

Textbook Tracker 4.1.1 Release Notes 8/13/2010

=====

Current Textbook Tracker customers will need to contact COMPanion prior to updating to version 4. This update is included as part of your support subscription and version 4 will require new registration codes. Version 3 to Version 4 data conversion is now fully supported; it is highly recommended that administrators review their preferences and scheduled events settings due to a number of changes and differences. Scheduled Archives will need to be reconfigured in the v4 Scheduled Utilities module.

Due to multiple data enhancements, a database rebuild may be required on updating. COMPanion encourages all v4 users to update to this version at their earliest convenience.

Please contact COMPanion at 1-800-347-6439 or COMPanion Technical Support at 1-800-347-4942 with any questions regarding this update or for release notes for versions prior to 4.1.

Documentation for version 4 is available online at
< http://www.companioncorp.com/mediawiki/index.php/Textbook_Tracker>

******* Archive and Backup your Data before updating*******
*****Ensure that you are running a minimum version of 3.3.0 before updating*****

Textbook Tracker 4.1 runs on the following operating systems. Below are more specific recommendations: Mac OS 10.5, Mac OS 10.6, Windows XP, Windows Server 2003, Windows Vista, Windows 7, Windows Server 2008

System Requirements for Data Stations

Minimum

Mac OS 10.5, Windows XP
G4, Pentium 4 (or equivalent)
1 GB of RAM
20 GB of Free HD/100,000 Items
1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 Multi-Core/Processor
2 GB of RAM or more
20 GB of Free HD/100,000 Items

System Requirements for Central Union Data Stations

Minimum

Mac OS 10.5, Windows XP
G5 or X86, Dual Processor/Core
2 GB of RAM
20 GB of Free HD/100,000 Items
TCP/IP Network
1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 Multi-Core/Processor
4 GB of RAM or more
20 GB of Free HD/100,000 Items
TCP/IP Network

System Requirements for Controller Systems

Minimum

Mac OS 10.5, Windows XP
G5 or X86, Dual Processor/Core
2 GB of RAM
20 GB of Free HD/100,000 Items
TCP/IP Network
1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 Multi-Core/Processor
4 GB of RAM or more
20 GB of Free HD/100,000 Items
TCP/IP Network

System Requirements for Workstations

Minimum

Mac OS 10.5, Windows XP
G4, Pentium 4 (or equivalent)
512 MB of RAM
200 MB of Free HD
TCP/IP Network
1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows XP or 7
X86 Multi-Core/Processor
1 GB of RAM or more
200 MB of Free HD or more
TCP/IP Network

Browser Requirements for Web Workstation

Minimum (recommended)

FireFox 3.6+ for Mac or Windows
Safari 4+ for Mac OS X
1024 x 768 Resolution

Optional

Internet Explorer 7+ , FireFox 3+
and others for both Mac and
Windows

Overview of Major Features:

Textbook Tracker 4.1.1 is a maintenance release in the 4.1 series introducing several minor enhancements and changes. We have corrected several reported issues and have further improved performance and stability. Additionally, we have enhanced the database to support larger files, up to 4 GB.

Specific Enhancements and Changes:

Circulation:

- * In-stock holds can again be removed from the Holds List of the Holds Tab on the Circulation window.
- * When receiving Payment transactions from the third party billing service, we are no longer outputting the same transaction to the output file.

Database:

- * The max file size for a database file has been increased to 4 GB to better support large institutions.

Export:

- * By request, we have added a new Patron Fine export to Textbook Tracker. The same format that exists in Alexandria.

Import:

- * Importing Circulation Groups is once-again working.
- * Imports are again working reliably when Alexandria is configured to run in non-english languages.

Item Management:

- * Leading zeros are now being handled in the Item Selection window per the state of the barcode handling preference to ignore leading zeros.

Miscellaneous:

- * A corrupt .SET file will longer cause a mysterious "runtime error" that has been encountered on Windows. The corrupt .SET will be renamed and a fresh one will be created.

Patron Management:

- * Leading zeros are now being handled in the Patron Selection window per the state of the barcode handling preference to ignore leading zeros.

Preferences:

- * Grade table logic now accounts properly for Spanish. This means that the preference files where the grade table information is stored will no longer bloat in a Spanish installation causing slow-downs, and other strange behavior.
- * The preference to control the stripping of leading zeros from barcodes now applies also when "Has Mangled Barcodes" is enabled.

