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Introduction

The SirsiDynix Symphony Administrator Notes for SirsiDynix Symphony 3.2.1 are a subset of the entire set of release notes for SirsiDynix Symphony 3.2.1. Since this version of SirsiDynix Symphony includes a large number of enhancements and corrections, the administrator notes are intended to help the system administrator identify the changes that may require additional configuration. For many software changes, supplemental information is included in this document to alert SirsiDynix Symphony administrators to tasks that might need to be performed as part of staging the new version at your site, such as the following list.

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

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

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.
Upgrading to SirsiDynix Symphony 3.2.1

Sites running SirsiDynix Symphony 3.2, Unicorn GL 3.1 and Unicorn GL 3.0 may use the Software Delivery Service on the http://clientcare.sirsidynix.com website to upgrade to SirsiDynix Symphony 3.2.1. Sites running a version of Unicorn prior to Unicorn GL3.0 should contact your customer account manager to discuss your options.

The Software Delivery Service contains detailed information and procedures for upgrading to SirsiDynix Symphony 3.2.1. The instructions found there are more complete than those detailed in these notes, and may contain information that was added after this document was published. Depending on the version you are upgrading from, the features used at your site, and your operating system, not all of the following information will be pertinent to your site. An overview of the upgrade process follows.

Getting Ready for SirsiDynix Symphony 3.2 Multimedia Tour

For sites upgrading from Unicorn GL3.0 or Unicorn GL3.1, the Getting Ready for SirsiDynix Symphony 3.2 Multimedia Tour is an interactive introduction to the new features of SirsiDynix Symphony 3.2.

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

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

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

Given the relatively limited number of major enhancements in SirsiDynix Symphony 3.2.1, there is no multimedia tour for this version.
Review the Post-Upgrade Steps

Proper planning and sharing of information with library staff is essential to having a successful upgrade to SirsiDynix Symphony 3.2.1. Before obtaining the upgrade file, the SirsiDynix Symphony administrator should examine the upgrade instructions in their entirety, and should plan to allot enough time to complete the upgrade and all post-upgrade steps before making the system available. After obtaining the upgrade file and running the upgrade script, the SirsiDynix Symphony administrator must perform additional tasks, such as running an authority report and some database rebuild reports, updating your C WorkFlows client, updating the WorkFlows Java™ client, and preparing the webserver.

Verify the Server and Client Requirements

A link is provided to the server and client requirements for SirsiDynix Symphony from the Software Delivery Service. Before beginning the upgrade, ensure that your site meets the memory and disk space requirements and that the level of your operating system is supported in this version. Sites upgrading from SirsiDynix Symphony 3.2, Unicorn GL3.0 or GL3.1 will not encounter a significant increase in the disk space needed for SirsiDynix Symphony 3.2.1, unless the site is also implementing Unicode or migrating to the Oracle database from the Informix option.

Kernel Parameter Changes Needed for Linux, Solaris, and HPUX

At Unicorn version GL3.1, enhancements were made allowing multiple processes to access the Circulation Map, to improve performance. For sites running SirsiDynix Symphony on Linux, Solaris, or HPUX, if you have not done so already, you may need to increase your kernel parameter settings. Before you start the upgrade, investigate the kernel settings on your unix operating system and verify that the settings are appropriate. The Software Delivery Service contains recommendations for the new settings.

WorkFlows Java Client for PCs Requires JRE 6_03


When you update to the new SirsiDynix Symphony 3.2.1 client for Windows, you will automatically install the new Java Runtime Environment (J RE 6_03) on your Windows workstation.

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

The SirsiDynix Symphony 3.2.1 upgrade includes WorkFlows Java Client version 3.2.1.2.14 for Windows and Macintosh.

Verify Your Version of Oracle

Sites that are using the Oracle database system must verify your Oracle version before running the upgrade. SirsiDynix supports Oracle 10.1 at release 10.1.0.5 or higher, and Oracle 10.2 at release 10.2.0.2 or higher. Oracle 9i continues to be supported for non-Unicode sites at release 9.2.0.6 or higher. Oracle 9g is not supported.

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

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

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

```
COMP_ID                        VERSION
------------------------------ ------------------------------
CATALOG                            10.2.0.2.0
CATPROC                             10.2.0.2.0
```

At the SQL> prompt, type `quit` and then press Enter. Note the Oracle release number. If you are on a version of release 10.1 that is lower than 10.1.0.5 or a version of release 10.2 that is lower than 10.2.0.2, please upgrade Oracle before you schedule the upgrade to SirsiDynix Symphony 3.2.1.

Oracle Tablespaces

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

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

- The SirsiDynix Symphony-related tablespaces are not set to autoextend. This may increase the possibility of an upgrade failure if a tablespace runs out of room.
- The rollback segment is not set to autoextend. Again, this may increase the possibility of an upgrade failure if the rollback segment runs out of room.
- You do not use the SirsiDynix Symphony default tablespaces. If this is the case, you will have to have an accurate /Unicorn/Config/oraclespace file which is updated to include any new tables required by the current SirsiDynix Symphony release. If the oraclespace file is not current, the upgrade will fail.
- All remote sites, and local sites for which the oracle logon is something other than the sirsi default logon, require a /Unicorn/Config/oracle.logon file which contains the following three fields.

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

Oracle Listener Must Be Running

Before you perform the SirsiDynix Symphony 3.2.1 upgrade, verify with your Oracle DBA that the Oracle listener is running. Without the listener, the SirsiDynix Symphony 3.2.1 upgrade will fail. Sites that use a remote Oracle with their SirsiDynix Symphony server will probably already have the listener running.

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

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

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

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

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

The SirsiDynix Symphony 3.2.1 upgrade will set a new language field in the patron record based on the language setting in the environment policy tied to the patron's profile. Before you do the SirsiDynix Symphony 3.2.1 upgrade, please verify ahead of time that the environment policies contain the desired language setting.

