VOYAGER 9.1.1 UPGRADE: NEW FEATURES AND CHANGES FOR TECHNICAL SERVICES STAFF

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Voyager 9.1.1 Upgrade Basics



Upgrade Basics

- What? Voyager will be upgraded from version 7.2.5 to 9.1.1
- When? Friday June 12, 2015 starting at 5:00 pm through Monday June 15, 2015 at 8:00 am. Voyager will be unavailable during this time.
- Why? Move I-Share to the latest version of Voyager.
 Gain benefits of enhancements and bug fixes provided by Ex Libris in the releases since 7.2.5
- Who? CARLI Staff will be upgrading the server, I-Share documentation, and providing new clients. Library Staff will need to install new clients and be familiar with new features.



Upgrade Basics

How can I prepare my library for the upgrade?

- Make sure PCs meet the minimum requirements outlined.
 - http://www.carli.illinois.edu/products-services/ishare/sysreq/secure/voyager-v9-sysreq
- Review the Release Notes and "Resolved Issues" for versions
 8.0 through 9.1.
 - http://www.carli.illinois.edu/products-services/ishare/execute/upgrade
- View upcoming webinars from CARLI
- Decide how you will install new Voyager clients and customized files.
- Let patrons know that there will be no online catalog availability during the upgrade.

Client Updating/Installing – 2 Options

1. Voyager Client Update Checker

http://www.carli.illinois.edu/products-services/i-share/execute/secure/vcuc-faq

- If already installed and configured to check for new clients automatically, the Update Checker will install the latest clients and customized files (callslip.ini, CARLI_Reports.mdb, tag tables) Monday, June 15.
- It will automatically back up your existing C:\Voyager folder to C:\Voyager_BAK_# (where # is the internal version number of the Update Checker program
- Please note: PC must be on for auto-update to occur, but user can be logged out.



Client Updating/Installing – 2 Options

- 2. Manual Install (VoyagerInstall.exe)
- Back up all customized files.
- Replace "generic" Voyager files (callslip.ini, voyager.ini, reports.mdb, tag table files) with CARLI customized files.

The method of updating clients is a local decision, either way you will need to have the new version of the clients installed and configured before you can run Voyager after the upgrade is complete on June 15.



Upgrade Basics

For more information:

Upgrade Webpage

http://www.carli.illinois.edu/products-services/i-share/execute/upgrade

Upgrade Frequently Asked Questions

http://www.carli.illinois.edu/products-services/i-share/execute/secure/15-UG-FAQ



General Updates in Voyager 9.1.1

New Features and Changes



General Changes in Voyager 9.1.1

- New reports.mdb/CARLI_reports.mdb file
- Support for 10-digit OCLC Numbers
- Login and Password Changes



General Changes - Login Changes

 When an operator is logged in to any client, view server and database login specifics

Login Information	
Operator Name:	operator, demo
Operator ID:	demo
Location:	Circulation Desk
Encryption:	Disabled
Server:	10.100.2.37
Database:	DEV910NCDB
Cluster:	VOYDEV
	OK



 Operators can now change passwords from the File menu of each client

🔔 Voyager System Administration	
File	Functions Help
Login Information	
C	hange Password
E:	×it



- System Administrator is now able to configure password options, for example:
 - Passwords can be set to expire
 - Password minimum and maximum length
 - What combination of alphanumeric characters are required
- Accounts can be locked after X number of invalid login attempts



14-00	rity - Security Options	
rassw	vord Options	
P	Password Requirements Password Requirements Invalid Login Attempts	
	New password cannot be same as previous 3 ⊕ passwords Minimum password age: 1 ⊕ Days ▼	
١	Maximum password age (expiration): 50 🕏 days	
	Alert user 5 🚊 days before password will expire	
	Password Length Password may contain:	
	Minimum - at least: 8 🗦 Maximum - at most: 15 🗦 🔽 User's Id 🔽 User's name	
	At least 5 alphabetic character(s)	
	At least 1 = uppercase character(s)	
	At least 1 - lowercase character(s)	
	At least 1 ÷ number character(s)	
	At least 1 ÷ special character/symbol(s)	
	Special / symbols: 1@#\$%^&*?~'!!;'=-,,	
8.	Save Cancel	
	20.0	



