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WorkFlows Version 4.2.0 Features and Updates Guide

Last updated: March 10, 2026

Installation Date/Time: Sunday, 15 March, starting at 9 PM

WorkFlows Upgrade Instructions are available [here](#). This is the top link on the downloads page linked below.

WorkFlows Upgrade Installation File Download Page: Links will also be shared via the email forum announcements. The upgrade must be installed using administrator privileges on the computer. The Windows and Mac versions are hosted on the downloads page: <https://support.librariesofrsa.org/project/downloads-setup/>

Enhancements and Bug Fixes

The following list of enhancements and bug fixes are the most relevant to RSA member libraries. In addition to those listed below, the release includes bug fixes and administrative and system support upgrades.

Enhancements

Some of these enhancements required touching each and every wizard in WorkFlows and were quite extensive. Primarily these are marked with **. These are issues that have long been on the consortia wish list.

MacOS – WorkFlows is now notarized and trusted by Apple to ease installation issues.

Holding Codes for Serial Control updated to include Item Categories 6 – 10

Serial Control check-in now uses item categories 6-10 from the holding codes when creating items. This may require adjustments to local settings.

Outreach Interest and Template Wizards Updated to include Item Categories 3 – 10

Member libraries using Outreach templates may wish to update them after the upgrade to include Item Categories 3 – 10.

Display User Preferred Name and User Suffix in Circ Wizards

Two new system-wide settings have been added to allow control whether or not user preferred names and user suffixes display within the circulation wizards.

Note: RSA will most likely turn these on. We can't do so until after the upgrade.

New User Suffix and User Title wizards in the System-wide Configuration

The ability to create set lists of User Suffix and User Titles has been added. These would allow RSA to create a system-wide shared list of allowed titles and suffixes. Workflows can be configured locally to use or not use the system-wide lists.

Options to Make First Name, Birth Date, and/or User Categories Required Fields in the User Record

A set of Required User Information options has been added to the Copy User, Modify User, and New User Registration wizard properties. These options allow staff to specify whether the first name, birth date, user categories 1-12, or any combination of these fields in the user record are required for WorkFlows to save the record. These may be of interest to public libraries to enforce local patron entry requirements.

**** Limit Pickup Location for Item Holds**

Symphony Item Types may now be designated as "non-transitable" ensuring that items are picked up and returned at the item library. In theory, this is a fix to the issue of things like Rokus, Kits, and Laptops getting transited. In fact, it's complicated for consortia.

- This is a per item type setting. Meaning ALL RSA members with items attached to that item type will not be allowed to put them in transit. Library Staff who know the "Transit not allowed" password/override can put items into transit regardless of this setting.
- Each item type can be configured to have a Transit Bill Reason (one per item type system-wide). This will create a bill for patrons who return a non-transitable item to the wrong library.
- Each item type then has a Transit Fee amount (one setting per item type). This is the amount of the bill created for returning a non-transitable item to the wrong library.

We will need to work with several member libraries to do testing on some no longer used item types configured with test items to figure out how well this will work for RSA. If it's workable in our setup, we can create a limited set of non-transitable item types.

User Expiration Dates Greater than 2037

WorkFlows now allows user expiration dates later than 2037. Schools that register PreK – K students will appreciate this.

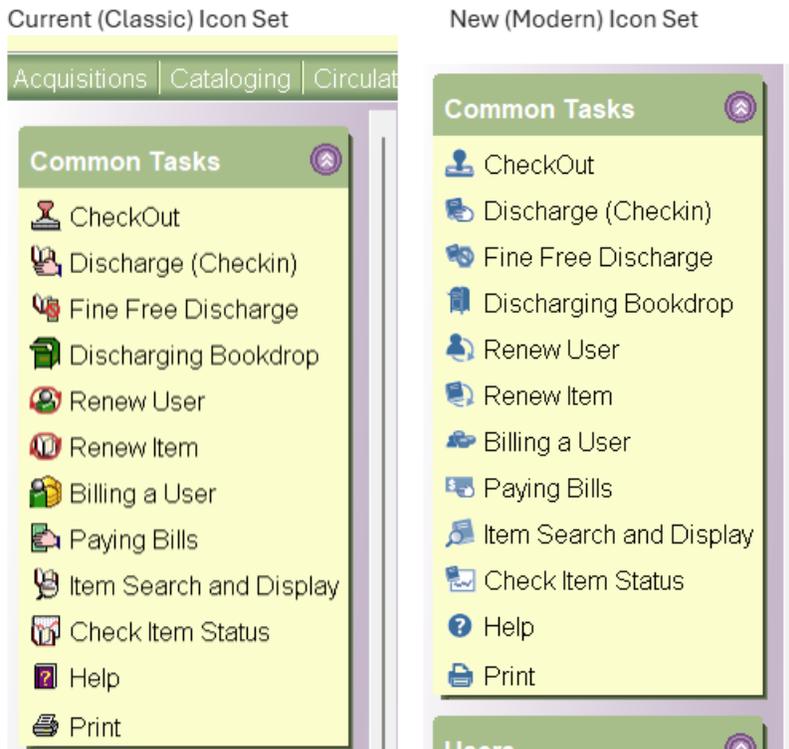
**** WorkFlows Reports Permissions Groups**

The system has been upgraded to allow multiple WorkFlows login users to co-own reports. This allows more than one login ID (not just CIRC) to view and use report templates and view and print out finished reports and bill notices.

Note: RSA will begin the setup of this for libraries using BLUEcloud Circulation, and small libraries where the shared CIRC account is only used to view reports.

