

Vubis Smart 2.4.2 Patch (2.4.2 build 4)

Release notes/Impact statement

December, 2007

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Changes at a glance:

AFO	Type of change	Impact for library	Related to	Page # & section release notes	Online Help reference
	111 display of item status (also in WebOpac)	finally possible to make proper distinction for items that are truly not meant to be lent		section 11.1, page 37	not applicable
	111 copying related records with Z39.50	use is optional	AFO 133 AFO 651	section 11.2, page 37	111.4.2.1 Copy a record
	137 new AFO for OpenVlacc loader (Belgium)	specific for the Belgian libraries that use a link with the National Catalogue (Vlacc)	AFO114 AFO 115 AFO 133 AFO 134 AFO 651	section 6, page 23	137
	141 automatic harvester for bibliographic records	use is optional	AFO 133 AFO 651	section 8, page 30	full online help update deferred to 2.5
157/158	various updates for indexing	improved monitoring of indexation processes		section 7, page 24	157 158
	252 preview print for specific user ID	use is optional		section 11.3, page 37	252.3 Select type of print job; look at temporary print file
	252 filter option	use is optional		section 11.3, page 37	252.3 Select type of print job; look at temporary print file
	271 option to define email texts for acquisitions messages	if ACQ message are sent via email, one can now define a message text and subject line		section 11.4, page 38	271.2.6 Email text
	321 improved way for adding Type of Holdings records	authority control for ToH records instead of free text additions	AFO 111	section 11.5, page 38	321.4.1 Add type of holdings to a subscription

367 new authority lists	related to improved way for adding ToH records	AFO 321	section 11.6.1, page 40	367.4 Serials authority lists 367.4.12 Authority list 4223 367.4.13 Authority list 4224
367 override password for deletion of receipt info	prevents accidental deletion of receipt info	AFO 311	section 11.6.2, page 40	367.10 Miscellaneous 311.3.4 Delete an issue
367 There is a new menu option for the Pattern Templates	allows for proper maintenance (add, delete, modify, copy) of templates for serials publication patterns		section 11.6.3, page 41	367.12 Pattern template codes
431 field focus for barcode replacement screen	parameter cannot be set interactively, needs to be determined on upgrade/installation		section 11.7, page 42	431.4.2 Replace barcode
482 detailed explanation of block type 13 ("Items returned too late")	better understanding of the impact of this block type	circulation AFO's WebOpac	section 11.8, page 44	482.15 Block borrowers
485 two new options have been added to the batch handling of acceptgiros	only applicable for the Dutch market		section 11.9, page 46	485.2.3 Batch handling of acceptgiro's
651 detailed explanation of flexible date formats	better understanding of the impact of various date format settings		section 4, page 8	651.13 System date formats
651 new reporting/viewing option in cataloguing permissions	only applicable if cataloguing permissions are used		section 12, page 51	651.14.3.2 View profiles per user
WebOpac Preferences	new options in templates for display of group elements and order of subfields	possibility to create better displays for full records	section 10, page 34	Templates 2. Elements

WebOpac Preferences	options / per profile - security when using Mozilla browser	only applicable if Mozilla browser is used	section 11.12, page 49	Options (Profile) 7.2 Miscellaneous options start screen
	various support for iDeal payments from WebOpac	possibility to let users pay various costs with iDeal from with user activities in the WebOpac	section 5, page 12	497.3 Financial groups 497.4 Financial groups for current location 497.6 Credit card payment options General information on credit card payments
	general updates to RSS functionality	only applicable if RSS is used	section 9.2, page 31	not applicable
	general new Z39.50 API's	only relevant if Z39.50 search & retrieval is used	section 11.11, page 48	not applicable

1. Introduction

The objectives of the Vubis Smart 2.4.2 patch are the following:

- ✓ Resolve known outstanding server defects that existed in version 2.4.2 or earlier versions of Vubis Smart;
- ✓ Resolve known outstanding client defects that existed in version 4.105 or earlier versions of the Vubis Smart client;
- ✓ Introduce a selection of smaller functional enhancements;

Technically the 2.4.2 patch is also referred to as 2.4.2.4 (2.4.2 build 4).

Please read the 2.4.2 patch upgrade instructions and documentation carefully prior to starting an upgrade to the Vubis Smart 2.4.2 patch.

Some notes on documentation

For most changes mentioned in this document, the online help has been updated accordingly. Exceptions are:

- An automatic harvester in AFO 141 (online help update for this is deferred to the next release);
- RSS feeds: no updates requires because the changes do not involve AFO's 653/654 nor the WebOpac Preferences;
- New Z39.50 API's: no updates requires because the changes do not involve any AFO's nor the WebOpac Preferences
- All fixes listed in the last chapter of this document (online help update for these is deferred to the next release).

2. Migration path to Vubis Smart 2.4.2 patch

Customers will obtain 2.4.2.4 through the usual upgrade process, including a test upgrade and, if required, data migration or manipulation, prior to implementation in a production environment. For more information about the upgrade schedule and training, please contact your local account representative.

The 2.4.2.4 release level may be applied from a base level of 2.4.1.15, 2.4.1.16 or 2.4.1.17 which will undergo data conversion for volume/serial based records. Customers migrating from 2.4.2.2 or 2.4.2.3 need not undergo data conversion but will receive the benefit of the updated routines and enhancements. **Please refer to the 2.4.2 upgrade document for information on upgrading to release 2.4.2.**

An upgrade to 2.4.2.4 does not require re-indexation of the system.

3. Client version compatibility

The minimal client build for this patch is 4.105.

The recommended version of the Vubis Smart client to run with server version 2.4.2.4 is client build 4.116 (which is made available together with patch 2.4.2.4).

Build 4.116 will also run under Windows Vista (See the “Running VubisSmart client under Windows Vista.doc” document for more details and limitations). This document is part of the upgrade package for client version 116.

4. Flexible date formats – support for regional date formats

4.1 Introduction

Flexible date formats were introduced with release 2.4.2. Below however is a more complete explanation of the impact of this feature.

The online help will be modified accordingly with the next round of documentation updates.

4.2 Functional description

General date entry, display and output (i.e. print or email) throughout Vubis Smart is now in the format defined by the client's workstation Operating System instead of using the previously fixed format of DD/MM/YY. This allows the handling of region specific date formats (i.e. MM/DD/YYYY) and to remain consistent with the workstation and its users.

The setting that determines the date format is different between the Vubis Smart Client environment and the Vubis Smart WebOpac environment.

Infor highly recommends that the year portion of the date format used by both the system settings and the various workstations is set to use the 4 digit year, as has been the general recommended practice in the Information Technologies industry since the year 2000.

Client

On each workstation, the Control Panel / Regional and Language options / Customise / Date will determine:

- Short date format (used for dates throughout the system such as due dates, transaction dates, report output dates etc.);
- Long date format (i.e. create/update date for Bibliographic records, \$\$DATUM for notices)

This means that the date format for output such as notices, invoices or orders to vendors is now controlled by settings on the various workstations.

Workstations within an organisation which are used for producing output will have to be checked for proper and consistent set up of date formats.

Impact:

Date display and entry may be different for each region and may be different from the previous fixed setting of Day/Month/Year throughout Vubis Smart.

For example,

Default German uses the format of DD.MM.YYYY (double digit Day and Month with dot separator) with the following results:



The screenshot shows a dialog box titled "Membership fee" with a blue header and a red close button. The dialog contains several input fields and buttons. The data is as follows:

Field	Value
Borrower category	NEW : New Patrons
Last Activity Date	21.09.2007
Expiry date	01.01.2008
Last renewal date	05.09.2007
Membership type	
Registration date	20.07.2004

Buttons: OK, Cancel, Help

Default English, United States uses the format of M/D/YYYY (single digit month and day) producing the following results:



The screenshot shows a dialog box titled "Membership fee" with a blue header and a red close button. The data is as follows:

Field	Value
Borrower category	NEW : New Patrons
Last Activity Date	9/21/2007
Expiry date	1/1/2008
Last renewal date	9/5/2007
Membership type	
Registration date	7/20/2004

Buttons: OK, Cancel, Help

Default setting for English (Australia) or French (Belgium) is in the format D/MM/YYYY using single digit day, double digit month with the following results:

Membership fee

Borrower category: NEW : New Patrons

Last Activity Date: 21/09/2007

Expiry date: 1/01/2008

Last renewal date: 5/09/2007

Membership type:

Registration date: 20/07/2004

OK
Cancel
Help

If labels have been added to the various notice output to indicate the date format, then these may need modification / review.

Example, Due Date field for Overdue Notices

Prior to 2.4.2, the date of September 30, 2007 would have produced the following Output

Due Date (DD/MM/YYYY): 30/09/07
VIDEO J BEAUTY : 39959003542262
Title: Beauty and the beast

For US sites whose default regional date setting is M/D/YY, this same notice will now produce the following output. Modification on the label (to M/D/YY) is required.

Due Date (DD/MM/YYYY): 9/30/07
VIDEO J BEAUTY : 39959003542262
Title: Beauty and the beast

Exceptions:

- (1) Some reporting structures such as the 47x series of statistics will still request input for dates in a particular structure and will not use the flexible date format.
- (2) AFO481 – Miscellaneous/ SIP2 Settings can be used to specify the expected date format for SIP2 devices.

Note

AFO 452 – The Date format for Overdue notes etc. is coming from the workstation.

WebOpac

Since a browser cannot access the settings in the Operating System, the date format to be used in the Vubis Smart WebOpac must be defined in the application. This is done in AFO651 – System date formats.

This AFO is used to set the entry and display date format for the WebOpac and the WebOpac only.