Security - Security Options
Password Options —
Password Requirements Password Requirements 2 Invalid Login Attempts
Account will be locked after 3 invalid login attempts If locked out, the lockout period will be 3 Minutes Account lockout counter will be reset after 1 Minutes Enter text that will be shown on the change password screen:
Your new password must - be a minimum of 8 and a maximum of 25 characters long - be different from the previous 3 passwords
Save Cancel



Other General Changes

Updated Indexes

- 97 indexes added/updated
- The CARLI office is planning to run index regens on a library by library basis during the week of June 15-19, from approximately 5pm through 7am.
- During your library's regen process, you will not be able to save records to your database.

Resolved Issues

Bug fixes from Voyager 8.0 through 9.1.1



Global Data Change (GDC)

- GDC is a new client that was added to Voyager starting with version 8
- CARLI will not be making GDC available immediately at upgrade as further investigation into the client and its impact on I-Share performance will be needed.
- See http://www.carli.illinois.edu/products-services/i-share/15-UG-GDC



Acquisitions in Voyager 9.1.1

New Features and Changes



Acquisitions New Features

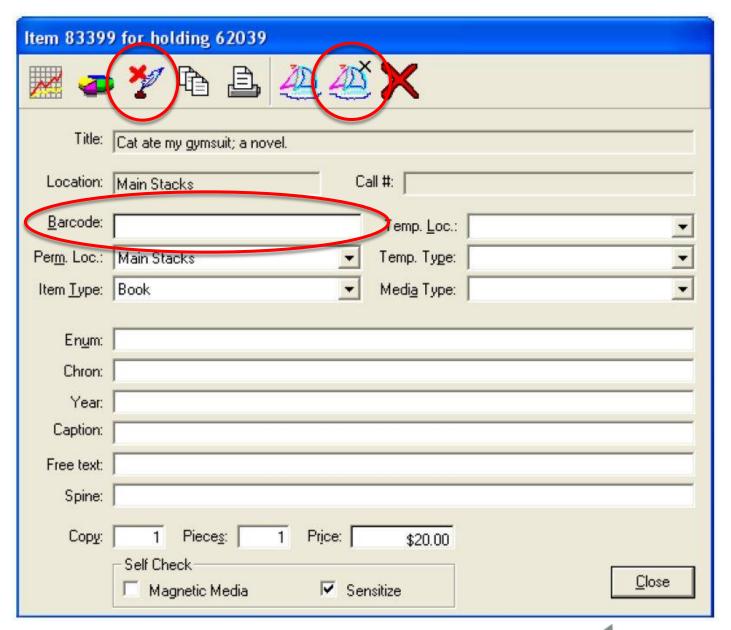
- Improved Item Creation Workflows
- Suppressed Records are more easily identified
- Quick Line Item for Invoices now displays title
- Alternative Vendor Names will allow search and retrieval by additional names
- New ISO Currencies added
- Select a standard number on a PO
- Extended Fund Allocations using specific amounts instead of percentages
- Piece Identifier will display on EDI Invoices
- Incoming EDI messages are now sorted by File
 Update" Column

 CARLI
 Consortium of Academic an Research Libraries in Illinois

Acquisitions: Item Creation & Item Notes

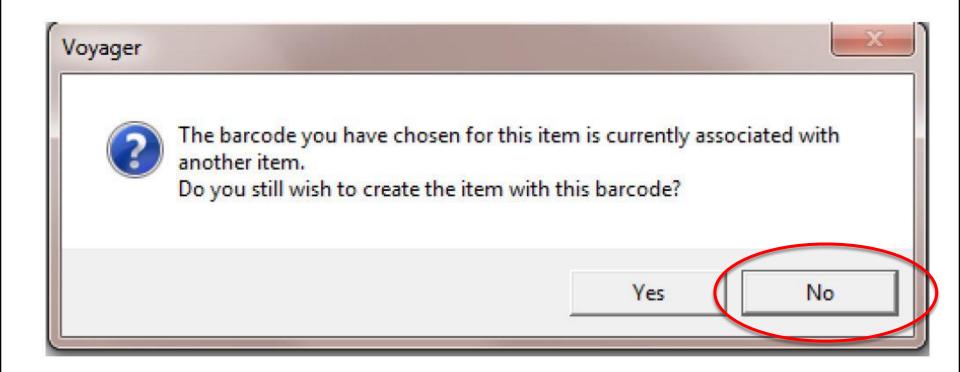
- Item creation simplified from 7 clicks to 2 clicks.
- Charge & Discharge notes can be added.
- "No" now selected on warning popup when adding a duplicate barcode.







