ENTERPRISE 4
ENTERPRISE 4.0 TIMELINE

Enterprise 3.1
Enterprise 3.1.1
Enterprise 4.0
Enterprise 5.0

2009  Q4   Q1  Q2  2010  Q3  Q4  2011  Q1  Q2
ENTERPRISE 4.0

• Target release: Q2 2011
• Locally-hosted option
• Tighter integration of Place Holds and My Account functions using web services to make calls directly to the ILS, eliminating the need to go through e-Library
• Ability to create “My List” and place holds against those items
• Novelist Integration
• Ability to multi-select records in various places within the interface
• Collapse duplicate items in detailed display
• Export results to citation databases like EndNote and RefWorks
SYMPHONY ROADMAP
SYMPHONY 3.4 TIMELINE

- Symphony 3.3.1
- Symphony 3.4
- Symphony 4.0

2009 Q4 Q1 Q2 2010 Q3 Q4 Q1 Q2 2011
SYMPHONY 3.4

• Power User Tools
  – Context menus (right click menus) are available from the circulation checkout, bill, hold, suspension, booking & reservation lists
  – Context menus contain a list of commands that apply to records in the list that can be launched from a wizard
  – This allows staff to perform the majority of workflows without leaving a single wizard
LIST OF ONGOING CHECKOUTS - SINGLE ITEM SELECTED
LIST OF ONGOING CHECKOUTS - MULTIPLE ITEMS SELECTED
DISPLAY ITEM CONTEXT MENU OPTION
PLACE HOLD CONTEXT MENU OPTION
RIGHT CLICK MENU FROM SINGLE ITEM SELECTION IN CURRENT CHECKOUTS
RIGHT CLICK MENU FOR MULTIPLE ITEMS SELECTION IN CURRENT CHECKOUTS
DISPLAY HOLDS OPTION FROM CONTEXT MENU
SYMPHONY 3.4

- **Item Group Editor**
  - IGE allows editing items in batch.
  - Edit items on the fly (as an unsaved set) or edit items in a saved group
  - Archive current (before changes) item values for restoring at a later date
  - Merge groups of items
  - Add/remove items to/from an existing group
  - Delete groups
ITEM GROUP EDITOR

New Group Item Editor Wizard
ITEM GROUP EDITOR

Single Search
ITEM GROUP EDITOR

Advanced Search
ITEM GROUP EDITOR
ITEM GROUP EDITOR

Group Search
ITEM GROUP EDITOR
ITEM GROUP EDITOR

Select groups to merge and click Merge Groups.
Create a new Group ID automatically, manually or use one of the existing group's IDs. Click Merge Groups again.
Check Archive before editing checkbox, select item characteristics to change, click Edit Items.
ITEM GROUP EDITOR

Group creation & archive successful
ITEM GROUP EDITOR

Items can be restored to archived values
SYMPHONY 3.4

• Item Group Editor
  – IGE allows editing items in batch.
  – Edit items on the fly (as an unsaved set) or edit items in a saved group
  – Archive current (before changes) item values for restoring at a later date
  – Merge groups of items
  – Add/remove items to/from an existing group
  – Delete groups

• Pull On-shelf Items with Holds Wizard
SYMPHONY 3.4

• Item Group Editor
  – IGE allows editing items in batch.
  – Edit items on the fly (as an unsaved set) or edit items in a saved group
  – Archive current (before changes) item values for restoring at a later date
  – Merge groups of items
  – Add/remove items to/from an existing group
  – Delete groups
• Pull On-shelf Items with Holds Wizard
• New User Standing Map configuration wizard
New configuration wizard brings new ease and flexibility in allowing privileges based on a user’s standing.
USER STANDING MAP

Relevant actions that can be allowed/denied based on standing
USER STANDING MAP

User Standing policies are library-configured (can be anything)
**USER STANDING MAP**

All available client interfaces may be considered.
SYMPHONY 3.4

• Item Group Editor
  – IGE allows editing items in batch.
  – Edit items on the fly (as an unsaved set) or edit items in a saved group
  – Archive current (before changes) item values for restoring at a later date
  – Merge groups of items
  – Add/remove items to/from an existing group
  – Delete groups

• Pull On-shelf Items with Holds Wizard

• New User Standing Map configuration wizard

• Report Output Updates
  – Add XML output, including style sheets
XML REPORT OUTPUT

XML Output option
XML REPORT OUTPUT

Users can select delivered or even custom style sheets.
XML REPORT OUTPUT

Style Sheet selection when opening a finished report
XML REPORT OUTPUT

Open files in any xml-capable program (browser, Excel, Word, etc). This is a bibliography report in IE.
XML REPORT OUTPUT

Excel view, using delivered style sheets
SYMPHONY 3.4

• Additional Circulation Enhancements
  – User PIN policy
USER PIN POLICY
SYMPHONY 3.4

• Additional Circulation Enhancements
  – User PIN policy
  – Current Checkout Counter added to the Checkout Wizard
SYMPHONY 3.4

- Additional Circulation Enhancements
  - User PIN policy
  - Current Checkout Counter added to the Checkout Wizard
  - Display all checkouts in transaction list
SYMPTOM 3.4

