LUC 2006: Changes, New Features & Reports for System Administrators in the Java Client

Amy Morgenthaler, Service Assurance Manager

October 5, 2006
Agenda

• An Introduction to the Java client
• Converting Toolbars to the Java Client
• Using the Toolbar Management Utility
• Saving Properties in the Java Client
• Reports in the Java Client
• Configuration Toolbar
• Q&A
An Introduction to the Java client in GL 3.1

- User Customizable interface
  - Themes or Classic look - you choose!

- More Windows features
  - Cut and paste
  - Font and window size control
  - More information available to you at a glance
<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Pub. Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>AXIS: the next generation of Java Soap</td>
<td>Irani, Romin</td>
<td>2002</td>
</tr>
<tr>
<td>An album of memories personal histories from the greatest ... Brokaw, Tom</td>
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<td>2001</td>
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<tr>
<td>American Muslims the new generation</td>
<td>Hasan, Asma Gull</td>
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<td></td>
<td>2000</td>
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</tbody>
</table>

Description

**Leader** 0c
**ISBN** 1861007159
**Local system #** Sirsi 10723
**Personal Author** Irani, Romin
**Title** AXIS: the next generation of Java Soap by Romin Irani and S. Jeelani Basha
**Edition** 1st ed.
**Publication info** Wrox Press, Inc. c2002
**Physical descrip** 250pp.
**Subject term** Java (Computer program language)
**Held by** **********
### Item Search

**Search for:** generation  
**Index:** Title  
**Library:** ALL  
**Current:** Foulke, Patricia --- Romantic weekends New England : coastal Maine... --- F 2.3 .F684 1998EB --- ID:29419-

### KEYWORD Title generation, ALL: 21 records

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</tr>
</tbody>
</table>

### Description

**Call Number/Item:**  
HD 30.28 .D36 2000 - MAIN  
27553-1001 - 1 - BOOK - STACKS

**Price:** $0.00  
**Home location:** STACKS  
**Current location:** STACKS  
**Item category 1:** none  
**Item category 2:** none  
**Date created:** 5/1/2003  
**Date last charged:** NEVER  
**Last discharged:** NEVER  
**Date inventoried:** 2/20/2001  
**Times inventoried:** 0  
**Item type:** BOOK  
**Media desk:** none  
**Previous user ID:** NEVER  
**Last activity:** NEVER  
**Total checkouts:** 0  
**In-house uses:** 0
Toolbars and Properties in the Java Client
You’ve Downloaded the Java Client, or Upgraded Your Version of Unicorn - Now What?

• Step One: Convert custom toolbars from the C client to the Java client

• Step Two: Give your users access to wizards

• Step Three: Do you need access to more than one Java version at the same time?

• Step Four: Manage Wizard Properties
Reference Materials to Use

• Creating a local custom toolbar using the Java client
  - http://www.sirsi.com/uhtbin/custinfo/Products/Workflows/Faqs/jwf_localcustomtoolbar.html
    • Demonstration of copying wizard to local toolbar
    • Demonstration of adding wizard to local toolbar

• Creating a custom toolbar to save to the server using the Java client
  - http://www.sirsi.com/uhtbin/custinfo/Products/Workflows/Faqs/jwf_servercustomtoolbar.html
    • Demonstration of creating a custom toolbar to be saved to the server

• Check out the FAQ titled “Toolbar Management: Best Practices” in the WorkFlows Help Files
Saving Properties in the Java Client

- Property files are associated with user IDs through the User Access policies

- Properties on the server are managed using the new Save Properties wizard

- Users can also select a property file on the server and download it to their workstations using the Load Properties wizard
What’s on the Server?

The following files contain delivered and customized property settings in the *Unicorn/Property* directory on the Unicorn server.

- The *font* file records the font setting established by the Preference menu (on the Preference menu, point to Desktop, then click Font Settings).
- The *preference* file stores WorkFlows session settings, such as the last window size that have been established for various windows in WorkFlows.
- The *property* file contains customized property settings on the workstation.
- The *site* file contains delivered property settings customized by SirsiDynix.
- The *system* file contains delivered default property settings. This file is redelivered with each Unicorn upgrade.
- Additional files created and named by the Unicorn administrator contain customized property settings.
Properties Tip

If you set properties using the right-click method, when exiting the client, you will be prompted whether or not to save changes to properties. If properties are set when using the wizard (a left mouse click), changes are not saved when exiting the client.
Creating a Property File in the Java Client