If it is not defined, the default date format of DD/MM/YY remains in effect.

5. iDEAL payments

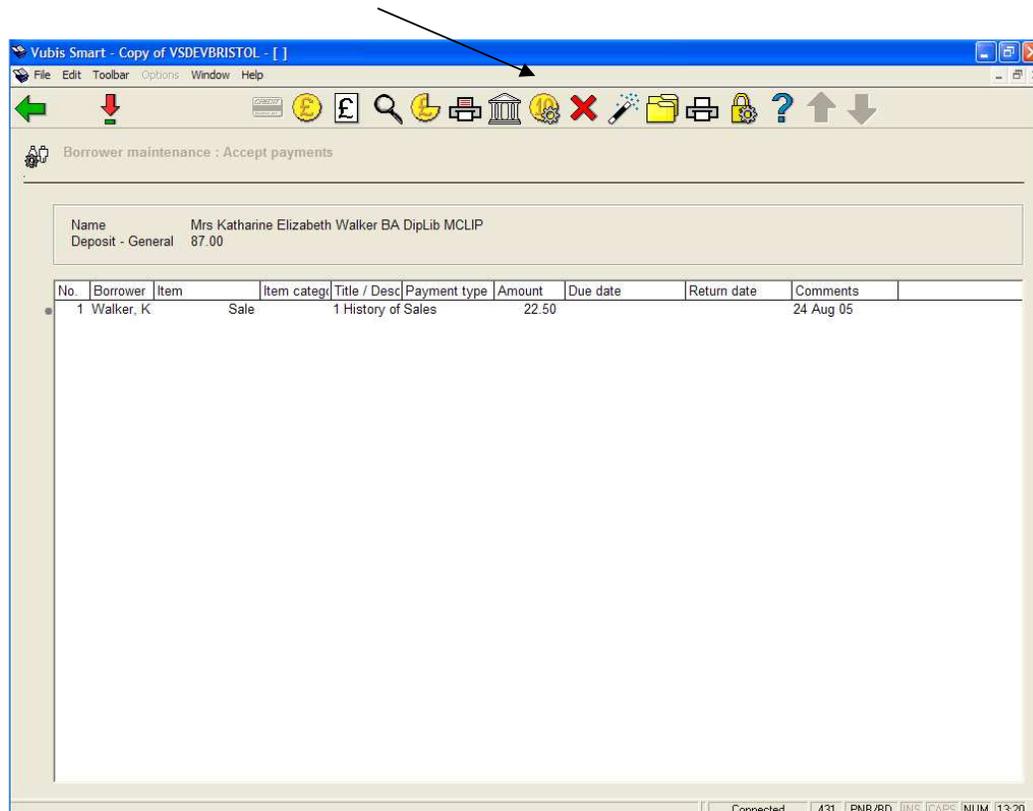
5.1 Introduction

Specifically for the Dutch market an interface has been implemented to allow for payments via iDEAL.

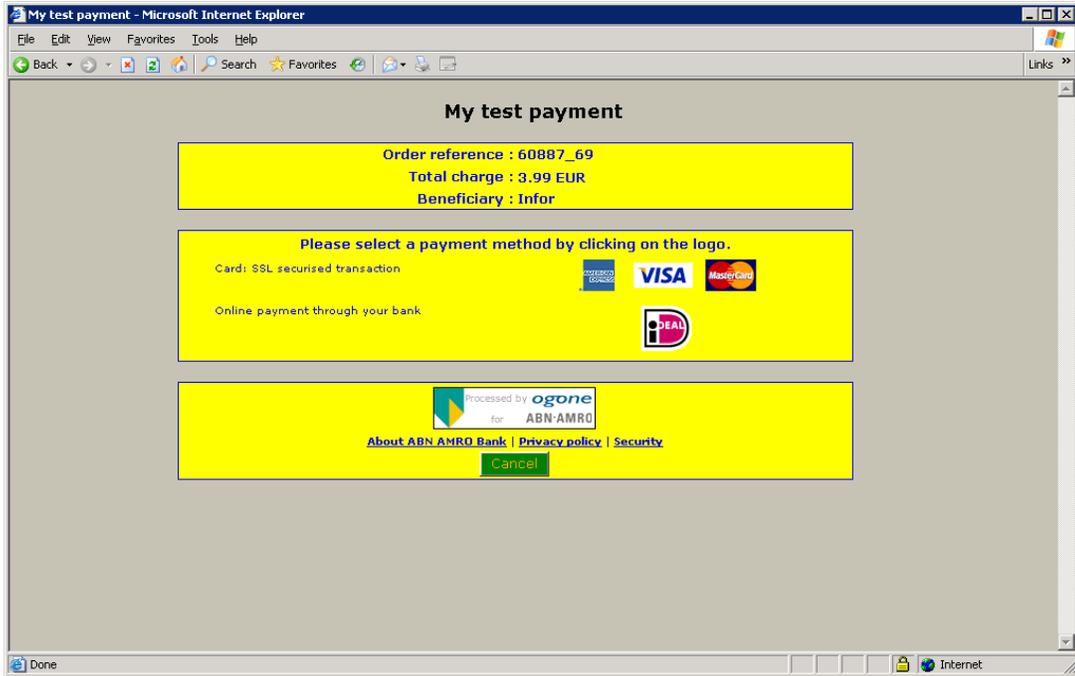
The “iDEAL” implementation is similar to and extends the implementation of card payments using the “BucksNet” service provide in the UK. This behaves in a very similar way, although specific technical details differ.

When a borrower wishes to pay by credit card, the system identifies the total amounts owing, and simply passes this information to the iDEAL system with sufficient information to identify the library, payer and so on.

Clicking on the “Credit/Debit card payment” command icon (from within the online or

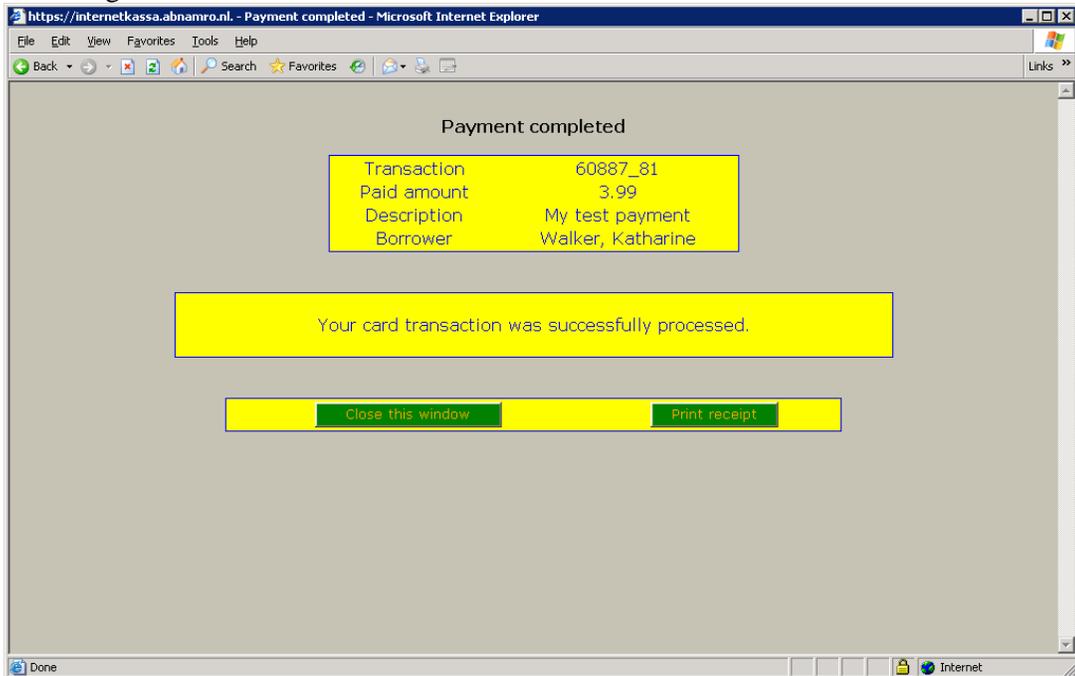


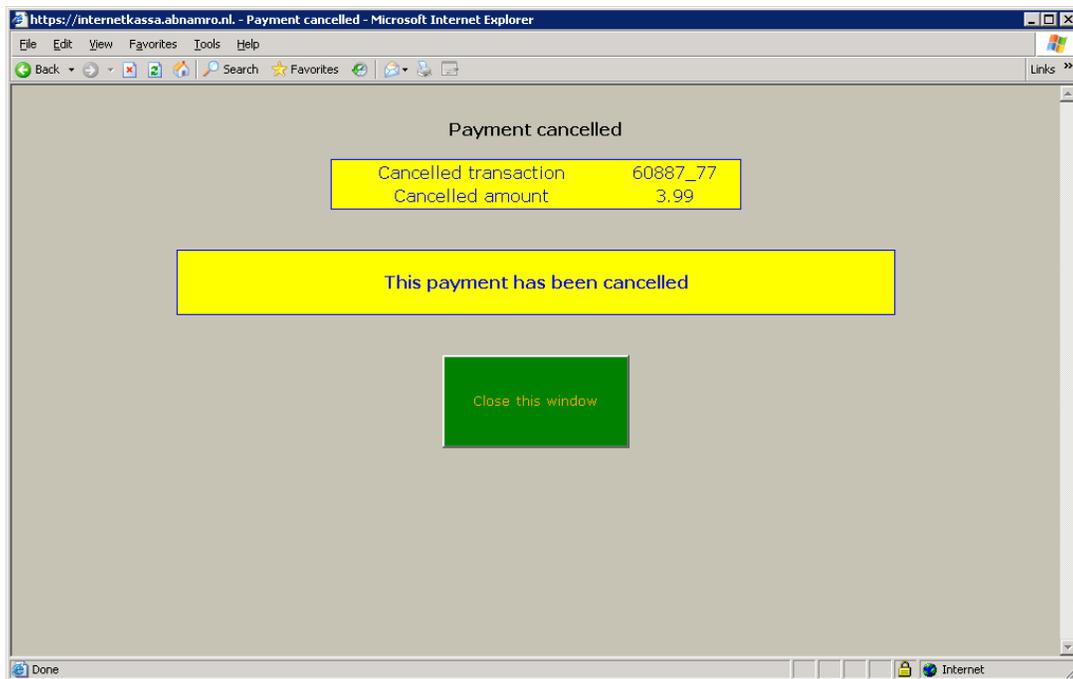
WebOpac), opens up a Web session with a summary of the payment details, requesting confirmation of the payment.



