SirsiDynix Symphony 3.3.1

Release Notes

DOC-SDSRNEN-S

December 2009

This document is compatible with SirsiDynix Symphony 3.3.1.[It also covers other products and versions (list any covered).]Information in this document may also be compatible with later versions.

December 2009

Table of Contents

Introduction

The *SirsiDynix Symphony Release Notes* for SirsiDynix Symphony 3.3.1 contains information about significant enhancements and corrections included in SirsiDynix Symphony 3.3.1.

This document is arranged as follows.

- General changes, which can not be easily categorized
- 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.

WorkFlows Client

General

WorkFlows C Client Deprecated for Version 3.3.1

With the release of SirsiDynix Symphony Version 3.3.1, the WorkFlows C client will no longer be supported. Sites using the C client will need to upgrade to the WorkFlows Java client. Steps to upgrade to the WorkFlows Java client are included in the Software Delivery Service upgrade information on the SirsiDynix Client Care web page.

General

Corrections

Unable to Qualify Keyword Search of UNIMARC Records by Language

Previously, a keyword search on UNIMARC records could not be correctly qualified by language. In MARC21, the language coding in the 041 tag and the 008 fixed field bytes 35-37 are used to create the language qualifier in the keyword index. Language is stored in different tags in UNIMARC than in MARC21, so the search program was changed to conditionally look in the correct tags, depending on the UNIMARC format.

For UNIMARC formatted records, SirsiDynix Symphony will search for language in the following way:

- In the 101 tag subfield a
- If not found, then in the 100 tag, bytes 22-24

(UNI-25242)

Unable to Search Korean Hangul Records — Unicode Oracle Sites Only

Previously, there were problems with keyword searching Korean Hangul records. This only occurred on SirsiDynix Symphony Unicode Oracle systems using BRS searching of Korean Hangul. To remedy this issue, a new Korean lexeme dictionary is delivered with the Version 3.3.1 upgrade. This dictionary will produce better and more consistent segmentation of Korean Hangul records. Users who want to index and search Korean Hangul should run the Rebuild Text Dictionary (Rebuildtext) report after this new lexeme dictionary is delivered.

(UNI-24573)

Symphony Oracle Unicode Systems Experienced “Unable to Write to Station” Errors on Start Up

Sites running SirsiDynix Symphony in the Oracle Unicode environment sometimes experienced “Unable to write to station” errors when starting their systems. A threading problem was found in the starter program which has been corrected. (UNI-24191)

Workstations Unable to Log In After Server Halt and Run

A site notice that after the nightly halt/run of the server, the part programs began repeatedly going up and down rapidly, and workstations could not log in because of stations being locked. The only workaround was for someone to manually halt the system again and run it in the early morning hours. Changes were made to the multi-threaded starter to correct this problem. (UNI-24192)

Acquisitions

General

Enhancements

Tax Paid to Vendor Field Added to Invoice Lines Tab

In invoice wizards that display the Invoice Lines tab, this tab now displays the Tax Paid to Vendor field. This field also displays when adding invoice lines in the Add Invoice and Add Invoice Lines wizards. The Tax Paid to Vendor field indicates whether taxes are paid to the vendor. Some sites prefer to have the taxes accrue, and pay them directly to the government agency that levies the tax. If this field is selected (or Y), tax will be paid to the vendor. If this field is cleared (or N), the library will pay the taxes directly to the government agency. Tax Paid to Vendor only displays when Invoice Taxes is configured for the system.
(UNI-23139)

Corrections

Unable to Close Vendor Information Port Helper With the Windows Close Button (X)

When using the Vendor Information Port (VIP) helper in the order wizards, if a user clicked the Windows Close button (X), the helper would not close. This has been corrected.
(UNI-21198)

Invoice Line Display Reorganized With Respect to Material Type and Tax Handling Fields

Previously, when acquisitions tax was used, the Material Type and Tax Handling fields appeared above linking fields such as Order ID, Fund ID, and so forth. The display of invoice lines has been reorganized with material type and tax handling below linking fields for greater clarity. (UNI-23950)

Unable to Select a Library Authorization When Adding or Modifying a Fund

On the Fund Cycle Information tab of the Add Fund and Modify Fund wizards, a user was unable to select a library from the Library Authorization drop-down list. When the user clicked the down arrow to select a library, the list window was blank. When the user closed the list, a Library Authorization value was selected, but the wizard would not save this selection. This occurred only on systems configured to display policy descriptions instead of policy names. This has been corrected.
(UNI-24137)

Unable to Use the Windows Close Button in Acquisitions Wizards and Helpers that Use Detailed Display

In acquisitions wizards that use the Detailed Display, library staff were unable to close the wizard windows using the Windows Close button (X button). This also occurred in the Add Temporary Title helper. These issues have been corrected. (UNI-24548)

Unable to Add Invoice Lines with Tax Amounts Using the Add Invoice Helper or Add Invoice Tool

In the Receive Orders wizard, a user was not able to add invoice lines with tax amounts using the Allow Selection of Orderlines for Invoicing button in the Add Invoice helper, or by using the Add Invoice tool after receiving the item.

After the user selected the Allow Selection of Orderlines for Invoicing option, and highlighted the orderline in the Receive Orders tree, the user noticed that under Invoice Line Information, only the Amount field displayed. Since this order was with a tax included vendor, the user expected to see the Tax Handling fields along with the Amount field. When the user typed an amount that included tax and clicked the Invoice Selected Orderlines button, the following message displayed:

```
$<datacode)kG> Required field missing
```

The user was unable to add an invoice line with tax amounts using this option in the helper.

These issues have been corrected in the Add Invoice Lines helper and Add Invoice tool. Now, in the Invoice Line Information, the Amount field and Tax Handling fields display when an orderline is selected in the Receive Orders tree and the order is with a tax included vendor. The user is now able to add invoice lines with tax amounts using this Invoice Selected Orderlines option in the helper or the tool. (UNI-20645)

“Invline Type Error In Field Size” Message When Adding Rebate/Adjust Lines to Invoices

Previously, when a user attempted to add a Rebate/Adjust linked invoice line to an invoice, the invoice wizard displayed the following message:

```
“invline type Error in field size”
```

If the user changed the invoice line to a Rebate/Fund linked line, the message did not display. A new policy name, REBATEADJUST, had been added for the Rebate/Fund linked lines, but this name exceeded the 10 character limit for policy names. This resulted in the “Error in field size” message that displayed. Now, the policy name has been changed to REBATEADJ, which is within the policy name character limitation. (UNI-24589)

Add Temporary Title Helper Ignored the Set Current Location of New Items to AVAILABLE_SOON Property Setting

In the Add Temporary Title helper, even though the Set Current Location of New Items to AVAILABLE_SOON behavior property was selected, the helper ignored that property setting. The new title's Current Location was not set to AVAILABLE_SOON as expected. It was determined that the Available Soon property setting in the Add Title wizard was used instead. This has been corrected. (UNI-22965)

Modifying the Tax Exempt Vendor Check Box for an Invoice Did Not Affect Existing Invoice Lines

When selecting or clearing the Tax Exempt Vendor check box on the Invoice tab of an invoice, the user expected to see either tax invoice lines removed or re-calculated. However, after the Tax Exempt Vendor change was saved, the wizard (or tool) displayed a warning dialog that invoice lines might be affected (which the user expected to see), but no changes were made to the existing invoice lines. This has been corrected. (UNI-22836)

Adding Invoice Lines Displayed "Invline final price" Error

When adding invoice lines to an invoice with the Tax Included in Invoice Line Amount option selected, a user noticed the following error:

```
Invline final price Required field missing
```

But, she was unable to enter another price. This has been corrected.

Also, the Add Invoice Line window should not display the Amount Including Tax field for Rebate and Tax link types, even when an invoice for a vendor that includes tax is created. The Amount Including Tax field was removed for these link types. (UNI-24969)

EXEMPT Value Disappeared from Tax Handling Options When Encountering Missing Order ID/Fund ID Error on Invoice Line

In some instances, the EXEMPT value for Tax Handling options would disappear when creating invoice lines. If a user created an invoice line and used a tax structure that had a least some taxes with the Allow Exemptions option selected, but he forgot to add a fund ID or order ID to the invoice line, an error dialog about the missing fund ID or order ID would display. However, after the user acknowledged this dialog and clicked OK, the EXEMPT value disappeared for the taxes that should display that option. This has been corrected. (UNI-25411)

Wizard Fields Were Not Retaining Data When Using Multiple Windows Mode and Multiple Wizards Were Open

When using the WorkFlows client in Multiple Windows mode, if a user had multiple wizards open, including the Add Vendor and/or Modify Vendor wizards, data entered in the wizard fields was not retained. When the user moved between the wizards, the data was cleared. This has been corrected. (UNI-25936)

Add Invoice Allowed Choosing Exempt Tax Handling Even When Tax Structure Did Not Allow Exemptions

Previously, the Add Invoice wizard and tool allowed users the ability to choose EXEMPT in the Tax Handling field even though the tax structure defined for the invoice did not allow exemptions. For example, a user created a tax structure with one or more taxes, but did not select Allow Exemptions for this tax structure. The user then created an invoice using the tax structure. In the Tax Handling field, the user was able to select EXEMPT from the drop-down list. As a result, the invoice was created with no tax lines. This has been corrected. EXEMPT will not appear in the Tax Handling drop-down list when the tax structure does not allow exemptions. (UNI-24126)

Editing the Date Paid in an Invoice Line Caused a Misleading Message to Display

If a user edited the Date Paid and/or Check Number fields when modifying an invoice line, the change was saved, but the wizard displayed the following message:

```
Invoice line already paid—cannot be change/removed
```

This message was misleading and made the user think an error had occurred when, in fact, the changes were properly saved. This has been corrected. (UNI-24125)

Odd Spacing In Report Output Corrected

On a SirsiDynix Symphony Oracle system, a site noticed that the Vendor Acquisition Claim (Acqclaim) report had odd spacing in the report output between the Ordered, the Date and Amount information. This has been corrected. (UNI-26228)

Add Ordered Items to Catalog Wizard

Corrections

Holds Not Processed Properly When Multiple Distributions Were Loaded in Batch

In the Add Ordered Items to Catalog wizard, when multiple distributions are present, they can be loaded in subsequent steps or altogether in batch, depending whether the Add Items check box for a distribution is selected or not. Previously, the only the distributions that were loaded in the first iteration were considered for satisfying holds or sent intransit to the owning library. This has been corrected. (UNI-23873)

Duplicate Order Wizard

Corrections

Duplicate Order Proceeded Even When the Fund in the Destination Fiscal Cycle Was Set to Ordering Not Allowed

The Duplicate Order wizard was allowing an orderline to be duplicated without warning even though one or more funds in the destination fiscal cycle was set to “No” for the Ordering Allowed option. This has been corrected. Now, a warning dialog displays and lists all funds in which Ordering Allowed is disabled. This alerts the user that the funds should not be used. (UNI-21319)

Modify Invoice Wizard

Corrections

Changing an Invoice’s Tax Structure Multiple Times Resulted in an EXEMPT Order-linked Invoice Line

Previously, if a user changed the tax structure multiple times on an existing invoice with tax lines, eventually the ORDER-linked invoice lines would be marked as tax handling EXEMPT, and tax lines reflecting the current tax structure were not created. If the user modified the ORDER-linked invoice lines and set the tax handling to STANDARD, the tax/adjust invoice line would be added. This has been corrected. Now tax handling is reset when the tax structure is changed as indicated in the tax handling map. Combinations of tax structure and acquisitions material type not specified in the tax handling map are set to the tax handling value STANDARD. (UNI-23464)

Receive Orders Wizard

Corrections

Received Orders Were Not Being Highlighted in Search

Previously, when using the receive order setting in default properties, a bibliographic search (such as ISBN) in the Receive Orders would not highlight the orderline associated with the title. This has been corrected. (UNI-26227)

VIP Wizard

Corrections

Delivered Ingram Policy Corrected

Previously, the Ingram VIP policy was delivered with an incorrect URL. When the user attempted to log in, the following message displayed:

```
authentication failed
```

The URL for the Ingram VIP policy has been corrected. The correct URL is as follows:

```
http://tb2bigus.ingrambook.com/contentdataservice/contentws.aspx
```

(UNI-25554)

Authority

General

Corrections

UNIMARC Authority Did Not Always Authorize Subjects from Certain Types of Authority Records

Previously in UNIMARC authority processing, only entries of the Authority type were used to decide whether or not an authority record was appropriate for a series. UNIMARC authority processing did not check authority records whose types of entry were c, f, and g, but it should have. This has been corrected.