- Creating a Property File on the Server
  - Do the following to create a property file and save it on the Unicorn server:
    - Click the **Save Properties** wizard on the System Utilities toolbar.
    - In the **Select the property file you want to work with** list, type a new file name.
    - Click **Load**.
    - Under the **Properties** folder, navigate to the wizard or wizards whose properties you want to modify.
      - To expand a module folder and see the list of wizards for that module, click the plus sign (+) next to the folder, or double-click the name of the folder.
      - To close a module folder and hide the list of wizards for that module, click the minus sign (-) next to the folder, or double-click the name of the folder.
    - Select a wizard name in the wizard list, and click **Modify**. The Set Properties window for the selected wizard appears for you to make modifications.
    - When you finish making changes to the wizard properties, click **OK** to close the Set Properties window.
    - Repeat steps 5 and 6 for each wizard whose properties you want to modify.
    - When you have finished modifying the properties, click **Save**. The property file you just created is saved on the Unicorn server.
  - Click **Close** to exit the Save Properties wizard.
Modifying Properties in the Java Client

- **Modifying a Property File on the Server**
  - Do the following to modify and save a property file on the Unicorn server:
  - Click the **Save Properties** wizard on the System Utilities toolbar.
  - In the **Select the property file you want to work with** list, select the property file you want to modify.
  - Click **Load**.
  - Under the **Properties** folder, navigate to the wizard or wizards whose properties you want to modify, and make your changes.
  - When you have finished modifying the properties, click **Save**. The modified property file is saved on the Unicorn server.
  - Click **Close** to exit the Save Properties wizard.
Reports in the Java Client
New Features of Reports in the Java Client

• Sorting by report columns with the click of a button

• Pipe delimited output

• New reports
<table>
<thead>
<tr>
<th>Report name</th>
<th>Owner</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>117025</td>
<td>SIRSI</td>
<td>7/30/2004, 9:03</td>
</tr>
<tr>
<td>BillR's Assumed lost report</td>
<td>BILLR</td>
<td>7/15/2004, 15:27</td>
</tr>
<tr>
<td>BillR's Collections Info</td>
<td>BILLR</td>
<td>7/14/2004, 15:45</td>
</tr>
<tr>
<td>BillR's Set Items to DISCARD</td>
<td>BILLR</td>
<td>8/2/2004, 16:38</td>
</tr>
<tr>
<td>Bill Totals by Bill Type</td>
<td>SIRSI</td>
<td>6/24/2004, 9:51</td>
</tr>
<tr>
<td>Clean Holds Shelf</td>
<td>SIRSI</td>
<td>5/3/2006, 8:29</td>
</tr>
<tr>
<td>Collections Information</td>
<td>SIRSI</td>
<td>7/8/2004, 12:58</td>
</tr>
<tr>
<td>entrylist for 856</td>
<td>SIRSI</td>
<td>6/29/2006, 8:34</td>
</tr>
<tr>
<td>Expire Holds</td>
<td>SIRSI</td>
<td>8/22/2006, 9:33</td>
</tr>
<tr>
<td>Generalized Bill Notices</td>
<td>SIRSI</td>
<td>7/30/2004, 9:11</td>
</tr>
<tr>
<td>Hold Recall</td>
<td>SIRSI</td>
<td>7/12/2006, 16:15</td>
</tr>
<tr>
<td>JKPL 115738</td>
<td>SIRSI</td>
<td>7/22/2004, 17:55</td>
</tr>
<tr>
<td>List Transits 198640</td>
<td>SIRSI</td>
<td>6/30/2006, 14:18</td>
</tr>
<tr>
<td>List Users</td>
<td>SIRSI</td>
<td>8/21/2006, 16:01</td>
</tr>
<tr>
<td>Serial Claim Notices</td>
<td>SIRSI</td>
<td>7/12/2006, 15:44</td>
</tr>
</tbody>
</table>
Reports with Pipe Delimited Output

- Circ Mailer
- Expire Available Holds
- Final Bill Notice
- Hold Overdue Notices
- List Titles Used/Unused
- Notice for cancelled Holds
- Recall for Reserve Notices
- Transaction Statistics

- Create Circulation Notices in Batch
- Expire Holds
- Generalized Bill Notices
- Hold Pickup Notices
- New Overdue Notices
- Overdue Notice
- Reserve Overdue Notices
Fixed Format Manager

- A new helper that displays on the finished report wizard when pipe delimited options are available
- Can be used to display pipe delimited output in separate window
- Can be used to email pipe delimited output to email addresses
- Can be used to remove pipe delimited files from server
Reports that select transactions