Enhancements to Invoice Wizards Invalidate InfoVIEW Client Invoice Commands

In SirsiDynix Symphony 3.2.1, many new features have been added to the invoice wizards, such as invoice tax functionality, invoice locking and unlocking, and the new Created in Cycle and Date Ready fields. Because the Unicorn InfoVIEW client is no longer supported by SirsiDynix, the invoice commands used by this client have not been upgraded with these new features. Now, the invoice commands in the InfoVIEW client no longer work at all. The invoice commands, however, are still functional in the WorkFlows C client. If the library uses the InfoVIEW client for acquisitions work and also processes invoices through SirsiDynix Symphony, the library must upgrade to WorkFlows.

SVA Activity

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

Downloading the Upgrade File

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

Note: Unicorn can be running while the download takes place

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

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

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

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

Post-Upgrade Steps

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

Sites That Use Accountability

The Workflows Java Client Accountability toolbar and wizards are delivered with the SirsiDynix Symphony 3.2.1 upgrade, but will be available only for systems configured to use Accountability. Access to the accountability wizards are delivered with the sirsi and admin logins. Administrators should review the wizard functions to determine who should have access to these wizards and modify the User Access policies as needed. Administrators should also review the new wizard properties and determine how these properties should be set.

Also, following the upgrade to Version 3.2.1, administrators should open the new Workflows Java Client, go to the Global Configuration wizard from the Configuration toolbar, and access the Catalog Search Fields policy. This policy controls the search indexes that are available in the Workflows Java Client wizards. For each index required in the accountability wizards, the administrator needs to modify each Catalog Search Field policy and select the Use For Accountability check box. It is recommended that the following policies be modified: AUTHOR, GENERAL, PERTITLE, SERIES, SUBJECT, and TITLE.

Unicorn/Bincustom

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

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

Setting Up User Access Policies

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

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

Updating Your WorkFlows C Client

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

Installing/Updating the WorkFlows Java™ Client

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

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

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

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

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

Running the Rebuild Heading Display Databases Report

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

Running the Rebuild Text Database Report

If you are upgrading from Unicorn GL3.0, after the upgrade completes run the Rebuild Text Database (Rebuildtext) report. Running this report will index all ISBNs twice, once in the 10 digit format and once in the 13-digit format. In addition, sites that use materials booking will not be able to do group bookings until this report is run.

Run the Rebuild User Database Report

If you are upgrading from Unicorn GL3.0 or Unicorn GL3.1, after the upgrade completes, run the Rebuild User Database (Rebldusertext) report. Running this report will allow you to take advantage of the new multiple user ID functionality in SirsiDynix Symphony 3.2. Sites upgrading from SirsiDynix Symphony 3.2 do not have to run the report.

Reschedule Specific Previously Scheduled Reports

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

- Book X12 Invoices
- Serials X12 Invoices
- Bibliographic Database Overlay
- Load Bibliographic Records
- Load Bibs with Order Info
- Load Bibs for Selection
- Load Bibs with Selections and Decisions
Update your Z39.50 Gateway Destinations

Starting in version GL3.1, it was required that your Z39.50 gateway destinations contain a value for Character Code. If this field is blank, the default value of UNICODE will be used, which may be inappropriate for the site to which you are connecting. If you are upgrading from Unicorn GL3.0, please make sure your Z39.50 gateway destinations contain the appropriate Character Code values. Otherwise, searching may not return correct results.

Preparing the Webserver

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

Downloading and Updating Your Hyperion Client

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

Downloading and Updating Web2

If your site is using Web2, after you have upgraded your SirsiDynix Symphony server to 3.2.1, you may wish to obtain the 3.2.1 Web2 server. To download the latest Web2, use the following procedure.

1) Connect to the SirsiDynix Software Delivery Service ftp server by typing ftp ftp.sirsi.com, then press Enter.

2) At the login prompt, type symphony, then press Enter. {these have changed}

3) At the password prompt, type upgrades, then press Enter.

4) A successful login message should display and then an ftp> prompt.

5) At the ftp prompt, type cd Web2_3.2.1 and then press Enter.

6) At the ftp prompt, type bin and press Enter to change to binary transfer mode.

7) Now type get Web2_3.2.1.exe and press Enter to transfer the upgrade file from the ftp server to your Web2 server.

8) After the transfer successful message displays and the ftp prompt returns, type bye and press Enter to close the ftp connect.
9) Type `exit` and press Enter to close the command prompt window and proceed with the upgrade.

## Optional Post-Upgrade Steps

### Non-Unicode Sites that Execute Direct SQL Queries

An enhancement in SirsiDynix Symphony 3.2.1 addresses a character set conversion issue for sites running the Oracle database management system for sites not configured to use the Unicode encoding scheme. Previously, database records which contained non-ASCII characters (such as some diacritics) did not display properly on Windows when Oracle database administrators executed SQL queries against their databases from outside of Unicorn. To correct this problem in SirsiDynix Symphony 3.2.1 sites, after upgrading to SirsiDynix Symphony 3.2.1 the Oracle database administrator should issue this command as the Oracle user on the server, after making sure that ORACLE_SID is correctly set.

```
loadjava -u [user]/[password] -v -resolve Marc8Converter.java
```

The `[user]` and `[password]` values should be replaced by the Oracle database user and password which has access into the SIRSI schema.

### Recreate Local Toolbars for WorkFlows Java Client

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

Instructions for running the conversion scripts are provided in the optional post-upgrade steps section of the Software Delivery Service.

### Running the Rebuild Heading Databases Report on Oracle Systems

Faster browsing and less CPU utilization during browsing have been achieved on Oracle systems that use authority control by adding a binary heading index in addition to the linguistic index. This new index is built automatically by the Rebuild Heading Databases report, which SirsiDynix recommends that Oracle sites that use authority control run after the upgrade. Running the Rebuild Heading Databases report is optional, but some sites will improve browsing performance if they run the report. Note that running this report requires that a large temporary tablespace be built for Oracle to sort the keys during this process, so the report output should be viewed to see if there were any problems building these indexes. If the indexes are not built, SirsiDynix Symphony will still run properly, but browsing speed will be slower. If your site is upgrading
from SirsiDynix Symphony 3.2, there is no need to run this report as a post-upgrade step.