Reports:

- * Removed the "Include Charges" checkbox from the Circulation Listing and Notices report window panes as it was causing confusion in the new reporting windows. To include charge records on any circulation report, add the appropriate Transaction Type and Balance selections.
- * 4 Per Page Circulation Notices are again printing correctly.
- * Custom text in email format circulation reports is no longer being printed in duplicate.
- * Item Details again shows when a checked out copy is due back.
- * Circulation Notice - Outstanding Charges reports we're not reflecting the true replacement cost for an item. This has been corrected.
- * Fixed problems with Patron Level selections.
- * Fixed 3 x 10 format barcode reports where they were printing slightly too high on the label stock.
- * Date selections in reports are again properly respecting Date and Currency localization preferences.

SIF:

- * Updated parsing of StudenSchoolEnrollment GradeLevel in v2.0r1 so it will be imported during synchronization.
- * SchoolInfo local id is no longer rejected if it is too long.

Textbook Tracker 4.1.0 Release Notes
5/6/2010



Current Textbook Tracker customers will need to contact COMPanion prior to updating to version 4. This update is included as part of your support subscription and version 4 will require new registration codes. Version 3 to Version 4 data conversion is now fully supported; it is highly recommended that administrators review their preferences and scheduled events settings due to a number of changes and differences. Scheduled Archives will need to be reconfigured in the v4 Scheduled Utilities module.

Please contact COMPanion at 1-800-347-6439 or COMPanion Technical Support at 1-800-347-4942 with any questions regarding this update or for release notes for versions prior to 4.1.

Documentation for version 4 is available online at <
http://www.companioncorp.com/mediawiki/index.php/Textbook_Tracker>

***** Archive and Backup your Data before updating*****
 Ensure that you are running a minimum version of 3.3.0 before updating

Textbook Tracker 4.1 runs on the following operating systems. Below are more specific recommendations: Mac OS 10.5, Mac OS 10.6, Windows XP, Windows Server 2003, Windows Vista, Windows 7, Windows Server 2008

System Requirements for Data Stations

Minimum

Mac OS 10.5, Windows XP
 G4, Pentium 4 (or equivalent)
 1 GB of RAM
 20 GB of Free HD/100,000 Items
 1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows 7 or 2008
 X86 Multi-Core/Processor
 2 GB of RAM or more
 20 GB of Free HD/100,000 Items

System Requirements for Central Union Data Stations

Minimum

Mac OS 10.5, Windows XP
 G5 or X86, Dual Processor/Core

Recommended

Mac OS 10.6, Windows 7 or 2008
 X86 Multi-Core/Processor

2 GB of RAM
20 GB of Free HD/100,000 Items
TCP/IP Network
1024 x 768 Resolution

4 GB of RAM or more
20 GB of Free HD/100,000 Items
TCP/IP Network

System Requirements for Controller Systems

Minimum

Mac OS 10.5, Windows XP
G5 or X86, Dual Processor/Core
2 GB of RAM
20 GB of Free HD/100,000 Items
TCP/IP Network
1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 Multi-Core/Processor
4 GB of RAM or more
20 GB of Free HD/100,000 Items
TCP/IP Network

System Requirements for Workstations

Minimum

Mac OS 10.5, Windows XP
G4, Pentium 4 (or equivalent)
512 MB of RAM
200 MB of Free HD
TCP/IP Network
1024 x 768 Resolution

Recommended

Mac OS 10.6, Windows XP or 7
X86 Multi-Core/Processor
1 GB of RAM or more
200 MB of Free HD or more
TCP/IP Network

Browser Requirements for Web Workstation

Minimum (recommended)

FireFox 3.6+ for Mac or Windows
Safari 4+ for Mac OS X
1024 x 768 Resolution

Optional

Internet Explorer 7+ , FireFox 3+
and others for both Mac and
Windows

Overview of Major Features:

- * Textbook Tracker web services now support secure communications via Secure Socket Layer (SSL).
- * The Add Title Assistant / MARC Search is now available in the Web Workstation.
- * Textbook Tracker now offers additional circulation modes and reports for better tracking of item transfers between sites.
- * Textbook Tracker now enhances your collection data automatically by attempting to locate and retrieve cover art for titles in your database that do not have any. This feature can be disabled in preferences if desired.
- * Stability and performance have been improved throughout the application, and numerous functional and aesthetic issues have been addressed.

Specific Enhancements and Changes:

Authority Control:

- * Added City and State Authority Control to Textbook Tracker.
- * Patron location Authority Control is again offering the correct location search window when enabled.

