

Textbook Tracker 4.21.0 Release Notes
Build 20120116

=====

Due to multiple data enhancements, a full database rebuild will 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 4.21.0.

Documentation for Textbook Tracker 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******

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. v3 to v4 data conversion includes core data such as item and patron records, transactions, patron history, etc. Quick reports and preferences that are no longer applicable will not be converted. 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.

Textbook Tracker 4.21.0 runs on the following operating systems. Below are more specific recommendations: Mac OS 10.5, Mac OS 10.6, 10.7, Windows XP, Windows Server 2003, Windows Vista, Windows 7, Windows Server 2008

System Requirements for Data Stations

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 or X64 Multi-Core/Processor
4 GB of RAM or more
20 GB of Free HD/100,000 Items

Minimum

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

System Requirements for Central Union Data Stations

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 or X64 Multi-Core/Processor
Variable - see RAM Recommendations
20 GB of Free HD/100,000 Items

Minimum

Mac OS 10.5, Windows XP
G5, X86, or X64 Dual Processor/Core
Variable - see RAM Recommendations
20 GB of Free HD/100,000 Items
1024 x 768 Resolution

System Requirements for Controller Systems

Recommended

Mac OS 10.6, Windows 7 or 2008
X86 or X64 Multi-Core/Processor
Variable - see RAM Recommendations
20 GB of Free HD/100,000 Items

Minimum

Mac OS 10.5, Windows XP
G5, X86, or X64 Dual Processor/Core
Variable - see RAM Recommendations
20 GB of Free HD/100,000 Items
1024 x 768 Resolution

System Requirements for Workstations

Recommended

Mac OS 10.6, Windows XP or 7
X86 or X64 Multi-Core/Processor
2 GB of RAM or more

Minimum

Mac OS 10.5, Windows XP
G4, Pentium 4 (or equivalent)
1 GB of RAM
1024 x 768 Resolution

Browser Requirements for Web Workstations

Recommended

FireFox 6+ for Mac or Windows
Safari 5+ for Mac OS X

Optional

Internet Explorer 8 or 9+
and others for both Mac and
Windows
1024 x 768 Resolution

Controller and Central Union RAM Recommendations:

Up to 5 collections: 4 GB or more
Up to 20 collections: 8 GB or more
Up to 30 collections: 12 GB or more
Up to 50 collections: 16 GB or more

NOTE: For controller or central union configurations managing more than 50 collections, contact COMPAnion for specific recommendations.

NOTE: In all cases COMPAnion recommends modern and fast Hard Drives for Data Stations. Database applications are disk intensive and with modern disk hardware performance will be greatly enhanced. SSD technology has shown promising results in early testing.

Overview of Major Features:

Textbook Tracker 4.21.0 offers enhanced Report, Utility, and Export interfaces designed to simplify the process of working with ad-hoc as well as saved operations. Additionally, this release further improves on performance, reliability, and stability and includes a number of minor enhancements and fixes.

Documentation for the Report, Utility, and Export windows will be available online, and accessible through the help links in the application. Please view this video for an overview on reporting: <<http://www.goalexandria.com/videos/wiki/reports.html>>

Special Considerations

Beginning with version 4.21.0 COMPanion will only support email messaging via your own or other SMTP servers. COMPanion will no longer be supporting the built in SMTP feature. If your system was configured to use this option, you'll need to configure the program for a new SMTP server. If you need assistance with this please contact COMPanion Technical Support. Additional details for configuring Textbook Tracker to work with your SMTP server are available online at:

http://www.companioncorp.com/mediawiki/index.php/System_Preferences:_Network_Services:_Email

COMPanion is aware of an issue currently that may prevent Workstation clients from properly updating to 4.21.0. Sometimes the update process will get confused and although it will appear the update is progressing, nothing is actually happening. If a client update is taking longer than a few minutes or if it reports to be running a version older than 4.21.0 following the update, the client application may need to be removed completely and reinstalled.

Please contact COMPanion Technical Support if you require assistance. Instructions for installing Workstations are available online at:

http://www.companioncorp.com/mediawiki/index.php/Installing_Textbook_Tracker_v4_Workstations

Additional Key Enhancements and Changes:

Circulation:

- Fixed tabs in Copy Statistics so full checkout date is showing.
- Added a message box to better alert operators when check outs fail due to the require circulation group preference being set.
- Central Union - Textbook Tracker will now use the operators current site for the site code of items added from the unknown barcode window.

Database:

- Updating to 4.21.0 will require a full database rebuild on first launch.
- We have changed the order that data files get rebuilt and validated to address issues where validation sometimes needed to be done twice.