**Notify SirsiDynix Upon Completion**

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

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

General

Corrections

Custom Toolbars Created in the WorkFlows C Client and Moved to the WorkFlows Java Client Can Be Modified or Removed

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

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

SirsiDynix Symphony Administrator Notes

If a custom toolbar created in the WorkFlows C client did not have balloon help text and/or flyby help text for a custom wizard group, the wizard group displayed as a blank box on the toolbar when the toolbar was moved to the WorkFlows Java client. If a user or administrator tried to view or edit the custom toolbar using the Toolbar Management wizard on the Utility toolbar, the custom wizard group on the toolbar had a blank label, and the wizard group could not be modified or removed from the toolbar.

The toolbar conversion has been changed so that if a custom WorkFlows C client toolbar does not have flyby help text or balloon help text for a custom wizard group, the wizard group icon displays correctly on the toolbar when the toolbar is displayed in the WorkFlows Java client. The toolbar conversion copies the custom wizard group name to the Balloon Help Text field and/or Flyby Help Text field for the wizard group. The Toolbar Management wizard can be used to modify or remove the custom wizard group on the custom toolbar.

Note: If the conversion script was already run to move the custom toolbars to the WorkFlows Java client, and the custom wizard groups do not display correctly in the WorkFlows Java client, run the corrected conversion script again. The custom wizard groups on the custom toolbars will then display correctly in the WorkFlows Java client.

(UNI-14046)
Accountability

General

Enhancements

Accountability Module Added to WorkFlows Java Client

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

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

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

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

Accountability Wizards

The new Accountability wizard toolbar includes the following wizards.

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

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

**Special Features for Accountability Wizards**

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

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

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

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

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

**Changes to Checkout and Renew Wizards**

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

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

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

Accountability Global Configuration Policies

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

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

Accountability Reports

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

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

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

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

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

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

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

Sirsidynix Symphony Administrator Notes

The Accountability toolbar and wizards are delivered with the SirsiDynix Symphony 3.2.1 upgrade, but will be available only for systems configured to use Accountability. Access to the accountability wizards are delivered with the sirsi and admin logins. Administrators should review the wizard functions to determine who should have access to these wizards and modify the User Access policies as needed. Administrators should also review the new wizard properties and determine how these properties should be set.

Following the upgrade to Version 3.2.1, administrators should set several Global Configuration policies.

- **The Catalog Search Fields policy controls the search indexes that are available in the WorkFlows wizards.** The available search indexes display in the Index drop-down list for the Item Search window. The Catalog Search Fields policy is accessed from the Searching tab in the Global Configuration wizard. For each index the administrator wants to make available in the accountability wizards, she will need to modify each Catalog Search Field policy and select the Use For Accountability check box. It is recommended that the following policies be modified: AUTHOR, GENERAL, PERTITLE, SERIES, SUBJECT, and TITLE.

- **The following policies control the display of user accountability information in the circulation wizards.** The administrator can “turn on” or “turn off” the user accountability information fields displays by modifying these policies. These policies are accessed from the User Accountability tab in the Global Configuration wizard.
  - Display of User Birth Date Field
  - Display of User Birth Place Field
- Display of User Citizenship Field
- Display of User Social Security Number Field

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

Add Order Items to Catalog Wizard

Corrections

Class Scheme Field Added for Users to Specify the Call Number
Classification for Items

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

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

SirsiDynix Symphony Administrator Notes

Possible values for the Class Scheme field used in the Add Ordered Items to Catalog wizard should be defined with the Classification policy wizard.

(UNI-11254)
Circulation

General

Enhancements

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

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

SirsiDynix Symphony Administrator Notes

Contact SirsiDynix Client Care to configure SirsiDynix Symphony to allow items to be checked out or renewed for the full loan period instead of for a truncated loan period based on the user’s library privilege expiration date.

(UNI-12325)

Hold Wrapper Slip Printing Added to Circulation Wizards

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

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

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

SirsiDynix Symphony Administrator Notes

Hold wrapper slip printing can be configured and customized by selecting the Print Hold Wrapper Slip check box and properties button in the properties of the following wizards.
Check Item Status
Checkin Bookdrop Items
Discharge/Checkin
Fine Free Discharge/Checkin
Receive Items From Transit
Remove Item Hold
Remove User Hold
Trap Holds
What's In Transit

Refer to the WorkFlows Online help for information about customizing the appearance of hold wrapper slips and specifying what information will print on the hold wrapper slips.

\textbf{Note:} The receipt printer availability options must be configured on the Preference menu for hold wrapper slips to print.

(UNI-6209)

\textbf{New Override for Item Has Available Holds Block at Check Out}

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

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

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

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

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

SirsiDynix Symphony Administrator Notes

During the Version 3.2.1 upgrade, the Operator policy wizard will be updated with the Available Hold Block Override. Administrators will need to review the Operator policies on their systems to determine which policies should include this new override.

(UNI-14875)

Checkout Wizard

Enhancements

Enhanced Processing for Checking Out Multiple-Piece Items

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

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

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

  Item has multiple circulating pieces.

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

SirsiDynix Symphony Administrator Notes

Set the Multi Circ attribute in a multiple-piece item's Item Type policy according to how the library wants to record the item's checkout in circulation statistics.
• To record a multiple-piece item checkout as a single checkout transaction, clear the Multi Circ attribute in the item's Item Type policy.

• To record a multiple-piece item checkout as one checkout transaction for each piece, select the Multi Circ attribute in the item's Item Type policy.

(UNI-12311, UNI-11447, UNI-12155, and UNI-12692)

Barcode Validation Settings Wizard

Enhancements

New Barcode Validation Settings Wizard For Circulation and Cataloging Wizards

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

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

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

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

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

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

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

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

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

The wizard’s Behavior tab displays the following fields.

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

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

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

**SirsiDynix Symphony Administrator Notes**

To use the user ID and item ID auto-generation feature, a custom autoids file
must be configured in the /Unicorn/Autoids directory on the server. For infor-
mation about auto-generating user and item IDs, refer to “FAQs: Customizing
Auto-generated IDs” in the WorkFlows Java client online Help.

In order for this wizard to appear, custom Barcode Validation must be config-
ured for the system. Contact SirsiDynix Client Care to enable this configura-
tion. If the system has been configured for Classic Barcode Configuration, the
Barcode Validation Settings wizard is not available.

Because multiple subformats may appear in the Barcode Format drop-down list,
it is up to the library to determine which subformat is used by their barcodes.

