Days Old field on the Days Old tab had a maximum value of 300. This was not a sufficient maximum value for this field when running this report. Now, the maximum value for Days Old has been increased to 3650 days (10 years).

Additionally, the report log did not indicate the Days Old value and whether the user was running the report in update mode or not. This has been corrected.

If this report was scheduled to run periodically, users will need to modify the scheduled report to make this modification.

(UNI-5071)

My Circulation Group Reports

Enhancements

Monthly Cash Report for K-12 Systems Now Includes Transaction Date Selection

Previously, the Monthly Cash (Cashmonthly) report included only the Library selection on the Transaction Selection tab. Now, the Transaction Date Range selection is also available. Use the gadget to select a range of dates for the transactions. This report will now calculate cash totals within a selected transaction date range and print the results by Library.

(UNI-10925)

Corrections

Unable to Select Group ID Using the Gadget in List Checkouts by Group ID/Homeroom Report

Previously, the List Checkouts by Homeroom (Hrchargesall) report displayed a system message similar to the following when any value was typed in the Group ID field gadget on the Group ID tab.

Invalid input data: group_id:Group ID(s): KULMER

This has been corrected.

(UNI-12086)
My Statistics Group Reports

Corrections

Reports Displayed Blank Transaction Statistics Selection Tabs

In the My Statistics report group, reports that limited transactions by item or user categories displayed a blank Transaction Statistics Selection tab. This only occurred when the system was not configured as a K-12 system.

The following My Statistics reports have been corrected. They now display the Item Category and User Category fields for selection on the Transaction Statistics Selection tab.

- Count Copies by Item Cat 1 (in My Copies report group)
- Count Copies by Item Cat 2 (in My Copies report group)
- Custom Circ Count by Item Cat 1
- Custom Circ Count by Item Cat 2
- Custom Circ Count by User Cat 1
- Daily Circ Count by Item Cat 1
- Daily Circ Count by Item Cat 2
- Daily Circ Count by User Cat 1
- Monthly Circ Count by Item Cat 1
- Monthly Circ Count by Item Cat 2
- Monthly Circ Count by User Cat 2
- Weekly Circ Count by Item Cat 1
- Weekly Circ Count by Item Cat 2
- Weekly Circ Count by User Cat 2

(UNI-9103)
Serials Group Reports

Corrections

Corrected Form of Name to Display (in Catalog) Selection

In serial reports that allow selection of serial control records, such as the Count Serial Controls report, if a user selected a value for Form of Name to Display on the Serial Control Selection tab, the report would not run. This has been corrected.

Additionally, the Form of Name to Display values that display in the gadget have been clarified. The values that now display are as follows.

- NAME (same as Chronology)
- NUMERATION (Enumeration)
- BOTH

(UNI-14045)

Talking Tech Group Reports

Enhancements

New Talking Tech i-tiva File Creation Report

The Talking Tech i-tiva File Creation (Talkingtechit) report is a new report that creates a notice file in a new format for the Talking Technologies i-tiva phone notification software.

This report evaluates user records and collects information on holds, bills, and overdue items. It then generates the hold notices for materials available for pickup, bill notices, and overdue notices, and generates the notice file.

Note: This report is only used with Talking Tech i-tiva systems. Other Talking Tech systems use the Talking Tech Message Generation report.

The Talking Tech i-tiva File Creation report is in the Talking Tech report group.

This report contains the following tabs.

- Basic Tab—This tab provides basic information about the report.
- Bill Selection Tab—This tab is used to select specific bills for the report.
- Charge Selection Tab—This tab is used to select specific charges for the report.
- Hold Selection Tab—This tab is used to select specific holds for the report.
• Notice Type Output Tab—This tab is used for selecting the notice types this report will create, including bill notices, charge notices, and/or hold notices.

• User Selection Tab—This tab is used to select specific user records for the report.

• User Status Selection Tab—This tab is used to select user records by user status and estimated fines for the report.

(UNI-12986)
Request

Duplicate Request Wizard

Corrections

Duplicate Request Wizard Auto-generated IDs Even Though Property Was Not Selected

In the Duplicate Request wizard, even though a user cleared the Generate New Request IDs Automatically behavior property (elected not to auto-generate IDs), the wizard assigned an auto-generated ID any way. The wizard was ignoring the behavior property setting.

This has been corrected.

(UNI-9715)
SIP2/NCIP Servers

General

Enhancements

SIP2 Payment Transactions Now Recorded in History Logs with Station Information

SIP2 payment transactions are now written to the history logs with station information so that users can gather the statistics needed to determine which payment transactions were made from which SIP2 device.

Using API commands, users can pull fine payment transactions by SIP2 device (using the dC datacode), and after identifying the station (using the FW datacode), they can identify the SIP2 user as it is defined in the sip2.cfg file. The combination of both of these pieces of information should help users to obtain the information they need, money collected via SIP2 and from which port.