Central Administrator:

- * The 'District' menu option has been renamed to 'Sites'.
- * The Circulation window will no longer make an item current from a previous collection when switching collections.

Circulation:

- * Central Union - Created CHX and CHXP commands; CHX allows operators to change location information on copies in the same scan they are placed in transit to a new site. CHXP generates a shipping list of the scanned items.
- * Central Union - Created BP command; this command allows operators receiving items shipped to them in a batch via CXHP to generate a report showing the items received, and the items that remain in transit or "missing".
- * The reservations calendar shows processing days needed for reservations before and after the reservation.
- * The Activity monitor on the Circulation window has been replaced with a list of all the Connected Clients. Report and Utility activity monitoring is done through Operations Management.
- * IBS and IS modes should now be properly suppressing dialogs when using the RR command.
- * CH mode no longer shows new locations next to the command line. They are included in log messages.
- * Typing the 'FF' command or selecting from command help causes the charges pane/payments sub-pane to be shown.
- * The .X command no longer clears the current patron.
- * .X [patron barcode] now makes the patron current and sets the mode to Transfer.
- * .X [patron barcode] [item barcode] now makes the patron and item current and sets the mode to Transfer.
- * Focus is returned to the command line after renewing from the renewal tab.
- * Focus is returned to the command line after making a selection from the homeroom tab.
- * Patron Details now displays Check-out date as well as Due Date for Loaned Items.
- * When refunding a credit, you are no longer allowed to adjust the Refund Method menu. Credits are refunded in cash only.
- * Added a payment method drop down menu to the refund window. It has two options: Cash (when selected, refund functions same as it did before), and Credit. Selecting credit issues an accepted credit, marks the payment refunded, and adds the refund to the Refunds tab. Menu is deactivated if user lacks sufficient security access.
- * Restored the GPP command to working order.
- * In-Transit items are not available for reservations anymore if the reservation period or buffer starts before the in-transit is finished.
- * Restored the exceptions reports (script imports).

- * The Cash Drawer Balance report is now functional.
- * The preference to charge a minimum fee when a lost item is found now results in a charge record if there are no other charges or combined with other fees if there are any.
- * Added Print Credits button to command strip. It prints both Accepted and Un-accepted credits for the active patron.

Command Help:

- * Implemented a search/filter in Command Help. This filter works on a space-delimited search of the help entry's title and description.
Begin your search with a dash (-) to limit your search to Command Names only.

Controller:

- * The 'Run as Service' check box saves correctly now when selected via the Web Admin interface.
- * Controlled Data Stations again create their client installers.
- * Removed restart utility from clients connected to controlled data-stations.
- * Added a command line to the Controller for use when needed or under the direction of Technical Support. It is accessed via the Help menu.
- * Bonjour has been disabled for controlled data stations.

Courses:

- * Titles which have been added to the course title list, but not saved yet, can now be removed properly.
- * Courses no longer have a practical limit for how many times a course record can be duplicated.
- * Courses now prompts for a name when a course record is duplicated.

Email:

- * The email-service is now determining when to authenticate correctly.
- * Made corrections to the email services to prevent an issue where some email would be sent multiple times.

Export:

- * The Favorites tab now updates correctly when the custom sort order is changed on the saved tab.
- * The Clear All Selections action menu item in Edit windows is now functioning correctly.
- * The default action on Enter in the edit/add windows is now Run rather than Save.
- * Unnamed new saved operations now prompt the user for a name before saving.
- * The "Use _1 instead of | in 852 tag" option in item and copy exports is again working.
- * Export to FTP should now be working.
- * In some cases, tab delimited exports could be missing the header. This has been corrected.
- * Added tab delimited option for circulation group export.

Help:

- * Fixed ping on Windows 7 so non-administrative users can access online help.

Import:

- * All Import operations are now managed by the Operations Manager.
- * Corrected an issue with tab delimited item imports where fields were not updated correctly when adding add'l authors to existing titles via import.
- * Added support for a delete tag in tab delimited patron imports. An entry of %%Delete%% in supported fields will cause the data currently in that field to be removed when a record is updated.
- * Tab delimited imports are now a bit more flexible with regard to the terminating slash character in the header; the header should be read properly with or without it.
- * The Patron Site filed is now being used when importing a patron file with no Patron Site specified.
- * Added Circulation Group import support.
- * Added support for specifying Import Headers with saved Import operations.
- * Import logging is now more complete and accurate.
- * Fixed import field mapping dialog not showing all record fields.

Inventory Helper:

- * Sorting of the inventoried copies list is suppressed and will only appear in scanned / entry order.

