



SirsiDynix Symphony, SymphonyWeb, and Data Control: What's New in 2023

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Agenda

- Current release 4.0.0
- Upcoming 4.1.0 (Q3 2023)
- Roadmap 4.x.x



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Latest release

<https://support.sirsidyndix.com>

Home / Products / Product Releases

4.0.0 (May 2022)

- Symphony, SymphonyWeb WorkFlows



Home / Documents / Release Notes

Release Notes

Select a product and version

Home / Symphony and SymphonyWeb

Symphony and Sym

View Revisions Reports

Symphony and SymphonyWeb 4.0.0 Release

Related Collections

- Symphony 4.0.0 Upgrade Instructions
- Symphony 4.0.0 WorkFlows Client Ins
- Symphony Data Control 3.2.0 Docum

Related Content

SirsiDynix BLUEprint - Symphony, Sym

Account Lockout (1 of 5) - Setup

Did you know?

The account lockout functionality will prevent individuals from guessing User IDs and PINs that could provide access to the Symphony ILS or the e-Library online catalog. It will help ensure both Symphony and individual accounts are protected from unauthorized use. In order to use this functionality, contact SirsiDynix Customer Support to enable the "Policy PINs" module.

- Log in to Java WorkFlows as an admin user
 - Navigate to Configuration > Access Control Configuration group
 - Open > User PIN wizard
- Click > Copy to copy the delivered UPIN policy
 - Enter a New policy name
 - Click > OK
- Enter value for Number of allowed attempts before lockout
 - Enter value for Amount of time the account is locked
 - Select time radio button for Amount of time the account is locked
 - Enter value for Amount of time until failed attempts are forgotten
 - Select time radio button for Amount of time until failed attempts are forgotten



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WorkFlows, SymphonyWeb & e-Library 4.0.0

Account Lockout (1 of 5) - Setup

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 - Select time radio button for Amount of time until failed attempts are forgotten
 - Check > Use this policy for invalid users
 - Click > Save



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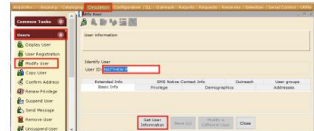
WorkFlows, SymphonyWeb and e-Library 4.0.0

Account Lockout (5 of 5) - Testing user lockout experience and unlocking a user

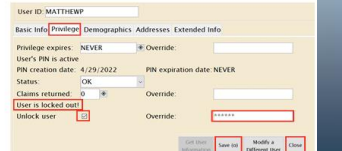
- Exit or log out of WorkFlows, SymphonyWeb or e-Library.
 - Start a new session. Log in with any valid User ID and an *invalid* PIN
 - Click > OK
 - An **Error message** will appear indicating the number of attempts before account lockout
 - Click > OK and repeat entering an invalid PIN, and clicking OK until the **Error message** states: **Your account has been locked. Please see a system administrator for assistance.**



- Log in as an Administrator
 - Click > Circulation module
 - Click > User wizard group
 - Click > Modify User wizard
 - Enter the locked-out User ID
 - Click > Get User Information



- On the **Privilege** tab, select > **Unlock user checkbox**
 - Enter the **Unlock Override** discussed in BLUE-print "Account Lockout (4 of 5)"
 - Click > **Save** and then click > **Close**. This User ID is now unlocked
 - Exit or log out of the session as the Administrator, and log back in as this unlocked user to demonstrate the success of unlocking the user



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SymphonyWeb Enhancements in 4.0

Product: SymphonyWeb | Version: 4.0.0 | Category: - Any - | [Apply](#) | [Export PDF](#)

Jira #	Summary	Product	Version	Category	Enhancements
UNI-41290	Notices Helper added to SirsiDynix SymphonyWeb Users can now access the Notices helper in SirsiDynix SymphonyWeb via Schedule New Reports and Scheduled Reports wizards.	Symphony, SymphonyWeb	4.0.0	Reports	
UNI-42752	Easier resizing of helper windows within SirsiDynix SymphonyWeb Visual guides now show when users resize helper windows. The size of the area to click to resize helpers has also been increased.	Symphony, SymphonyWeb	4.0.0	Performance	User Inspired
UNI-42856	Screen flickers while mouse wheel scrolling through search results in SirsiDynix SymphonyWeb Previously within SirsiDynix SymphonyWeb, the screen would sometimes flicker when scrolling through search results. This has been fixed so that no flickering occurs when mouse wheel scrolling through search results specifically.	Symphony, SymphonyWeb	4.0.0	Performance	
UNI-42869	SymphonyWeb: Additional map type configuration wizards The following SirsiDynix Symphony Configuration wizards are now available to use in SirsiDynix SymphonyWeb 4.0.0: ... Read more...	Symphony, SymphonyWeb	4.0.0	Configuration	
UNI-43037	Additional Configuration wizards available for SirsiDynix SymphonyWeb The following SirsiDynix Symphony Configuration Wizards are now available to use in SirsiDynix SymphonyWeb 4.0.0: Acquisitions Material Type, Authority Index, Binding, Circulation Set Category, Course Term, Fund Level 1-6, Information Desk, Item Category 1-5, List Category 1-2, Name Label, Serial Control Category 1-2, Serial Control Claim... Read more...	Symphony, SymphonyWeb	4.0.0	Configuration	