- Reports that select transactions can further define the transactions by type of interface
  - OPAC
  - SVA
  - 3M
  - Sip2
  - NCIP
  - Webcat
  - Workflows
  - INFOview
<table>
<thead>
<tr>
<th>Report name</th>
<th>Owner</th>
<th>Status</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Titles, Excluding Cats</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,12:47</td>
</tr>
<tr>
<td>Individual Overdue Notices</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,11:06</td>
</tr>
<tr>
<td>Count Users</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,9:24</td>
</tr>
<tr>
<td>Count Users</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,9:20</td>
</tr>
<tr>
<td>Count Users</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,9:13</td>
</tr>
<tr>
<td>Count Users</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,9:10</td>
</tr>
<tr>
<td>Count Users</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,9:05</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/30/2006,0:06</td>
</tr>
<tr>
<td>List Users</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/29/2006,14:17</td>
</tr>
<tr>
<td>Serial Control Records</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/29/2006,13:49</td>
</tr>
<tr>
<td>List Policies</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/29/2006,10:40</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/28/2006,0:05</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/27/2006,0:05</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/26/2006,0:05</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/25/2006,0:05</td>
</tr>
<tr>
<td>Overdue Notice</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/24/2006,15:34</td>
</tr>
<tr>
<td>Overdue Notice</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/24/2006,15:28</td>
</tr>
<tr>
<td>setdelinq</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/24/2006,14:41</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/24/2006,0:05</td>
</tr>
<tr>
<td>Set Items to DISCARD</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/23/2006,15:13</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/23/2006,15:12</td>
</tr>
<tr>
<td>Expire Holds</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/22/2006,9:07</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/22/2006,0:05</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/21/2006,0:05</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>8/20/2006,0:05</td>
</tr>
</tbody>
</table>
New Reports

- Load Bibs for Selection
- Load Bibs with Selections and Decisions
- Load flat selection records report
- Authority Headings without Associated Bibliographic Headings
- Change Invalid Headings by Authority
- Change Invalid Headings by Bib
- Extract deletions for OCLC report
- Edit due dates globally
- Purge Charge History
- Circulation by Zipcode
- Update Shelving Keys report
- Serial Controls not linked to Vendor
- Rebuild Heading Display Database
- Expire Available Holds
- Final Bill Notice
Obsolete Reports

- Correct Authority Thesauri
- Reorganize Thesauri Dictionary
- Authority XRef Generation
Authority Changes

• Unicorn can now display mixed case headings

• Run only once the Rebuild Heading Display Database to update the case display
Reports to Reschedule when you upgrade

- Bibload
- Pull Onshelf Holds
Configuration Toolbar

New Look, Same Functions
Gateway Database: Elements for IBISTRO Gateway

Public Access Choices
- Search/Home
- Search for Hussars
- Community info
- Library Catalog

Find It Fast!
- 'A' to 'Z'
- Animals
- Business & Industry
  - Advertising
  - Agriculture
  - Business Writing
  - Businesses
  - Employee Crimes
  - Employee Participation
  - Franchises
  - Hiring & Firing
  - Home-Based Business
  - Industries
  - Management
  - Marketing
  - Retail Trade
  - Salesmanship
  - Small Business
    - Starting a Business
    - Tourist Trade
    - Training Employees
- Cars & Motors
- Computers
- Education
- Employment
- Environment
- Family
- Finances
- Fine Arts & Crafts
- Food
- Genealogy
- Health
- History
- Home & Do-It-Yourself
- Language & Literature
- Newspapers & Periodicals
- Newspapers
- Periodicals
- Performing Arts
- Pets
- Politics
- Religion
- Science
- Social Studies
- Sports
- Travel
- Uniforms
- Wildlife
- Zoology

Catalog Search Qualifier

Initial catalog operation: Search
Presentation type: Labelled fields

- Home location:
- Item library:
- Item language:
- Item format:
- Item type:
- Item category 1:
- Item category 2:
- Publication year qualifier string:
- Search result set be sorted by: -PBYR

Create (b)  Modify  Shift  Move  Copy  Remove  Cancel (d)
Library Calendar Wizard

- You can allow non admin users access to this wizard without granting access to other configuration wizards
Main Library

Closed dates:

Closed days

Gadget: Closed Dates

Closed from

August 2006

Until

August 2006

Closed Dates

Closed from: 08/30/2006

Until: 09/10/2006