(UNI-12466)
Mail Items Wizard

Enhancements

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

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

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

Sirsidynix Symphony Administrator Notes

Sirsidynix Symphony administrators will need to review the Auto-generate Tracking Numbers functionality for the Mail Items wizard and determine whether or not to select the Auto Generate Tracking Numbers behavior in the wizard properties.

If the site wants to use auto-generated tracking numbers, the administrator will need to add a tracking auto-generated ID file in the /Unicorn/Autoids directory. The numbering sequence would be #TR-#. If the libraries want to use their own tracking numbers, the administrator will need to create a tracking file for each library with the names tracking1, tracking2, tracking3, and so on, where the number represents the Library policy number.

If the administrator does not create a tracking file, SirsiDynix Symphony will auto-generate the tracking numbers using an internal key (number).

For more information about creating custom auto-generated IDs, refer to “FAQs: Customizing Auto-generated IDs” in the WorkFlows Java client online Help.

(UNI-12467)
Modify User Wizard

Enhancements

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

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

SirsiDynix Symphony Administrator Notes

Administrators should review the Modify User wizard properties and set the Show Web Auth ID property according to whether the library wants to display the Web Auth ID field when user records are modified.

- To display the Web Auth ID field on the Privilege tab when the user record is edited with the Modify User wizard, select the Show Web Auth ID check box in the wizard properties.
- To hide the Web Auth ID field, clear the Show Web Auth ID check box.

By default, the Show Web Auth ID check box is cleared so the Web Auth ID field does not display.

(UNI-1851)
e-Library Enhancements

Added Ability to Control Default Search Operator for Keyword Searches

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

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

SirsiDynix Symphony Administrator Notes

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

The delivered environment files (ibistro.env, ilink.env, and k12.env) have been enhanced with the new SEARCH_OPERATOR environment variable. The SEARCH_OPERATOR environment variable controls the default operator for keyword searches. The default value is SAME. System Administrators can copy this variable to the system.env file and change the value to AND, NOT, OR, SAME, WITH, XOR, ADJ, or NEAR. Please exercise caution as not all of these choices make sense as a default operator. If the site would like AND to be the default operator for keyword searches, use SEARCH_OPERATOR|AND|.

This enhancement affects the following e-Library files.

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

(UNI-11450)
EnvisionWare eCommerce Can be Offered as an Online Bill Payment Option to Pay Library Bills

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

SirsiDynix Symphony Administrator Notes

To make the eCommerce payment option available to library users, the library system must meet the following prerequisites.

- The library system must have a SIP2 server.
- The library system must purchase the eCommerce product from EnvisionWare, Inc.

Once the prerequisites are met, the system administrator should copy the following new variables from the ibistro.env file or the ilink.env file to the system.env file and configure the variables.

- ENVISIONWARE_PAYMENT specifies whether the eCommerce payment option is available. If this variable is set to 0, the eCommerce payment button does not display in the e-Library. If this variable is set to 1, the Pay Bill(s) with eCommerce button displays when a user views a bill list with the Review My Account option in the e-Library. By default, this variable is set to 0.
- ENVISIONWARE_URL specifies the Universal Resource Locator (URL) of the EnvisionWare eCommerce server for the library system. By default, this variable setting is blank.

The following e-Library files and pages have been enhanced.

- Unicorn/Webcatcommon/Pages_deliv/Elib_revC/js_functions.h
- Unicorn/Webcatcommon/Pages_deliv/Elib_revB/js_functions.h
- Unicorn/Webcatcommon/Pages_deliv/Elib_revB/25.pg
- Unicorn/Webcatcommon/Pages_deliv/Elib_revC/25.pg
- Unicorn/Webcat/Config/ilink.env
- Unicorn/Webcat/Config/ibistro.env

(UNI-11392, UNI-12741)

Added Ability to Link to Full Details from My Account Lists

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

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

SirsiDynix Symphony Administrator Notes

SirsiDynix Symphony Administrators can control whether or not users can link to the Full Details of catalog records from the My Account lists by copying the following variable to the system.env file.

USE_FULLDETAIL_LINKS|0|

By default, this variable is set to 0 or do not use Full Details links. If the administrator sets this variable to 1, the Details link will appear next to the Title or Author/Title information, and users can click this link to see Full Details of the catalog record.

(UNI-14604)

Added Ability to View Total Number of Holds for Requested Items in My Account Holds Lists

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

Example:

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

Your position in the holds queue: 1

Now, the hold queue could display as follows.

Your position in the holds queue: 1 of 499

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

SirsiDynix Symphony Administrators can control whether or not users can view the hold totals in the My Account Holds lists by copying the following variable to the system.env file.

USEHOLDQUEUEPOSTOTAL|0|

By default, this variable is set to 0 or does not display the total number of holds in the holds queue. If the administrator sets this variable to 1, the total number of holds will display in the holds queue for requested items.

Note: To use this variable, the USEHOLDQUEUEPOS variable must be set to 1. Additionally, this variable is only valid with Demand Management when using system level holds with no prioritization.

(UNI-14607)

Added Intransit Message to Holds List in My Account Pages

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

Example:

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

In transit for pickup at: MAIN

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

SirsiDynix Symphony Administrator Notes

SirsiDynix Systems Administrators can control whether or not the intransit status message will display in the My Account Holds lists by copying the following variable to the system.env file.

USEHOLDINTRANSIT|0|

By default, this variable is set to 0 or does not display intransit messages. If the administrator sets this variable to 1, the intransit messages will display in the Availability column of the My Account Holds lists.

(UNI-14607)
Added Ability to View Item Types for Items Listed in the My Account Lists

After a user logs in to the e-Library and moves to the My Account/Review My Account page and views any of the My Account lists, she can now see the item type values for listed items. The value appears below the Title or Title/Author for each item. This is particularly useful if the user is working on a project and has checked out a number of books with similar titles in different media. This way, the user can tell which of the listed items are books, which are DVDs, and so forth.

SirsiDynix Symphony Administrators can control whether or not the item type values will display by modifying a variable in the e-Library environment files. As delivered, the item types will not display in the My Account lists.