This may have various options depending on how it is configured.

When the payment is accepted, or otherwise, the user is returned to one of the following screens.





It is worth noting that the screen colours and fonts can be configured by the library to match the “look and feel” of their Websites (see the configuration section below). (And in fact many service providers will allow very considerable custom configuration but this would have to be negotiated between the library and the service provider).

5.2 Configuration

Charges by location

In order to implement the iDEAL payment system, it is necessary to configure the settings for Charges By Location (AFO497) and the Financial Groups settings, also from AFO497.

In brief, it is possible that payments inside the library system should be made to more than one organisation (e.g. in a consortia environment). In order that the money paid through iDEAL gets directed to the right organisation, it would be necessary to setup several different accounts on the iDEAL system (for different banks). When a payment for one or more charges is being made, the system needs to work out which account should be used when connecting to iDEAL, so it is necessary to know to which organisation the money for any given charge really belongs.

Specific parameter settings

Under the Credit card payments options section a new field has been added to the input form for Credit card limits and options.

The additional option added to this screen is “Service provider” which is a combo box with one of the following options

- None
- BucksNet
- iDEAL

This is a SYSTEM wide setting. For the system as a whole only one payment service provider may be selected- if there **are** separate organisations (accounts) then they may have separate accounts BUT they must all use the same service provider. It **would** be possible to change from one service provider to another in the lifetime of the system (but would be for all users, and of course there are some practical considerations when a service provider is changed, not just for Vubis Smart).

The Payment system in use may be changed from “none” to one of the others but may NOT be changed once set. This can, of course, be reset by Infor support.

Financial group parameters

When “iDEAL” is chosen as the service provider, the input form for financial group details will have different details than for instance for BucksNet:

@FinancialGroupiDEAL - Financial groups (iDEAL)

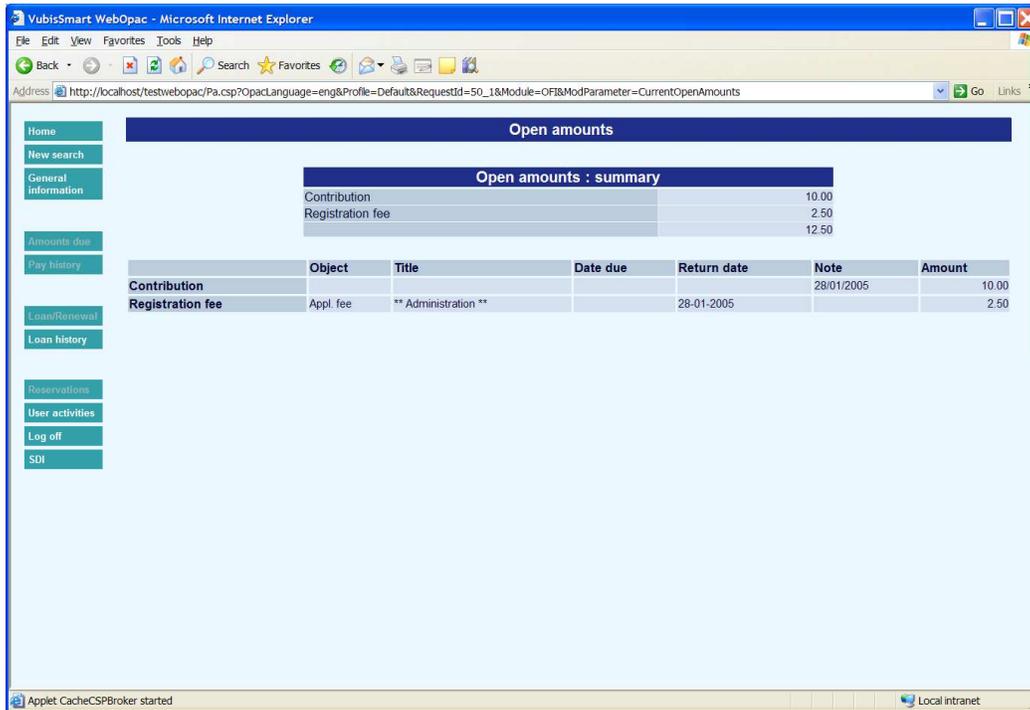
Financial group code	MainiDEAL account
Description (English)	Main
Description (Dutch)	Main
Description (French)	Main
<hr/>	
Connection URL	http://localhost/vsdewobristol/CSP/IDEALconnect.csp
URL of service provider	https://internetkassa.abnamro.nl/ncol/test/orderstandard.c
Internet kassa PSPid	InforDev
Currency code	EUR
SHA-1 signature	*****
Return SHA-1 signature	
Main background colour	RGB:c6c3b5
Main text colour	black
Table background colour	yellow
Table text colour	blue
Button background colour	green
Button text colour	orange
Font (e.g. Arial)	
Web page wording	My test payment

OK
Cancel
Help



Allowing Payments from the WebOpac

An additional option in the User Activities set-up in the WebOpac preferences allows the ability to pay by credit card to be turned on or off by Web “profile”.

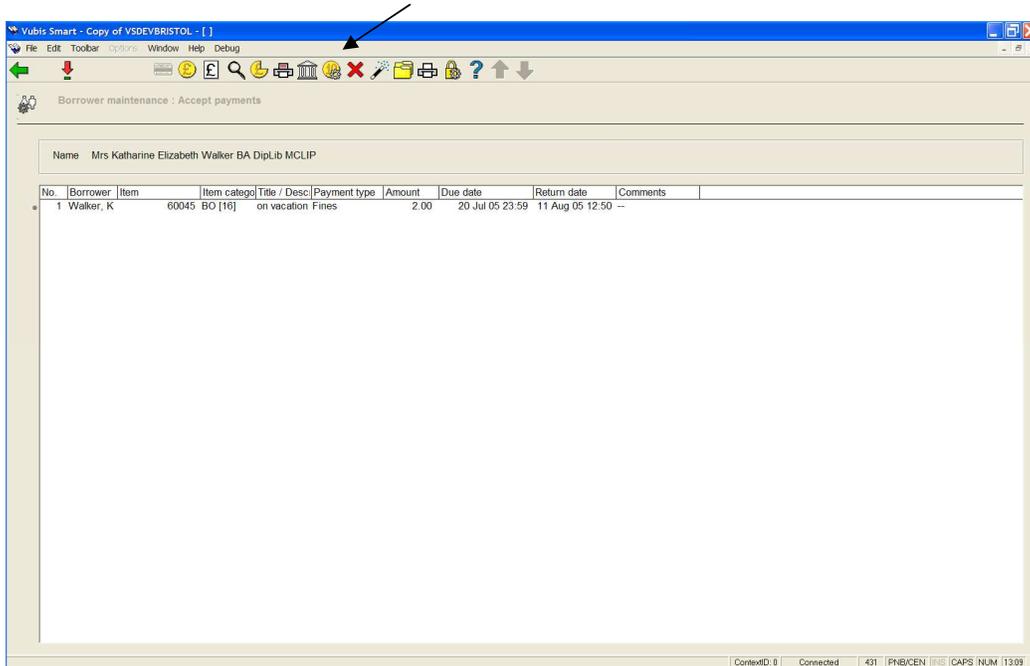


Credit card payment may be initiated from the “User Activities / My account” screen - an example of which is shown above. An additional “Credit Card payments” button will be displayed if the Credit Card Payment Options / In Use setting is “on”, and the various criteria are suitable (for example, that the total to be paid is more than the minimum specified).

Selection of this option will take the user to the service provider screens.

Payment from Online System

The option to pay by credit card is offered from AFO414/431 – Accept payment screen. An additional “credit card” icon may be offered.



The credit card option is only active if the total amount payable is greater than the minimum amount setting, configured according to the Credit card.

The system will then ask who is actually going to make the payment. Suppose, for example, that a borrower returns several overdue items on behalf of their family. In this case, the Accept payments screen may show several items borrowed by several different borrowers. This is necessary to pass some details across to the service provider, so that an appropriate receipt may be printed.

Miscellaneous payments and membership fees

The same workflow also applies when making a “Miscellaneous payment” or paying “Membership fees”. Whether this is allowed is configured in AFO494 – the setting is specific to each location.

Borrower’s financial and transaction history

A unique transaction id is allocated to any credit card payment. The “Borrower’s financial history” list (and details screen) as shown below is updated to display this unique reference number.

Note that there are five types of transactions:

Credit card payment	indicates that this user has started to make a credit card payment. As pointed out above – it should be noted that this is logged against the card holder (if registered with the library)
Credit card pay submitted	indicates that the processing against the provider started
Credit card pay accepted OK.	indicates that the payment completed
Credit card pay failed	indicates that the payment failed
CardHolder payment failed	logged against the cardholder.