The UNIMARC tag 106 will now be used to determine if a type of entry is also suitable for subjects. If the tag 106 does not exist in the record, then the types of entries used for subject authority will default to the following:

- a-e (main entry)
- f-g (series)
- h-i (main entry and series)
- j-l (subject)

(UNI-24872)

Cataloging

General

Corrections

UNIMARC and SUNIMARC Formats Updated

The SirsiDynix Symphony UNIMARC and SUNIMARC formats have been updated.

Only new installations will receive the entire set of format changes in the SirsiDynix Symphony installation.

For existing sites, the SirsiDynix Symphony administrator will need to make the appropriate format policy changes, as needed.

- In the U122 field (Time Period of Item Content) , subfield a (Time Period) has been made repeatable.
- In the U125 field (Sound Recordings and Printed Music) subfield c (Vocal Score, Accompaniment Reduced for Keyboard) has been added.
- In the U128 field (Music Performances and Scores) subfield d (Key or Mode of Musical Work) has been added.
- In the U130 field (Microforms - Physical Attributes) subfield a the following changes have been made

  Character position 7 (Colour) code z (other) has been added.

  Character Position 10 (Base of Film) codes c (safety base, acetate undetermined), d (safety base, diacetate) , e (safety base, polyester) ,f (safety base, mixed, mixed safety base films spliced) and g (safety base, triacetate) have been added.
- In the U140 field (Antiquarian - General) subfield a (Antiquarian Coded Data - General) character positions 0-3 (Illustration Codes - Book) and 4-7 (Illustration Codes - Full Page Plates) code z (other) has been added.
- In the U141 field (Copy Specific Attributes) subfield b (leather) has been added.

- The U145 field (Medium of Performance) has been added with the following valid Indicators and Subfields:
  - Indicator 1 (Arrangement indicator) .

Code	UNIMARC Description
0	original composition
1	arranged composition

  - Indicator 2 (Alternative medium indicator)

Code	UNIMARC Description
#	not applicable
1	alternative medium of performance

  - Subfield codes

Code	UNIMARC Description
a	Type of Performance Medium (not repeatable)
b	Instrument/voice, conductor, other performer or device (8 characters) Use the abbreviations listed in Code list A/1-9, A/12-13. For suffixes use codes reported in Code list B-C.
c	Type of ensemble (8 characters) Use the abbreviations listed in Code list A/10-11. For suffixes use codes reported in Code list B-C.
d	Group within larger ensemble (8 characters) Use the abbreviations listed in Code list A/10-11. For suffixes use codes reported in Code list B-C.
e	Number of parts (4 characters) Each repeated e subfield contains a four-character code indicating the total number of real parts indicated in the suffix. For suffixes use codes reported in Code list D.
f	Number of players (4 characters) For suffixes use codes reported in Code list D.

Valid values for **Subfield a** (Type of Performance Medium)

Code	UNIMARC Description
a	vocal *a capella* music
b	instrumental music
c	vocal-instrumental music
d	electroacoustic music
e	elecroacoustic-mixed music
u	undefined,variable

- The U425 field (Updates) has been added with the following valid Indicators and Subfields:
  - Indicator 2 (Note indicator)

Valid Entry	UNIMARC Description
0	Do not make a note
1	Make a note

  - Subfield codes

Subfield 1 (Linking data) - For *Embedded Fields*

OR for *Standard Subfields*

Valid Entry	UNIMARC Description
a	Author (not repeatable)
b	General Material Designation (not repeatable)
c	Place of Publication (not repeatable)
d	Date of Publication (not repeatable)
e	Edition Statement (not repeatable)
f	First Statement of Responsibility (repeatable)
g	Subsequent Statement of Responsibility (repeatable)
h	Number of Section or Part (not repeatable)
i	Name of Section or Part (not repeatable)
l	Parallel Title (repeatable)
n	Name of Publisher, Distributor, etc. (repeatable)
o	Other Title Information (repeatable)
p	Physical Description (repeatable)
s	Series Statement (repeatable)
t	Title (mandatory, repeatable)

Valid Entry	UNIMARC Description
u	Uniform Resource Locator (not repeatable)
v	Volume Number (not repeatable)
x	International Standard Serial Number (not repeatable)
y	International Standard Book Number/ International Standard Music Number (not repeatable)
z	CODEN (not repeatable)
0	Bibliographic Record Identifier (not repeatable)
3	Authority Record Number (not repeatable)
5	Institute to Which Field Applies (not repeatable)

- In addition, the ZUNIMARC Full Entry ID Synonym List has been modified to include the 145 and 425 fields.

(UNI-25698)

Unable to Load Certain Persian (Farsi) Bibliographic Records on Unicode Systems

Previously, a site running SirsiDynix Symphony Unicode was unable to import certain Persian (Farsi) bibliographic records using the MARC Import Utility or when using the SmartPort wizard. The utility and wizard would display character conversion warnings. It was determined that some control characters were not being converted before the import. This has been corrected. (UNI-24165)

Linked Fields Not Displaying Same Field Labels

Previously, if two fields were linked, the labels for these linked fields were not consistently displayed if the first field of the pair had a display variation based on an indicator value. In the Bibliographic Description helper and on the Description tab of the MARC Record Editor viewer, the first field would display the label based on the correct display variation for the indicator value, but the second field always displayed the label based on the first display variation. For example, if a 520 with a 1st indicator value of “2” and a 880 field were paired, in the record display, the 520 tag displayed the label “Scope and Content” but the paired 880 tag displayed “Summary.” The screens in the helper and viewer were ignoring the indicator values. This has been corrected. (UNI-24164)

Deleting Fields Using the Shortcut Menu in the MARC Record Editor Caused Data Corruption

Previously in the MARC Record Editor, in certain circumstances, when a user selected the Delete Field option from the shortcut menu after right-clicking the expand arrow to the left of the field to be deleted, data in the remaining fields could be corrupted.

For example, when modifying a bibliographic record, if a user selected the 505 Contents Note field so that it was the active field (cursor focus is in the field), but right-clicked the expand arrow in the 500 General Note field, and selected Delete Field from the shortcut menu, the 500 field was deleted, but the data from the 505 field was copied to the 596 field below.

This also could occur when deleting subfields. These issues have been corrected. (UNI-22942)

After Transferring or Removing a Title Record, No Records Displayed for the Browse Heading

A user noticed that when a title record in the list of records for a heading was transferred or deleted, no records displayed for that heading in subsequent searches. For example, in the Delete Title wizard, a user searched the subject “Quilting -- Patterns,” and five titles were listed. The user deleted a title in the list. When the user performed a browse subject search again for “Quilting -- Patterns,” the search View pane was empty. The user expected to see the “Unavailable for display” message for the title that was removed and then the four remaining titles. The cataloging wizards were selecting the “Unavailable for display” entry to display, and this caused the empty search View pane. This has been corrected. (UNI-24431)

Keyword Search Not Working Properly if NSB/NSE Characters Were Present in the UNIMARC Tag

Previously, users were unable to perform a keyword search if the string contained certain non-filing characters, and the NSB/NSE characters were present in the UNIMARC tag. For example, if the user searched “L’opéra” and the “L” was preceded by NSB and followed by NSE, the search string could not be found. It was determined that the NSB/NSE characters were not being removed from the UNIMARC tag before indexing, and instead they were changed to space value. This has been corrected. Now, any NSB/NSE characters are removed from the tag before indexing. (UNI-25710)

Z39.50 Catalog Searches No Longer Display Shadowed Items

Generally, Z39.50 catalog destination searches do not include shadowed titles in the search result. However, these searches did include shadowed call numbers/items in the holdings statements when there were unshadowed items associated with the same title. This has been corrected. Now, shadowed call numbers with no copies

and visible call numbers, all of whose copies are shadowed, no longer display in the holdings display when a user searches a Z39.50 catalog destination. Copies that are shadowed or whose current location is shadowed also no longer display.
(UNI-26059)

SmartPort Wizard

Corrections

SmartPort Browse of a Unicode Zserver Was Not Displaying Diacritics Correctly

Performing a Browse (or Scan) in SmartPort of a Unicode Zserver did not display diacritics correctly in the browse index. Also, once the user encountered a heading with a mis-translated diacritic, she was unable to continue with a search from the list. This has been corrected. (UNI-25690)

Transfer Titles, Call Numbers, or Items Wizard

Corrections

Transfer Wizard Was Not Blocking Transfer When Group-range Holds Should Block the Transfer

Previously, the Transfer Titles, Call Numbers, or Items wizard incorrectly allowed the transfer of all items linked to a call number even when a Group-range hold could not be filled by any remaining copy linked to the title. The wizard was incorrectly setting the hold range to System when performing the transfer. This has been corrected.
(UNI-25592)

Circulation

General

Enhancements

New Payment Library Field Added to Bill Records

Previously in SirsiDynix Symphony, the library where a payment was made was not recorded in the bill payment database. The payment library information was recorded only in the system log files, which made it difficult for libraries to readily access this information without running a variety of reports. Recording the payment library is useful for accounting purposes and also for handling patron questions. Adding the payment library allows libraries to easily see which library took in the money for a payment. It also can be helpful for handling patron disputes or questions about fines.

Now, a new field, Payment Library, has been added to the bill record, and the payment library is populated any time a bill is paid in the Symphony clients. The Payment Library field is easily visible in the WorkFlows wizards and bill glossaries where user bills and payments are created and displayed. For example, the Payment Library displays on the Bills tab of the Display User and the Item Search and Display wizards. (UNI-24292)

Overdue Fines Can Now Be Deducted from Automatic Refunds to User Credit Accounts

When a lost item is returned, the paid lost item fees can be automatically refunded to the user’s credit account. Libraries can now control whether or not overdue fines are deducted from these automatic refunds. Libraries control this by selecting a new attribute in the Default Price policy named Deduct the Overdue Fine from the Refund Amount. Default Price policies are used to define the default price and associated processing fees for lost items. These policies can be mapped to specific item type and library combinations.

When the Deduct the Overdue Fine from Refund Amount attribute is configured, the refund amount returned to the user’s credit account will be reduced by the overdue fine calculated according to the existing rules and conditions for the overdue fine. This only applies to billable users who have user credit accounts and when automatic refunds are configured.

The overdue fine would be calculated from the date due up to the item’s return date. When the refund is credited and the overdue fine deducted, the overdue fine will appear in the user’s record as paid.

If the overdue fine is greater than the refund amount, the overdue fine is still deducted from the refund, and the remaining fine is added to the user’s record.

- If the “leftovers” of the overdue fine can be paid with funds from the user’s credit account, then the bill is paid.
- If the “leftovers” of the overdue fine cannot be paid from the user’s credit account, an alert is displayed, and the bill amount is displayed in the Discharged Items list entry for the discharged item.