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

SirsiDynix Symphony Administrator Notes

SirsiDynix Systems Administrators can control whether or not the item type values will display in the My Account lists by copying the following variable to the system.env file.

USE_ITEMTYPE|0|

By default, this variable is set to 0 or does not display item types. If the administrator sets this variable to 1, the item type values will be available for all My Account lists.

(UNI-14605)

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

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

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

EZproxy must be customized for its use with the SirsiDynix Symphony SIP2 server and e-Library. Refer to the EZproxy documentation for information on customizing EZproxy.
Note: EZproxy stores a session cookie that is stored for the duration of the browser session and is read by the e-Library. Security issues could arise on shared workstations if users do not log out of EZproxy at the end of their e-Library sessions. System administrators should customize the e-Library to display the EZproxy logout screen when the user selects the Logout button. In addition, system administrators should customize the length of time that the EZproxy Single Sign On URL is valid in a session so a user cannot access a previous user’s e-Library information by using the Back button in the Web browser.

SirsiDynix Symphony Administrator Notes

To use the EZproxy Single Sign On feature with the e-Library, the system administrator must complete the following tasks. Following sections describe each task.

- Configure the EZproxy Single Sign On environment variables.
- Complete additional e-Library configuration.
- Configure the Logout button to redirect users to the EZproxy logout screen.
- Configure EZproxy to use the Single Sign On feature for the e-Library.
- Customize e-Library links for use with EZproxy.

The following e-Library files were modified for the Single Sign On enhancement.

- Unicorn/Language/Deliv/English/messages
- Unicorn/Webcat/Config/ilistro.env
- Unicorn/Webcat/Config/ilink.env

Configuring the EZproxy Single Sign On Environment Variables

Two new environment variables have been added to the ilistro.env file or ilink.env file to enable EZproxy Single Sign On and the EZproxy session timeout. Copy the variables to the system.env file and modify them.

- If the library uses EZproxy to authenticate remote user logins with a proxy server, and permits the use of cookies that retain login information, the EZPROXY_SSO_KEY variable can be set so remote users only have to enter user IDs once to log into the e-Library or other product on the library’s Web site. Set the EZPROXY_SSO_KEY variable to the same value as –Secret= in the ezproxy.cfg file. The value must be exactly 24 characters long. Refer to the EZproxy documentation for more information about the –Secret value.
The EZPROXY_SSO_TIMEOUT variable is used to prevent a user from accessing another user’s e-Library information by using the Back button in the Web browser and clicking the EZproxy Single Sign On link. Set the EZPROXY_SSO_TIMEOUT variable to specify the length of time that the sso= parameter in the EZproxy Single Sign On URL is valid. The time period starts from the second that EZproxy signs in the user. The default value is 30 seconds. When the time period ends, the following message displays, and the e-Library login screen displays.

Session has timed out

**Note:** Exercise caution when setting the EZPROXY_SSO_TIMEOUT variable. The EZPROXY_SSO_TIMEOUT variable could be set such that a patron would have enough time to step up to a library workstation and use the Web browser’s Back button to access the EZproxy Single Sign On link while the sso= parameter in the link is still valid from the previous user’s session. However, the EZPROXY_SSO_TIMEOUT variable value should not be set so low that users will not have enough time to move from the EZproxy Single Sign On screen to the e-Library.

Additional e-Library Configuration

The following e-Library environment variables in the system.env file must be configured for the EZproxy Single Sign On feature. SirsiDynix recommends copying the variables to the system.env file and modifying the values as needed.

- Set the Web authentication user access variable (WEBAUTH_UASC) to a valid User Access policy name. For example, to specify the PUBLICWEB user access, set the variable as follows. In order to login the user with the login information sent by EZPROXY, the WEBAUTH_UASC must be a user access with Display User ability.

```
WEBAUTH_UASC|PUBLICWEB|
```

- Set the Web authentication station library variable (WEBAUTH_STALIB) a valid Library policy name. In order to login the user with the login information sent by EZPROXY, the WEBAUTH_STALIB must be a valid station library. For example, to specify the Morley Library as the station library, set the variable as follows.

```
WEBAUTH_STALIB|MORLEY|
```

- Set the EZproxy Single Sign On key variable (EZPROXY_SSO_KEY) to the same value as -Secret= in the ezproxy.cfg file. The value must be exactly 24 characters long. Refer to the EZproxy documentation for more information about the -Secret value.

Redirecting Users to the EZproxy Logout Screen

EZproxy stores a session cookie that lasts for the browser session that is read by the e-Library. The e-Library’s Logout button will end the e-Library session, but will not remove the cookie and will not log the user out of EZproxy. If the workstation is a shared computer, the next user who clicks the e-Library link will be logged in as the previous user. SirsiDynix recommends customizing the e-Library’s Logout button so the user is redirected to the EZproxy logout screen. The EZproxy logout screen (ezproxy/docs/logout.htm) can then be modified to redirect the user to an appropriate Web page.
Use the home URL environment variable (HOME_URL) in the system.env file to specify the EZproxy logout screen. The following example shows how to configure the HOME_URL variable.

```
HOME_URL=http://thisezproxy.com:2048/logout
```

### Configuring EZproxy Single Sign On for the e-Library

The EZproxy Single Sign On feature requires modifications to SSO setting in the ezproxy.cfg file. Although SirsiDynix provides an example for configuring the SSO setting in EZproxy, the required configuration is subject to change without notice. Refer to the EZproxy documentation for the most up-to-date information.

**Note:** The ezproxy.cfg file must be updated when EZproxy is upgraded, or when the EZproxy configuration is changed.

Do the following to modify the SSO setting in the ezproxy.cfg file.