Online Displays during payment processing

During this process, the outstanding charges are marked as “provisionally paid”. Since a separate browser window is opened, it is feasible that the borrower data is accessed separately by other online or WebOpac sessions.

In this case, all payment options are “frozen” and a message is displayed for each borrower shown on the Accept payments screen and also in the “Open amounts summary” screen in the WebOpac.



This may also occur if, for example, the processing against the service provider was interrupted, for example by an Internet problem etc. Because of the security implications, this can only be “untangled” by a separate function.

Successful payment

The success of a payment is returned by the service provider opening a Vubis Smart Web page, as shown earlier on in this document.

The Web page carries out two functions – firstly an acknowledgement by Vubis Smart. The wording may be defined by the library- but would something to the effect that

Your online payment has been successfully processed.

with a “Close window” button to close the window.

In addition, the Web page processing marks all the relevant transactions as fully paid.

Failure

A failure Web page may also be opened by the service provider to indicate that there was a problem.

In this case, a browser screen is opened to indicate failure. A reason for the failure may be returned and will be displayed in the screen.

The marking of payments as provisionally paid is “undone” by the system.

Cancellation

Similarly if the borrower cancelled the payment, then a Web page is opened to confirm this to the user, and behind the scenes the system “undoes” the potential payments.

Reconciliation reporting

Vubis Smart will allow the generation of a reconciliation report in more or less the same format as that of the service provider, such that the two reports can be matched to cross check what Vubis Smart “thought” had happened with what is recorded on the service provider’s system.

An initial selection screen is offered

@CreditCardRptSelection - Card transaction reporting

Service provider: iDEAL

From order date: 14/09/2007

To order date: 14/09/2007

From transaction id: [Empty]

To transaction id: [Empty]

From Pay ID: [Empty]

To Pay ID: [Empty]

Valid

Cancelled or failed

Locked

Manually repaired

Manually failed

Save settings

OK

Cancel

Help

Defaults

And this leads to a screen which can be used to match the service provider report.

Translations for the WebOPAC and staff settings

Although, formally, the screens are initiated from the WebOpac, they are shared between staff and WebOpac payment options. The specific wording as supplied with Vubis Smart is the same for both contexts.

However, the configuration with the service provider allows for many options, so the supplied wording is fairly general. The following screens allow the library to change the supplied wording AND to add wording for any OPAC languages configured. Since these are related to both staff and OPAC functions, the maintenance of this is handled from the main online.

This can be specific to each financial group (i.e. each account with the service provider). The “languages” icon is used to select this. Selection of a language shows the current texts in use. To change a text the library may select a line and key an alternative. The system supplied message is retained and shown as a reminder of what the message is dealing with.

CheckList for configuration settings

The following table summarises the system settings which need to be looked at if card payments are to be used.

- a. AFO497 Credit card limits and options
- b. AFO497 Charges by location need to be configured for each type of charge
- c. AFO497 Financial groups

Note also consideration needs to be given to setting up the multilingual or textual messages most relevant to the library’s configuration in the “Language settings” option for each financial group.

- d. AFO497 Financial group by location A financial group must be assigned for each location
- e. WebOpac Preferences – User activities Check option "Borrower can use credit/debit cards for payments"

6. OpenVlacc loader – new AFO 137

6.1 Introduction

The central Vlacc catalogue in Belgium allows their customers to download records through Z39.50 to the customer's local system. The customer has to install a PERL script that is provided by the Vlacc organisation – this script will retrieve "signal" files from the Vlacc system that indicate which records have been added or modified. Only records for which the customer has a shelfmark link will be notified. This download facility is called "OpenVlacc".

For Vubis Smart a specific loader has been developed that will automatically process the signal files that have been retrieved by the PERL script. This functionality is license controlled.

An important feature of the loader is that related records can be retrieved automatically, even when they do not appear in the signal files.

Note: Although the implementation is different in many aspects, the main principle is similar to the OUF loader that is used by various customers in the Netherlands for automatic download of records from the Pica GGC database.

6.2 Functional description

The OpenVlacc loader is controlled through AFO 137 – this AFO displays a menu with the following options:

- Start loader
- Stop loader
- Setup

The loader is started as a permanent background process, using the standard Vubis Smart functionality for the starting of such processes. When it is stopped the process will create a report that can be viewed in AFO 642.

The loader stores all logging and report information in the global ^DataVlacc.

The parameters are defined using the third menu option.

7. Indexing – AFO 157 / 158

7.1 Introduction

Various modifications have been made to indexation in AFO 157 and 158. The important ones are described below.

7.2 Input form indexing profile

There was one form to add/modify a profile and there was one form to execute a form. On the execute form there were parameters that should be included in the add/modify form, and the other way around.

So it is better to make both forms identical. This has the advantage that all parameters used during execution can be the saved in the profile.

This form exists in three versions:

- One for indexing the bibliographic indexes when partial indexing is installed:
`^SysDD("Auth", "Indexes", "General", "*", "GeneralProperties", "PartialIndexes", "*")=1`
- One for indexing the bibliographic indexes without partial indexing being installed. This form does not have the option "Rebuild Partial Index information before indexing?"
- One for indexing the authority indexes (AFO 158). This form does not have the option "Rebuild Partial Index information before indexing?" nor the option "Index also authorities?"

One major difference with the old form for executing a profile, is that the option "Update type", with the choice between "Add" and "Delete", is replaced by a simple check box "Delete from indexes".

7.3 View Detailed Information from Index Processing Log

A new option ("magnifying glass" icon) is available on the AFO 157 / AFO 158 screens, which provides a summary log for all executed indexing profiles via AFO 157 or AFO 158 respectively.

Example:

No.	Start time	Index profile	Status	End time
1	14 Sep 2005 14:08:10	everything	Busy	-
2	14 Sep 2005 14:06:17	index4	Finished	14 Sep 2005 14:06:19
3	14 Sep 2005 11:43:52	db2	Stopped	14 Sep 2005 11:45:18
4	19 Aug 2005 11:07:53	db2	Finished	19 Aug 2005 11:09:34
5	19 Aug 2005 11:05:25	laaa	Finished	19 Aug 2005 11:05:58
6	19 Aug 2005 10:54:43	allwords	Not started	-
7	19 Aug 2005 10:07:57	db2	Finished	19 Aug 2005 10:08:08
8	19 Aug 2005 10:06:37	db2	Finished	19 Aug 2005 10:06:47
9	19 Aug 2005 10:05:26	db2	Finished	19 Aug 2005 10:05:38
10	19 Aug 2005 10:04:39	db2	Finished	19 Aug 2005 10:04:56
11	19 Aug 2005 09:39:29	db2	Not started	-
12	19 Aug 2005 09:30:53	Fratest	Finished	19 Aug 2005 09:31:12
13	19 Aug 2005 09:30:00	Fratest	Not started	-
14	20 Jun 2005 10:49:10	index4	Finished	20 Jun 2005 10:49:17
15	19 May 2005 15:19:29	everything	Finished	19 May 2005 15:23:58
16	19 May 2005 15:18:48	Index19FullTitleVubisSmart	Finished	19 May 2005 15:18:59
17	13 May 2005 16:36:45	pubdate	Finished	13 May 2005 16:36:57
18	13 May 2005 16:30:32	pubdate	Finished	13 May 2005 16:30:44
19	13 May 2005 16:28:21	pubdate	Stopped	13 May 2005 16:28:23
20	13 May 2005 16:27:02	pubdate	Finished	13 May 2005 16:27:16
21	13 May 2005 16:26:35	pubdate	Finished	13 May 2005 16:26:36
22	13 May 2005 16:25:54	pubdate	Finished	13 May 2005 16:25:57
23	13 May 2005 16:23:30	pubdate	Finished	13 May 2005 16:23:31
24	13 May 2005 16:14:37	pubdate	Stopped	13 May 2005 16:14:39
25	13 May 2005 16:08:46	pubdate	Stopped	13 May 2005 16:08:48

The display is in inverse chronological order of execution.
The status can be "Busy", "Finished", "Not started" or "Stopped".

Select a line to display more detailed information. Example:

```

Index report
Profile: Ryear2
Started on 21 Jun 2007 at 20:20:24
Finished on 21 Jun 2007 at 20:20:33

The indexing was started by user ADMIN (System Administrator)
The following indexes are treated:
  Database: 2 (Vubis Smart database )
  Index: Ryear2 (Restriction on year 2)

ONLY the basic indexes are indexed, NOT the permuted indexes
Indexing in namespace: VUBIS
After indexing, the indexes are moved to the search namespace
Stop indexing after how many errors: 100

The following indexes have been built:
Index Ryear2 (Database 2) in 5 seconds

There are no errors
    
```

You can also delete a line from the display and the history log. This does not influence the indexing itself.

7.4 Partial indexes

With the new bitmap structure, there is now an index Partial. If the user chooses the option "Rebuild Partial Index information before indexing?", then this Partial should always be rebuild too.

There are two possible error situations:

- When indexing a range of indexes and the user chooses the option "Rebuild Partial Index information before indexing?", then the index "Partial" should be in the list of indexes to be rebuild.

- When indexing a complete database and the user chooses the option "Rebuild Partial Index information before indexing?", then the index "Partial" should be in here:

```
^SysDD("Bib", "Indexes", "IndexDefs", "Partial", "GeneralProperties",  
"Databases", "*")=[list of databases]
```

7.4.1 Restart partial indexes

So far, when the indexing was interrupted during the build of the partial indexes, restart was not possible: In case of restart, the program started from the beginning. From now on it is also possible to restart the partial indexes.