Acquisitions: Duplicate Barcode Default Warning





Acquisitions: Suppressed Records

Suppressed Records are now more easily identified

🍫 Hldg (66645) for bib (81682) : Harry Potter and the prisoner of Az
MARC System Bib Title(s) History
✓ Suppress from OPAC
<u>L</u> eader 00179nx a22000854 4500
005: 20070712070050.0 00 <u>7</u>
00 <u>8</u> 070712 4 u 8 1 001 u u 0 901128

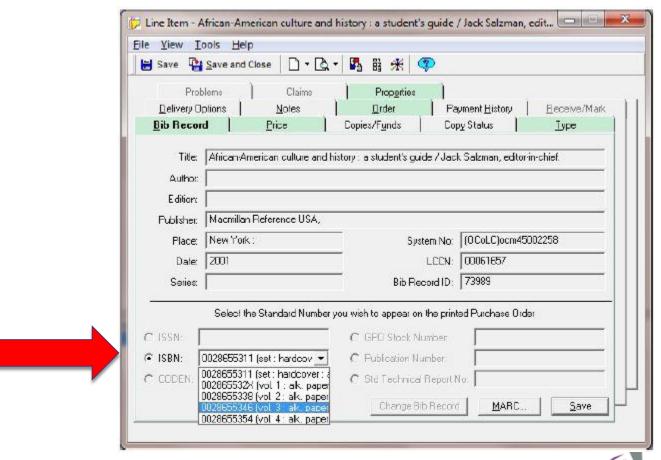


Acquisitions New Features

- Quick Line Item for Invoices now displays title
- Alternative Vendor Names can be added to Vendor Records
- New ISO Currencies Added



Acquisitions: Select standard number on PO





Acquisitions: Extended Fund Allocation

Extended Fund Allocations by Amount instead of percentages

Add/Edit Fund Alloca	tion		
Cost per copy:	\$5.00	PrePay per copy:	\$0.00
Ledger:	2014 Test Ledger		→
Commit to Fund:	General Allocated Fund		<i>8</i> 46
	100.00		
oposito <u>c</u> inicark	\$5.00		
	<u>S</u> ave	<u>C</u> ancel	



Acquisitions: EDI Updates

- Piece Identifier as entered on EDI Invoices will display in the Piece Identifier field on the invoice as displayed in Voyager.
- Incoming EDI messages are now sorted by the "File Update" column. List may be resorted by clicking on column headers.



Cataloging in Voyager 9.1.1

New Features and Changes



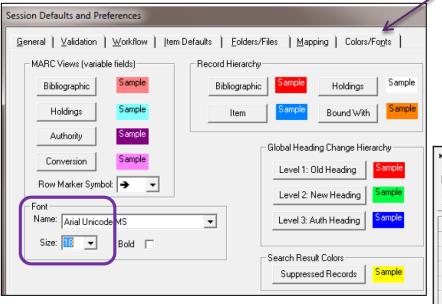
Cataloging New Features

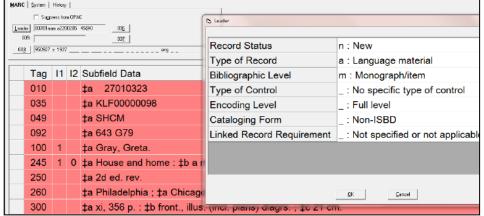
- Larger font size configuration
- Link to RDA Toolkit
- Automatic update of item location and item type
- Improved identification of suppressed records
- New pop-up charge and discharge notes
- Enhanced record hierarchy display
- New printing options
- Duplicate item barcode default
- New Pick & Scan features
- New dup detection profile option