(UNI-12870)

Added Ability to Place a Hold on Available Item that Matches the Pickup Library

Users can now configure the NCIP server to place a hold on an available item that has a location that matches the pickup location (pickup library). Now, when a hold is placed, the NCIP server will use the ISBN, ISSN, or OCLC number identifiers to create a list of item IDs that will satisfy the hold. The list will be arranged so that the items matching the item's library and the hold pickup library will be listed first. The hold pickup library will be defined by the settings file element <HoldPickupLocationUsage>. This item list will be used in attempting to place a successful hold. The NCIP server will try three times to place a successful hold.

(UNI-10642)

Added Ability to Set Pickup Library for AcceptItem, RequestItem, and ItemRequested Messages

Previously, the SirsiDynix Symphony NCIP program only identified one library value in the agency translation table. As a result, libraries could not identify a separate item library and pickup library for hold transactions.
Now, the SirsiDynix Symphony Pickup Library Name has been added to the agency translation table. This new value can be used to set the pickup library when placing a hold in SirsiDynix Symphony. The affected NCIP messages are Acceptitem, Requestitem, and ItemRequested.

(UNI-13031)

New Available Hold Override for SIP2

SirsiDynix Symphony now has two hold overrides for checkouts. If an item has an available hold (the item is on the holds shelf, on hold for another patron), library staff can override the hold with the Available Hold Block override. For situations with an outstanding hold (the item is on the shelf in the stacks, on hold for another patron), library staff can use the Hold Block override.

SIP2 now implements these changes. The sip2.cfg file uses OUTSIDE_HOLD in the checkout overrides line to allow for a checkout override for an item with an outstanding hold, and now uses AVAILABLE_HOLD in the checkout overrides line to allow for a checkout of an item which has an available hold.

The sip2.cfg file now includes the following lines.

- CHECKOUT_OVERRIDES| AVAILABLE_HOLD|
  Allows for checkout of items which have an available hold on them.

- CHECKOUT_OVERRIDES| OUTSIDE_HOLD|
  Allows for checkout of items which have an outstanding hold on them.

Note: These two overrides are not interchangeable. To handle the available hold scenario, there must be AVAILABLE_HOLD in the CHECKOUT_OVERRIDES line in sip2.cfg. Likewise, to handle the outstanding hold scenario (hold block), there must be OUTSIDE_HOLD in the CHECKOUT_OVERRIDES line.

(UNI-14876)

New Operator Policy Configuration Option for SIP2

A new configuration option was added to the sip2.cfg file which allows users to add an operator policy for each port. This new option will allow users to track the overrides used by individual SIP2 units.

The sip2.cfg file now includes the following line.

OPERATOR_POLICY|SUPER|

The second entry in the OPERATOR_POLICY line is a valid SirsiDynix Symphony Operator policy name. By default, SUPER is delivered. If users select an invalid Operator policy (the policy cannot be found), SIP2 will display the following message.

Operator policy, XXXXX, not found.

If a needed override operator is missing from the Operator policy, likewise, SIP2 will display the following message.

Operator policy, XXXXX, does not contain YYYYYY YYYY override.
Important Note: If a user changes the default Operator policy value, he must be certain that the policy he chooses includes, at a minimum, the following overrides. If these overrides are not included, the "Operator policy does not contain override" message will display.

- Available Hold Block Override (Oq)
- Clear Charge Override (Oc)
- Floating Item Override (Ok)
- Holds Block Override (Oe)
- Item Lost Override (Oh)
- Item Pieces Override (OP)
- Master Override (OM)
- Not Recirculated Override (Od)
- Transitted Item Override (Ob)
- User Edit Override (OA)

(UNI-14876)

 Corrections

NCIP Server Not Converting Diacritics Correctly

Previously, the SirsiDynix NCIP server was communicating with the SirsiDynix Netstarter server with the character encoding set to ISO8859-1. Consequently, the NCIP server could not "decode" diacritics encoded in UTF-8 (Unicode). This occurred on Unicode systems only. Now, the NCIP server has been configured for the UTF-8 character encoding set and can properly convert Unicode characters and diacritics.

(UNI-6763)

NCIP Server Was Missing Checkout Item Override

Previously, the NCIP server was not allowing materials that had holds for other patrons to be checked out. The SirsiDynix Symphony server requires an override to checkout materials that have holds on them, and the NCIP server was missing this override option.

Now, the NCIP settings file includes a new element that allows sites to control whether or not items with holds for other patrons can be checked out to the new patron.

(UNI-13019)
SIP2 Server Was Not Clearing INTRANSIT Status After Items Were Discharged

Previously, the INTRANSIT status was not being removed in the SIP2 server when an item was received and checked in at its owning library. This was corrected.

(UNI-13020)

SIP2 Server Unresponsive When Checking In Floating Items with Holds Belonging to a Library Other than the Station Library

Previously, the SIP2 server was unresponsive when checking in certain materials. It was determined that this problem occurred when checking in an item that met the following three conditions.

- had a floating item type
- had a current library other than the station library,
- had active holds

The SirsiDynix Symphony server was attempting to edit the library for the item, but could not because of the active holds. The SIP2 server could not handle the error response sent from the SirsiDynix Symphony server.

This has been corrected. Now, the Edit Library request will not be sent from the SIP2 server if there are active holds on floating items.