Changes to the Default Price Policy

The Default Price policy contains a new attribute, Deduct the Overdue Fine from Refund Amount. (The Default Price policy appears in the Circulation Configuration group.)

If the Automatic Refund attribute is selected in the Default Price policy, and a paid lost item bill is to be refunded to the user’s credit account, the library can control whether or not the overdue fines that accrued for the lost item are deducted from the refund.

- If the Deduct Overdue Fine attribute is selected, the calculated overdue fine will be deducted from the credit refund (to the user’s credit account) for the paid lost item bill when SirsiDynix Symphony creates the credit at check in. The total refund amount would be the amount of the paid lost bill minus the calculated overdue fine. The overdue fine would be calculated from the date due up to the item’s return date. The overdue fine will appear in the user’s record as paid, and the payment type will be AUTOREFUND.
- If the Deduct Overdue Fine is not selected, SirsiDynix Symphony will create a credit refund for the full paid lost bill. The full payment amount is returned to the user’s credit account, and no overdue fine is created and/or paid.

New Auto Refund Payment Type Policy

A new Auto Refund Payment Type policy (AUTOREFUND) is delivered. This policy is used for paying overdue fines with an automatic refund for a lost item. The AUTOREFUND policy should not be removed.

Changes to WorkFlows Wizards

The following wizards have been modified to accommodate deducting overdue fines from automatic refunds to user credit accounts.

- Discharge/Checkin Wizard — A new Deduct Overdue from Refund default property was added to this wizard. This property specifies the payment type to be used when a bill is automatically refunded, overdue fines are deducted, and the remaining amount is added to the user’s credit account. The default payment type for the Deduct Overdue from Refund property is AUTOREFUND.
- Checkin Bookdrop Items Wizard — When a paid/lost item is returned and the check in date has been back dated in the Checkin Bookdrop Items wizard, the overdue fine deducted from the credit refund is calculated using the due date and the back dated check in date.

The Fine Free Discharge/Checkin wizard has not been modified. When a paid/lost item is returned and the item is checked in using the Fine Free Discharge/Checkin wizard, the overdue fine is not deducted from the credit refund. No overdue fine is created and paid.

Automatic Refund and Overdue Fine Scenarios

The follow scenarios describe what happens when the system is configured to deduct the overdue fine from the refund amount for a paid lost bill.

Scenario 1: Hazel Butternut has an item overdue. The item was due on 3/30/2009. According to library policies, this item is now assumed lost. Hazel has been billed the replacement cost of $10.00 for the item. So, she pays the $10.00 lost bill.

Hazel then finds the lost item and returns the item to the library on 6/16/2009. When the item is checked in, SirsiDynix Symphony checks the Default Price policy for the item/library combination and determines that an automatic refund of $10.00 should be applied to Hazel’s credit account. However, before the refund can be applied to her credit account, the system will deduct the accrued overdue fine.

The overdue fine is calculated from the date due to the check in date. The item was due on
3/30/2009 and returned on 6/16/2009 with an overdue fine of $.10 a day. The maximum overdue fine set in policies for the library is $3.00. The overdue item has reached the maximum overdue fine amount, so $3.00 is deducted from the original $10.00 refund, and a $7.00 refund is applied to Hazel's credit account. A $3.00 overdue fine for the item is created and paid with the AUTOREFUND payment type.

Scenario 2: Paul Patron has an overdue item that was due on 5/30/2009. He cannot find the item, so he reports the item as lost. Paul is billed a $25.00 lost bill, which he pays.

Paul later finds the item and returns the item to the library for a refund on 6/16/2009. When the item is checked in, SirsiDynix Symphony checks the Default Price policy for the
item/library combination and determines that an automatic refund of $25.00 should be applied to the Paul’s credit account. However, before the refund can be applied to his credit account, the system will deduct the accrued overdue fine.

The system calculates the overdue fine. The item was due on 5/30/2009 and returned on
6/16/2009 with an overdue fine of $.10 a day. The maximum overdue fine set in policies for the library is $3.00. The calculated overdue fine is $1.70. Before the refund is issued, $1.70 is deducted from the $25.00 refund amount, and a $23.30 refund is applied to Paul’s credit account. A $1.70 overdue fine for the item is created and paid with the AUTOREFUND payment type.

(UNI-24592, UNI-24226)

Card Replacement Fee Option Added to User Lost Card Wizard

In Version 3.3.1, the option to automatically create a bill for card replacement fee has been added to the properties of the User Lost Card wizard. The properties added to the User Lost Card wizard display on the Behavior tab and include the following:

- Bill Card Replacement Fee to User — Select the desired card replacement fee option.
  - Yes — If selected, the wizard will automatically bill a replacement card fee when a user's card is marked as LOST. The bill reason is taken from the Reason for Bill property setting in the User Lost Card wizard. The amount of the bill is determined by the Card Replacement Fee policy. Where applicable, taxes will be applied according to the Bill Reason policy. The user will be billed even if the user profile is not billable.
  - No — If selected, the wizard will not bill a replacement card fee when a user's card is marked as LOST.
  - Prompt — This is the default option. If selected, you will be prompted that a bill for the replacement card fee was created when a user's card is marked as LOST. The bill reason comes from the Reason for Bill property setting in the User Lost Card wizard. The amount of the bill is determined by the Card Replacement Fee policy. Where applicable, taxes will be applied according to the Bill Reason policy. The user will be billed even if the user profile is not billable.
- Reason for Bill — This property allows you to choose the default reason for the bill created when the Bill Card Replacement Fee to User option is selected. It is set to LOSTCARD by default.
- Display Bill and Allow Payment for the Card Replacement Fee— Select this check box to allow immediate payment for the Card Replacement Fee. The property is selected by default. This option uses the newly created Card Replacement Fee policy.

If the Card Replacement Fee policy is not defined, or all lines are set to charge a $0.00 fee, the prompts for charging a fee and immediately paying the fee will not display even if properties are selected. (UNI-24360)

User Glossaries Now Display the Date Last Sent to Collections Field

The user glossaries in circulation wizards now display the date when debt collection information was last updated for a user. The Date Last Sent to Collections field in the user glossary displays the date the user was last sent to collections. (UNI-25009)

Corrections

Manual Refund Helper Was Not Including Taxes

When using the Manual Refund helper in the Credit User Account wizard, a user noticed that the helper was not including taxes in the refunds. The helper based the refund on the amount billed, rather than the amount billed plus tax. This has been corrected.
(UNI-21647)

Hold Wrapper Printed Date/Time When Display Month as Text Was Configured

After upgrading to Version 3.3, a site noticed that the Date/Time was printing on hold wrappers, even though the Circulation Global Configuration policy was set to Display Month as Text on Receipts. This was confusing to their patrons because the Pickup By field that printed on the hold wrapper was printing a date/time when the library was closed.

For example, the time was included for the Pickup By field like the following:

```
Pickup by: June 3, 2009 11:59 PM
```

This was confusing to patrons because the library was not open until 11:59 P.M. However, the time did not print when the Circulation Global Configuration policy was set to Display Month as Number on Receipts. This has been corrected.
(UNI-24193))

Suffix and Title Fields Were Not Keyword Indexed

After a site moved the Name fields of their user records to the new name fields (Last, First, Middle, Preferred, and so forth) introduced in Version 3.3.0, the library staff noticed that they could no longer search user records by the Suffix or Title fields. Previously, these fields were searchable. This has been corrected.
(UNI-25930)

Renew Wizards Now Check for Overlapping Booking Due Dates Before Renewal

Previously, the Renew Item and Renew User wizards did not check for overlapping booking due dates/times and could, potentially, allow for renewing a user's booking beyond the start date/time of the next booking for a different user. This has been corrected. Now, the Renew Item and Renew User wizards check for overlapping booking due dates before renewing booked items, and will truncate the due date if any future bookings are found for a different user. (UNI-25358)

A Manual Refund Could Be Made for the Same LOST Bill

A user was able to create a full refund of the same LOST bill twice—once using the Manual Refund helper, and again by discharging the item and receiving an automatic refund to the user's credit account (when the system is configured for automatic refunds to credit accounts on discharge). The system was not checking for a previously issued refund to a user's credit account on a discharged item. This has been corrected. (UNI-24863)

User's Middle Name Displayed Twice When Preferred Name Was the Same as Middle Name

Previously, when a user's preferred name was the same as her middle name, then the middle name would appear twice in the user information displays and in report output.

For example, a user's name was Mary Ronda Porter, and "Ronda" was the user's middle name as well as the name the user goes by. The name "Ronda" appeared in the Preferred Name field and also the Middle Name field. If the Use Preferred Name option was selected in the user record, then the user's name displayed as "Ronda Ronda Porter."

This has been corrected. The system now checks the preferred name against the middle name, and if the names are the same, then only the preferred name is displayed.
(UNI-24950)

Performance Problem when Loading User Records

In SirsiDynix Symphony, the process of loading a large number of user records would not complete at the time of the scheduled halt and run, which was causing errors in the user load.

This has been corrected.

(UNI-22551)

Users Sorted by Preferred Name

In the WorkFlows Java client, if there was a user with a preferred name and the 'user preferred name' check box was subsequently de-selected, the user name was still sorted by preferred name in the browse user search hitlist. It also prevented searching by the user's first name in browse search.

This has been corrected.

(UNI-26574)

Hold Queue Reorder Wizard Gave e-Library Holds Higher Hold Queue Rank

When holds placed in the WorkFlows Java client were reordered using the Holds Queue Reorder wizard, any holds subsequently placed in e-Library were placed at the top of the queue. This occurred only when the recall status of the holds was standard recall.

This has been corrected.

(UNI-26250)

Checkout Wizard

Corrections

Hold Canceled with Incorrect Override

In the Checkout wizard, a user was able to cancel an available hold on an item using an incorrect override and check out the item to a different user. Typically, if the Proxy Checkout with Cancel Hold behavior property is configured, and the library staff member attempts to check out an item with an available hold to a different user, the “Override checkout item and cancel hold” dialog displays. The staff member then types an override and is able to cancel the hold and check out the item to the new user.