• Additional Circulation Enhancements
  – User PIN policy
  – Current Checkout Counter added to the Checkout Wizard
  – Display all checkouts in transaction list
  – Enhanced Hold Processing
    • Ability to set OPAC hold range in hold map
    • Enhanced options for filling hold at checkout
  – Extended length of name fields
  – Configuration option for user name keys and new Rebuild User Name Keys report
  – Item price field added to receipt fields
  – Zip code prints on same line as city and state in notices
  – Separate bill maintenance settings for Bill User wizard and Pay Bill wizard
SYMPHONY 3.4

• Collection Exchange Enhancements
  – New policies added for Exchange Dates and Pending item location
SYMPHONY 3.4

• Collection Exchange Enhancements
  – New policies added for Exchange Dates and Pending item location

• e-Library Enhancements
  – Persistent User Login for e-Library
  – Enhanced Enrichment Content displays
  – Added Enrichment Content option: video clips
  – New Enterprise integration themes for the e-Library OPAC
Patron not logged in; placing item on hold
PERSISTENT LOGIN

Patron is now logged in for entire session; free to perform any activity that requires login.
VIDEO CLIP CONTENT OPTION

Quick Links
Video Clip
Summary
Video & Music Summary

Summary

During his second year as a student at a school for wizards, the famous young magician Harry Potter investigates a series of attacks on the school, as well as a mysterious voice that warns him of imminent danger.

Video Clip

Video & Music Summary
SYMPHONY 3.4

• Wizard name and subsequent wizard actions reflected in main window captions (helps with screen readers, RFID apps, and macros)
• Symphony System Monitoring Agent
  – Automated push of version, license, and detailed configuration information to client care
  – Allows for pro-active system monitoring
• SIP checkin sends an audible alert when a LOST item is checked in
• Common Access Card (CAC) Support (military requirement)
• Smartcard Support (based on Scottish MiFare standard)
  – Use smartcard reader to scan cards for circ transactions
  – User registration wizard/helper will pull all available data from smartcard to populate user record
• Symphony Implementation Automation
  – Streamlined, more efficient
  – Goal: reduce average implementation time from 100 to 45 days
SYMPHONY 3.4

• Audit trail database
  – Audit trail data no longer contained in Fund Extended Info.
  – Audit trail tab; configured in Global configuration
  – Now associated with Fund/cycle combination
  – Audit trail records created with changes to fund/cycle budget in Add fund, Duplicate fund, Add fund cycle, Modify fund, Modify fund budget, Transfer budget amount and Rollover fund wizards.
AUDIT TRAIL DATABASE
AUDIT TRAIL DATABASE

<table>
<thead>
<tr>
<th>Operation Type</th>
<th>Previous Amount</th>
<th>New Amount</th>
<th>Source Fund</th>
<th>Destination Fund</th>
<th>Date Created</th>
<th>User ID</th>
<th>Station Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer</td>
<td>$3500.00</td>
<td>$3000.00</td>
<td></td>
<td>JOE/2010</td>
<td>8/18/2010, 11:56 SIRSI</td>
<td>ARROWOOD</td>
<td></td>
</tr>
<tr>
<td>Replace</td>
<td>$3000.00</td>
<td>$3500.00</td>
<td></td>
<td>SIRSI/14/2010</td>
<td>8/18/2010, 11:14 SIRSI/CAF</td>
<td>CAFFEY</td>
<td></td>
</tr>
<tr>
<td>Transfer</td>
<td>$5000.00</td>
<td>$3000.00</td>
<td></td>
<td>SIRSI/14/2010</td>
<td>8/18/2010, 11:14 SIRSI/CAF</td>
<td>ARROWOOD</td>
<td></td>
</tr>
<tr>
<td>Replace</td>
<td>$1000.00</td>
<td>$5000.00</td>
<td></td>
<td>SIRSI/14/2010</td>
<td>8/18/2010, 11:14 SIRSI/CAF</td>
<td>ARROWOOD</td>
<td></td>
</tr>
<tr>
<td>Create</td>
<td></td>
<td>$1000.00</td>
<td></td>
<td></td>
<td>8/18/2010, 11:32 SIRSI</td>
<td>ARROWOOD</td>
<td></td>
</tr>
</tbody>
</table>
SYMPHONY 3.4

- Audit Trail Information Now Saved in Its Own Database
  - Audit trail information was previously stored in Extended Info fields of fund records.
  - New audit trail records will store this information more effectively and offer greater options for storage and reporting of this data.

- Tax update: Remit to vendor field in Invoice record
TAX UPDATE – REMIT TO VENDOR
SYMPHONY 4.0

• Target GA: Q2 2011
• Symphony Anywhere
• FRBR/RDA Updates
• SMS Messaging*
• StaffWeb Enhancements
  – Academic Reserves
  – New reports
  – Google GWT conversion (Gadget Windowing Toolkit)
• International Support
  – German ILL SLNP
  – Phase 2 UNIMARC
  – Additional Internationalization and localization updates (often abbreviated with the numeronyms i18n and L10n (i18n: 18 stands for the number of letters between the first I and last n in internationalization)
SYMPHONY 4.0

• School Interoperability Framework (SIF) Support
• Operational Efficiency Pack
  – Automatic backups of policy and config files
  – Getcircinfo for customers and staff troubleshooting
  – Remove user report updated for error handling
  – Admin user tools for easier support

Possibly delivered earlier to coincide with release of Horizon 7 5.1