(UNI-12949)

SIP2 64 Response Displayed Blanks for the First 16 Characters of the Address Field

Previously, the SIP2 64 Response would display blanks for the first 16 characters of the Address (BD) field. If there was an address to display in the field, the blanks would overwrite the first 16 characters of the address.

This has been corrected.

(UNI-12025)

SIP Server Stopped Accepting Connections

After upgrading to version GL 3.1, a site noted that the SIP server would stop accepting connections some time during the day. The problem was related to the display of the summary information fields in the SIP 64 response message. The information in the 64 response prevented the self check units from making future connections to the SIP server.

This has been corrected.

(UNI-14090)
SIP Checkout with No Blocks Not Setting Due Dates Correctly

A site was using SIP2 devices offline as a standalone solution. When the unit was back online, it would send the stored SIP2 request with the “no block” flag set. Although check in requests were registered with the correct return dates, the check out requests were showing the current date as the date charged.

This has been corrected. Now, the date of the charge or renewal with a “no block” flag will be the transaction date given in the 11 and 19 SIP response messages. If the “no block” flag is not set, the default system time will be used.

(UNI-12948)

SIP Hold Counter Not Correct

Previously, SIP2 devices were not displaying correct values for User Hold Counter and Number of Available Holds in the patron account summaries. The SIP server was not returning the correct hold counts in the 64 SIP response message (patron information).

Now, the hold counter for the 64 SIP response was corrected, as well as the summary list of hold items.

(UNI-13313)
Selection Lists

Add Selection List Wizard

Corrections

Unable to Create Selection List with Auto-generated ID on French Language System

On a French language system, in the Add Selection List wizard, a user wished to create an auto-generated ID for a selection list, so she selected Automatique from the drop-down list in the ID field. The value “Automatique” was sent to the server rather than the uppercased value “AUTOMATIQUE” which would prompt the server to auto-generate an ID. Instead, the server thought the upper and lower cased Automatique was a unique ID, and so created the first selection list with the selection list ID Automatique. When the user attempted to create a second selection list with an auto-generated ID, the list could not be created. The wizard displayed a message that the ID (Automatique) already existed.

This has been corrected for all non-English systems that may use upper and lower cased characters.

(UNI-13354)

Order From Selection List Wizard

Corrections

Ordering From Selection Lists Was Using One Vendor for All Orders

In the Order From Selection List wizard, if the user had selected Enter Listline Vendor in Session Settings and had selected One Order Per List Line in wizard properties, the wizard would sometimes populate all of the orders with the vendor selected for the first list line, even though the remaining list lines used different vendors.

This has been corrected.

(UNI-13660)
Remove Selection List Wizard

Corrections

**Current Item Is Now Set When Removing Selection List Lines**

In the Remove Selection List wizard, a library staff member wanted to remove a single selection list line, but also wanted to remove the item record to which the line was linked. But, the item record was not set as the Current item, and so when using the Remove Title, Call Numbers, or Items wizard, the staff member had to search for the item again. This process would then close the Remove Selection List wizard window.

Now, when a user is removing a single list line in the Remove Selection List wizard, the item linked to the line is set as the Current item, making it easier to remove the item using the Remove Title, Call Numbers, or Items wizard.

(UNI-13344)
Serials Control

General

Corrections

Check Mark for Next Expected Issue No Longer Displays

When a serial control record is displayed in the WorkFlows Java client, the next expected issue for receipt should be marked with a “Y” in the Expected column of the Expected tab. In the WorkFlows C client, the next expected issue is marked with a red asterisk (*). After the Version 3.2 upgrade, neither the WorkFlows Java client nor the WorkFlows C client displayed the next expected issue marking.

This has been corrected in both clients.

(UNI-14600)

Checkin Issues of a Serial Wizard

Corrections

Message Displayed When Scanning or Entering Barcodes

In the Checkin Issue of a Serial wizard, when receiving more than one copy of an issue, after the user scanned or typed the first barcode, the wizard displayed an error message.

You must supply item ID

After the user clicked OK in the message dialog box, she was able to receive the remaining copies correctly, without the error message displaying.

This has been corrected. The wizard will accept the barcode if it is scanned (and the scanner is programmed with the Enter command) or if the user types the barcode and presses Enter. The wizard will only display the error message if the user fails to type or scan a barcode and manually clicks the OK next step button.

(UNI-13996)
Unable to Barcode and Receive All Issues for a Journal with Over 100 Serial Distributions

In the Checkin Issues of a Serial wizard, if a user was barcoding and receiving issues of a journal that had over 100 serial distributions, not all distributions displayed in the Check In window. The user was unable to enter barcodes for the distributions that did not display. When she clicked OK to receive the issues, the wizard received the barcoded issues, but not the issues for the distributions that did not display.

This has been corrected.

(UNI-14371)

Modify Control Wizard

Corrections

Extended Information Field Displays Expanded on Extended Info Tab

In the Modify Control wizard, on the Extended Info tab of a serial control record, the extended information field data (such as Notes and Comments) displayed in very small windows.