But, in this instance, the staff member had typed an invalid override code, and the following message displayed.

```
Available hold block override not defined
```

When the staff member clicked OK, the next message displayed.

```
Entry not valid, required field missing
```

After the staff member clicked OK, the wizard canceled the hold, even though the staff member had not entered a valid override. This has been corrected. (UNI-24930)

Copy User Wizard

Corrections

Copy User Wizard Displayed Wrong User Profile

Previously, when a library staff member copied a user record, the User Profile of the new user was that of the login user rather than the user being copied. This has been corrected. (UNI-22102)

Discharge/Checkin Wizard

Corrections

Hold Receipt Would Not Print for First Discharged Item

After a user logged into WorkFlows with a fresh session, the first receipt print job from the Discharge/Checkin wizard (for a hold receipt) did not print. If the user discharged the same item a second time, the receipt would print. This has been corrected. (UNI-21021)

Display Circulation Sets Wizard

Enhancements

Search by Set Name Helper Now Highlights First Record in a Hitlist

Previously, the Search by Set Name helper in the Circulation Sets wizard did not highlight the first record in a search hitlist. When the first record in a hitlist is highlighted, it can be selected by pressing Enter. This also allows the user to navigate without a mouse, using the Up and Down arrow keys, or Page Up/Page Down, or Home/End. Now, this navigation functionality has been added to the Search by Set Name helper. (UNI-2175)

Display User Wizard

Corrections

Outreach Extended Information from Previous User Displayed in Non-outreach User Record

In the Display User wizard, when the Show Outreach Tab behavior property was configured, if the library staff member first displayed an outreach user record, then moved to a
non-outreach users record, the outreach extended information from the previous user displayed on the Outreach tab of the non-outreach user's record. The Outreach tab was not being cleared between the user record displays. This has been corrected. (UNI-23656)

Modify User Wizard

Corrections

Customized Policy Lists Incorrectly Changed User Profiles

On a system configured to use customized policy lists, in the Modify User wizard, when a library staff member modified a user record for a user with a user profile that is not included in the station operator's customized policy list for user profiles, the User Profile field first displayed asterisks (****) in the field. This is the correct behavior. But, when the staff member modified the user record and moved to another tab in Modify User, the User Profile field was changed to the first user profile in the staff member's customized policy list. The User Profile field should not be modified; it also should continue to display asterisks to the staff member. This has been corrected. (UNI-23828)

Renew User Wizard

Corrections

Override All Failed Items Behavior Property Not Working

Previously, the Renew User wizard was ignoring the Override All Failed Items behavior property setting. When this behavior property is selected, the Override All Failed Items dialog box should open in the Renew User window. This dialog box allows the user to enter an alternative, shorter due date. However, the wizard was not presenting this dialog box for the new due date. This has been corrected. (UNI-22352)

Collection Exchange

General

Corrections

Unable to Exchange Items with Exchange Items Wizard

After upgrading to Version 3.3.0, a site was unable to exchange items using the Exchange Items wizard. The following message displayed:

```
start or end file reached (Cannot get value. Record at end of file)
```

This has been corrected. (UNI-25472)

Symphony Not Recognizing New Collection Exchange Items

Previously, Symphony was not recognizing collection exchange items as NEW even though the user had marked the bibliographic record and item records with a New Category Date. This has been corrected. (UNI-25942)

Manage Profiles Wizard

Corrections

Decimals Were Not Saved in Manage Profiles Wizard—Oracle Systems Only

In the Manage Profiles wizard, if a user modified numbers on the Profiles tab (such as Target, Desired, and Quota) to include decimal values, the decimal values were not saved. For example, a user changed the Quota for an exchange category from 10 to 10.2, but when the user closed and reopened the wizard, the Quota value reverted back to 10. This occurred only on SirsiDynix Symphony systems running Oracle. This has been corrected.
(UNI-23421)

Director's Station

General

Corrections

Patch Install for Running Director's Station 3.1.10.7.1 Against the 3.3.1 Symphony Server

If a site has Director's Station 3.1.10.7.1 installed before upgrading their Symphony server to Version 3.3.1, the `\Datainterchange` report directory and files are overwritten in the upgrade process. A software patch is being delivered with the Symphony Version 3.3.1 upgrade to correct this. Sites need to apply this patch after the Symphony upgrade and before running the Extract Director's Station Data (Datainterchng) report for the first time in order for billing measures to work. The patch is needed only if the site has Director's Station 3.1.10.7.1 installed before the Symphony upgrade and will continue to use this version after the upgrade. Instructions for applying this software patch are included in the Symphony 3.3.1 post-upgrade instructions.

The Symphony Software Delivery Service and post-upgrade instructions are available from the SirsiDynix Client Care Web page at http://clientcare.sirsidynix.com/ index.php?goto=Product&pid=2&Downloads.

If the site upgrades to Director's Station 3.1.10.7.1 after Symphony Version 3.3.1 is installed, SirsiDynix Client Care will install needed fixes when they perform the upgrade.

(BIP-367)

e-Library

General

Recommendations for Libraries Using Custom Elib_revD Pages

There are significant changes to the e-Library Elib_revD page set in SirsiDynix Symphony 3.3.1. This may cause previously created customizations not to work after the Symphony 3.3.1 upgrade. If you have already been using the Elib_revD page set in e-Library, and you have been making customizations, you can choose to preserve your customized Elib_revD page set. To do this:

Before the upgrade

1 Create the new directory Unicorn/Webcatcommon/Pages_deliv/Elib_revD_old. Copy the files in the Unicorn/Webcatcommon/Pages_deliv/Elib_revD directory to the newly created Elib_revD_old directory.

2 Create the new directory Unicorn/Webcat/Pages_custom/Elib_revD_old. Copy the files in the Unicorn/Webcat/Pages_custom/Elib_revD directory to the newly created Elib_revD_old directory.

3 Edit the Unicorn/Webcat/Config/system.env file so the PAGES_SET variable is defined as follows:

PAGES_SET|Elib_revD_old|

4 Edit the Unicorn/Webcat/Config/*.env file that is associated with a test login as follows.

PAGES_SET|Elib_revD|

After the upgrade

After the Symphony 3.3.1 upgrade, you will still have the Elib_revD page set that you had before the upgrade, including the customizations. You can see the new Elib_revD page set, minus your customizations, by logging in with a test login. This will allow you to test changes with the new page set.

In e-Library 3.3.1, the CSS structure has been changed to incorporate the use of themes. A default theme, along with themes for elementary, middle school and high school users, are delivered. The new structure does change the location of the custom.css file that should be used to create custom styles; you will need to edit the custom.css within the theme you are using. All sites will be delivered using the default theme. The CSS for this theme is located in Unicorn/Webcat/Config/Css/default/css . To change the theme in use, you can edit the THEME environment variable with the path to the new theme you wish to use.

Upgrading Environment Variables

The default values of several variables have changed for e-Library in SirsiDynix Symphony 3.3.1. Additionally, some variables are no longer used in revD pages.

When you upgrade, the system copies a select set of variables and value pairs from the default environment file (ilink.env or ibistro.env) to the system environment file (system.env). If one of the variables is already in the system environment file, that variable and value from the default environment file is not copied. Then, the system overwrites the default environment file with the new default values for 3.3.1. This ensures that you do not lose any customized settings. However, if you are currently running SirsiDynix Symphony 3.3 with revD pages, after the upgrade you may want to change (or delete) the variables in the system environment file that start with DISP so that you use the new defaults.

The following is a list of the copied variables:

- ENRICHMENT_URL (only needed for 3.3.1 revC pages)
- BROWSER_ENRICHMENT_URL (only needed for 3.3.1 revC pages)
- OPAC_CONTENT_WAIT (only needed for 3.3.1 revC pages)
- LINK_ENRICHMENT_URL_PT1 (only needed for 3.3.1 revC pages)
- LINK_ENRICHMENT_URL_PT2 (only needed for 3.3.1 revC pages)
- DISP_CONTENT_AUTHOR_BIO
- DISP_CONTENT_BLURB
- DISP_CONTENT_BOOKWRAP
- DISP_CONTENT_COVER_FULL
- DISP_CONTENT_COVER_GIF
- DISP_CONTENT_EXCERPT
- DISP_CONTENT_REVIEW
- DISP_CONTENT_BLREVIEW
- DISP_CONTENT_CHREVIEW
- DISP_CONTENT_LJREVIEW
- DISP_CONTENT_SLJREVIEW
- DISP_CONTENT_SUMMARY
- DISP_CONTENT_TOC
- DISP_CONTENT_CLCD

For ChiliFresh in revD, you do not need to modify your page files as they already contain the necessary codes to display the content when you enable ChiliFresh using the variable.

Enhancements

Copy Admin File from Main Server to Remote e-Library Server

When any changes are made to the User Access or Environment policies in the WorkFlows Java client, it is required that the `...Unicorn/Config/admin` file on the main SirsiDynix Symphony server be copied over to the remote e-Library server. This is necessary in order to keep the admin files in sync so that, when using Configuration Admin in e-Library, the correct environment file will be modified.

This only applies to SirsiDynix Symphony systems that use a remote e-Library server.

(UNI-25947)

RevC Theme Created for Elib_revD Pages

In e-Library 3.3.1, an eLib_revC theme has been created for use in the eLib_revD set of pages. This allows libraries that like the revC look to keep using it, while taking advantage of functionality that has been introduced with the Elib_revD set of pages.

Use of the revC theme may be configured by your SirsiDynix Symphony Administrator.

(UNI-22987, UNI-24216)

Syndetics Content Retrievable Via UPC or OCLC Number

In e-Library, additional enrichment content may now be retrieved from Syndetic Solutions (a Bowker company) using the UPC or OCLC number if those numbers are present in a bibliographic record. DVD or CD covers are examples of content that may be able to be retrieved by UPC or OCLC number.

In order to retrieve appropriate content using either the UPC or OCLC number, the bibliographic record must contain data in the following fields:

- The UPC number must be present in the 024 with an indicator of 1 in the first position on a MARC21 system or the 072 on a UNIMARC system.
- The OCLC number must be present in the 001 or 035 of a MARC21 or UNIMARC system.

To purchase access to Syndetic's enrichment content, contact the library's SirsiDynix Sales representative.

(UNI-21753)

User Group Information Displays in Review My Account in Elib_revD Page Set

In e-Library, if a patron is part of a User Group (also known as a Family Card), data about the other members of the User Group will now display in Review My Account in the Elib_revD page set.

If a patron is part of a User Group, then information about the patron displays as well as information about the User Group in a separate section. The changes are among the following:

- In the Alerts section on Account Summary, the status of the patron displays separately from the status of the group.
- In the Summary section on Account Summary, Checkouts and Overdues for the patron display separately from Checkouts and Overdues for the group.
- In the Summary section on Account Summary, Outstanding Holds for the patron display separately from Outstanding Holds for the group. In addition, holds available for pickup by the patron will display separately from the holds available for pickup by the group.
- Under Checkouts, the number of Checkouts and Overdues for the patron display separately from the number of Checkouts and Overdues for the group. In addition, these checkouts may be sorted by the member of the group's user/patron name.
- Under Holds, holds available for pickup and outstanding holds may be sorted by
user/patron name.
- Under Bills, bills may be sorted by user/patron name.

Group Checkouts information will only appear if USE_RENEW_REVIEW is set to 0.

(UNI-18081)

e-Library May Now Be Accessed Via iPhone

An iPhone browser may now be used to access e-Library. When the iPhone is rotated,
e-Library will change it's display accordingly.

In order to take advantage of the iPhone capability, a library must be using the Elib_revD set of pages at SirsiDynix Symphony version 3.3.1.

(UNI-22540)

e-Library Variables May Now Be Modified in the Browser

In e-Library, there is now the option for a System Administrator to modify certain environment variables through the browser. The System Administrator has the option to change individual environment files as he/she sees fit.

You must use a System Administrator login in order to have the ability to make changes to the environment files using the graphical interface. Once logged in as System Administrator, a Configuration Admin option will display in the rootbar, where these changes can be made.

(UNI-23006)

RTL Arabic Interface Now Supported in the Elib_revD Page Set

In e-Library, the Right-to-Left Arabic interface is now supported in the Elib_revD set of pages.

(UNI-24105)

Patron Authentication Using LDAP Now Available in e-Library

Patron authentication using LDAP can now be done in e-Library. LDAP stands for Lightweight Directory Access Protocol, and allows a library to authenticate against a user database other than the ILS. (UNI-22548)

Variables Added to e-Library to Allow for Enterprise Integration

To allow better integration with Enterprise, variables have been added to e-Library. These variables only apply to customers who have both e-Library and Enterprise. (UNI-25478)

Improved Performance Of Enriched Content Loading

e-Library now loads all the enriched content asynchronously, after the page has loaded. This allows users to browse results and content much earlier. (UNI-23033)

ChiliFresh Reviews integration

You can now include ChiliFresh reviews information for each item on the hit list page and in the item details page. Users can see review data and submit a review of the item. To enable this feature, you must set up the CHILIFRESH_ACCOUNT and USE_CHILI_ENHANCED_CONTENT variables. For more information, see the Configuration Admin online help for Integrating third party enriched content.

