Workflows Upgrade to Version 4.1.0 Guide
Last updated: March 12th, 2024

Installation Date/Time: Sunday, 24 March, starting at 9 PM

Full Installation file download links: Direct links shared via listserv post. Files will be hosted on the support site on or about the 20th of March.
https://support.librariesofrsa.org/project/downloads-setup/

The following list of enhancements and bug fixes are the most relevant to RSA member libraries. In addition to those listed below, many minor bug fixes and administrative and system support upgrades were also made.

Enhancements

Default path for applications to view and print reports updated
The default path for the "Application to View Reports" and the "Application to Print Reports" fields in the Report Session wizard is now set to C:\Windows\notepad.exe for Windows workstations. In addition, if an application field in the Report Session wizard is empty, WorkFlows uses the workstation's default application for opening the applicable file type.

> Note: these do not overwrite your settings if you've changed them in the past. If you see Notepad opening instead of Wordpad and wish to revert to Wordpad, you will need to change the settings in the Reports, Report Session wizard. Contact RSA if you need assistance.

WorkFlows does not indicate checkout security failure for Envisionware RFID checkouts
Sometimes, for items with an RFID tag, WorkFlows would allow the checkout of an item even if the RFID device failed to set the security of the item's RFID tag to allow checkout. This has been fixed so that WorkFlows returns an error if the RFID device fails to set the item's RFID security, prompting the user to try the checkout again.

Maximum Response Size set to 5000000 by default for WorkFlows
The default value of the Maximum Response Size attribute of the WorkFlows and SirsiDynix SymphonyWeb Desktop Setup options has been increased to 5,000,000 characters (which is also the maximum allowed value for this field).

> Note: this is already the standard RSA setting. If you haven't set this already, this change will reduce some pop-up warnings most notably when opening the finished

reports wizard and displaying magazine records with thousands of copies attached.

Consortium Membership: If the station library has no copy, but there are copies in the station's consortium group, then that group's copies should be the first in the list. (For libraries with branches)
An "Order of Consortium Groups" set of options was added to the configuration for the Item Search helper. This allows for the item-level holdings list to be sorted according to which consortium groups (or libraries) have a copy of an item available. For details, see the "Display Tab" section of the "Configure Options for Item Search Helper" topic of the WorkFlows Online Help.

> Note: This allows the item tree display in the Item Search and Display wizard, Call Number/Item screen, to consider the copies owned by branch libraries the same as the main library and bring those results to the top. This primarily helps all libraries with branches to more quickly determine if any branch in their library holds a copy of the title.

Item Categories 6-10
Cataloging features that use item categories have been updated with the new item categories 6-10. This includes the following wizards and helpers:
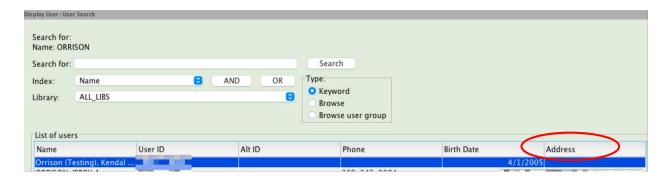- Add Brief Title
- Add Item
- Add Title
- Call Number and Item Maintenance
- Delete Title, Call Number or Items
- Duplicate Title
- Edit Item
- Item Search and Display
- Item Search helper
- Modify Title

> Note: RSA is currently undecided on what, if anything, we'll use these additional item categories for. They would most likely be used for internal use for special projects or to shadow groups of items, etc. These would not change how the items are searched in RSAcat by patrons. These were developed for high-end, automated sorting machine use.

Properties to display user address in user search result added to User Search Helper
Two new options to support the display of user addresses in a user search result have been added to the User Search Helper Properties. Display Address, when enabled, will display the user address in the user search result. Character Limit of Address allows the WorkFlows administrator to limit the number of characters from the address that display.

> Note: A frequently requested enhancement by RSA libraries. You will be able to show the user search wizard with addresses to aid finding the correct user.

Option to print hold wrapper for items transited to fill a hold at another library, additional Hold Wrapper fields, and more

Two new fields, "Pickup Library" and "First Name" were added to the Receipt Fields for Hold Wrappers. They can now be selected to print from any wizard that allows hold wrapper printing. Like the user's Last Name, printing of the user's First Name on the hold wrapper can be limited in length to protect the user's privacy.

A group option has been added to the "Print transit slip if transit to is outside selected group" attribute of the Checkin/Bookdrop, Discharge/Checkin, Fine Free Discharge, and Trap Holds wizard properties. This option indicates that WorkFlows should print a transit slip only when the item being put into transit is outside the consortium group selected in the corresponding drop-down list. For more information, see the "Properties" topics for each of the above-listed wizards in the WorkFlows Online Help.

In addition, the "Print When Item Selected for Hold at Current or Other Library, Not When Receiving From Transit for Hold" property was added to the properties for hold wrappers. This allows libraries to print a hold wrapper when an item is transited to another branch library to fill a hold.

> Note: Some of these changes may be helpful depending on your local holds processing procedures. If your library has branches and you don't wish to print hold slides for transits to you other branches, you can now turn that off in many wizards.

RFID security checking can be enabled or disabled

An "RFID tag security enabled" option has been added to the RFID Pad Configuration. This setting determines whether WorkFlows should change the security flag of an item's RFID tag when the item is checked in or out.

> Note: This setting should only be considered by libraries with RFID tags on their items. Libraries who don't have RFID tags or RFID readers don't need this feature at all.

Search by User Key

Staff users can now look up users by User Key within the User Search helper.

Note: Occasionally useful in particular situations. Will mostly be used by RSA Staff.

Bug Fixes

Copy User wizard does not honor Charge History Rule of copied user record.
The Duplicate User and User Lost Card wizards were not copying the Charge History Rule value when copying a user, and instead set the Charge History Rule to a default value of CIRCRULE. This has been fixed so these wizards honor the user's Charge History Rule when making copies of the user.

Note: in RSA's case, the CIRCRULE Charge History setting does NOT enable Charge History. All circ rules in RSA are set to NOT record charge history making this setting meaningless. However, it's annoying to have patrons set this way as it's not the norm. This is something we're wanted for some time now.

Emailed Checkout Receipts including charges from other users
In rare cases, it was possible for a patron to receive checkout information from another patron in their checkout email receipt. This has been fixed so patrons only receive their own checkout information in their email receipts.

Emailed checkout receipts incorrectly filtered as spam
For Solaris and Red Hat servers, certain scripts and reports used by the email checkout feature included a FROM field set to the library's email address, causing some email providers to flag the mail as spam. This has been fixed so that the FROM field is instead set to whomever is **sending** the notice, such as the server hosting Symphony. Changing the email format in this way prevents the mail from being incorrectly filtered as spam.

Last Activity Date rule incorrectly prevented user bill counters from updating
Beginning with SirsiDynix Symphony 3.7.1, a user's bill count was not properly updated after paying off one or more bills, specifically when the "Paying a bill" attribute for the associated Last Activity Date Rule policy was turned off. This has been fixed so that a user's bill count is properly updated when paying off bills, regardless of Last Activity Date Rule policy settings.

Trap Holds incorrectly handles in-transit items with canceled hold
If an item was in transit for a hold that was canceled or suspended while the item was in transit, the Trap Holds wizard would wrongly make the item available for the next hold in the hold queue, regardless of pickup library. This has been fixed so that the Trap Hold Wizard rechecks the item status after taking it out of transit and puts the item in transit for the next hold, if needed.

Note: YEA!!!!!!!!!!!!!!!!!!!!!!!!!! Long standing issue resolved.