Cat Client: Larger Font Size Configuration

■ Font size: 8 – 72 points

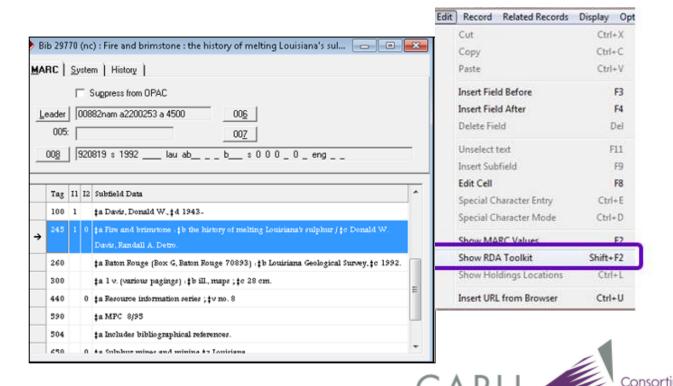






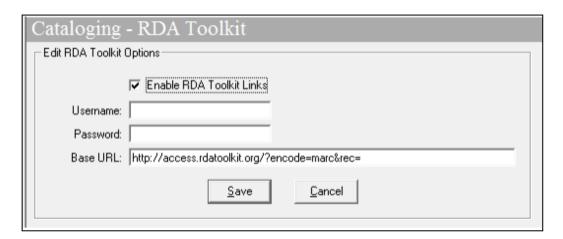
Cat Client: Link to RDA Toolkit

- How it works:
 - Select row, or place cursor in tag, indicator, or subfield
 - Shift+F2 or Edit menu "Show RDA Toolkit"

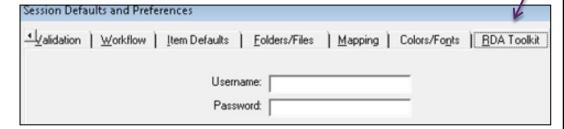


Configuring Link to RDA Toolkit

- Individual or institutional-level configuration
 - □ Start in SysAdmin Client: Cataloging tab RDA Toolkit



Setting for individual-level access is in Cat Client: Session
 Defaults and Preferences – RDA Toolkit tab



Cat Client: Automatically Update Item Location and Item Type when Updating MFHD Location

MARC System Bib Title(s) History	
☐ Suppress from OPAC	
<u>L</u> eader 00176cx a22000851 4500	
005: 20130426122201.0 00 <u>7</u>	
00 <u>8</u> 121115 0 u 8 4 001 u u 0 000000	
Tag I1 I2 Subfield Data	
→ 852 ‡b reference ‡h DT59 ‡i .A12 1853b	
Voyager Cataloging	X
The record was successfully updated. 1 item record was updated with an updated permanent location. 1 item record was updated with an updated item type.	on.
0	ОК

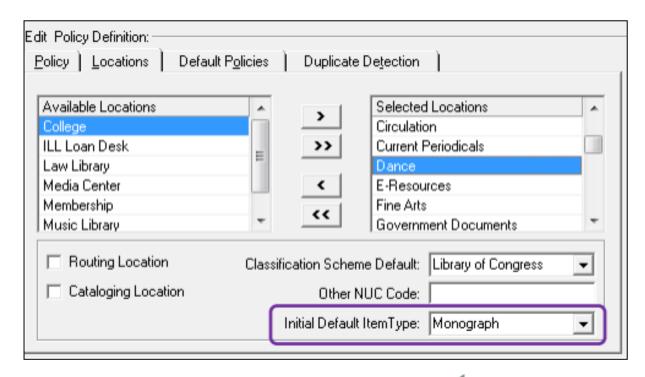
<u>B</u> arcode:	3281002298661	Temp. <u>L</u> oc.: ■]
Per <u>m</u> . Loc.:	Reference Department	Temp. Tyge: ▼	-
Item <u>T</u> ype:	book	Medi <u>a</u> Type: ■	.]
En <u>u</u> m:			