This has been corrected. The extended information field windows have been expanded and now display more of the data in the initial extended information field window. If there is more data than what appears in the initial window, the user can scroll through all of the data using the scroll bar.

(UNI-11495)
SirsiDynix StaffWeb

General

Enhancements

Override Added for Checking Out, Renewing, or Marking a Copy With an Available Hold as Missing

Previously, if a copy had holds on it, the following override message displayed if a patron tried to check out or renew the copy, or if the library staff tried to mark the copy as Missing.

The following copy has one or more holds

However, the library staff could not tell from the override message whether a hold to be overridden had already been trapped for another patron.

Circulation has been enhanced to display one of two override messages when a copy that has holds is about to be checked out, renewed, or marked as Missing.

- If a hold on the copy has already been trapped for a patron, the override message displays as follows.

  The following copy has an available hold

- If the copy has holds, but none of the holds has been made available yet, the override message displays as follows.

  The following copy has one or more holds

(UNI-14906)

Corrections

Message Text Changed to Indicate a Copy ID is Required for a Bill

If the New Fine option under Patron Status on the Circulation tab was used to create a fine bill with a bill reason that requires a copy ID to be specified (such as OVERDUE), SirsiDynix StaffWeb displayed the following message.

#IQ required field missing

The message has been changed to read as follows, so the library staff will know that a copy ID must be supplied.

Copy ID not specified

(UNI-9573)
Circulation

Corrections

Pressing Enter Closes the “User Not Found” Message Box

In the Circulation tab functions (such as Check Out), if a patron search did not match any patron records, and the user pressed the Enter key instead of clicking OK on the “User not found” message, the help topic for the current Circulation function would display. The Circulation tab functions have been changed so that when the user presses the Enter key while the “User not found” message displays, the message dialog box closes and the cursor is returned to the Patron ID field.

(UNI-13624)

Message Text Changed to Indicate a Copy ID is Required for a Bill

If the New Fine option under Patron Status on the Circulation tab was used to create a fine bill with a bill reason that requires a copy ID to be specified (such as OVERDUE), SirsiDynix StaffWeb displayed the following message.

#IQ required field missing

The message has been changed to read as follows, so the library staff will know that a copy ID must be supplied.

Copy ID not specified

(UNI-9573)

Patron Record Saves Correctly After User Changes the Date Component Separator in the Privilege Expires Field

If the SirsiDynix StaffWeb user manually typed a date in the Privilege Expires field in Maintain Patrons while creating a patron record, and used a separator other than the forward slash (/) to separate the components of the date, a message displayed to alert the user to the incorrect date entry. However, when the user closed the message, made more edits to the patron record, and tried to save the record, the following message displayed.

User already exists

The changes to the patron record could not be saved until the user cleared the Maintain Patrons screen, located the patron record, modified the data, and saved the patron record again.

The Maintain Patrons screen has been corrected so that if a message displays and the user corrects a date that was manually entered in the Privilege Expires field, the patron record is saved correctly when the user clicks Save.

(UNI-15334)
System Configuration

General

Enhancements

Control Policy Removal Wizard Added

A new wizard called Control Policy Removal has been added to the Configuration toolbar in the WorkFlows Java client. This wizard allows the system administrator to control which policies in the SirsiDynix Symphony system may be protected from removal. Once a policy is marked as non-removable, then it may not be removed by anyone regardless of user hierarchy level, including the system administrator, until it is unselected in the Control Policy Removal wizard.

(UNI-11732)

Customize Policy List Wizard

Corrections

Message No Longer Displays When Accessing Policy Lists After the WorkFlows Client is Restarted

If the Customize Policy List wizard was used to customize policy lists by library, and another WorkFlows session was started while the wizard was still open, the following message correctly displayed if a user in the second session tried to modify a policy list using the Customize Policy List wizard.

Records are currently in use, please wait.

However, the message would continue to display even after the Customize Policy List wizard was closed in the first WorkFlows session, and when the first WorkFlows session was closed.

The Customize Policy List wizard has been changed so the message will not display if the wizard is closed in the first of two WorkFlows sessions.

(UNI-8049)
Global Configuration Wizard

Enhancements

New Global Configuration Policy Allows Libraries To Control How the Suggested Exchange Number Is Calculated

When sites initially start using Collection Exchange, the system will suggest a larger number of items for exchange than the per exchange quantity in order to reach the target quota. Some sites may not want to exchange large parts of their collection but would rather exchange the per exchange quantity set in policies. The new Suggest Exchange Items global configuration policy will allow sites to do so.

This policy provides the following configuration settings. The default configuration setting is Suggest Per Exchange Quantity Plus Deficit When Below Target.

- Suggest Per Exchange Quantity When Below Target — Click this option, and the system will suggest that Headquarters send the per exchange quantity to branches, instead of the target quantity minus the deposited material plus the per exchange quantity. The branch library will have zero items suggested to send back to Headquarters until the branch's target quota is reached. This option is selected by default.

- Suggest Per Exchange Quantity Plus Deficit When Below Target — Click this option, and the system will suggest that Headquarters send to branches the target quantity minus the deposited material plus the per exchange quantity.