7.4.2 Restart after a general fatal error

So far, when the indexing was interrupted due to a general fatal error, restart was not possible: In case of restart, the program started from the beginning.

From now on it is also possible to continue the indexing.

One of the reasons for a general fatal error is an error during the initialisation of the format of the database. In that case, the indexing starts again with the previous index.

7.5 Multi-database indexes & bitmap indexes

In the old index structure there was a temporary solution for multi-database indexes. (See below.) A multi-database index that was used for example in database 2, 4 and 6 has this structure:

```
^IndexBib("2,4,6","Fratest",1,"*", "R","THE CHILD NUMBER 1  
.2.1128")=1~dut^^^58857^1^^~1^200.001.*|$a.001.*,4
```

Now with the bitmap indexes, it was thought that a better solution was possible, because in the bitmap structure there is a node for the database ID.

In the bitmap index structure it looks like this:

```
^BitIndexBib("Fratest",1,"*",2,0)=<<$C(147,1)_"ú"_$C(0)_"^"_$C(4)_"g"_$C(4,1  
41,4,3,6)_"|"_$C(6)_"a"_$C(6)_"E"_$C(6,10,7)_"Å"_$C(7)_"i"_$C(7)>>  
^BitIndexBib("Fratest",1,"*",4,0)=<<$C(151,1)_"w"_$C(0)_"d"_$C(0)_"o"_$C(2)>  
>  
^BitIndexBib("Fratest",1,"*",6,0)=<<$C(149,1,10,0)_"J"_$C(0)>>
```

However, the permuted indexes don't have a database:

```
^IndexCycleBib("Titlebib"," CENTURY\EIGHTEENTH")=EIGHTEENTH CENTURY  
^IndexCycleBib("Titlebib"," COLOURED\CREAM")=CREAM COLOURED
```

So finally we came up with the following solution.

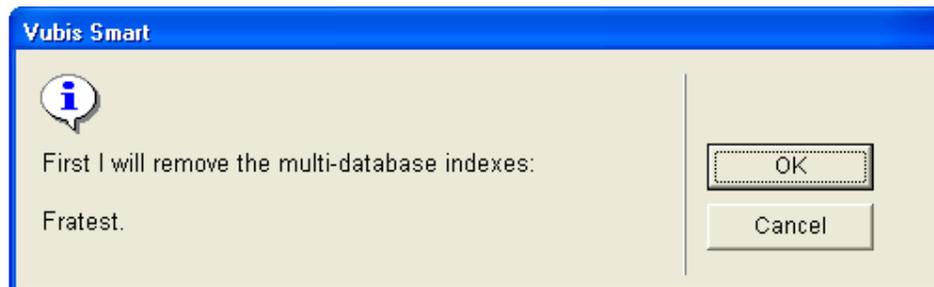
In the indexing there are two situations:

- Indexing one or more indexes
- Indexing a whole database

Indexing one or more indexes

Old situation

If one or more indexes are indexed, there was a subroutine that checked for multi-database indexes and deleted them before the real indexing started:



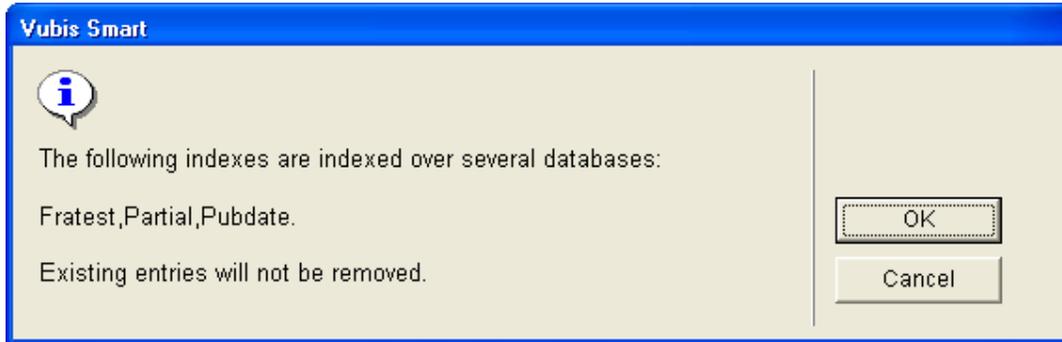
New situation

This check is now obsolete because index structure simplified the removal of the index.

Indexing a whole database

Old situation

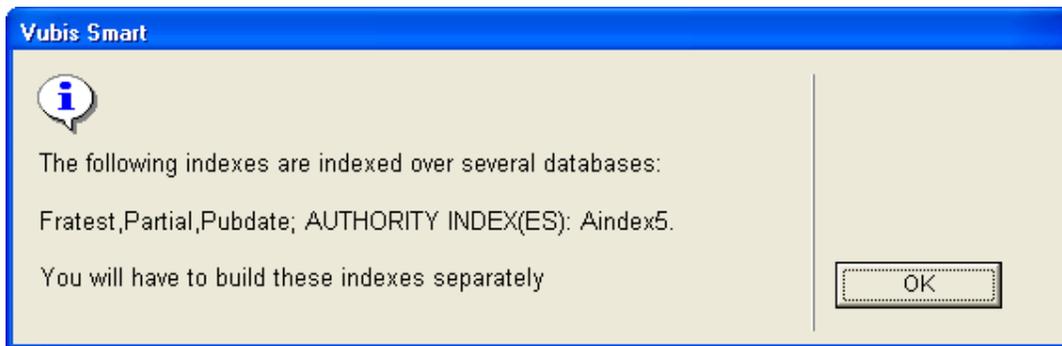
If a whole database is indexed and this database contains indexes that are used in another database, the following message is displayed:



This however was not a very good solution because the indexes can point to non existing records.

New situation

The solution now is that these multi-database indexes are **not** indexed when indexing a whole database.



7.6 Miscellaneous

7.6.1 Default namespace

Old situation

When making a new profile it defaults to the first in the list. It should default to [Default setting].

When modifying a profile there is also no option [Default setting] available. Only the execute function has the setting available.

How it should be:

[Default setting] should be a available everywhere and it should be the default when adding a new profile.

Solution:

This is solved because we now always use the same form for Add and Modify as is used for Execute.

7.6.2 Protection against corrupt info

Modification in MONINDEXextractVariables^JIndexInteractiveInfo to prevent crash when information is missing

7.6.3 Restart check

In the old situation, the whole global ^MONINDEX is scanned to see if the indexing of one of the indexes that is now proposed for indexing did not finish successfully.

This is modified to check only the last execution of each of the profiles.

7.6.4 Textual modifications

All references to MONINDEX have disappeared because there is no need anymore for the user to look in MONINDEX.

8. An automatic harvester for bibliographic records

8.1 Introduction

Vubis Smart now supports an automatic harvester for bibliographic records, using Z39.50 as the harvesting protocol.

The 'harvester' automates the copy cataloguing workflow which allows you to use the Z3950 cataloguing profiles to search Z3950 targets and allow the merge of data into your original cataloguing records.

8.2 General description of the workflow

A standard import profile is defined in AFO133 which specifies the Z3950 input record type; any conversions if required, match and merge criteria, destination database and template, etc.

This import profile is specified on the definition for the Z3950 Database. A Z3950 target is created for the copy partners, and a cataloguing profile is created to link the original record key to the copy source. See AFO651 / Z3950 Parameters / Target Profiles / Cataloguing Updates for details.

A selection profile is created in AFO141 to retrieve a list of bibliographic records. Two fields have been added to the input form for creating a selection profile and are applicable only to the bibliographic application : 'Update type' and 'Update profile'.

- update type – this is a dropdown list that only contains, for the time being, Z39.50 - Update bibliographic records
- update profile – this is a dropdown list of valid Z39.50 cataloguing update profiles

The selection profile can be executed either against a predefined savelist or may be used to create a new savelist. The system will loop through the resulting savelist and process each bibliographic record as follows:

#1 – A Z39.50 search will be started using the distinctive search criteria within the cataloguing profile selected. This could be EAN, ISSN, ISBN or similar distinctive search criteria (key).

#2 – The request will generate one of three possible options:

- √ no record is returned – a message is written to a report file
- √ one record is returned – the bibliographic record is updated using the standard load and update tools
- √ more than one record is returned – a message is written to the report file

The error / processing reports can be viewed using the standard report capabilities in AFO 642 in a standard txt format.

9. RSS modifications

9.1 Introduction

Requirements were

1. Make daemon more reliable, using less CPU by use Cache class for XML.
2. More and prettier information in the WebOpac

9.2 Make RSS daemon more reliable

The RSS daemon is the program that runs constantly to check if there new feeds available for the active channels.

The previous version of the RSS daemon used often all the CPU.

This daemon has been partly rewritten. It now uses the so-called SAX parser, a standard for parsing XML. The result is that the RSS daemon program is much more stable and does not take much CPU anymore.

The SAX parser has a strict interpretation of XML. Channels that do not fully respect the rules cannot be used. Errors do especially occur with character set definitions: The default character set of XML is UTF-8, so when a channel sends a feed with a diacritic character in another character set than UTF-8 and this is not defined in the header, then this results in a SAX parser error and the data cannot be retrieved. (Often it is possible to display such a page correctly in an Internet Browser, because they are more tolerant than SAX.)

9.3 Modifications in the WebOpac

On the start page, the lay-out has changed.
The display is sorted on category.

