

## Textbook Tracker 4.21.3 Release Notes

### Build 20120727

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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](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\*\*\*\***

#### **System Recommendations:**

Textbook Tracker 4.21.3 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

Please see the following documentation for system recommendations:  
<[http://www.companioncorp.com/mediawiki/index.php/Textbook\\_Tracker\\_v4\\_Installation](http://www.companioncorp.com/mediawiki/index.php/Textbook_Tracker_v4_Installation)>

#### **Overview of Major Features:**

Textbook Tracker 4.21.3 offers a significantly improved Title Assistant and MARC Search cataloging tool as well as numerous bug fixes, stability and performance improvements, and other minor enhancements.

#### **Special Considerations**

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

Current Textbook Tracker v3 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 Quick reports and preferences that are no longer applicable will not be converted.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 Rebuilds and Archives will need to be reconfigured in the new v4 Scheduled Utilities module.

Beginning with version 4.21.1 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](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.x. 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.x 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](http://www.companioncorp.com/mediawiki/index.php/Installing_Textbook_Tracker_v4_Workstations)

### **Additional Key Enhancements and Changes:**

#### **Inventory Helper:**

- Improved Inventory Helper session management so that circulation performance will not degrade when large inventory sessions are in progress.

#### **Item Management:**

- Enhanced and simplified the Title Assistant and MARC search tool. Results from all specified Z39.50 sources are now displayed as they are found without requiring additional user interaction.
- Corrected an issue with filtering and selecting on Copy Site Code in Item Management.
- It is now possible to search on blank fields in the Simple Item Selection window by searching on double quotes (""). This indicates to Textbook Tracker that you wish to search for records with "nothing" in the specified field.
- The cover art download service will now download images in accession date order, newer items first.

#### **Operation Management:**

- Printing of charges, payments, refunds, and credits from the circulation window no longer go through Operation Management as these are circulation related printouts expected to be available immediately, not traditional reports.

#### **Patron Management:**

- It is now possible to search on blank fields in the Simple Patron Selection window by searching on double quotes (""). This indicates to Textbook Tracker that you wish to search for records with "nothing" in the specified field.
- Automatic Imports from a COMPanion Patron Server are now functional with both Textbook Tracker and Alexandria.

#### **Preferences:**

- Removed MARC Search / Z39.50 client preferences as they are no longer required for the Title Assistant or MARC Search tool.

#### **Reports:**

- Updated PDF generation code for better printing support on older model printers.
- All letter text fields in the report window accept carriage returns instead of causing the report to be run when 'Return' is depressed.
- Made several minor formatting adjustments in report templates including Circulation Notices, Listings, and Copy Label reports.
- Whenever a Report, Utility, or Export window is opened the Operator, Site, and Favorites

filters will be reset to OFF.

- Added circulation notice "In-Stock Hold Notice - Email" as a format option.
- The Circulation Listings 1 Line With Charges (734) is now named correctly and offers the correct fields; Name, Barcode, Title, Cost / Fine.

**Utilities:**

- Specified MARC tags can now be completely removed using the 'Remove' catalog utility. Select Tag Subfield 'Other', enter in a tag number only, with no subfield specified, and in the 'Value to Remove' field enter the text %%delete%%. This will cause all instances of the specified tag to be removed for the selection.
- Restored 'To Date:' field on Fix Due Date utility.
- Corrected several window layout issues in Title Catalog Utilities.
- Fixed Course ID and Course Name Selection for Courses Utilities.

**Textbook Tracker 4.21.2 Release Notes  
Build 20120306**

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

**System Recommendations:**

Textbook Tracker 4.21.2 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

Please see the following documentation for system recommendations:  
<[http://www.companioncorp.com/mediawiki/index.php/Textbook\\_Tracker\\_v4\\_Installation](http://www.companioncorp.com/mediawiki/index.php/Textbook_Tracker_v4_Installation)>

**Overview of Major Features:**

Textbook Tracker 4.21.2 offers significant improvements to secure communications and corrects an issue in Item Management that could cause sporadic problems when trying to save changes to title or copy records.