Note: If the configuration is set to send the per exchange quantity, the system will not generate a suggestion list of items to send for exchange until the target quota has been reached.

(UNI-5996)

Corrections

User Search Fields Policy Missing in Global Configuration Wizard

After upgrading to Version 3.2, the User Search Fields policy was missing in the Global Configuration wizard. This policy should appear on the User Information tab in this wizard. (The User Search Fields policy allows the SirsiDynix Administrator to configure the search indexes that display for user searching.)

This has been corrected.

(UNI-14101)
Access Control Configuration

Enhancements

New Available Hold Block Override Added to Operator Policy

The Operator policy now includes a new override code which can be used when an “available” hold is being charged to a user that is not the user for which the item is on hold. This override is called the “Available Hold Block Override.”

This new override is available for the following wizards (and transactions).

- Checkout
- Ephemeral Checkout
- Mail Items
- Renew Items
- Renew User
- SIP2 transactions
- NCIP transactions

Now, in the Overrides field of an Operator policy, a user can click the Policy List gadget, select Available Hold Block Override and add it to the Overrides list.

When checking out or renewing an item, if a library staff member attempts to check out an item to a user, and that item is being held for another user, the message “Item has available hold” will display. The staff member can type the override code for the Available Hold Block Override and proceed with the check-out or renewal. Self-checkout systems and NCIP transactions can be configured to provide this override automatically.

The Holds Block override can still be used in these wizards (and SIP and NCIP transactions) to override holds for items that have not been trapped to fill a hold.

(UNI-14792)

Corrections

Modifications to Command List Policies are Saved Correctly

When a Command List policy was modified to add commands, such as Remove History, Create User Online, and Activate User Online, the modifications to the policy were not saved correctly. The following message would sometimes display in the WorkFlows Java client or the e-Library when a user tried to use a wizard that required the commands that were not correctly added to the Command List policy.

COMMAND NOT CONFIGURED
The Command List policy wizard has been corrected so that modifications to the policy are saved correctly, and the message no longer displays.

(UNI-12585, UNI-13500)

## Acquisitions Configuration

### Corrections

#### Unable To Create Large Order Maps

When using the Order Map wizard to create order templates, if the user was creating a large order map (100+ lines), the Workflows Java client would appear to stop responding. If the user attempted to save the map, the following message displayed.

*A funding/distribution pair has fewer items funded than distributed*

This message was accurate since not all of the segments were entered. However, the client would not allow the user to continue with making any changes or saving the order map line.

The Order Map wizard has been corrected. Now, this wizard honors the Acquisitions Session Setting, Display Only Selected Segment in Viewer Pane of Segments Interface, on the Defaults tab. When this Session Setting is selected, all segments will display in the Segment tree, but only the segment currently selected in the tree will display in the Viewer pane.

(UNI-14254)

#### Error Message When Currency Policy Uses Comma

In the Workflows Java client, when modifying any policy that contained a currency field, if the Currency policy was configured to use a comma for the decimal point the following error message displayed.

*Dollar amount must be $999999999.99 or less*

This has been corrected. When modifying a Billing Structure policy, for example, with a system that has the Currency policy configured to use a comma, all changes are saved appropriately.

(UNI-12573)
Cataloging Configuration

Corrections

Add, Delete, Update Database Report Dictionary Errors

When the WorkFlows Browse Index configuration wizard was used to create new browse indexes on a SirsiDynix Symphony system, only two of the four different database tables needed for each Browse Index were being created. This could lead to database error messages when the Add, Delete, Update Database (Adutext) report was run.

This has been corrected.

(UNI-13865)

Cannot Add Existing Entry ID Tag to a Catalog Format

Previously when staff attempted to add the 910 tag as a local tag to their catalog formats, the WorkFlows Java client stopped working.

This has been corrected.

(UNI-13828)

Should Not Be Able to Enter a Pipe Character (|) into the Default Value of a Fixed Field in an Authority, Cataloging, or Holding Format

Previously in Cataloging, Authority and Holding format configuration, it was possible to add and save a pipe (|) character as a fixed field’s Default value on the Fixed Field tab, thus adding a new field and displacing the values of other fields.

This has been corrected. Users will not be allowed to enter a pipe (|) character as a default value in one of these fields.

(UNI-14615)

MARC Editor Help Wizard Description Field Allowed Entry of Special Characters

In the WorkFlows Java client, the MARC Editor Help Wizard was allowing the entry of a semicolon and a horizontal bar (pipe) in the description field. This was causing a corrupted value to appear.

This has been corrected. The description field no longer allows the entry of a semicolon or horizontal bar (pipe) character.

(UNI-12094)
Circulation Configuration

Enhancements

Multi Circ Attribute Added to the Item Type Policy Wizard for Multiple Piece Item Circulation

The Item Type Policy wizard has been enhanced with the Multi Circ attribute. This attribute can be used to indicate whether transactions for multiple-piece items of the selected item type should be recorded in circulation statistics as one transaction for each piece, or as one transaction for the entire multiple-piece item. If this attribute is selected, the Item Has Multiple Circulating Pieces prompt displays during checkout for the user to enter the number of pieces. The Number of Pieces field in the item record is checked if the Multi Circ attribute is selected, but the value from the item record does not display in the “Item has multiple circulating pieces” prompt. By default, the Multi Circ attribute is not selected.