The date displayed is the RSS "LastBuildDate" if available, or else the date that the last update was performed by the Vubis Smart RSS daemon.
The date format of RSS is RFC 822 or RFC 3339. Both dates are always in English:
This is converted to a local date in the local language.

Example:

```
<pubDate>Tue, 03 Jun 2003 09:39:21 GMT</pubDate>
```

Is translated to:

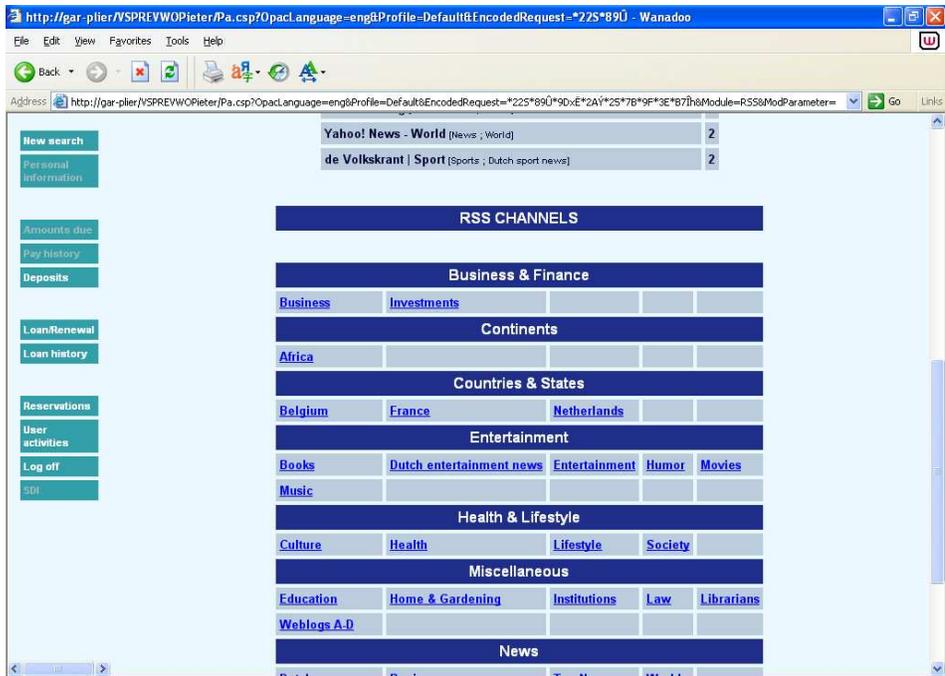
"Dinsdag, 3 juni 2003, 9:39" (Dutch)

"Tuesday, June 3, 2003, 9:39" (English language with North American date format)

"mardi, 3 juin 2003, 9:39" (French)



On the page where the user can modify his channels, the order of channels is now alphabetic. Also the category is displayed after the channel name, so that you can easily find it in the list of active categories.



10. Changes to display of records in WebOpac

Various enhancements have been made to the way bibliographic details are displayed in the WebOpac. We now have the ability to specify how to group elements (subfields) together for display including punctuation which are repeatable. And also the ability to display subfields in data order in the record.

Basically there is now a means to keep the specified order when there are multiple tags defined in the data element details for each template:

Order	
Respect order of subfields in record	<input type="checkbox"/>

If the tag in the record is stored as \$a1 \$c1 \$t1 \$a2 \$t2 \$a3 \$t3

If the field is OFF, then we display \$a1 \$a2 \$a3 \$c \$t1 \$t2

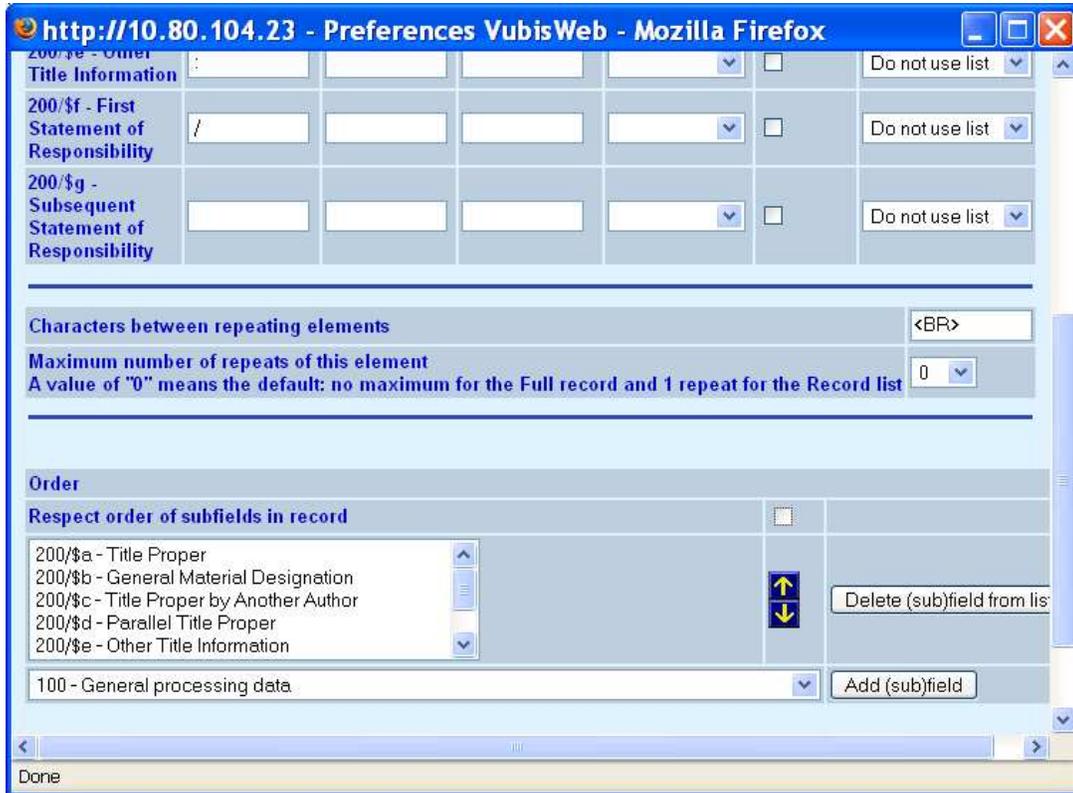
If the field is ON, we display \$a1 \$c1 \$t1 \$a2 \$t2 \$a3 \$t3

Example (data in the bibliographic record)

```

200 1# $a Le ¶roi et le bouffon ou the king and the miserable monkey
      $e Études sur le théâtre de Hugo de 1830 1839
      $f Anne Ubersfeld
200 1# $a Birmanie =
      $d images du bouddhisme vivant ;
      $a Burma =
      $d images of living buddism
      $a Burmese =
          $d More Images of life
  
```

The WebOpac template details for this field:



The result is the following where in the second tag all \$a are grouped and display, followed by the \$d (not respecting the order in the MARC record). This was the previous functionality, so the new feature is that the flag can be added to NOT resort on repeatable subfields in the MARC record and display as they are in the tag:

Title: Le roi et le bouffon ou the king and the misérable monkey : Études sur le théâtre de Hugo de 1830 1839 / Anne Ubersfeld
Birmanie =Burma = Burmese = = images du bouddhisme vivant ;
= images of living buddism
= More Images of life

11. Some smaller changes

11.1 AFO 111 and WebOpac – item status

We have fixed the problem where items that should be regarded as reference copies (its item category is in the list of non loanable categories) are displayed in the shelfmark summary in the WebOpac as "not available" instead of "not for loan".

11.2 AFO 111 - Copying related records with Z3950

Introduction

Sometimes Z3950 is used to retrieve records with the final purpose to copy them to the local database. This functionality already exists for a long time, but if the record has relations to other records, there is no way to automatically retrieve and load the related records as well.

Additional functionality has now been added to make this possible, through the use of LNK fields in conversion profiles.

Implementation

When the records are retrieved with a Z3950 search, an import conversion profile should be used in which the relations that should be retrieved in case of a copy are stored in LNK fields, very similar to how this is done for the standard loader. The only difference with the standard loader LNK fields is that the \$c does not contain the name of a local matching profile, but the name of a Z3950 update profile, while the \$d subfield holds the key for the Z3950 search.

For the definition of Z3950 update profiles see:

AFO651 -> Z3950 -> Z3950 Client: Target profiles -> Cataloguing profiles button.

For the definition of Z3950 import profiles see:

AFO651 -> Z3950 -> Z3950 Client: Databases and Database Groups -> database details.

The record should be copied using an import profile **without** conversion. The user can indicate if relations should be copied as well – in that case, when the record is copied the system will try to retrieve and load the related records with the information in the LNK fields. This is done by using the data harvester logic - no additional setup is required.

11.3 AFO 252 – Extra options

Option to print orders for specific ID

Select a type of print job from the overview screen. On the next screen there is an option "print". Choose this option to print details of all orders or of orders for a particular login ID. After choosing this option the system will show a list of users (staff) who entered the orders in the print file, followed by the number of orders they entered. A form is displayed where you can enter for which user (or all) you want to print lists. After you have made your choice the system will switch to the standard output procedure.

Restrictions

There is also an option "R(estrictions)" available on the screen for reviewing the contents of a specific print type file.

11.4 AFO 271 – New option to specify subject line for emails

There was no possibility to define a subject line or message text for orders sent via email. A new menu option has been added to AFO 271 – Print parameters control: Email texts. With this option you can define a subject line and message text for each type of printout (like regular order forms, first reminder, receipt notices etc) in relation to each type of recipient (supplier, requestor, staff).