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Latest release

Home / Products / Product Releases

3.2.0 (May 2022)

- Symphony Data Control

Product Releases

Product Type Product

SirsiDynix

- User IDs (barcodes) and names of staff members who will use Symphony Data Control :

User ID/Barcode	User Name	Permissions	Administrator*
ADMIN	Administrator	Run Query, Edit	Choose an item.
SIRSI	SirsiDynix	Run Query, Edit	Choose an item.
		Run Query, Edit	Choose an item.
		Run Query, Edit	Choose an item.
		Run Query, Edit	Choose an item.
		Run Query, Edit	Choose an item.
		Run Query, Edit	Choose an item.

* Note that users marked as Administrator will be assigned the 'Batch Edit' permission by default.

Number of concurrent jobs
By default, SirsiDynix will specify a Concurrent Jobs value of "5" unless otherwise specified. SirsiDynix Symphony Data Control by default allows up to 5 concurrent search and/or edit jobs, but this setting can be adjusted based on the number of staff using Symphony Data Control simultaneously. SirsiDynix recommends a max value no greater than 10 concurrent jobs to prevent performance issues.

Number of concurrent jobs: 5

SirsiDynix Symphony Data Control URL
By default, your Data Control URL will end with "/DataControl". SirsiDynix Symphony Data Control allows for some customization of the URL, though, via the folder name of the Symphony Data Control client files (for example, <https://sitecode.sirsi.net/<DataControl>/>).



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Upcoming (Q3 2023)

4.1.0

- Symphony, SymphonyWeb WorkFlows

4.x.x

- Data Control

Home / Documents / Product Roadmap

Product Roadmap

Product: Symphony | Version: -Any- | Category: -Any- | Apply | Reset

Jira #	Summary	Status	Product	Version	Category	Enhancement
UNI-32381	Acquisitions and Circulation tax policies -- Extend percentage field decimal places beyond just two The decimal percentage of both the Acquisition and Circulation Tax policies will be increased to allow for more precise calculations.	Open	Symphony, SymphonyWeb	4.1.0, Current Development	Acquisitions, Circulation	User Inspired
UNI-38384	Consortium Membership: setting to have the tree sorted by Consortium Group Name A wizard property will be added to allow for sorting by Consortium Group Name (with the station library's group always first in the item tree display list).	In Progress	Symphony, SymphonyWeb	4.1.0, Current Development	Circulation	Item Search and Display Holdings need to be in alphabetical order of Consortium Group
UNI-40618	SymphonyWeb/WorkFlows : Single Sign-On SymphonyWeb and WorkFlows will support Single Sign On (SSO) using BLUEcloud's CAS. Staff will be able to use SSO to authenticate with BLUEcloud, SymphonyWeb and WorkFlows.	Open	Symphony, SymphonyWeb	Current Development	Circulation, Booking, Acquisitions, Serials, Cataloging, Requests, Reports, Academic Reserves	
UNI-42343	More editable fields within SirsiDynix Symphony Data Control More record attributes, such as Library and Item Type within the Item table, and Date Received and Date Loaded within the Distribution table, will be editable within the Data Control client.	Open	Symphony, Symphony Data Control	Current Development	Data Control, Acquisitions, Cataloging	



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Upcoming - 4.1.0

Technologies

- Windows 11 (Java WorkFlows)
- Mac M1 and M2 processors (Java WorkFlows)
- Windows Server 2022 (Symphony, SymphonyWeb)
- SQL Server 2022 (Symphony, SymphonyWeb)



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Upcoming - 4.1.0

Integrations

- Lyngsoe IMMS™ integration
- IMMS™ = Intelligent Material Management System
- Real time integration
- Lyngsoe APIs
- Changes made in JWF and SymphonyWeb include