Novelist Enriched Content Integration

You can now include NoveList enriched content for each item on the hit list page and in the item details page. The hit list page enriched content can show links to Similar Authors and Similar Titles. The item details page enriched content can include feature articles, author biographies, book discussion guides, book talks, similar authors, similar titles, and related articles. For more information, see the Configuration Admin online help for Integrating third party enriched content. (UNI-21923)

ADA Compliance

e-Library now complies with several ADA standards, including the Illinois Information Technology Accessibility Act (IITAA) Web Accessibility Standards, Section 508 Information Technology Accessibility Standards, W3C Web Content Accessibility Guidelines (WCAG) 1.0, and W3C Web Content Accessibility Guidelines (WCAG) 2.0.

(UNI-21754)

Corrections

Online User Registration <NAME> Variable Didn’t Translate

In Online User Registration, if a NEW_RESPONSE e-mail containing the <NAME> variable is sent by library staff to a newly registered user, a blank line gets entered into that space rather than the user’s name.

This has been corrected. The <NAME> variable in a NEW_RESPONSE message now translates to the user's name when sending the e-mail. (UNI-21972)

Due Dates Didn’t Display for Checked Out Items

In e-Library, when using the Elib_revD page set, the due dates were not displaying for items that were checked out. This applied when the following environment variable was set

```
USE_RENEW_REVIEW|0|
```

This has been corrected. The due date for checked out items will now display regardless of the setting for the USE_RENEW_REVIEW environment variable. (UNI-21689)

PayPal PayFlow Pro Changes

As of September 1, 2009, customers using PayPal’s PayFlow Pro with their OPACs were told they would need to upgrade to the next version of PayFlow Pro. In order to accommodate the changes made to the PayFlow Pro interface, variables will need to be set by your SirsiDynix Symphony Administrator. (UNI-23328)

Online User Registration Duplicated User Address Fields

If default values were entered for any of the User Address fields in the User Address policies in SirsiDynix Symphony, those fields were duplicated when a user created an account through Online User Registration.

This has been corrected. In addition, if default values were entered for any User Address fields not included in the User Address template entries, those default values will still be present in a record created through Online User Registration. (UNI-24960)

PayPal Pay All Option Could Not Handle Paying Multiple Bills Properly

Previously, the e-Library's PayPal Pay All option had problems processing multiple bills. When there were only a few bills to be paid, the payment worked fine. However, if there were a number of bills to pay, then the data returned did not include all the bill information. The Custom field is used to send payment information from PayPal to e-Library. The problem with paying multiple bills is that the Custom field is limited to 255 characters and users/groups with large number of bills were exceeding this limitation. Now, a more brief form of the Pay All information is being sent, and special processing better handles the multiple bill payments. (UNI-20572)

81.pg Contained a Class Error

In previous versions of e-Library, the delivered 81.pg contained an error, which indicated the incorrect class was being applied. This has been corrected.

Recreadlist2.cmd Contained an Error

In previous versions of e-Library, the delivered recreadlist2.cmd in the Elib_revD page set contained an error that indicated the incorrect class was being used.This has been corrected.

No Blastoff Class in revD CSS

The Blastoff class was missing from the revD CSS. It has now been included. (UNI-21881)

e-Library revD Hitlist Printing

Previously, there were some known printing problems where a user trying to print a hit list would get incomplete lists of hit list items. Users can now print more than one page of results. (UNI-21918)

Can't Place Holds In e-Library If Call Number Contains an Apostrophe

Patrons can now place holds on items that have an apostrophe in the call number.

(UNI-22372)

Data in Weblogs Causes Director's Station Errors

At the end of a month, if a query was run at or around midnight, sometimes it would show in the next month's log. This caused an error when loading data into Director's Station. Additionally, diacritics at the end of the search string caused an error when loading data into Director's Station. Both issues have been fixed so that processes run at or around midnight and diacritics in search strings do not cause errors. (UNI-24538)

Permalink Can Be Faulty if Call Number Contains a '/'

The permalink feature was not replacing the slash character with the hexadecimal equivalent. This has been correctedd.

(UNI-25322)

Diacritics in Emails From OPAC Are Corrupted

Diacritics were corrupted in emails sent from the kept list. This is because the system did not test for character set and add UTF-8, as required. The system now tests for and uses the appropriate character set. (UNI-25350)

Misleading KEEP button function (RevD)

e-Library allowed users to click the Keep button for items that had no copies when the VIEWHITS_UNAVAILABLE variable was on; however, the item was not added to the kept list. This has been corrected so that the button does not display in this situation.

(UNI-25405)

Misleading My List function (RevD)

e-Library allowed users to click the My List button for items that had no copies when the VIEWHITS_UNAVAILABLE variable was on; however, the item was not added to the permanent list. This has been corrected so that the button does not display in this situation.

(UNI-25407)

Users Cannot Place Holds In e-Library with SDS 3.3 and revD

The problem occurred when USE_SUSPEND_HOLD and USE_HOLD_EXPIRATION_DATE were both set to 0 and the date value was NULL. The system now checks for an empty or NULL date value before trying to use it.

(UNI-25612)

Problem with Permanent Lists in sds3.3

When using the permanent list feature, an error message displayed indicating that a routing already existed. This was caused when some library IDs were not unique. This has been fixed so that each library has a unique ID. (UNI-25693)

Place Hold Icon Not Appearing in Brief Hits List if First Call Has No Copies Attached, and is Otherwise Holdable (RevD)

The Place Hold icon did not display if the first call number attached to a title did not have any copies attached. This has been corrected; the place hold button now appears for titles where the first call number attached has no copies if the title is otherwise holdable.

(UNI-25966)

Duplication of Request IDs When Submitting Transactions to PayFlow Pro

This error was caused because it was possible for two PayPal requests to be created with the same ID since request IDs were based on the current system time. The request IDs are now generated differently so that they will be unique no matter when created.

(UNI-26122)

Most Popular Report Aggregated Charges on Similar Titles

When running the most popular report in the iBistro group of reports, if two titles were similar enough that the “browse-formatted” or search version of the titles were the same, the charge count was being aggregated. This resulted in the incorrect most popular title being displayed.

This has been corrected. The Most Popular report now counts charges based on display title instead of the “browse-formatted” or search title.

(UNI-21642)

Message No Longer Displays When Browsing a List of Results for a Hit in a Hitlist Limited by Library

If a patron limited a search in the e-Library by library, then selected a hit in the search hit list and browsed all of the results for that hit, the following message could display.

```
Cannot allocate the boolean array
```

This message could display, for example, when the patron searched by library, selected an author from a hitlist of authors, and browsed the list of titles by the selected author.

The e-Library has been corrected so the message will not display when the patron browses the results from a hit selected from a search hitlist limited by library.

(UNI-25946)

Materials Booking

Display Item Bookings Wizard

Corrections

Reservations Information Displaying in Display Item Booking Wizard

Previously, the Display Item Bookings wizard was displaying reservations for the item. The wizard was not making the distinction between a booking and a charged reservation. This has been corrected. Reservations will no longer display in Display Item Bookings wizard. (UNI-25999)

Modify Booking Due Date Wizard

Corrections

Change To Due Date Of Booking Not Displaying Correctly

Previously, after creating and checking out a booked item to a user, if the Modify Booking Due Date wizard was used to change the date due, the changes to the due date did not display in the Bookings tab in the Display User wizard. This has been corrected.

(UNI-24437)

Outreach

Create History Wizard

Corrections

Issues Related to Creating Outreach History for User A When Item is Charged to User B

When attempting to create outreach history for user A while the item in the transaction was charged to User B, the wizard incorrectly attempted to create history for the user who currently has the item charged. When user B is established as an outreach user, outreach history was created for the wrong user. When user B was not an outreach user, the error Not Active Outreach User was returned.

This has been corrected so that history is created for the user specified in the wizard, regardless of whether the item is charged.

(UNI-23948)

Reports

General

Corrections

Report Output Files No Longer Refer to Unicorn Name

In previous versions of SirsiDynix Symphony, the report output files referred to Unicorn even though a SirsiDynix Symphony system was running the reports. This has been corrected. Report output files no longer refer to the Unicorn name. (UNI-25237)

Changing Ownership of a Template Report Did Not Change the Operator Value in the `.set` File

When a user changed the ownership of a (template) report, the operator value in the `.set` file for that report would retain the value of the original owner. For example, a user created a template for the Remove Items by Location report, and the owner of the report was the user's login, ADMIN. The user then changed ownership of the report to CIRC. But, in the `.set` file for the report, the report was still owned by ADMIN. When the report ran, the operator value was ADMIN. This has been changed. Now, when a user changes ownership of a report, the `.set file` now reflects the same value as that of the current owner. In the scenario described above, the operator will now be CIRC. (UNI-20715)

Call Number Range Gadget Corrected

After the Version 3.3 upgrade, a user noticed that the Call Number Range gadget on the Call Number Selection tab of the List Bibliography report would not accept a call number range that included alphabetic characters. When the user selected the x-y button in the gadget, typed call numbers with alphabetic characters in them, and clicked OK, the report displayed the following message:

```
Input must be numeric
```

This issue affected all reports that use the Call Number Range gadget. The gadget has been corrected. (UNI-25349)

Unable to Email Notice Reports to Multiple Users When the Total Length of the Email Addresses Was Greater than the Page Width

Previously, when a user record contained a list of multiple email addresses and a report attempted to email a notice to the list, the emails would become corrupted if the length of the list was greater than the report page width (usually 80 characters). This has been corrected. (UNI-22407)

NSB/NSE Characters Around Initial UNIMARC Article Printed Incorrectly in Report Output

Previously, NSB/NSE characters that were inserted before and after UNIMARC initial articles were printing incorrectly in the report output. They appeared as boxes, but they should not display at all. This has been corrected. (UNI-25709)

Improved Report Log Error Message for Incorrectly Formatted REC_TRANS Entry in Vendor EDI Address

Previously, if a user had incorrectly formatted the POA REC_TRANS entry of an vendor's EDI address, the X12 reports (Book X12 Orders, Serial X12 Orders, and more) would display the following error message in the report log:

```
**Error in field size
```

This message did not provide enough information, and the user was not certain whether the issue was with the incoming X12 file or the EDI address.

Now, if a REC_TRANS entry is incorrectly formatted in the vendor's EDI address, the report log will display a message similar to the following:

```
**Error in vendor EDI Address REC_TRANS entry -- 855;bookpoaX12.map -
- INGRAM/ROCKEFELLR/2009
```

This message now lists the errant entry text and the affected vendor EDI address. (UNI-25662)

Viewing Report Results Displayed Wrong Finished Report

After running several reports in succession, if the user selected Finished reports, selected a report in the list, and then clicked View, the wrong finished report displayed. The results for the previous report in the list displayed instead. This has been corrected. (UNI-21684)

Filter Helper Problem Corrected

Previously the Filter helper for the Finished Reports wizard was not working properly. After clicking the Filter helper, selecting a setting and from the resulting list of reports choosing to view a finished report, another window would open on top in the WorkFlows client. Behind the view window, the filtered list of finished reports disappeared and the following message would display.

```
there are no matching reports scheduled
```

This has been corrected. Now, the list of reports continues to display.