Item Management:

- * Sorting by sequence number when searching in the item management window should work properly now.
- * The Item Management MARC editor now errors if you try to remove the 245 title tag.
- * There is a new service that searches for cover art for titles that have an ISBN but are using the default images.
- * The copy usage table has been restored under the Copy Statistics tab.
- * When adding a new title, copy, or patron the <cmd +=> or <ctrl+=> modifier in edit fields will cause the equivalent field value from the previous visible item or copy to be copied into that field.
- * Title is now correctly searched in the local collection when adding titles via the Add Title Assistant / MARC Search.
- * Renewals are now being shown in copy statistics.
- * The Author field is no longer locked for editing in the simple item management interface. We have updated it to allow editing of any type of Author main entry; 100, 110 and 111. The default type if adding an author via the simple interface will be a 100 record.

Log:

- * The server log now shows when a patron's 'Keep Patron History' setting has been enabled or disabled.
- * Added server logging for Copy, Title and Patron creation and removal actions; perviously only the client logged these actions.
- * When a title is removed, the log entries specifying the related copy removals are now properly displaying the barcodes of the removed copies.
- * The transaction log is now cleared when someone logs in.
- * The double-click for the transaction log has been enhanced so that if there is a recognizable URL in the description field, the browser will be launched with that link.

- * Web logins are now recorded in the server log.

Misc.

- * Archiving when quitting from the login window should work now.
- * Clients are now displaying the current server date/time when notified its date/time settings are different from the servers.
- * Fixed file permissions on mac such that new files and directories should now inherit their permissions from their parent directory instead of being created with default permissions.

Operation Management:

- * Operation output now begins on the first page of the summary.
- * Scheduled operations no longer create unnecessary output files.

Patron Management:

- * Copy numbers now appear correctly in Patron Details.
- * Added the option to search by User ID in the Patron Selection window.
- * Added the option to search by First Name in the Patron Selection window.
- * An error message is now displayed when a patron record can not be saved due to an invalid email address.

Preferences:

- * The site email address now accepts a blank field and are being tested for a correctly formatted email when present.
- * Added MT - Montana Shared Catalog to the z39.50 address book. This will appear in new or default lists only.
- * Added a new policy option to "Only count open days in Loan Period".
- * 'Filter Results by Site ID Code' preference now is properly disabled if the system is not registered as a Central Union.
- * The policy options to limit reservations and holds to patron site is disabled for systems not registered as a Central Union.
- * Terminology for Patron 'Fax Number' can now be customized along with other field labels under Edit - System Preferences - Terminology.
- * Added a preference to 'Hide Patron's Name on Receipts'. When enabled we will print only the patron's initials on receipts.
- * The Temporary Item Default Policy preference is now working.
- * The Central Union preference to filter System Patron counts by Site ID Code is now an Operator Preference only.
- * Restored the 'Remote Services Time-out' preference to Site Information - Services.

Reports:

- * The Favorites tab now updates correctly when the custom sort order is changed on the saved tab.
- * The Clear All Selections action menu item in Edit windows is now functioning correctly.
- * The default action on Enter in the edit/add windows is now Print rather than Save.
- * Unnamed new saved operations now prompt the user for a name before saving.
- * Fixed formatting, page breaks, and blank pages on several PDF format reports.
- * Temporarily removed Web Activity reports pending an overhaul of the Web Statistics mechanisms in 4.2.

- * Circulation Letter report, Include charges report no longer labels everything Overdue.
- * Fixed copy reports Author sort. Also Fixed Copy Call Number sort to use Author and Title as subsorts.
- * Changed terminology for Use Local Library option to Filter results by Site ID.
- * Renamed Copy List - Summary to Copy List with Summary.
- * Copy List - Detailed report is now displaying the correct value for Purchase Cost.
- * Sorting by Curriculum codes are now supported in Item List reports.
- * Sorting by Bibliographic Term is now supported in Item List reports.
- * Sorting by Interest Term is now supported in Item List reports.
- * The proper "Skip Some Labels" template is now in place for landscape format Label reports.
- * Fixed copy reports Author sort. Also Fixed Copy Call Number sort to use Author and Title as subsorts.
- * Added card expiration date to Account Information - Letters and Account Information - Email.
- * Added a new detailed 'Command Barcodes' report with one barcode per line and six barcodes per page.
- * Added an Email Format Refund Letter report under Reports > Circulation > Notices. Sends an email with the date, amount, and description of each refund.
- * Added an option to include Location or Second Location information on Patron Label reports.
- * Patron and copy detailed usage reports no longer have blank first pages.
- * Report delivery via FTP is now functioning correctly.
- * All selection criteria for a report is now displayed in the report header.
- * Added report template ID to report headers.
- * The text for Letter and Notice type reports is now displayed in the report edit window and can be edited on a report-by-report basis.
- * All circulation notice and letter report types now assume the default selection is for overdue items.
- * Acquisitions report selection options are now consistent, and contain all of the selection options they should at this time.
- * Results filtered by Site ID Code has been restored in report edit windows where it applies for Central Union.
- * Added a Saved Operation Summary report under Special Reports - Other.