11.5 AFO 321 – adding Type of Holdings record

There was a requirement to simplify the add new type of holding option in AFO 321 (and AFO 111). Changes made:

- reorganised display of fields (separated OR out of 'Or create a new record' field so that choice is more apparent).
- 'Create a new record' field is now authority-list controlled (with the ability to enter your own text if necessary). In this way, the library has some control over what staff members enter into this field.
- The OPAC label field will also be controlled by an authority list (with the ability to enter your own text if necessary).
- For the above two new authority lists were added to AFO 367 - Serials authority lists: 4223 (Type of Holdings description) and 4224 (Type of Holdings OPAC label)

The screenshot shows a Windows-style dialog box titled "Add type of holdings". It features a "Type" text field with "Issues" entered. Below it is a "Choose from an existing Type of holding:" dropdown menu. An "OR" separator is present. The "Create a new record:" dropdown is currently empty. The "OPAC label" list box shows "Index", "Issues", and "Supplement". There is a "Default for serials checkin" checkbox and a "Choose a pattern template:" dropdown. The bottom section has a "Retrospective statement" text area, an "Automatically generate Follow up statement" checkbox, and "OK", "Cancel", and "Help" buttons.

The new authority list creation is part of the upgrade procedure.

11.6 AFO 367 – various changes

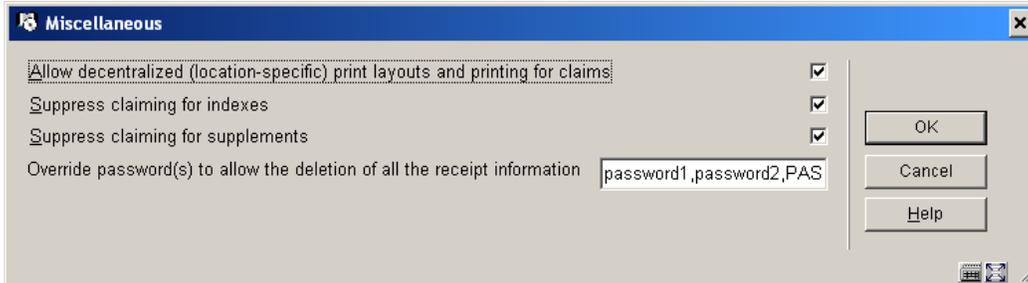
11.6.1 new authority lists

See description above under AFO 321 changes.

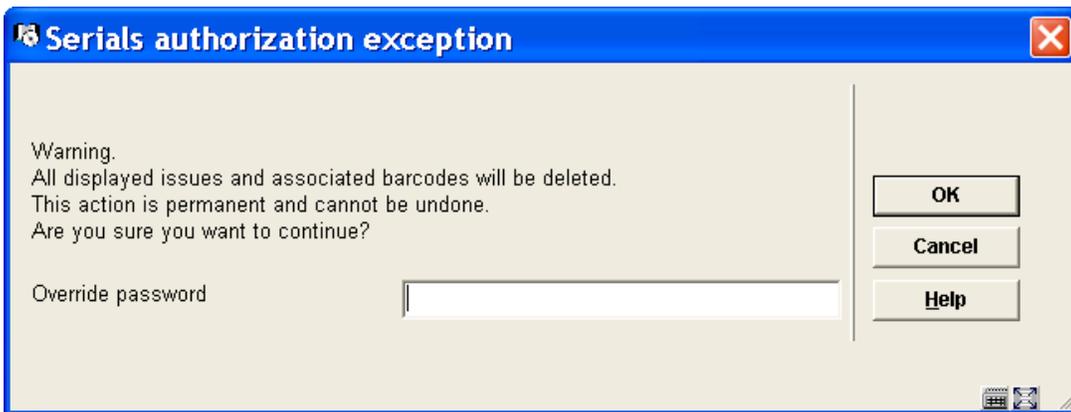
11.6.2 passwords for deleting receipt information

In AFO 367, under Miscellaneous there is a new field for override passwords (entry)

Multiple passwords can be entered as comma delimited.



Later, when using the Delete All receipt data, the following will appear:



You must enter the override password which matches the settings (Case sensitive)

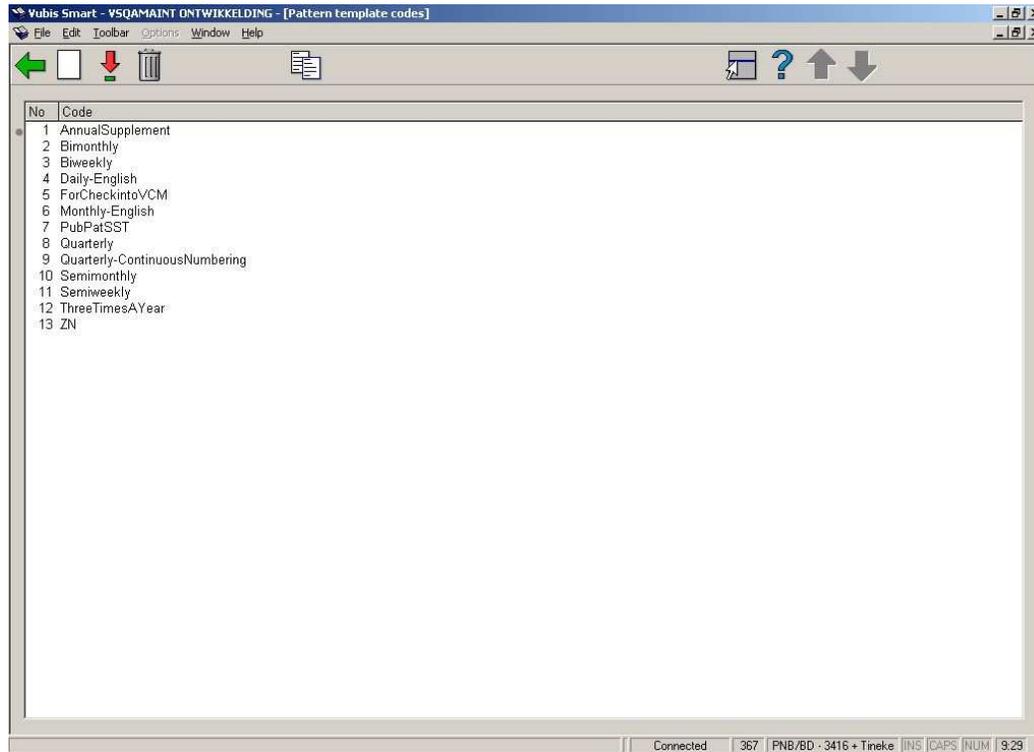
Entering the incorrect password generates an error message. Enter the correct password and any data which is eligible for deletion is cleared.

If there is data which cannot be deleted (i.e. subscription is still active and there are next expected entries available) the data is not removed and there is a message to that effect.

11.6.3 template management

A new option has been added to AFO 367: Pattern template codes. You can still add templates to the system by using the option "Save as template" when defining a serials publication pattern in AFO 321. But the new option allows for proper maintenance (add, delete, modify, copy) of these templates.

After choosing this menu option an overview screen will be displayed:



After installation this will contain various templates. But you are free to delete these and create your own.

11.7 AFO 431 – field focus with barcode replacement

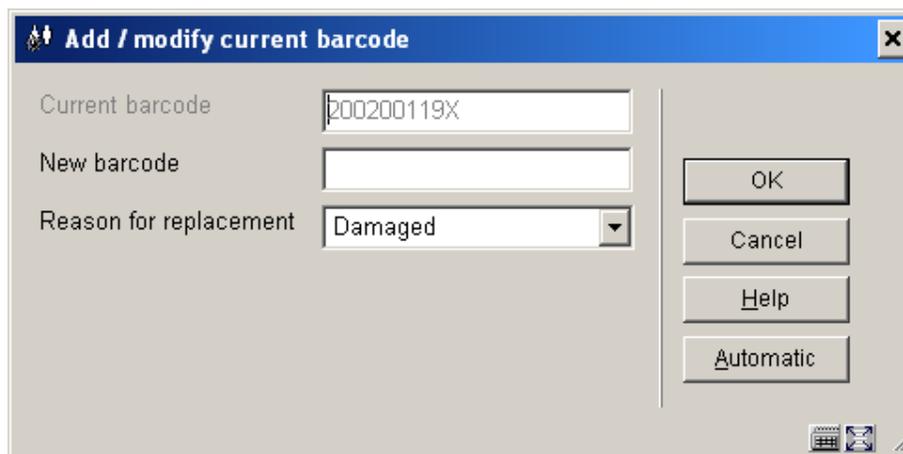
There was a need for a parameter to control the focus (i.e. the point where the cursor is when opening the form) when replacing borrower barcodes. In the old situation the focus was always on the replacement reason, forcing staff to select a reason.

Setting the reason code (not assigning barcode): with the focus in the barcode field instead of the reasons field, one can still just press ENTER (or click on OK button) to save the default replacement reason. It is no different from its 2.4.1.17 behaviour where if one just opened the replacement form and pressed ENTER, one would save the empty barcode field and the default reason code with the result being the barcode is currently being replaced.

The focus can only be set on the first field of a form, so for some customers the barcode field must be the first field of the form. For other customers the focus must be on the replacement field, so that must be the first field of their form.

There is a new **non-interactive** parameter, that forms part of the upgrade procedure. If set to 1, Barcode shows before replacement code. If set to 0, Replacement code shows before Barcode. The upgrade procedure will turn this parameter on for each metainstitution as long as the following conditions are met: -

If the default language for the system is Dutch at the time of the upgrade, the barcode will display before the reason for replacement code field:



** Technical note:

[^]AFO("ULI.ReplacementBarcodeFirst",MetaInst) is set to 1

If the default language for the system is not Dutch, the reason for replacement code field is displayed prior to the New Barcode field.