Configure Automatic Update of Item Location and Item Type in SysAdmin

 Set Initial Default Item Types for all selected locations in SysAdmin – Cataloging tab -- Policy

Definitions





Enable Automatic Update of Item Location and Item Type in Cat Client

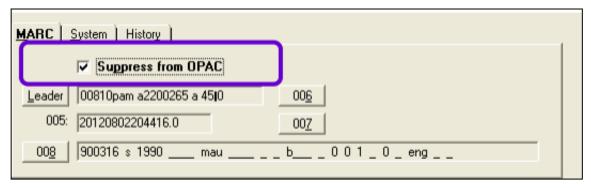
- Cat Client: Session Defaults and Preferences Workflow tab:
 - Update permanent location of attached items when MFHD is saved to the database
 - Update item type of attached items when MFHD is saved to the database (based on item location definitions)

	✓	Check for Duplicate Item Barcodes
	✓	Suppress confirmation message upon successful save
(✓	Update permanent location of attached items when MFHD is saved to the database
l	굣	Update item type of attached items when MFHD is saved to the database (based on item location definitions)



Improved Identification of Suppressed Records

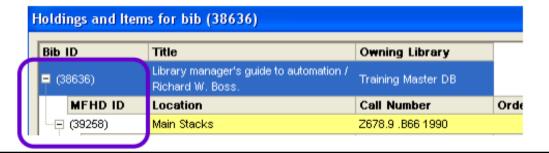
"Suppress from OPAC" flag moved to the MARC tab



- Record ID numbers display in parenthesis
 - ☐ Title bar



Record hierarchy display

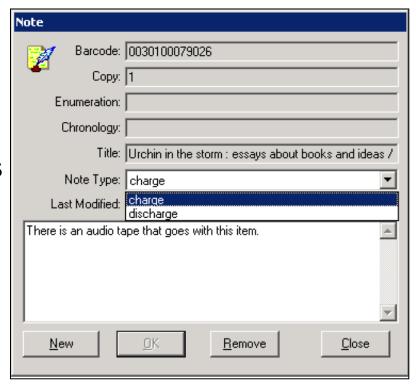


Item Records: New Pop-up Charge & Discharge Notes

- 3 types of notes can be added to the item record
 - Regular
 - Charge
 - Discharge



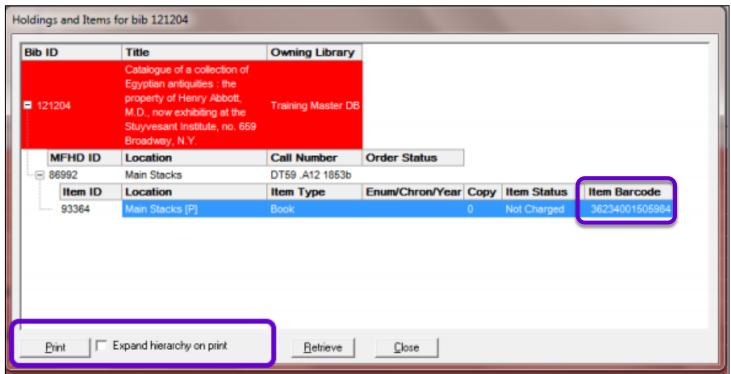
Charge and Discharge notes
 pop up as alerts in Circ





Item Records: Enhanced Record Hierarchy Display

- Item barcodes added
- New printing options





Other New Printing Options

- Print an Item Record
 - From item record screen
 - Configurable by the [ITEM_RECORD] stanza in catalog.ini