- Define the `-URL` value to be the value of the e-Library catalog.
- Define the `-Secret` value to be the same as the EZPROXY_SSO_KEY environment variable value in the e-Library's ibistro.env file or ilink.env file. The value must be exactly 24 characters long.
- Define the `SSO -URL` value so the e-Library's URL ends with a unique value. The example below uses `abc`, and that value will also be part of the e-library's URL.

```
SSO -URL=http://youriBistro.SirsiDynix.org/uhtbin/cgisirsi/x/0/0/49 -Secret=abcdefghijklmnopqrstuvwx abc
```

### Customizing e-Library Links for Use with EZproxy

To use the e-Library with EZproxy, modify any links to the e-Library to use the new Single Sign On link that is defined with the `SSO -URL` value in the ezproxy.cfg file. For example, the `SSO -URL` value is defined as follows.

```
SSO -URL=http://youriBistro.SirsiDynix.org/uhtbin/cgisirsi/x/0/0/49 -Secret=abcdefghijklmnopqrstuvwx abc
```

The e-Library link should be modified as follows so EZproxy is used when users select the link.

```
http://youriBistro.SirsiDynix.org/sso/abc
```

(UNI-14106, UNI-15199)
Configuration Permits Users to View Links to Check Out Electronic Books Purchased From BWI Without Having to Log Into the e-Library

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

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

SirsiDynix Symphony Administrator Notes

If the BWIFOLLETT_EBOOKS environment variable in the ibistro.env file or the ilink.env file was set to 1, users could not see the URL links to check out electronic books that the library purchased from BWI unless the users were logged in. The variable setting could not be set such that a library could allow its users to see the URLs to check out e-books without logging into the e-Library first.

The BWIFOLLETT_EBOOKS environment variable has been changed so that if the environment variable is set to 1 in the system.env file, the URLs for e-books purchased from BWI will display whether a user is logged into the e-Library or not. If the BWIFOLLETT_EBOOKS environment variable is set to 0 or is not defined, the e-books purchased from BWI cannot be checked out, but the URLs for e-books will display to all users.

(UNI-6466)
Hold Button No Longer Displays When All Copies Are in Non-Holdable Locations

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

SirsiDynix Symphony Administrator Notes

- This change only affects Demand Management holds.
- The following Elib_revC pages were modified: 17_item_services.h, 4_module_hitlist.h, 5_item_services.h

(UNI-14863)

Corrections

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

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

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

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

SirsiDynix Symphony Administrator Notes

The SUPPRESS_BAD_UTF8 variable has been added to the Unicorn/Webcat/Config/webconfig file to prevent the display of the Unicode characters for the ligature tie (U+0361) and the double tilde (U+0360) when a large Unicode font is used in the e-Library.

- If this variable is not set or is set to 0, the Unicode characters for the left and right ligature and the double tilde will display incorrectly when the Arial Unicode MS font is used in the e-Library. The first half of the ligature or tilde will display before the first character instead of on top of the first character; the second half of the ligature or tilde will display on top of the first character instead of on top of the second character. The default value of the variable is 0.
• If this variable is set to 1, the e-Library will suppress the Unicode characters for the left and right ligature and the double tilde from displaying in any e-Library display.

**Caution:** The SUPPRESS_BAD_UTF8 variable setting does not have any effect on ISAM systems and on Oracle systems that do not use UTF-8 encoding.

**Note:** The SUPPRESS_BAD_UTF8 variable setting does not change the display of the left and right ligature and double tilde diacritics in the WorkFlows Java client.

(UNI-13153)

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

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

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

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

### SirsiDynix Symphony Administrator Notes

The following pages were corrected.

• Unicorn/Webcatcommon/Pages_deliv/Elib_revB/js_functions.h
• Unicorn/Webcatcommon/Pages_deliv/Elib_revC/js_functions.h
• Unicorn/Webcatcommon/Pages_deliv/K12/js_functions.h

(UNI-3440)

### Reading Program Default Setting Honored

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

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

### SirsiDynix Symphony Administrator Notes

The following Elib_RevB page was corrected: 2011.pg

(UNI-4125)
Reports

Acquisitions Group Reports

Enhancements

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

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

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

SirsiDynix Symphony Administrator Notes

If the User Order/Request Notice report is scheduled to run regularly, review the report settings and determine if any of the new selection options available on the Distribution Selection report tab should be configured.

(UNI-2294)
**Administration Group Reports**

**Corrections**

**User Statuses Display Correctly in the Transaction Statistics Report Output**

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

**SirsiDynix Symphony Administrator Notes**

If the Statistics Log (Statlog) report is not run regularly, and the output of the Transaction Statistics (Statistics) report displays a row of asterisks in place of user statuses (OK, DELINQUENT, BLOCKED, BARRED, or other custom user statuses), run the Statistics Log report to regenerate the statistics logs. Then, run the Transaction Statistics report again to produce the corrected output.

(UNI-14536)

**MARC Import Group Reports**

**Enhancements**

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

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

- Create Accountability Based On Title Information Entry - If this option is selected, the Entry ID field becomes available. The user selects the entry ID that contains the title and item accountability information. After these selections are made, and as bibliographic records are loaded, title and item accountability records will be created with the classification, bib classification, access restriction, need to know, and review date values found in this entry. The entry can contain multiple access restriction and need to know values. If the entry does not contain a classification value, or the classification is invalid, the bibliographic record will not be loaded but written to the error file, and a message will be written to the report log.
• Create Accountability Based On Default Data – If this option is selected, the Classification, Bib Classification, Access Restriction, Need to Know, and Review Date fields become available. The user must select a value for the Classification field; the other fields are optional. After these selections are made, and as bibliographic records are loaded, title and item accountability records will be created with the selected defaults. If the user does not select a default classification, the report will not run.

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

Create Accountability Based On Title Information Entry

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

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

• | a Classification
• | b Bibliographic classification
• | c Access restriction
• | d Need to know
• | e Review date

If the entry does not contain a classification value, or the classification is invalid, the bibliographic record will not be loaded but written to the error file, and a message will be written to the report log.

Create Accountability Based On Default Data

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

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

• Bib Classification – Select a bib classification from the drop-down list. The values presented in this list are defined in the Clearance policy wizard. As bibliographic records are loaded, the title and item accountability records created will be assigned this default bib classification. If a default bib classification is not selected, the bib classification for these records will be set to the same value as the Classification field.
• Access Restriction – Select an access restriction from the drop-down list. The values presented in this list are defined in the Restrict policy wizard. As bibliographic records are loaded, the title and item accountability records created will be assigned this default access restriction. The review date for this access restriction will be set to the date selected in the Review Date field on this tab.