**Special Considerations**

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

Current Textbook Tracker v3 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 Rebuilds and Archives will need to be reconfigured in the new v4 Scheduled Utilities module.

Beginning with version 4.21.1 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](http://www.companioncorp.com/mediawiki/index.php/System_Preferences:_Network_Services:_Email)

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[http://www.companioncorp.com/mediawiki/index.php/Installing\\_Textbook\\_Tracker\\_v4\\_Workstations](http://www.companioncorp.com/mediawiki/index.php/Installing_Textbook_Tracker_v4_Workstations)

### **Additional Key Enhancements and Changes:**

#### **Import:**

- The Operation Summary Report for import operations is again showing relevant information for all imported records.

#### **SIF:**

- SIF messages sent to the ZIS in push mode now show the correct status.

#### **Utilities:**

- Item Catalog utilities are working again.

### **Textbook Tracker 4.21.1 Release Notes Build 20120210**

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Documentation for Textbook Tracker is available online at:

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### **System Recommendations:**

Textbook Tracker 4.21.1 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

Please see the following documentation for system recommendations:

[http://www.companioncorp.com/mediawiki/index.php/Hardware\\_and\\_Operating\\_System\\_Recommendations](http://www.companioncorp.com/mediawiki/index.php/Hardware_and_Operating_System_Recommendations)

### **Overview of Major Features:**

Textbook Tracker 4.21.1 offers a number of stability and performance enhancements as well as a new Operation Management system. The Operations Manager has been redesigned with a focus on reliability and the Operation Management window has been simplified to be more user friendly. Please see the following documentation for more information:

[http://www.companioncorp.com/mediawiki/index.php/Operation\\_Management\\_Window](http://www.companioncorp.com/mediawiki/index.php/Operation_Management_Window)

### **Special Considerations**

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## **Additional Key Enhancements and Changes:**

### **Central Union:**

- Hold and Reservation notification emails sent by the system will now be addressed to the library email address from the Site Management record associated with the item. This ensures that operators at each site receive these notices rather than only the District Administrator.

### **Circulation:**

- Alternate titles, such as those from MARC tag 246, are again being displayed in the title lookup window accessed by the 'T' or 'ST' commands.

### **Controller:**

- Controller administrators now have tools available to schedule archive and rebuild operations for all managed Data Stations in a central location. See the 'Utilities' option under the controller 'Tools' menu.

### **Database:**

- Textbook Tracker now supports data files greater than 4GB in size.

### **Import:**

- Corrected a patron import issue that could cause the patron accession date to be set to the systems 'Far Past' date of Jan. 1, 1904 rather than the actual date they were added.

### **Inventory Helper:**

- The inventory session and list of scanned items is again being properly cleared when the operator selects to 'Reset' or 'Finish' the session.

### **Preferences:**

- Corrected an issue that caused some SSL certificates to be seen as invalid.
- Corrected a preference related issue affecting archives - Textbook Tracker should again archive properly to the users specified directory or mounted volume.
- Changed "Operation Queue" security to "Operation Management "security to better fit with the redesigned Operation Management window. Access levels include 'View Personal', 'View All', and 'Remove All'.

### **Reports:**

- Circulation Notice Email format now prints "Item Marked Lost" under the Date Returned field if the item is lost.
- Corrected status and total information displayed in the Circulation Letter the Parents.

## **Textbook Tracker 4.21.0 Release Notes Build 20120116**

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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.

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### **System Recommendations:**

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

Please see the following documentation for system recommendations:

<[http://www.companioncorp.com/mediawiki/index.php/Textbook\\_Tracker\\_v4\\_Installation](http://www.companioncorp.com/mediawiki/index.php/Textbook_Tracker_v4_Installation)>

### **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:

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[http://www.companioncorp.com/mediawiki/index.php/Installing\\_Textbook\\_Tracker\\_v4\\_Workstations](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 needs 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>](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.