Central Administrator:

- The Central Administrator can again properly reconnect to the local collection after failing to connect to another one.
- Corrected an issue that caused some of the menu items to not activate when switching back to the local collection on a Central Administrator.

Email:

- Corrected an issue that prevented circulation notice emails from being sent to patrons with multiple comma separated email addresses in their record.

Export:

- Implemented enhanced user interface. For more information, see: [<http://www.companioncorp.com/mediawiki/index.php/Export_Window>](http://www.companioncorp.com/mediawiki/index.php/Export_Window)
- Corrected an issue that could cause extra spaces to be added to copies in MARC format exports.

Import:

- Total number of records imported has been added to end of the Import Summary Report.
- Previously it was possible to create a new patron with the same Government ID as an existing patron on import. This has been corrected and on import if a patron is found to have a duplicate ID to an existing patron, then it is noted in the log and that field is set as blank for the new patron.

Item Management:

- The Add Title Assistant / MARC Search functionality has been enhanced to be more efficient and functional. We have added a 'Find More Records' option to the MARC Search Results window, allowing for the searching of additional servers. Servers must be configured in the Address Book preference pane and be 'Available'. The initial search and each additional search will search two servers at a time - server priority is also defined in the Address book preference pane for z39.50 servers.

Miscellaneous:

- Due to minimal use and wide availability external to Textbook Tracker, the Dictionary Window has been removed from the application.
- Textbook Tracker will now attempt to alert administrators in the event that hard drive free space is running low. An email will be sent to the administrators email address configured in preferences when Textbook Tracker detects there is less than 3x the size of the database free; If less than 1x is free, Textbook Tracker will refuse to start as it will not be able to operate correctly. It is critical to ensure your server hardware is well maintained.

Preferences:

- Central Union - when a new Site record is created, we are now creating a corresponding address book entry which further automates the Central Union setup process and eliminates duplicate work for the Operator.
- Added Site ID Code import/export support for Address Books.
- The 'Keep Patron History' setting in Policies is now correctly being applied to new Patron records when the system is not configured to "Keep History for All Patrons".
- The SSL preferences now accept DER format certificates.
- The SSL -> Create Temporary Certificate window now accepts URLs as well as IP addresses in the URL field.
- Corrected several reported issues with respect to sound preferences.

Reports:

- Implemented enhanced user interface. For more information, see: [<http://www.companioncorp.com/mediawiki/index.php/Report_Window>](http://www.companioncorp.com/mediawiki/index.php/Report_Window)
- Corrected an indexing issue preventing the Bibliographic Term selection from working properly.

- Added an option to 'Print Item Images' on Circulation Notice 2 per page, Circulation Letter, Circulation Letter to Parents, and Circulation Letter with Summary.
- Added a Cash Drawer report to Circulation -> Charges and Payments.
- Added a Recall Letters report to Circulation -> Notices.
- Added a Damaged Items Letter report to Circulation -> Notices.
- Restored Policy Exceptions Special Report.
- Moved the Reservation Label report from Copy reports to the correct location in Circulation - Reservation reports.
- Moved the Item Analysis report from Copy reports to the correct location in Titles - General reports.
- Custom Barcode report is no longer printing custom text when a barcode label is set to be skipped.
- Added a Serial # column to the Copy Status report.
- Added Patron Email selection option to Circulation reports.
- Added Accession Date selection option to Patron reports.
- Added a 'Has Picture' selection to Patron and Title reports.

Self Service:

- The self service window now disables all menu options for modules the logged in operator had access to when using the 'AS' command to access it. This ensures that patrons can not access restricted areas of the program when using a self service window accessed via the AS command instead of via self service operator login.

SIF:

- Made ZIS scheme and protocol user configurable and we also allow the ZIS URL scheme as specified in the SIF window to not match the specified security level. This allows customers with Infinite Campus ZIS servers not operating securely to communicate correctly with the server when the ZIS still expects HTTPS in the URL.

SIP2:

- SIP2 will now test for User ID as well as Patron Barcode in SIP2 Login Messages.

Utilities:

- Implemented enhanced user interface. For more information, see: http://www.companioncorp.com/mediawiki/index.php/Utilities_Window
- Added an 'Other' option to the drop down menu for the Copies -> Checkout utility. Selecting that option adds a Barcode textfield allowing the user to enter the barcode of a patron and checkout en mass to patrons other than system patrons.
- Added checked out records as line items in the Checkout utility summary report.
- Convert ISBN utility is now putting the newest ISBNs in the first 020 tag.

Web Workstation:

- Corrected an issue with resetting a patrons password when a new patron was being created; Textbook Tracker now prevents this ensuring the new patron is first saved so the correct patron is always updated when password changes are made.
- Changing a Copy ID in the Web Workstation Item Management window is no longer resetting the copies checkout count.