Example

If the Multi Circ attribute is selected for the KIT item type policy, and a user checks out kit that contains three pieces, the “Item has multiple circulating pieces” prompt displays. The Circulation staff member types a 3 at the prompt and completes the checkout. WorkFlows records the checkout as three checkout transactions, one checkout transaction for each piece. If the Multi Circ attribute is not selected for the KIT item type policy, no prompt displays, and the checkout of the three-piece kit is recorded as a single checkout transaction.

Note: The setting of the Multi Circ attribute does not apply to Offline WorkFlows transactions since item information is not available for checkouts in offline mode.

Corrections

Unable to Search After Reordering Shipping Cost Policies

In the Shipping Cost wizard, after creating several shipping costs, and then reordering the list of policies, a user was unable to use the Search function to find policies in the list. When the user clicked Search, the wizard would not respond. The user had to close and restart the wizard to continue.

This has been corrected.

(UNI-13084)
Unable to Modify, Copy, or Create Any Maximum Group Fee Policy—
SirsiDynix Symphony for Windows Servers Only

On Windows Servers, users were unable to modify, copy, or create any Maximum Group Fee policies. If a user modified a policy, and then tried to save the modifications, the Maximum Group Fee wizard would display the following message.

Unable to remove file. User ID must contain at least two digits.

There was a Windows permissions issue with the Maximum Group Fee policy file. This has been corrected.

This only occurred on Windows systems that upgraded to Unicorn GL 3.1. Systems running SirsiDynix Symphony 3.2 or later did not have problems creating or editing Maximum Group Fee policies.

(UNI-13013)

Global Library Hours Wizard

Corrections

Global Library Hours Wizard Removed Previously Entered Dates

In the WorkFlows Java client, the Global Library Hours wizard was removing existing dates from the library policy.

This has been corrected. The Global Library Hours wizard now has the option to Append or Replace.

(UNI-15205)

OPAC Configuration

Enhancements

New Attributes Added for Z3950 Search Gateway Element Types in the Gateway Database Wizard

The Catalog Element Set Name, Query Character Set, Search Element Set Name, Strip Diacritic Marks, and Do Not Send Record Character Set Negotiation attributes have been added to the Destination tab for Z3950 Search gateway element types in the Gateway Database wizard. The Character Coding attribute has been renamed to Record Character Set for clarity. Configure these options as needed for Z39.50 gateway searches.
**Catalog Element Set Name**

The Catalog Element Set Name attribute specifies whether a full or brief record will be captured when searching a Z39.50 catalog. Possible values include the following:

- **BRIEF** retrieves an abbreviated record from the destination database, and contains only the entries up to and including the 260 field. This setting is used only when connecting to the CALIS (China Academic Library and Information System) database.

- **FULL** retrieves the entire record from the destination database. When the destination database is OCLC, the non-Latin script is included in 880 fields.

- **F1** retrieves the entire record from the destination database, with Latin script included in 880 fields. This setting is only used when the destination database is OCLC.

- **F2** retrieves the entire record in Latin script only from the destination database, excluding any 880 fields. This setting is only used when the destination database is OCLC.

- **F3** retrieves the entire record in non-Latin script only from the destination database, excluding any 880 fields. This setting is only used when the destination database is OCLC.

**Note:** The Catalog Element Set Name attribute replaces the Cataloging selection in the Record Request Type option that has been removed from the SmartPort wizard properties.

**Query Character Set**

The Query Character Set attribute specifies the type of character encoding used by the query sent to this Z39.50 destination. Possible values include UNICODE, MARC8, ANSI, CCCII, BIG5, and GBK. The MARC8 value is the default value.

**Example**

The Library of Congress Z39.50 server expects search query strings to be sent using UTF8 character encoding. The Query Character Set attribute should be set to UNICODE for the Library of Congress destination.

**Record Character Set**

The Character Coding attribute has been renamed to Record Character Set for clarity. The WorkFlows client uses the value selected in the Record Character Set attribute to determine which character encoding is used by the Z39.50 site. Possible values include UNICODE, MARC8, ANSI, CCCII, BIG5, and GBK. The MARC8 value is the default value.
**Example**

Chinese sites may use CCCII records (which are also MARC records), but may use a different character encoding for Chinese characters. When records are imported into SirsiDynix Symphony from these Chinese sites, a different table for conversion is required to convert CCCII records to Unicode records. In this example, the Record Character Set attribute should be set to CCCII.

**Search Element Set Name**

The Search Element Set Name attribute specifies whether a full or brief record will be displayed, saved, or e-mailed when searching a Z39.50 catalog. Possible values include the following:

- **BRIEF** retrieves an abbreviated record from the destination database, and contains only the entries up to and including the 260 field. This setting is used only when connecting to the CALIS (China Academic Library and Information System) database.