(UNI-26186)

Report Name Limit Expanded

Previously in the Schedule New Reports wizard when a report name exceeded the maximum 30 characters and spaces limit, the report would not run. This has been corrected. The report name limit has been expanded to 80 characters so the Report Name field will display the full report name. (UNI-26210)

Matching on Indexed MARC Tag Selection Not Working as Expected

When scheduling a report to load bibliographic records to the catalog, a user selected the Match on Indexed MARC Tag option on the Load tab of the report, and then selected an ISBN type field (020) as the first field for matching. The user also listed subsequent fields for matching. But, when the report could not find a match for the ISBN, it also could not match for the subsequent fields in the list, and so new catalog records were created. After failing to match on the ISBN tag, the report script was still including the ISBN value in subsequent field searches. This has been corrected.

The following reports were corrected:

- Load Bibliographic Records (Bibload)
- Load Bibs for Selection (Selectbib)
- Load Bibs with Order Info (Biborderload)
- Load Bibs with Selections and Decisions (Selectbibemb)
- Load OCLC MARC w/049s Report (Loadoclc)
- Reload Bibliographic Records (Bibreload)
- Review Bibliographic Records (Bibreview)

(UNI-26213)

Administration Group

Corrections

Transaction Statistics and Scan History Log Reports Displayed "Invalid Transaction Format" Messages in Report Logs—Windows Servers Only

On SirsiDynix Symphony for Windows Servers systems, users noticed that the Transaction Statistics (Transtat) and Scan History Log (Logscan) reports displayed multiple messages such as the following in the report logs:

```
**Invalid transaction format
```

It was determined that multiple Windows processes were writing to the same log file, thereby causing the invalid transaction lines. This has been corrected. (UNI-24988)

Acquisition Group

Corrections

Updated Message For Vendor EDI Address Error

When running the Book X12 Orders (BookorderX12) report, if a user had typed an incorrect field value in the vendor's EDI address, the following error message displayed.

```
**must be octal number specifying one character
```

This message was not descriptive enough, so the user did not know what she needed to change in the vendor's EDI address.

Print Fund Summary Totals Option Listed Funds from Other Libraries

Previously, the List Invoices (Invoicelist) report's Fund Summary Totals option was listing fund totals for other libraries, even though the user had selected only one library on the Invoice Selection tab. This also occurred in other reports that use the Print Invoice output options and allow output of Fund Summary Totals.

The following reports have been corrected:

- Book X12 Invoices (Bookinvoicex12)
- Invoice Lines by Check Number (Checknumber)
- List Invoices, Lines (Invlinelist)
- List Invoices (Invoicelist)
- List Vendor Invoices (Listvendinv)
- Remove Partial Invoices (Rempartinvoice)
- Serials X12 Invoices (Serinvoicex12)
- Update Invoice Exchange Rates (Updateinvexch)

(UNI-26223)

Now, the report will display the following message when it encounters an incorrect EDI address value:

```
In the Vendor EDI address both the segment terminator and separator must
contain octal numbers specifying one character. Currently, one or both of
these values is invalid. Verify the values in those entries - usually
X12_DESEP and X12_SEGTRM.
```

(UNI-24569)

Rollover Fund Cycles Report Did Not Set Fund Cycle Date and Created By Values

When fund cycles were created by running the Rollover Fund Cycles (Rolloverfund) report, the new records' Date Created fields were set to NEVER and the Created By fields were blank. Now, when new fund cycle records are created by this report, the Date Created fields will be populated with the date the report is run, and the Created By fields will populated with the station operator value. (UNI-24116)

Administrative Group

Enhancements

Load Users Report Now Updates User's Preferred Language

In a previous version of SirsiDynix Symphony, a new Language field was added to the user record. In this field, library staff could indicate the user's preferred language for receiving library notices. This field defaults to English. Now, the Load Users (Userload) report has been enhanced with the ability to update the Language field of the user record. To do this, the library staff will need to add a valid Language policy name to the .USER_PREF_LANG. field of the ASCII text-formatted user record. (For pipe-delimited files, the Language field was added to the end of the record, field position 53.) When the Load Users report is run in Update mode or Create and Update mode, the Language field of the user records will be populated and/or updated with the new language values. (UNI-20838)

Corrections

Transaction Statistics Report Now Tracks the Modify Mail Shipping Command

Previously, the Transaction Statistics (Transtat) report allowed users to select the Create Mail Shipping (CW) command in the Command gadget on the Transaction Selection tab, but this command was not being using by the Mail Item wizard, and meaningful statistical information could not be obtained. Now, the Command gadget lists the Modify Mail Shipping command (WW). Selecting this command will provide a count of shipments sent via Books by Mail. (UNI-23863)

Load Offline Transactions Report Unable to Recognize a Library's Directory

A user noticed that the Load Offline Transactions (Loadstand) report would not recognize one of the library directories under the `/Unicorn/Standalone` directory. This occurred on a SirsiDynix Symphony UNIX system. It was determined that one of the programs used by this report assumed that the first two items in a directory (the `/Standalone` directory, in particular) are "." and "..". As a result, the program randomly skipped over some library directories. A majority of UNIX systems will place those two items first in a directory, but not all systems do this. Now, the program used by the Load Offline Transactions report ignores the "." and ".." items regardless of their position in the directory. This will prevent the program from randomly skipping over the library directories. (UNI-22132)

Refactor User Name Report Modified

The Refactor User Name (Refactoruname) report has been modified.

In the Last, First username format, unless a middle initial is found, the second word of the First will go into the Middle Name field in the user record. If a middle initial is found, it will go into the Middle Name field in the user record.

In addition, regardless of username format, the original name entry is no longer saved by default to the NOTE user extended information field. Instead, by default, the original name entry is not saved. However, the capability still exists to allow saving the original name entry to a selected User Extended Information field if desired.

The Refactor User Name report only needs to be run at the time of upgrading to SirsiDynix Symphony 3.3 or later, to take advantage of the expansion of user names in the user records to include the following fields: Last Name, First Name, Preferred Name, Middle Name, and Suffix. (UNI-26073)

Authority Group

Corrections

List Unauthorized Bib Records and List Unauthorized Tags Reports Modified to Allow AU, TI, and SU Index Selection for UNIMARC Tag Authorization

The List Unauthorized Bib Records (Unauthbib) and List Unauthorized Tags (Unauthlst) reports have been modified to assist the user in making the appropriate search index selections for authorizing UNIMARC tags. On the Entry IDs tab of these reports, the Entry IDs gadget now only displays relevant tags with the AU, TI, or SU group index options (AU for author, TI for title, or SU for subject). For MARC21 records, the Entry IDs gadget still allows index selection by entry ID. (UNI-24143)

Circulation Group

Enhancements

Assumed Lost Report Now Assigns the Correct Bill Payment Library When Lost/Process Fee bills Are Created and Paid with User Credit Accounts

LOST and PROCESSFEE bills can be created and paid automatically with the Assumed Lost report. When they are created, the billing library is based on either the charging library or owning library (depending on how the system is configured). When the bills are paid, the bill payment library assignment should take into account this charging library/owning library configuration option. Previously, the bill payment library was the library where the report is run.

The Credit Rule policy allows libraries to set which bills can be paid automatically with a user credit account. If LOST and/or PROCESSFEE bills are included in the Credit Rule policy, the Assumed Lost report can pay these bills with an existing user credit account. If the system is configured to charge by charging library, then the LOST and PROCESSFEE bills created by the report are created for the charging library (the charging library is the bill library). If the system is configured to charge by owning library, then the LOST and PROCESSFEE bills created by the report are created for the owning library (the owning library is the bill library).

Now, when the Assumed Lost report runs and automatically pays a LOST or PROCESSFEE bill, the bill payment library will be the same as the bill library. (UNI-24618)

Bill Totals by Bill Type Report Now Counts Only Payments at the Payment Libraries

The Bill Totals by Bill Type (Typetotal) report creates a list of payment types and the total amount paid or canceled for each payment type. In Version 3.3.1, the ability to select by payment library was added to this report.

Previously, if a user selected a specific library (or libraries) on the Bill Selection tab, the report would return bills that have at least one payment at the selected library. When the report printed details for the bills, it would print all information about all bills, not just the bills for the selected library.

Now, if the user makes payment library selections on the Bill Selection tab, then the report will only count and print the payments at the selected library or libraries. (UNI-25500)

Bill Payment Library Selection and Sorting Options Added to Reports

The new Payment Library field was added as a bill selection option for a select group of circulation and telephone messaging reports, and also as a sorting option for several circulation reports.

Payment Library as a Bill Selection Option

The following reports now display the Payment Library field on the Bill Selection tab. Using the Policy List gadget, users can select one or more payment libraries for this field.

The following Circulation Group reports display the new Payment Library selection option on the Bill Selection tab:

Bill Tax Summary (Billtaxsummary)	Bill Totals by Bill Reason (Reasontotal)	Bill Totals by Bill Type (Typetotal)	Circulation Mailer (Mlrcirc)
Count Bills (Billcnt)	Create Circulation Notices in Batch (Ntccirc)	Current Bills (Billstat)	Generalized Bill Notices (Bill)
List Bills (Billlist)	List Bills, Items (Billitemlist)	List Items with Bills (Billitem)	List Users with Billed Items (Billitemuser)
List Users with Bills (Billuser)	List Users with Bills, Charges (Billchargeuser)	Remove Bills (Rembill)	Remove Paid Bills (Delpaidbill)

The following reports from other report groups also display the new Payment Library selection option on the Bill Selection tab:

- Remove Paid Bill History (Removepaidbill) report in the Housekeeping group
- List Bills Paid in Full (Billspaidinfull) report in the My Circulation group
- Failed Calls Notice (Failedcallsntc) and Prepare Notices (Prepnotices) reports in the SVA group
- Talking Tech Message Generation (Talkingtechgen) and Talking Tech i-tiva File Creation (Talkingtechit) reports in the Talking Tech group

The Daily Cash (Cashdaily) and Monthly Cash (Cashmonthly) reports display the new Payment Library selection option on the Transaction Selection tab. The user can report on transactions made by either the selected transaction library (or libraries) or by the selected payment library (or libraries).

Payment Library as a Sorting Option

The new Payment Library field was added as a sorting option for the following reports:

- List Bills (Billlist)
- List Bills, Items (Billitemlist)
- List Bills Paid in Full (Billspaidinfull)

(UNI-24616)

Corrections

Clean Holds Shelf Report Not Selecting Suspended, Available Holds

Previously, the Clean Holds Shelf (Cleanholdshelf) report was not selecting suspended, available holds for cancellation. When a user suspended a hold, the WorkFlows client displayed the hold status as "suspended," but the hold record's item available flag was still set to Y for Yes, rather than S for suspended. This caused the Clean Holds Shelf report to miss the suspended hold. This has been corrected. Now, the report includes suspended, available (active) holds in the selection process, and runs these through the cancel hold process. (UNI-24265)

Individual Bill Notices Report Displayed "Read Only Data" Error Message

In the Individual Bill Notices (Billnotices) report, on the Output Options tab, if a user selected the gadget in the Message 2 field and chose a file from the drop-down list, the following message displayed when the report was run:

```
Read only data had been modified: prtusersummary: Message 2
```

This message also displays when the user tried to save the report as a template. This has been corrected. (UNI-24163)

Bill Reports Displayed "Data Overflow" Errors in Report Log—Windows Servers Only

After upgrading to Version 3.2.1, sites noticed that certain bill reports, such as Generalized Bill Notices (Bill), List Bills (Billlist), and Remove Bills (Rembill), displayed multiple "Data overflow" messages in the report log:

```
***Data overflow: bill number
```

This occurred only on SirsiDynix Symphony for Windows Servers systems. This has been corrected. (UNI-21230)

List Purchase Alerts with Demand Management Report Corrected

When the List Purchase Alerts with Demand Management (Holdtocopies) report printed a record that contained a diacritic or special character in the author or title, all subsequent lines in the report output were incomplete, and looked like the following:

```
2 1 2 Hydrotherapy for health and w Eidson, Richard

XX(242574

1 1 1 30-minute résumé makeover : r Kursmark, Louise

<1 <610.73069

1 1 <1 <1 <

<1 <1
```