** Technical note:

^AFO("ULI.ReplacementBarcodeFirst",MetaInst) does not exist or equals null –

This has been incorporated as a parameterised field for 2.5 and will be maintained by the site.

Notes

When changing the positioning on the form, a resize of the form may be required in order to view the fields in the correct order. The resize button is located on the bottom right-hand corner.

Please contact Infor if you want to have this parameter different from what it would be for your default language.

11.8 AFO 482 and other areas – explanation of Block type 13

Below is an explanation of how to set block type 13 ("Items returned too late") and what the subsequent behaviour of the system is.

<p>AFO482 - Borrower Blocks / items returned too late</p>	<p>The value here is any numeric value / 1/ 0 (i.e. 1/1/0 and 999/1/0) or null. If there is any value entered into the matrix, then the block is ON. If the value is null, the block is not applicable for the borrower category / location. A definition in the block type is a toggle instead of a limit.</p> <p>The general level setting is applied to the other levels (WebOpac, SelfCheck, Telephone Messaging) only if the other levels are NOT defined as in use. If the other levels are defined as in use, the any null value will be ignored for block setting, any other value will be assumed active.</p>
<p>AFO481 – WebOpac - Active Block Types</p>	<p>If this is defined as in use, then ONLY the block types listed are used for the setting of blocks.</p> <p>If Block type 13 is in use and Active, then the system will look at the 482 Block parameters - WebOpac settings first. If these are in use, then they are applied as defined. If they are NOT in use, then the general settings are used</p>
<p>AFO481 Circulation Workflow- Borrowers - Block types</p>	<p>As with all blocks, it is applicable ONLY if the block is in the active column</p>
<p>Setting the block</p>	<p>Block is placed on the borrower during returns (AFO412) or if item is loaned to a different borrower in AFO411.</p> <p>The block duration is the longest period during the return session if multiple items are returned (i.e. if you have an item 3 days Overdue, and one 10 days overdue, the block period is 10 days from today)</p> <p>Block duration does not take into account closed days (regular or variable)</p> <p>If a Block type 13 is currently set on the borrower record (e.g. For 3 more days) and additional items are returned with longer overdue periods the block is NOT recalculated.</p> <p>Block is placed on the levels defined as active / with values in AFO482 – Block parameters - Items returned too late. Once again, if the subsidiary tabs are in use, then the values on those tabs are used. If they are not designated as in use, then the General settings are applied to all levels.</p>
<p>Clearing / Resetting the block</p>	<p>Resetting the block is done when the borrower block status is checked. The system will now go through all 4 levels to see if current block</p>

	<p>(when defined) needs to be reset.</p> <p>Access points for block check are: Circulation functions such as AFO's 411 413 416 419 421 etc. where the block level is checked</p> <p>WebOpac functions - place reservation and User activities / Renewals</p>
--	--

Other Notes:

AFO451 does NOT look at these levels at all for Block 13 – Items returned too late

- If the date for expiry of the block = today or in the future, Borrower is blocked
- If the date for expiry of the block = yesterday or in the past, Block is removed

When setting the AFO482 Block parameters, the second value is used (overridable or not overridable).

The WebOpac does NOT check the block value / determine active update when displaying personal information (i.e. to see if Change data button should be ON) or when Logging in to User activities (i.e. to see if Alerting services should be on). It is only checked / possibly cleared when the user attempts to create a new reservation or renew item(s) currently on loan.

11.9 AFO 485 – New options

Two new options have been added to the batch handling of acceptgiros. Because these options are specific to the Dutch market, they will only be described in detail in the Dutch version of these release notes.

11.10 AFO 764 – statistics 2007

For more information on this feature [Download the Patch from AnswerLink](#):

Log in to AnswerLink with your usual ID and password. On the main screen you select the option: Software Downloads.

After selecting the option “Software Downloads”, you see a screen listing various solutions, where you click the “Attached files” icon of “Solution” number 587268 – Vubis Smart statistics 2007.

On the next screen you select download via HTTP for the file "stats.zip". You also download via HTTP the user manual in the language of your choice.

Please note

After installing the 2.4.2 patch, the Statistics 2007 solution must be re-installed because the 2.4.2 patch install will "undo" any previous installation of this option.

11.11 New Z39.50 API's

There is a new version of Z39.50 API's (both client and server, on all platforms Windows/Unix/Linux).

Since the last version of the API's several enhancements and bug fixes are introduced. See table below for details.

New version of both client and server: 2.70919.

In case of suspected problems, these API's should be installed.

As always these API's are backward compatible, meaning they work with all Vubis Smart versions.

What	client or server	Windows/Unix/Linux	Why install
Make a parameter in VubisSmartZ39Api.ini for the maximum number of connections: MAX_CONNECTIONS_CLIENT and MAX_CONNECTIONS_SERVER. So far it was hard-coded to 30. Example: MAX_CONNECTIONS_CLIENT=222 MAX_CONNECTIONS_SERVER=222	Both	All	If you have many simultaneous connections
Optional time-out: TIMEOUT_SERVER in VubisSmartZ39Api.ini. Example: # timeout in minutes (default no timeout) TIMEOUT_SERVER=1	Server only	All	If the clients do not correctly close the connection
Fix for maximum number of connections	Both	Unix/Linux	Bug fix
Memory fix in scan request and in search request	Client only	This (only) crashed on Linux SuSE, but it should be fixed everywhere	Bug fix
Fix for xinetd connection	Both	Unix/Linux using xinetd (and not inetd)	When using xinetd

11.12 Mozilla browser

Mozilla based browsers (i.e. FireFox) may retain sensitive borrower information in its history after Logout from User Activities when the WebOpac profile is set as a non-public workstation and does not open a new browser window. It is highly recommended that all profiles which allow public access to workstations be set to force the logout from User Activities to reset the session. The WebOpac Preferences / Options per profile / section OTHER OPTIONS START SCREEN / field Open VubisWeb in new browser window (Public workstations): should be set to YES in order to clear personal information for any profile where shared access is required.

12. Answerlink defect/enhancement list covered with 2.4.2.4

Following is a summary of customer reported defect fixes and enhancements requests introduced with patch 2.4.2.4.

123 - Global Change for Items

Added the ability to change a null value to a defined value.

132 - Export data

Added ability to export shelfmarks when items do not exist.

141 – SSP

Netloan support. An additional reporting requirement to identify borrower / Peoples Network utilisation information (Netloan) via SSP Reporting and Statistical module. SSP will generate a report which is able to identify the number of libraries users who make use of the People Network but who do not borrow other resources e.g. books, CDs etc.

215-External order number control

Removed double delete icons.

217-Potential Processing

Added "Save settings" button option on the Enter selection form.

245-Locations

If you have multiple institutions in your ACQ metainstitution, allow for possibility to print centrally for all locations.

411 - Loans

- o Borrowers with negative barcodes (original barcode is a negative number) will now record loans.
- o There is a new message (linking new ones or old cfly records) which prevents the linkage of a monograph holding to a non-monograph record.

422-Reservation queues

Added display of trapped barcode to status on reservation queue displays.

423-Edit items

Added Material type of shelfmark to the display line in the header pane.

435-Borrower collection agency

Allow submission of files to collection agency with full address details.

441-Import borrower data

Need ability to generate user PIN-code during borrower loading.

452-Start print jobs

- o Email Notices on non-windows platform. All borrowers in the group receive the same email. (Directory path for temp directory contains \ instead of / and a dot (.))
- o Add confirmation message for delete of stored print file

461/462/463

Location Manager Search - Direct match is done using the full code of the manager (i.e. Institution/Location). Entering a string will retrieve a result list where the string entered may be found in the location code or the description fields. A result list will be returned even if only one match is found.

481-Main circulation parameters

Miscellaneous / Circulation Workflow / Printing / Miscellaneous: Field for the "Postage charged based on.....". This is not a location specific field. The others on this screen are. But this setting is at the circulation metainsitution level.

482-Borrower file parameters

Added ability to automatically generate user PIN-code during borrower loading (AFO 441).

486-WinCirc

A field has been added to the setup in which the stop time of the process can be set.

486-WinCirc

The timestamp is set when the file is transferred from WinCirc/WinBus to the host (using the WinXXX client program). From now on files without timestamp will not be purged by the server application. They must be removed manually.

500-WebOpac

- Added the ability to specify how to group elements (subfields) together for display including punctuation which are repeatable.
- Possibility to display subfields in data order in the record.
- Possibility to make renewals based on borrower home location and not location of loan.
- Make routine used to retrieve book cover information 'aware' of proxy settings
- Make public note of serials subscription display in WebOpac as part of summary holdings statement
- Remove shelfmark from Select volume popup when creating a reservation for a multi-volume/serial title
- Make Output - serial / Volumes pick up output format for the new labels, chronology etc.

611 – Passwords

Add/modify logins; rephrased misleading wording lines 14 & 15 (now says "items/shelfmarks" instead of just "items").

651 – Server parameters

Cataloguing Permissions - Add reporting / Viewing mechanism to be able to see the various permission profiles / levels per Vubis smart user.

Infor Staff Utilities

- o 109498 - New option to rebuild the title in the item record based upon data from the Bibliographic record
- o 109499 – Add location – Edit check has been added . Location must be unique across all institutions
- o 110605 – New option to clean up entries / remove entries in ^SysQR based on date entered.
- o 110851 – identify barcodes that contain invalid characters and BCs that do not exist in BB
- o Serials Installation routine – modified for 2.4.2 structure