- **FULL** retrieves the entire record from the destination database. When the destination database is OCLC, the non-Latin script is included in 880 fields.

- **F1** retrieves the entire record from the destination database, with Latin script included in 880 fields. This setting is only used when the destination database is OCLC.

- **F2** retrieves the entire record in Latin script only from the destination database, excluding any 880 fields. This setting is only used when the destination database is OCLC.

- **F3** retrieves the entire record in non-Latin script only from the destination database, excluding any 880 fields. This setting is only used when the destination database is OCLC.

**Note:** The Search Element Set Name attribute replaces the Searching selection in the Record Request Type option that has been removed from the SmartPort wizard properties.

**Strip Diacritic Marks**

The Strip Diacritic Marks attribute specifies whether or not to strip the diacritic marks from the search query before sending the search request. If the Z39.50 server database to which the WorkFlows client is connecting is indexed without diacritic marks, the Strip Diacritic Marks attribute should be selected for that Z39.50 server.

**Do Not Send Record Character Set Negotiation**

The Do Not Send Record Character Set Negotiation attribute specifies whether to send a character set negotiation Protocol Data Unit (PDU) to a Z39.50 server. The attribute is useful when connecting to Z39.50 servers that do not handle character set negotiation packets well.
Recommended Settings for the Record Character Set and Query Character Set Attributes

The settings of the Record Character Set and Query Character Set attributes must be set so they do not conflict when SirsiDynix Symphony systems use Z39.50 connections to the Library of Congress (LC), OCLC WorldCat database, or servers that encode records in ANSI.

For the Z39.50 connections to the Library of Congress or OCLC WorldCat database, the settings vary depending on whether SirsiDynix Symphony is used on a Unicode system or a non-Unicode system.

- If a SirsiDynix Symphony Unicode system makes uses a Z39.50 connection to the OCLC WorldCat database, set the Record Character Set attribute to UNICODE, and set the Query Character Set attribute to UNICODE.
- If a SirsiDynix Symphony non-Unicode system uses a Z39.50 connection to the OCLC WorldCat database, set the Record Character Set attribute to MARC8, and set the Query Character Set attribute to MARC8.
- If a SirsiDynix Symphony system (Unicode or non-Unicode) uses a Z39.50 connection to the Library of Congress database, set the Record Character Set attribute to MARC8, and set the Query Character Set attribute to UNICODE.

Some Z39.50 servers, particularly in Europe, encode records in ANSI. Therefore, ANSI has been added to the list of possible values for the Record Character Set attribute and the Query Character Set attribute. When a record containing diacritic characters is retrieved from a Z39.50 server that encodes records in ANSI, the diacritics are encoded in ANSI. ANSI characters display correctly in Unicode, so when an ANSI record is displayed in SirsiDynix Symphony, no conversion is needed to display the diacritics correctly.

However, when the ANSI-encoded record is captured and saved, certain conversions must be done if the record is saved on the SirsiDynix Symphony server or on the local client system.

- If the record is saved on a SirsiDynix Symphony server, the record is converted to the MARC8 format. Since the diacritic characters are converted to MARC8, the length of tag data may increase, so the offset of the following tag data is adjusted accordingly.
- If the record is saved on the local client system, the raw ANSI record is saved as it is, and the record format information is saved as ANSI. The ANSI record will be converted to MARC8 before it is uploaded to the SirsiDynix Symphony server from the Z39.50 server or from the locally-saved file.

Note: If the ANSI record is to be uploaded to a Unicode SirsiDynix Symphony server, the record is converted to MARC8 even though ANSI characters display correctly in Unicode. The SirsiDynix Symphony server will then convert the MARC8 record to a UTF8 record before saving the record.

(UNI-2973, UNI-11807, UNI-13382 and UNI-14228)
Corrections

List of Alternate Icons for a Gateway Element Displays Correctly

If the user tried to modify a gateway element in the Gateway Database wizard, the Icon Name field on the gateway element's Basic tab was blank. As a result, the user could not select an alternate icon for a gateway element.

The Gateway Database wizard has been changed so the Icon Name field lists the icons the user may choose for a gateway element.

(UNI-13933)
Utilities

General

Enhancements

Incremental Backups Option Added to the Backup Utility

The SirsiDynix Symphony backup utility has been enhanced with an option to create incremental backups. Instead of only running full backups, libraries now can backup more often with an incremental backup, which saves only the data that changed since the previous full backup.

The incremental backup option is available in the SirsiDynix Symphony backup utility only when the delivered configuration file is copied and renamed to backup.cfg in the custom backups directory. The backup.cfg configuration file also includes additional options to define the directories to be backed up, the backup utility to be used, and the files that are to be excluded from the backup. Contact the library system administrator to ensure the important data is backed up properly.

(GL 3.2.1.284, UNI-5318)

Environment Variables Added to Run Commands or Scripts for Starting and Stopping Oracle

In previous versions of Unicorn and SirsiDynix Symphony, delivered scripts could be used to stop and start an Oracle system as needed for the library. However, some Oracle configurations prevented the delivered scripts from stopping and starting Oracle.