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

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

SirsiDynix Symphony Administrator Notes

SirsiDynix Symphony Administrators may use an existing 9XX entry with the designated subfields for accountability information, or they may create a new 9XX entry ID/entry for this purpose. For information about creating a new entry, refer to “How do I create a new entry in a format?” in FAQs: Working with Formats in the Workflows Java client online Help.

(Maintenance Group Reports)

Corrections

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

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

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

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

SirsiDynix Symphony Administrator Notes

Because of the Days Old field size change for this report, if this report was scheduled to run periodically, the administrator will need to modify the scheduled report and modify the Days Old field to an appropriate value.

(Maintenance Group Reports)
SIP2/NCIP Servers

General

Corrections

NCIP Server Was Missing Checkout Item Override

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

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

SirsiDynix Symphony Administrator Notes

The NCIP settings file has a new element NoHoldsOverride for CheckOutItem message.

<CheckOutItemMsgDefaults>
<NoHoldsOverride/>
</CheckOutItemMsgDefaults>

(UNI-13019)
System Configuration

Access Control Configuration

Enhancements

New Available Hold Block Override Added to Operator Policy

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

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

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

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

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

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

SirsiDynix Symphony Administrator Notes

During the upgrade, the Operator policy wizard will be updated with the Available Hold Block Override. Administrators will need to review the Operator policies on their systems to determine which policies should include this new override.

(UNI-14792)
Utilities

General

Enhancements

Incremental Backups Option Added to the Backup Utility

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

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

SirsiDynix Symphony Administrator Notes

The SirsiDynix Symphony backup utility has been enhanced with an option to create incremental backups. The incremental backup option is available in the SirsiDynix Symphony backup utility only when the delivered configuration file is copied and renamed to backup.cfg in the Unicorn/Custom directory. The backup.cfg configuration file also includes additional options to define the directories to be backed up, the backup utility to be used, and the files that are to be excluded from the backup.

Enabling the Incremental Backup Option

SirsiDynix delivers a configuration template file named backup.cfg.deliv in the Unicorn/Custom directory. To enable the incremental backup option, copy the backup.cfg.deliv file to a new file named backup.cfg in the Unicorn/Custom directory.

Caution: SirsiDynix recommends copying the backup.cfg.deliv file and renaming the copied file to backup.cfg to keep the original delivered configuration template file in case the copied file becomes corrupted or lost.

Note: If the backup.cfg file is not saved in the correct directory using the exact name of backup.cfg, the SirsiDynix Symphony backup utility functions as it did in previous versions of Unicorn, and the incremental backup option does not display as a selection option.

The backup.cfg file must be modified to specify the programs to be used for the archive and block programs, the files to back up, and the exclude file filter. When the backup.cfg file is configured and saved in the Unicorn/Custom direc-
tory, the incremental backup option displays in the SirsiDynix Symphony backup utility.

The remaining sections of this release note show a sample of the configuration file, and explain the modifications that can be made to the file.

**Sample of the Delivered Backup Configuration File**

The following text shows an excerpt of the delivered backup.cfg.deliv file.

```plaintext
### PARTITIONS SECTION ###
# path may contain multiple paths, space delimited
# Ex: 'path' => '/s /t /opt'
$partition{'unicorn'} =
   {'path' => '/s/sirsi/Unicorn /export/home/oracle',
    'sed_exclude_file' => '/s/sirsi/Unicorn/Custom/unicorn.excl'};

### DEVICES SECTION ###
# Uses $PATH env : arc_writer => 'tar -cvf -'
# Uses explicit tar program : arc_writer => '/opt/gnu/bin/tar -cvf -'
#
# If block_* entries exist, tar output is piped to/from the
# block_* command given
#
# The >>>FILELIST<<< placeholder in the arc_writer is replaced with the
# results of find on the paths specified after it's filtered through the
# sed program using the 'sed_exclude_file' as a sed script file.
#
# The >>>MEDIACNT<<< placeholder in the block_reader is replaced with the
# user input selection of "number of tapes".
#
# valid keys:
#   arc_reader    "archive read command and args"
#   arc_writer    "archive write command and args"
#   arc_toc       "archive toc command and args"
#   block_reader  "block read command and args"
#   block_writer  "block write command and args"

$device{'tape-4mm'} =
   {'arc_reader' => 'tar -xvf -',
    'arc_writer' => 'tar -T >>>FILELIST<<< -cvf -',
    'arc_toc' => 'tar -tpf -',
    'block_writer' => 'tapeio -w -b50 -s1953000 -d/dev/rmt0',
    'block_reader' =>
       'tapeio -n >>>MEDIACNT<<< -r -b50 -s1953000 -d/dev/rmt0'};
```

Refer to this sample file for the remaining sections of this release note.

**Modifying the Configuration File to Specify Backup Paths and an Excluded File Filter**

The PARTITIONS section of the backup.cfg file is used to specify what directory paths are to be backed up, and which files are to be excluded from backups.

The path variable defines the directory paths that are to be backed up. The path variable may contain multiple paths that are delimited by spaces.
The `sed_exclude_file` variable specifies the full pathname of the exclude file filter that uses standard sed syntax to specify which files and directories are to be excluded from the backup.

**Modifying the Configuration File to Specify Programs to Use for Archiving and Blocking**

The `DEVICES` section of the `backup.cfg` file is used to specify the programs used for the archive and block programs. For archiving, `tar` is used by default. For blocking, `tapeio` is used by default. By modifying the `arc_reader`, `arc_writer`, `arc_toc`, `block_writer`, and `block_reader` variables, other programs, such as `cpio` and `dd`, may be used.

**Testing the Modified Configuration File**

After the `backup.cfg` file has been modified, save the changes to the file.

**WARNING:** SirsiDynix strongly recommends saving a copy of the modified `backup.cfg` file to some location other than the backup media. In the event of an emergency recovery, the system administrator must know which utilities and options were used to make the backup. The modified `backup.cfg` file may be printed to keep a physical copy as well as storing the file electronically in a separate location.

The backup configuration file is written using Perl, so Perl can check the syntax of any modifications that have been made to the file using the following command.

```
perl -c backup.cfg
```

If the modified file's syntax is correct, the following message displays.

```
backup.cfg syntax OK
```

If the modified file's syntax is not correct, Perl displays messages to indicate where the incorrect syntax is in the file.