The report was not properly handling UTF-8 (Unicode) characters. This has been corrected. (UNI-24632)

Assumed Lost Report Notices Were Not Grouped Together

Previously, if a user had chosen to sort the Assumed Lost (Assumedlost) report output by zipcode or by group ID, the notices were not grouped together correctly. If the user had chosen the other sort options, user ID or user name, the notices were grouped appropriately. This has been corrected. (UNI-24631)

List Onshelf Items with Holds Report Not Selecting Multiple Copies

When running the List Onshelf Items with Holds (Pullonshelfhld) report, if a user selected more than one copy on the Number of Copies tab, no items were listed, and the report log displayed the following error message multiple times:

```
**Input line incorrect
```

The report was able to pick single copies, but picking multiple copies was not working properly. This has been corrected. (UNI-24927)

New Overdue Notices Report Not Sending Notices for Overdue Checkouts to Notice Master

Previously, the New Overdue Notices (Noverdue) report was not sending notices for overdue checkouts to the notice master for a user group. If a user had charges outside the group and inside the group, the user (not the notice master) received the notices for all of his or her charges. This has been corrected. (UNI-24161)

Debt Collection Group

Corrections

Collection Data Report Did Not Include First Name and Address Fields in Submission Output—Oracle Systems Only

Previously, the Collections Information (Collectiondata) report did not include the First Name and Address fields in the report output (XML file). This occurred on SirsiDynix Symphony for Oracle systems only. The Collections Information report output has been corrected. (UNI-24979)

e-Library Group

Corrections

Most Popular Report Aggregated Charges on Similar Titles

When running the most popular report in the iBistro group of reports, if two titles were similar enough that the “browse-formatted” or search version of the titles were the same, the charge count was being aggregated. This resulted in the incorrect most popular title being displayed.

This has been corrected. The Most Popular report now counts charges based on display title instead of the “browse-formatted” or search title.

(UNI-21642)

MARC Import Group

Corrections

Load Bibliographic Records Report Was Not Updating XX Call Numbers as Expected

After a site upgraded to Version 3.3.0, users noticed that the Load Bibliographic Records (Bibload) report was not updating the auto-generated (XX) call numbers as expected when order records were overlaid with fuller catalog records. Another call number was being created to which the copy information was added.

The Load Bibliographic Records report had been previously modified to accelerate the catalog matching process for Oracle systems. The modified report program was not checking the entire shelving key for auto-generated call numbers and, as a result, was not finding catalog matches. This has been corrected.
(UNI-25663)

MSSQL Group

Enhancements

Synchronize Policies Report Added to MSSQL Group of Reports

The Synchronize Policies report previously only appeared on the Oracle reports tab. But, on a SirsiDynix Symphony MSSQL system, the Oracle reports tab does not display. Now, the Synchronize Policies report displays on the MSSQL tab for MSSQL servers. Additionally, the report has been renamed from "Synchronize Policies to Oracle" to "Synchronize Policies" since it can be run on MSSQL or Oracle. The report will perform the server-appropriate functions when run on a MSSQL server or an Oracle server.
(UNI-24945)

My Statistics Group

Corrections

Custom Circ Count by Item Cat 2 and Other Statistics Reports Corrected

Previously, the Custom Circ Count by Item Cat2 (Statsict2custm) report output the row choice as Funding Source instead of the Item Category 2 values defined for the system, even though Item Category 2 was selected by the user. It was determined that the report was coded to use Funding Source as the row value instead of using the system-defined Item Category 2 values.

The following My Statistics reports were corrected:

- Custom Circ Count by Item Cat 2 (Statisict2custm)
- Daily Circ Count by Item Cat2 (Statisict2daily)
- Monthly Circ Count by Item Cat2 (Statisict2mthly)
- Weekly Circ Count by Item Cat2 (Statsict2wkly)

(UNI-24162)

Outreach Group Reports

Corrections

Suggest User Interest Records Report Was Missing a Label

In the WorkFlows Java client, the Suggest User Interest Records (Srchintsug) report was missing a label. The label for the heading of the browse route gadget on the Outreach Route Selection tab was instead displaying as

```
Gadget: $<browse_route:c>
```

This has been corrected.

(UNI-22318)

Reserve Group

Corrections

Reserves Pickup List, Update Report Not Producing Expected Output

Previously, the Reserves Pickup List, Update (Rsvpickup) report produced a single list of the holds that have been made available by the report rather than two separate lists of holds that have been made unavailable. Two lists should be produced by this report for the available holds made unavailable: one showing holds for which availability notices have not been sent, and one showing holds for which availability notices have been sent. Library staff require the lists to contain the details of the unavailable holds so that they can contact the patrons to let them know the items have been moved to the reserves collection.

The Reserves Pickup List, Update report has now been corrected to produce the two lists of available holds now made unavailable, along with details about these unavailable holds. (UNI-22133)

Serial Group

Corrections

Unable to Run the Delete Received Issues Report

A site was trying to run the Delete Received Issues (Remrecissues) report to delete old received issues of periodical, but the report would run in error and display messages in the report log such as the following:

```
6/19/2009,11:53:39 Station: 0079 Response: Sequence #: 02 Command:
*ERROR* message:You may not modify this library's serials information
message number:10010 workstation operator alert:1
```

But, the workstation operator did have permission to modify the serials information for all libraries. This has been corrected. (UNI-24962)

Talking Tech Group

Corrections

Talking Tech i-tiva File Creation Report Was Not Creating Bill Notices

The Talking Tech i-tiva File Creation (Talkingtechit) report was not creating any bill notices. Also, the report was creating a `notices.csv` file of size 0 bytes, which could not be imported properly (it could get "stuck" in the local directory, such as `C:\itiva\Import`) and could block future file imports. A 0 byte `notices.csv` file will not initiate calls.

This has been corrected. The report script now properly adds bill records to the `notices.csv` file. Also, the report script was modified to remove existing `notices.csv` files from the `\itiva\Import` directory and place a new `notices.csv` file in this directory only if it is greater than 0 bytes. (UNI-25187)

Text Group

Enhancements

Add, Delete, Update Databases Report Can Now Create UNIMARC Provisional Authority Records

The Add, Delete, Update Databases (Adutext) report was enhanced to create UNIMARC provisional authority records. To use this feature, the SirsiDynix system must be configured for UNIMARC authority and be configured to automatically create provisional authority records.

To configure the library's system to automatically create provisional authority records, contact SirsiDynix Client Care.

However, it is not recommended that systems be configured to automatically create provisional authority records. Most libraries do not have sufficient cataloging staff to review all provisional records as quickly as the system creates them.

(UNI-24777)

Corrections

Authedit Directory Is Now Emptied at the End Phase of Running the Add, Delete, Update Databases Report

Previously, the Add, Delete, Update Databases (Adutext) report was not clearing the `/Authedit` directory of authority record keys that were marked for deletion until the next run of the report. Now, the report has been modified so that the `/Authedit` directory is cleared at the end of the report run, just as the `/Textedit` directory is cleared of catalog record keys at the end phase of running the report. (UNI-25013)

Add, Delete, Update User Report Non-responsive If a Dynamic Indexing Lock File Existed

If an empty user dynamic indexing lock file was present on the Symphony system, the Add, Delete, Update User (Adusertext) report would become unresponsive and never finish. This report has been corrected to more properly handle dynamic indexing lock files and to ignore the presence of an empty lock file. (UNI-26103)

Request

General

Corrections

Users Now Allowed to Select a Call Number With No Items

Previously in the WorkFlows Java client, if a user created a request using the Create Request wizard with a Request Type of REQUISITN, the user could not select a title/call number without an item. This has been corrected. Users are now allowed to select a call number with no items when creating a request.

(UNI-26078)

Prompt for Request Type and User ID Didn't Display in Create Request

In the WorkFlows Java client, when creating multiple requests in a row, the prompt for request type, user ID did not display for subsequent requests. This made it impossible to create a request of a different type or for a different user without closing and opening the wizard again.

This has been corrected.

(UNI-24481)

SIP2/NCIP

General

Corrections

Self Check Machines Unable to Connect to Symphony

After upgrading to Version 3.3, a site was unable to connect their self check machines to the SirsiDynix Symphony server. The `sip2_status` log file displayed the following messages:

```
**Error in SIP translation tables

20090507103838 Sipserver 5 on port 6057:fatal exit - Error in SIP translation
tables

20090507103838 Sipserver 5 on port 6057:stopped - tables not found in upath
fileInvalid policy name NONE, for refund payment type
```

In the `sip2.tbl` file, there is a REFUND_PAYMENT_TYPE option. If this option is not defined, then the refund payment defaults to NONE. But, the site's Payment Type policies did not include the NONE payment type, and as a result, the self check machines could not connect because of the invalid policy name.

Now, the refund payment type defaults to CASH, which should be present on all SirsiDynix Symphony systems. (UNI-23750)

SIP2 Server Allowed Materials with Holds to be Renewed and Checked out

After sites using SIP2 servers upgraded from SirsiDynix Symphony 3.1 to 3.3, if a user tried to checkout an item or renew material which had a hold that had not been trapped (unavailable holds), the items were allowed to be checked out or renewed even though the action should have been blocked due to the hold. This has been corrected.
(UNI-25557)

SIP2 Updated for Talking Tech i-tiva File Creation Report Change

The Talking Tech i-tiva File Creation (Talkingtechit) report has been changed to remove the selection criteria for the Bill Selection tab. This is because the Talking Tech interface does not support call out for bill notices. This functionality will be added in a future release.

(UNI-26000)

Serial Control

General

Corrections

Unable to Use the Windows Close Button in Serial Control Wizards and Helpers that Use Detailed Display

In serial control wizards that use the Detailed Display, library staff were unable to close the wizard windows using the Windows Close button (X button). This also occurred in the Add Temporary Title helper. These issues have been corrected.
(UNI-24548)

Serials Routing Slip Format Spacing Corrected

When using the WorkFlows Java client, a site noticed that the first user field (typically the name) appeared on the line below the checkbox on the serials routing slips. This differed from the WorkFlows C client where the name appeared on the same line as the checkbox. This has been corrected so the name prints on the same line as the checkbox.
(UNI-26057)

Check In Wizard's Routing List Printing Did Not Recognize A-4 Size Paper

Previously, the WorkFlows Java client could not be set to print a routing list on A4-sized paper. Even though the user had set default printing properties in the Preference/Peripherals/Receipt Printer menu, and had selected the Print Routing Lists For Received Issues property in the Check In wizard, the printer could not recognize A4-sized paper. The user had to manually instruct the printer to use the A4 paper each time.

The WorkFlows Java client's Check In wizard does not use printer settings from the Preference menu, and making selections in the Preference menu had no affect on Receipt Printer settings, including paper size. In the WorkFlows C client, the user could set printer selections using a behavior property in the Check In wizard.

Now, the Print Routing Lists to Default Printer/Attached Receipt Printer property has been added to the WorkFlows Java client's Check In wizard properties.

- If the Print to Default Printer property is selected, routing lists will be printed on the workstation default printer with this printer's default paper settings (size and layout).
- If the Print to Attached Receipt Printer property is selected, routing lists will be printed to the receipt printer specified in WorkFlows Java client's Preference/Peripherals/Receipt Printer menu.

To use either printer option, the Print Routing Lists for Received Issues property must also be selected. (UNI-22337)

StaffWeb

Cataloging

Corrections

Default Values in User Address and Extended Information Did Not Display

Default values may be entered in User Address fields and Extended Information fields in the WorkFlows Java client. If default values were placed in any of these fields, they were not displaying in StaffWeb. Instead, those fields remained blank.