SIF:

- * SIF v2.0r1 message headers with context information no longer cause problems.
- * The secure settings in the SIF window/Connection tab are activated according to the SIF version and whether SIF secure communications are enabled.
- * SIF synchronize no longer needs to restart if the clear patron GUIDs or reset SIF date options are specified.

Utilities:

- * The Favorites tab now updates correctly when the custom sort order is changed on the saved tab.
- * The Clear All Selections action menu item in Edit windows is now functioning correctly.
- * The default action on Enter in the edit/add windows is now Print rather than Save.
- * Unnamed new saved operations now prompt the user for a name before saving.
- * Clear Patron Notes utility is working again.

- * Fixed patron utility to replace expiration and graduation dates.
- * When copies are transferred from one title to another, the circulation records that match the copies barcodes are now updated with the new items UID. This ensures they stay bound properly to the Title that owns the copy.
- * Added a 'Set Condition Code' Copy Utility.
- * Scheduled utilities now delay archive until just before being ran, rather than archiving when added to the queue.
- * Starting and Ending dates now appear correctly in the Remove Copy Utility.
- * Fixed Get Resources and Check for Updates utilities on a client.
- * Fixed Restore utility run from saved lists.
- * Restarting a Data Station from a client in the Utility Edit Window works now.
- * Added Forgive Fines Patron Utility.
- * The Import Patron Picture utility has been moved to the Import Window, under the Actions Menu (Gear).

VWP:

- * Pasted images are now automatically scaled to fit (both height and width).
- * VWP will no longer scale images up to fit the page size; it will only scale large images down to fit on the page.

Web:

- * Supported browsers are Internet Explorer 7 and 8, FireFox 3.5+, and Safari 4. Support for Safari 3 has been discontinued.
- * Textbook Tracker web services now support secure communications via Secure Socket Layer (SSL).
- * On windows IE will be responsible to open PDF documents if a default viewer is not found.
- * Web users will now be informed if connection to the server is lost.
- * Single-user licensees must access web from the same IP as their data station.
- * Web logins are now recorded in the server log.
- * Patrons can again log in via web to check their details.

Web Workstation:

- * The Add Title Assistant / MARC Search is now available in the Web Workstation.
- * Fixed several issues in the interface for proper display of fields.
- * Fixed several issues in the Web Workstation where changes to records or preference settings were not being saved correctly.
- * Restored the Title Replacement Cost field to Tile Information pane in Web Item Management.
- * You can now add new medium types via the web Item Management interface.
- * When modifying a patron or Item record in Web Management modules, the record list will be updated to reflect the changes.
- * Added attachment/links to item details.
- * Enabled Reservations modes in the Web Workstation.
- * The reservations calendar is now available in the Web Workstation.
- * Implemented the Reserves window in the Web Workstation.
- * The expired patron dialog will no longer be shown if card expiration dates are not being used.
- * Enabled print receipt options in Web Workstation, though the Slip Printer is not yet

supported.

- * Fixed several issues in the interface for proper display of fields.
- * Fixed several issues in the Web Workstation where changes to records or preference settings were not being saved correctly.
- * Changes to user preferences should now take place immediately.
- * Password fields in the Web Workstation are now treated as such and obscure the data entered into them.
- * The Operations Manager now correctly reports running operations for the current operator as well as all running operations.
- * The Operations Monitor should now be more responsive on Web.
- * Added a cancel option for queued and running web operations.
- * Reports downloaded in Web Workstation now have accurate names.
- * You can now add new medium types via the web Item Management interface.
- * When modifying a patron or Item record in Web Management modules, the record list will be updated to reflect the changes.
- * Whitespace and Return characters are now stripped from URL's saved to an Item Record through Web Workstation.
- * Added the ability to open a dialog of the transaction log message, via double clicking, for cases when the log message is too large for the display area.