(GL 3.2.1.284, UNI-5318)

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

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

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

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

In previous versions of Unicorn and SirsiDynix Symphony, scripts (such as the `stop_oracle` and `start_oracle` scripts in the Unicorn/Bin directory) could be used to stop and start an Oracle system. The third field of the Unicorn/Config/oracle-logon field determined if an Oracle system could be stopped and started by a script. If the third field contained a value, the Oracle system was assumed to be a remote Oracle system that could not be stopped and started. If the third field was blank, the Oracle system was assumed to be a local Oracle system, and the specified command or script could be used to stop and start Oracle. However, some Oracle configurations could require the Oracle listener to be used in some cases for connections, even when the Oracle system was local. In those cases, utilities such as the SirsiDynix Symphony Backup utility could not run properly since the Oracle listener would have to be used to connect to the Oracle listener.

To address the situation that could be presented by Oracle configurations, two new SirsiDynix Symphony environment variables have been added.

- `SIRSI_ORASTOPCMD` specifies the commands that are required to stop Oracle and the Oracle listener.
- `SIRSI_ORASTARTCMD` specifies the commands that are required to start Oracle and the Oracle listener.

If the variables are set, the specified commands are used to stop and start Oracle. If the variables are not set, the `start_oracle` and `stop_oracle` scripts in the Unicorn/Bin directory are used to stop and start Oracle.

**Note:** If the library does not want to stop and start Oracle from scripts, the `SIRSI_ORASTOPCMD` and `SIRSI_ORASTARTCMD` environment variables can be set to display a message or the contents of a text file.

The `SIRSI_ORASTOPCMD` and `SIRSI_ORASTARTCMD` environment variables can offer system administrators the option of stopping and starting Oracle on remote systems, if the system administrator has the skills to use advanced scripting and remote access that does not use passwords.

**Note:** On some Oracle systems, the `start_oracle` and `stop_oracle` scripts may not work after the system is upgraded to SirsiDynix Symphony 3.2.1. This issue will be addressed in a future release of SirsiDynix Symphony.

Example of Setting the Environment Variables to Commands

For example, the two environment variables are set as follows on a Linux system.

```
SIRSI_ORASTARTCMD=sudo -u oracle /home/oracle/unic_start.sh
SIRSI_ORASTOPCMD=sudo -u oracle /home/oracle/unic_stop.sh
```

In the examples above, the `sudo` program is used switch to the Oracle user, and run the `unic_start.sh` and `unic_stop.sh` scripts as the Oracle user. The `unic_start.sh` script will be used to start Oracle. The `unic_stop.sh` script will be used to stop Oracle.
Sample Scripts to Stop and Start Oracle Systems

The following example shows a script that uses the `sqlplus` command to stop an Oracle system.

```bash
#!/usr/bin/sh
ORACLE_HOME=/home/oracle/app/oracle/product/11.1.0/db_1
ORACLE_SID=unic
PATH=:${ORACLE_HOME}/bin:${PATH}:
LD_LIBRARY_PATH=:${ORACLE_HOME}/lib:
export ORACLE_HOME ORACLE_SID PATH LD_LIBRARY_PATH
sqlplus -s "/ as sysdba" <<EOS
shutdown immediate
EOS
lsnrctl stop
```

The following example shows a script that uses the `sqlplus` command to start an Oracle system.

```bash
#!/usr/bin/sh
ORACLE_HOME=/home/oracle/app/oracle/product/11.1.0/db_1
ORACLE_SID=unic
PATH=:${ORACLE_HOME}/bin:${PATH}:
LD_LIBRARY_PATH=:${ORACLE_HOME}/lib:
export ORACLE_HOME ORACLE_SID PATH LD_LIBRARY_PATH
sqlplus -s "/ as sysdba" <<EOS
startup
EOS
lsnrctl start
```

Example of Displaying a Message Instead of Stopping and Starting Oracle Systems from a Script

If the library does not want to stop and start Oracle from scripts, the `SIRSI_ORASTOPCMD` and `SIRSI_ORASTARTCMD` environment variables can be set to display a message. This example shows the `SIRSI_ORASTARTCMD` environment variable being set to display a message instead of starting Oracle.

```bash
export SIRSI_ORASTARTCMD="echo '--- The library does not allow Oracle to be run here. ---';echo"
```

```bash
> oracleadmin run noprompt
```

```
Attempting to startup Oracle
Oracle version is 11.
Using SIRSI_ORASTARTCMD env variable
--- The library does not allow Oracle to be run here. ---
>
```

Example of Displaying the Contents of a Text File Instead of Stopping and Starting Oracle Systems from a Script
If the library does not want to stop and start Oracle from scripts, the SIRSI_ORASTOPCMD and SIRSI_ORASTARTCMD environment variables can be set to display the contents of a text file. In this example, the administrator has created a text file named oramsg.txt in the /home/sysmessages directory. This file contains the following unformatted text, with a blank line before and after the text characters in the file.

********************************************************************
Our policy prohibits SirsiDynix Symphony direct access to
Oracle stop or start control. Contact the system administrator
for further explanation of this policy.
********************************************************************

The administrator sets the SIRSI_ORASTARTCMD environment variable to display the contents of the text file when a command or utility tries to start Oracle.

export SIRSI_ORASTARTCMD="cat /home/sysmessages/oramsg.txt"

> oracleadmin run noprompt

Attempting to startup Oracle

Oracle version is 11.

Using SIRSI_ORASTARTCMD env variable

********************************************************************
Our policy prohibits SirsiDynix Symphony direct access to
Oracle stop or start control. Contact the system administrator
for further explanation of this policy.
********************************************************************

>

(UNI-16101, UNI-11949)
General

Enhancements

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

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

SirsiDynix Symphony Administrator Notes

This requires setting the following variable on the operating system.

WEB2_REMOTE_USER=REMOTE_USER

This also requires setting the Web2 variable sso_ontheflylogin to T for true in the OPTIONS section of the Web2.set file.

Note: The following new Web2 file was added.

WEB2_HOME\cgi-bin\sso_onthefly.pl

The following HTML file was modified.

Login.html

(UNI-11539)