New WorkFlows Icon Set

You can now choose between two icon sets in WorkFlows: Classic and Modern. The Classic set includes the colorful icons you are accustomed to. The Modern set consists of newer icons that are shades of blue and have a more modern visual theme. To change the icon set, in WorkFlows select the Preferences menu, Desktop, Desktop Setup, then find the Icon Set: entry.



Third-party user address validation Option (System-wide)

The system can now be configured for the validation of user addresses within WorkFlows by a third-party address validation service. Currently, the only third-party address validation service compatible with the system is SmartyStreets.

Note: We will test this on the test server to see how it works. If it appears to be something we are interested in, and it's affordable, we'll work with the DAC and Board to get approval.

Customize emails in Symphony

Libraries can customize emails sent from the system. A script has been added that allows for customizations including addition of an unsubscribe address, customization of email headers and footers, and inclusion of MIME type for attachments.

Note: we can't test this on the test server, so we'll test it post-upgrade. It may not be workable for a consortia like ours. We can't be sure until we can dig into it in a live system actually sending emails. If it's configurable per library, and it works with the standard emails generated by the overdue, courtesy, and other patron facing reports, we'll work with members to roll it out.

Support for mk Solutions RFID pad devices

RFID pad support in WorkFlows has been extended to customers using mk Solutions RFID devices. As far as we know, no RSA libraries currently have mk Solutions RFID products right now; but just in case anyone is, we included this here.

Bug Fixes

Some of these you might have experienced; others are fixes for things that happened rarely or only in very specific instances.

MacOS WorkFlows Pop-up Fix

In WorkFlows on Macintosh computers, some pop-up dialogs would appear behind the WorkFlows window, giving the appearance of WorkFlows becoming unresponsive. This has been fixed so pop-up dialogs appear within WorkFlows as expected.

Modifying Hold Pickup Library Checks if Hold is Fillable at that Location

Previously, it was possible to modify a hold pickup library to a library where the patron does not have checkout privileges. This has been fixed so that the Modify Hold wizard checks that the hold is fillable at the selected location before allowing the modification.

Note: As part of this fix, it is currently no longer possible to modify the hold pickup library for an item that is available on the hold shelf. In cases where the pickup library must be changed for an available hold, it may be charged to a generic user to make the update and then discharge the item to put it into transit to the new pickup library. This temporary work around will be corrected in a future system release.

Hold Wrapper Settings Fix

Sometimes the Hold wrapper setup wizard did not save all the font and layout settings for footer lines beyond the first line of the hold wrapper, causing all footer lines to have the same font and layout despite their settings. This has been fixed so font and layout settings are honored for each footer line in the hold wrapper.

Call Number/Item Maintenance Wizard Fix

Occasionally, deleting single items using the Call Number/Item Maintenance wizard did not update the database as it should have after the user closed the wizard. This has been fixed so single item deletions are properly updated in the database after the user closes the Call Number/Item Maintenance wizard.

RSAcac, RSAcac Mobile, BLUEcloud Cataloging Shadowing issue resolved

The Symphony data extract/harvest and deltas processes were sometimes not updated with the catalog key when a catalog record, call number, or item was shadowed or unshadowed. This sometimes led to incorrect displays in these products. This has been resolved.

Transit Slips Accidentally Including User Information Fixed

A bug introduced in Symphony 4.1.0 sometimes included user information on transit slips. Depending on local setup, when printing transit slips with a transit reason of LIBRARY, WorkFlows sometimes included information about the user who turned in the item. This has been fixed so that the only time any user information could be included on a transit slip is when the transit is to fill a hold and the settings include user information fields. Due to protecting PII, user information should never be included on a transit slip.

Due date information in Checkout wizard and receipt not updated after due date is modified

Occasionally, when a checked-out item had its due date modified manually, the item would appear on the printed receipt with the incorrect due date. In cases of renewals, the item would display twice when printing the patron's current checkouts on the receipt, once with the original due date and again with the updated due date. These behaviors have been fixed so that the wizard's list of checkouts, Current Checkout List, and the checkout receipt all maintain current and correct data with each other, regardless of any renewals or due date modifications. These updates also have the effect of preventing any checkouts from displaying in both lists in the wizard or printing twice on the receipt.

Bills being left off of Talking Tech i-tiva notices file

The Talking Tech i-tiva report in SirsiDynix Symphony WorkFlows was not including all of the current bill information in the notices file. The report has been fixed and now includes all current bill information in the report output.

Recirculated item (i.e., one checked out to a recirculating account like Display) not correctly transited when checked in via SIP2/self-checks

Recirculated items checked in via SIP2 would erroneously transit back to the item's home location instead of back to the initial user record (for example, DISPLAY or BINDERY). This has been fixed so recirculated items checked in via SIP2 transit back to the initial user record as expected.

Holds being removed when suspended after becoming available on the hold shelf

There were previously issues with the fixholds binary unlinking items on hold that had been suspended after being available on the hold shelf. The fixholds binary no longer unlinks these items, allowing library staff to correct suspended holds available for pickup with the Clean Hold Shelf report or by manually editing the hold shelf.

Some ID and other display fields are wrongly being truncated in the WorkFlows interface

Some ID and other display fields in the WorkFlows interface were wrongly being truncated. This has been fixed so the entirety of the fields' contents displays in the interface.

Item categories 6-10 displaying in Global Item Modification wizard, even if they were not configured to display

Item categories 6-10 were being displayed in the Global Item Modification wizard, even when they were not configured to display in the wizard properties. This has been fixed so item categories 6-10 display or do not display depending on how the Global Item Modification wizard properties are configured.

The Add Brief Title Helper in Checkout displays item categories incorrectly

In Symphony 4.1.0, the item categories for the Add Brief Title Helper in Checkout did not display properly and disregarded properties settings for item categories 5 through 10. This has been fixed so that all item categories properly regard their property settings and display as expected.