New environment variables have been added to allow system administrators specify the commands that are to be used to stop and start Oracle instead of using the delivered scripts. The environment variables also offer the ability to display a message or the contents of a text file if the library does not want to stop and start Oracle from a script.

Note: This enhancement applies only in libraries that use Oracle databases with the UNIX or Linux operating system.

(UNI-16101, UNI-11949)
Corrections

Default Path from Label Designer Wizard Displayed in Source Field of MARC Order Import and MARC Selection Import

After using the Label Designer wizard and setting a default label template in this wizard, when a user opened the MARC Order Import Utility wizard, the Source field on the Import tab displayed the default path for that saved label template, and the Destination field displayed the home directory for the Unicorn server. And, the user discovered that the MARC Selection Import Utility wizard also displayed these template defaults.

These utility wizards were not clearing all of the previous data requests before displaying the wizard windows.

This has been corrected.

(UNI-13674)

Holding Code Table for EDI Wizard

Corrections

Help Text Displays Correctly in French

If the local language setting was set to French, the flyby help that displayed for the Holding Code Table for EDI wizard contained a word in English. The text displayed as follows.

Maintain Conserver un tableau en fonction de la politique des codes de fond a utiliser pour l’EDI

The flyby help text has been corrected to read as follows in French.

Conserver un tableau en fonction de la politique des codes de fond a utiliser pour l’EDI

(UNI-13348)

MARC Export Utility Wizard

Corrections

Marc Export Utility Wizard Couldn’t Export Flat ASCII Records on Unicode Systems

In the WorkFlows Java client, flat ASCII records could not be exported on Unicode systems.

This has been corrected.
MARC Import Wizard

Corrections

Unable to Display Loaded Bibliographic Files

In the MARC Import wizard, a user clicked the Loaded Bib Files tab to view the bibliographic files that were loaded. However, the tab would not open, and the WorkFlows client stopped responding.

After bibliographic files are loaded, SirsiDynix Symphony writes these files to the \Unicorn\Marcimport\Bibbackup directory and assigns the loaded files filenames that are at least 14 characters long and in accordance with the following naming convention.

[date and time][library number][session number][n|r|e]

The user’s system contained files in this directory that did not comply with the naming convention, and this caused the MARC Import wizard to not respond when attempting to display the file list on the Loaded Bib Files tab.

Now, the MARC Import wizard has been modified to not process file names shorter than expected by the system (14 characters in length). A system message will display instead.

Temporary Files Were Not Removed After MARC Import

After upgrading to Version 3.2, after a user imported records using the MARC Import wizard, the temporary log files created by the load process were not being removed from the server. These temporary files are typically found in the /Unicorn/Rpttemp directory. In previous versions, the temporary log files were removed.

This has been corrected.
MARC Order Import Utility Wizard

Corrections

MARC Order Import Not Converting MARC8 Records to Unicode—SirsiDynix Symphony Oracle Unicode Systems Only

On SirsiDynix Symphony Oracle sites using Unicode, the MARC Order Import utility wizard was not converting the incoming bibliographic records to Unicode. When records are loaded into a SirsiDynix Symphony with Unicode system, the MARC import programs should detect non-Unicode data and convert the data to Unicode. The MARC Import Utility wizard already performs this function. But, the MARC Order Import Utility wizard was not previously modified to include this conversion processing. This has been corrected.

(UNI-13701)

MARC Selection Import Utility Wizard

Corrections

MARC Selection Import Not Converting MARC8 Records to Unicode—SirsiDynix Symphony Oracle Unicode Systems Only

On SirsiDynix Symphony Oracle sites using Unicode, the MARC Selection Import utility wizard was not converting the incoming bibliographic records to Unicode. When records are loaded into a SirsiDynix Symphony with Unicode system, the MARC import programs should detect non-Unicode data and convert the data to Unicode. The MARC Import Utility wizard already performs this function. But, the MARC Selection Import Utility wizard was not previously modified to include this conversion processing. This has been corrected.

(UNI-13701)
Toolbar Management Wizard

Enhancements

Prompt Displays When Saving Toolbar Name

In the Toolbar Management wizard, when saving a toolbar with the same name as an existing delivered toolbar, a confirmation prompt now displays. The prompt reads:

Toolbar name already exists. Do you wish to replace?

If Yes is selected, a prompt asks for a new description. If No is selected, the main wizard window reappears.

(UNI-14898)

Corrections

Unable to Close Without Saving Changes to Custom Toolbars

In the Toolbar Management wizard, after making changes to customize a toolbar or toolbars, the choices presented were Save on Server and Close. If a mistake was made and “Close” was selected to not save the customized toolbar(s), the WorkFlows Java client was stuck in a loop and unable to proceed.

This has been corrected. If changes are made to a toolbar or toolbars, and Close is selected, no changes are saved.

(UNI-15208)
Web2

General

Enhancements

Perl Support for Single Sign On Servers When a Guest User Logs In On-the-fly

A Perl script supporting secure connections has been written to support LDAP authentication for other SSO servers for use with the login_when_needed command. Currently, it supports the CAS 2.0 server, but it can be customized to support other SSO servers.

(UNI-11539)