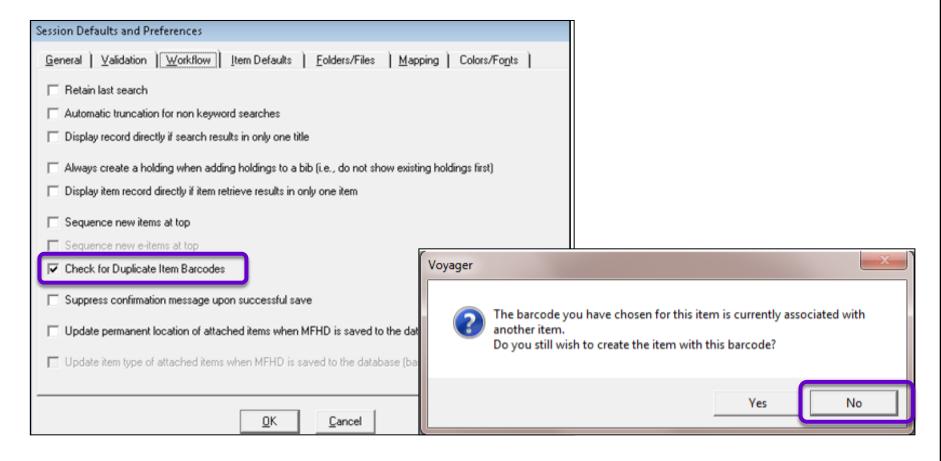
- From Get Items List
 - Configurable by the [MFHD ITEM LIST] stanza in catalog.ini



[ITEM RECORD] Heading=Item Record for Item ID HeadingFont=Times New Roman HeadingFontSize=12 HeadingFontBold=True HeadingFontItalic=False HeadingFontUnderline=True HeadingJustified=C LabelFont=Times New Roman LabelFontSize=12 LabelFontBold=True LabelFontItalic=False LabelFontUnderline=False TextFont=Times New Roman TextFontSize=12 BarcodeFont=Barcode 3 of 9 BarcodeFontSize=12 StartStopChar=* PrintStartStopChar=Y TitleLabel=Title: אבחבונים בקי

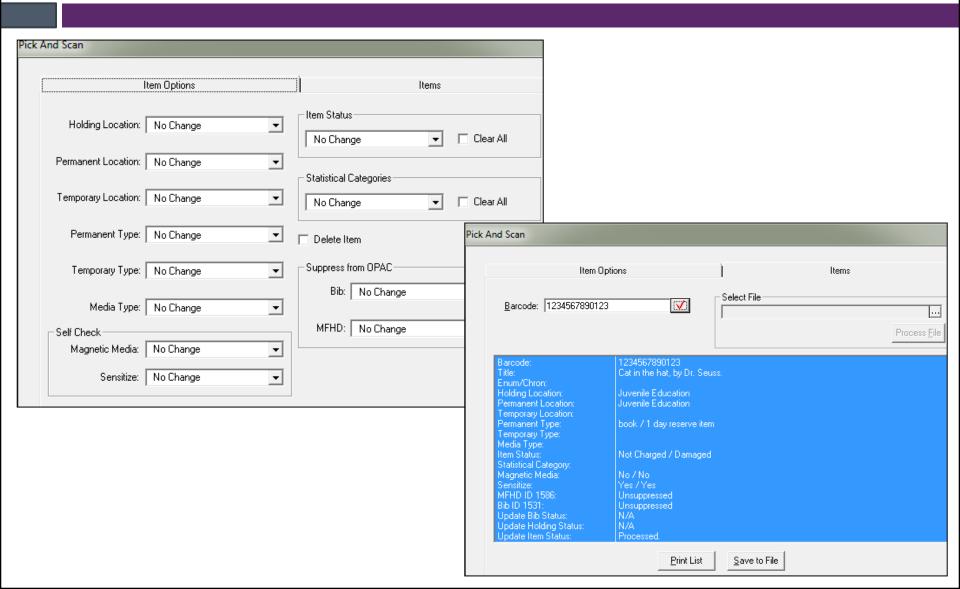


Duplicate item barcode default = "No"