This has been corrected. If default values have been placed in a User Address or Extended Information field in the WorkFlows Java client, they will also display in StaffWeb.
(UNI-21205)

Item Category 1 and 2 Fields Did Not Display After Switching Cataloging Tabs

Previously, the Item Category 1 and Item Category 2 fields on the Copy Information tab did not display values when the user switched from another Cataloging tab, such as Title or MARC Information. This has been corrected.
(UNI-25000)

Receipt Setup and Cataloging Options Didn't Initially Display After Upgrade

After upgrading to 3.3, SirsiDynix StaffWeb was missing some options under Administration. For example, the Receipt Setup options didn't display at all, and most Cataloging options were missing.

This has been corrected.

(UNI-24221)

Check In Wizard

Corrections

Null Value Was Printed for Certain Fields in Payment Receipts

In the Check In wizard, after paying a patron's bill for an overdue item, a user noticed that the payment slip created for this bill payment displayed values of "null" for the fields User ID, User Name, Group ID, and User Cat 1. This has been corrected. (UNI-25511)

Circulation

Enhancements

Current Location Added to Copy Display

When searching for a title in StaffWeb and displaying the copy list, the hitlist will now display current location information. Among other uses, this allows staff placing holds to determine which copies are currently on the shelf when placing a hold.
(UNI-22525)

Payment Library Field Added to Bill History Display

The Payment Library field has been added to the Bill History display in StaffWeb. In the XML and CSV output, Payment Library appears as column in the display. This column will be populated as new payments that include Payment Library data are made. For payments made prior to the implementation of the new Payment Library field, this column will be blank. (UNI-24593)

Transit Override Now Displays in Checkout

In StaffWeb, when attempting to check out an item that is currently in transit, an override may now be entered to clear the transit status and check the item out to the patron. If a correct override is not entered, the item remains in transit and is not checked out.

(UNI-24268)

Assumed Lost Override Now Displays in Checkout

In StaffWeb, when attempting to check out or renew an item that has been marked as LOST (assumed lost or claimed lost), an override may now be entered to clear the LOST status and check the item out to or renew the item for the patron. If a correct override is not entered, the item keeps its LOST status and is not checked out or renewed. (UNI-24264)

Reports

Reports Now Validate That the From Date is Before the To Date

In StaffWeb, with reports that contain a date range, the SirsiDynix Symphony system now validates that the From date is before the To date at the time the dates are entered, rather than when the report is run. (UNI-18173)

Overdue List Report May Now Limit Output by Selections

In StaffWeb, the Overdue List report, by default, will output a notice for all overdue items belonging to the user.

An option has been added

```
Limit Output to Selected Criteria
```

that allows notices to only be generated for those overdue items that match all of the limit to criteria. (UNI-21682)

Corrections

StaffWeb Reports Didn't Sort Correctly by Date

In StaffWeb, when clicking the Date Completed column, the reports were not sorting correctly by date.

This has been corrected. (UNI-21720)

Copies on Loan Report Options Did Not Work Correctly

In StaffWeb, the Copies on Loan report options "Only Copies Belonging to this Library" and "Only Patrons Belonging to this Library" were not working correctly. If the "Only Patrons Belonging to this Library" option was selected users that should have been selected were not included in the report output. If the "Only Copies Belonging to this Library" option was selected copies that did not belong to the library were being included in the output.

This has been corrected. (UNI-22018)

System Administration

Corrections

Copy Status Report Displayed in StaffWeb when Disabled in User Access

User Access for StaffWeb is controlled by the Access List for StaffWeb tab in the User Access policy, found in the WorkFlows Java client. When deselecting the option for the Copy Status report on the Access List for StaffWeb tab, the Copy Status report was still showing as an option for the user in StaffWeb.

This has been corrected. The Copy Status report will no longer be an option if it is deselected in the User Access policy on the Access List for StaffWeb tab.

(UNI-16138)

System Administration

General

Enhancements

User Record Load Format Updated with New Language Field

The user record load format has been updated with a new field, User Preferred Language. In the ASCII-text format, this field is labeled .USER_PREF_LANG. and can be populated with valid Language policy values. For the pipe-delimited user record format, this field was added as the last field of the user record, field position 53. When a user record is created in the WorkFlows Java client, this Language field defaults to English. Library staff can change the user's preferred language to any Language policy name defined for the system. The Load Users report can be used to update the Language field value in a user's record as long as the .USER_PREF_LANG. field (in ASCII-text format) is included in the user record and it contains a valid Language policy value. (UNI-20838)

Access Control Configuration

Corrections

User Access Wizard Was Not Displaying Fund Level 6 in Access List

In the User Access wizard, the Access List tab was not displaying Fund Level 6 in the list of wizards for access. As a result, users could not be granted access to the Fund Level 6 policy wizard. This has been corrected. (UNI-25236)

Acquisitions Configuration

Corrections

Tax Wizard Changed the Tax Rate Percentage

In the Tax wizard, if a user enters a Percentage field value with one decimal place, such as 8.7, the wizard should save the value with two decimal places, such as 8.70. But, the wizard was losing one one hundredth of a percentage point and was always saving an 8.7 value as 8.69. Even if the user entered 8.70 or 8.7% in the Percentage field, the wizard saved the value as 8.69. This has been corrected. (UNI-23775)

Cataloging Configuration

Corrections

Main Entry/Uniform Title Combination Authority Validation Was Not Using Indicator 2 of the Uniform Title Tag

Previously, the MARC21 catalog format's Main Entry/Uniform Title combination authority validation function was not using the Indicator 2 of the Uniform Title (240) tag when building the combination for checking against authority records. Typically, this was not a problem because most catalogers set the 240 tag's Indicator 2 value to 0 or blank. This has been corrected. The MARC21 catalog formats now support setting non-filing in Indicator 2 to denote non-filing characters in the Uniform Title. (UNI-24998)

Unable to Save Changes to Indicator Values for Certain Tags in Catalog Formats

Users were unable to update their catalog formats with the new indicator values for the 653 tag and other tags. For example, after a user updated the 653 tag with the new Indicator 2 values and clicked Save, the WorkFlows Java client became unresponsive. The user had to click Cancel and close the Catalog Format wizard.

The following tags were affected:

- 083
- 085
- 542
- 653
- 751
- 882

The Indicator 1 and 2 fields in these tags did not properly handle empty indicator values. This has been corrected. (UNI-25359)

Unable to Add New Entries to UNIMARC Catalog Formats

A user was unable to add new entries to the UNIMARC catalog formats. For example, when the user selected a new entry ID, U091, for the CNSERIAL format, the following error dialog displayed:

```
Entry Exists
```

When a new entry is created in WorkFlows, an internal entry number is automatically assigned. But WorkFlows was unable to assign an internal number for an entry that started with a non-numeric character (U).

This has been corrected. Now, when a new UNIMARC entry is created, WorkFlows will ignore the initial U of the UNIMARC tag when assigning the internal entry number. The remaining digits will be used to create the internal entry number. If that number is already used, the next available internal number will be assigned. (UNI-25606)

Circulation Configuration Group

Enhancements

Default Price Policy Modified for New Deduct Overdue Fine from Automatic Refunds Functionality

When a lost item is returned, the paid lost item fees can be automatically refunded to the user’s credit account. Libraries can now control whether or not overdue fines are deducted from these automatic refunds. Libraries control this by selecting a new attribute in the Default Price policy named “Deduct the Overdue Fine from the Refund Amount.”

For more information about the new Deduct Overdue Fine from Automatic Refunds functionality, see the Circulation chapter of this document.

If the Automatic Refund attribute is selected in the Default Price policy, and a paid lost item bill is to be refunded to the user’s credit account, the library can control whether or not the overdue fines that accrued for the lost item are deducted from the refund.

- If the Deduct Overdue Fine attribute is selected, the calculated overdue fine will be deducted from the credit refund (to the user’s credit account) for the paid lost item bill when SirsiDynix Symphony creates the credit at check in. The total refund amount would be the amount of the paid lost bill minus the calculated overdue fine. The overdue fine would be calculated from the date due up to the item’s return date. The overdue fine will appear on the user’s record as paid, and the payment type will be AUTOREFUND.
- If the Deduct Overdue Fine is not selected, SirsiDynix Symphony will create a credit refund for the full paid lost bill. The full payment amount is returned to the user’s credit account, and no overdue fine is created and/or paid.

(UNI-24592)

New Auto Refund Payment Type Policy

A new Auto Refund Payment Type policy (AUTOREFUND) is delivered. This policy is used for paying overdue fines with an automatic refund for a lost item. The AUTOREFUND policy should not be removed. (UNI-24592)

Card Replacement Fee Policy Added

In the WorkFlows Java client, the Card Replacement Fee policy has been added to the Circulation configuration group. This policy is used in conjunction with the Card Replacement Fee option available in the User Lost Card wizard properties, and allows library staff to bill a replacement fee to a patron who has lost his or her library card.

The Card Replacement Fee policy contains the following attributes

- **Name** uniquely identifies a specific Card Replacement Fee policy.
- **Description** provides more information about the Card Replacement Fee policy and its use by the library.
- **Library** specifies a library policy name. This attribute refers to the user's library.
- **User Profile** specifies one or more user profile policies.
- **Include/Exclude Selected Entries** specifies whether you are including or excluding the listed user profiles.
- **Card Replacement Fee** specifies the card replacement fee that will be applied.

The fee applied is controlled by the user profile of the user whose card is being marked LOST and the user's library. The system creates a replacement card fee in the amount specified in the Card Replacement Fee policy that matches the user profile and user library.

If the Card Replacement Fee policy is not defined OR all lines are set to charge $0.00 fee, the prompts for charging a fee and immediately paying the fee will not display even if properties are checked.

(UNI-24359)

Global Configuration

Corrections

Configure Cancellation of On Order Holds Corrected

In the Circulation Global Configuration group, the Configure Cancellation of On Order Holds policy allows users to control whether or not holds for on order items can be automatically canceled when the order for the item is changed or removed. Previously, if on order holds were enabled and automatically cancel on order holds was configured, the system was not canceling holds in the following instances:

- When the copies on order were canceled
- When the quantity in a holding distribution that could satisfy the hold was edited to quantity 0 (zero)

Now, canceling a segment with a holding distribution and changing the distribution quantity to 0 for a holding distribution will now prompt for the cancel hold confirmation or silently cancel holds associated with the holding distribution, depending on the system configuration. (UNI-24428)

Web 2

General

Enhancements

Web2 Upgraded to Use New Pay Pal PayFlow Pro HTTPS Interface

Web2 was upgraded to use PayPal's PayFlow Pro HTTPS interface to make payments (sales). This upgrade removes the dependency on the Pay Pal dll files which will not be supported later in 2009.

The `Web2.set` documentation (`U_iFiles.set`) was modified for the new PayPal URL. The paypal_payflow_pro_host entry was updated to the new URLs. Additionally, the paypal_payflow_pro_port entry was removed.

Old paypal_payflow_pro_host entry:

```
paypal_payflow_pro_host=test-payflow.verisign.com
```

New paypal_payflow_pro_host entry:

```
paypal_payflow_pro_host=pilot-payflowpro.paypal.com
```

The new entry information is as follows:

```
; Production (Live)

;paypal_payflow_pro_host=payflowpro.paypal.com

; Pilot (Test)

paypal_payflow_pro_host=pilot-payflowpro.paypal.com
```

The Web2 site will want to use the Production URL when they go live. The Pilot URL is the default.

(UNI-24008)