Cataloging Configuration

- Browse Index
- Classification
- Holding Code

Sort Point

Name	Description
EAST_CIRC1	East Circ Desk
EAST_SSRV1	East Self Serve Kiosk 1
EAST_SSRV2	East Self Serve Kiosk 2
MAIN_SSRV1	Main Self Service Kiosk 1
MAIN_SSRV2	Main Self Service Kiosk 2
MAINCIRC	Main Circ Desk
NORTH_CIR1	North Circ Desk
NORTH_SSR1	North Self Service Kiosk 1
NORTH_SSR2	North Self Service Kiosk 2
SOUTH_CIR1	South Circ Desk

Item Details:

37131080346059 - 1 - REF-BOOK - STACKS

Item category 0: none Item category 10: none
 Date created: 5/31/2007 Media desk: none
 Date last charged: 1/30/2008 Previous user ID: none
 Last discharged: Never Last activity: 2/19/2008
 Date inventoried: Never Total checkouts: 2
 Times inventoried: 0 In-house uses: 0

Callout: If your library system has the Lyngsoe Intelligent Material Management System™ (IMMS) integration with SirsiDynix Symphony configured, you are not able to modify the status of the item using the Check Item Status wizard, as these transactions are handled within IMMS.

MEDIA HOTELI LIDRANES: MAIN
 IMMS Discard Locations: DISCARD,MISSING



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Upcoming - 4.1.0

Integrations (cont.)

- Staff Single Sign-On (SSO) for Java WorkFlows and SymphonyWeb
 - Uses BLUEcloud CAS
 - Ability to use different idps
 - Use for multi-factor identification (MFA)
- BLUEcloud ID case “insensitivity”



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Upcoming - 4.1.0

User Inspired



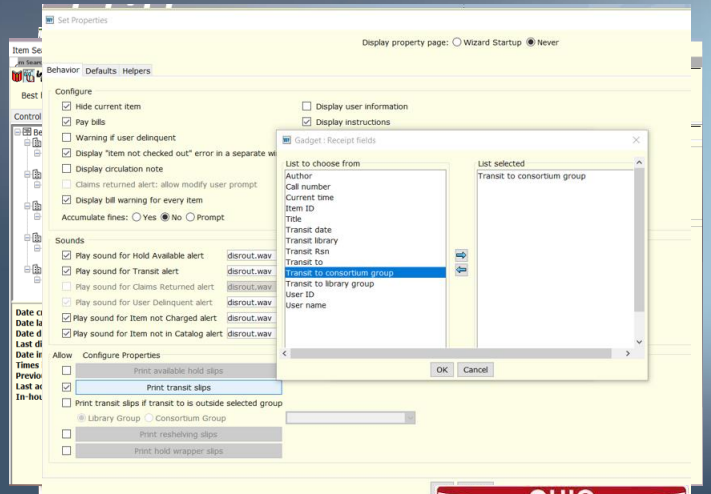
- Tax policies - Extend percentage field decimal places beyond two
- User Search option to include address
- Ability to search on Unique User Key



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Upcoming - 4.1.0 User Inspired (Cont.)

- Item Search & Display Consortia Group Sorting
- Consortia Group Destination Library on Transit Slips



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Upcoming - 4.1.0

Data Control

Ability to select and edit

- Item Type
- Vendor VED data



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Upcoming - 4.1.0

Fixes

- Look up Web Auth ID and have it be case insensitive
- Increase Character Limit in General Configuration Policy
- Fix behavior of trap hold wizard when item hold is cancelled
- Make access to scheduled reports more secure



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Roadmap

Technologies

- Red Hat 9 Support
- Rocky Linux
- Apache 2.4

3rd Party Products

- Improved RFID integrations
 - Bibliotheca
 - Envisionware



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Roadmap

Enhancements and Improvements

- Audit Trail - inclusion of User ID in transaction stats, views, and glossaries.
- Patron Address Templates - Improved control over display and order of patron address fields.
- Patron Registration - provide constant data drop-down list for patron title and suffix.



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Roadmap

Enhancements and Improvements (cont.)

- Option to require patron first name and/or birthdate
- Option to populate item price from 020\$c of the bibliographic record
- Improvements to Rebuild reports (Headings, Items, and Text)



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Roadmap

Enhancements and Improvements (cont.)

- API and Data Control Tool to access SMS contact information
- Limit pickup libraries for holds based on ITYPE
- COSUGI Enhancement Request
- Customer Feedback



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Questions?



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