Pick & Scan in Voyager 7.2.5

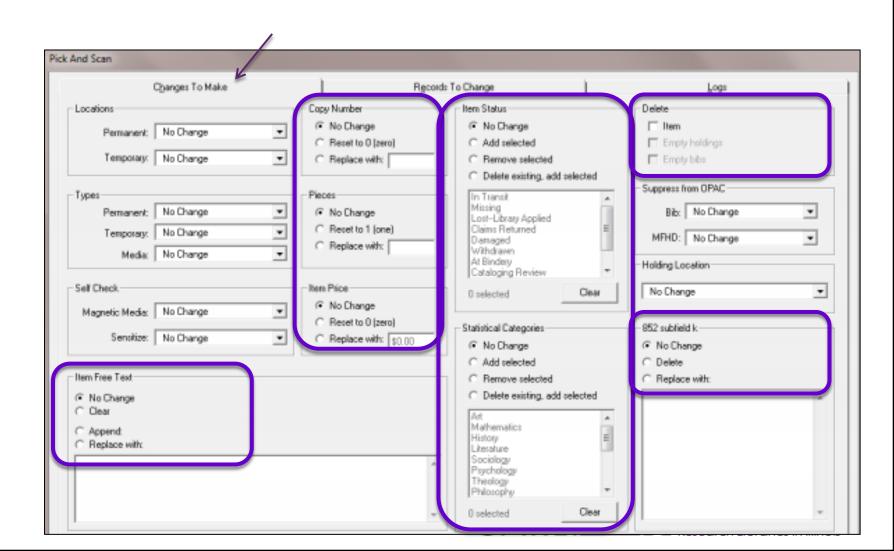


Pick & Scan in Voyager 9.1.1

- Workspace tabs renamed
 - Changes to Make
 - Records to Change
 - Logs
- New features and enhancements
 - Updates
 - Deletes
 - Record identifiers
 - Related records
 - Preview mode
 - Processing reports
 - Logging options



Pick & Scan: Changes to Make



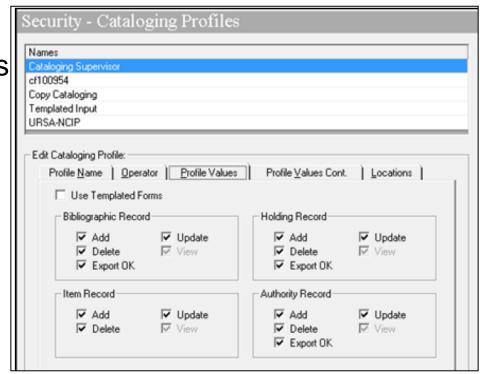
Pick & Scan: Permissions

- SysAdmin Security Permissions needed for the Cataloging client:
 - Update and Delete Items
 - Update and Delete Holdings
 - Delete Bibs

Set in Security –

Cataloging Profiles –

Profile Values tab

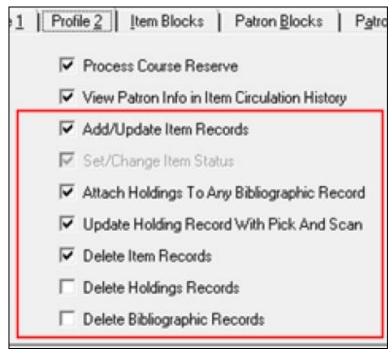




Pick & Scan: Permissions

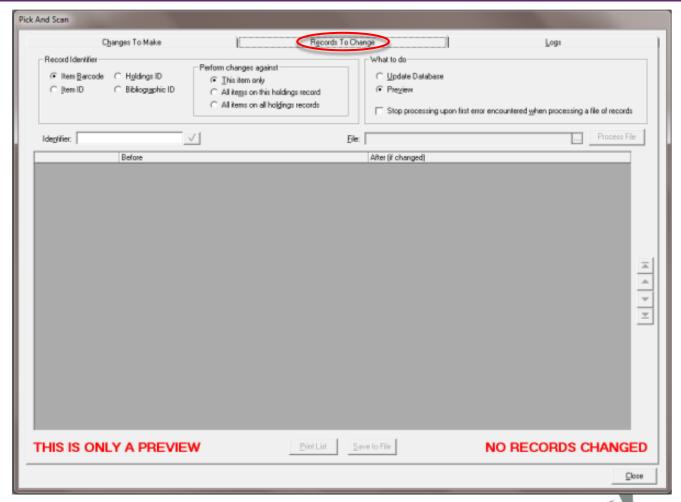
SysAdmin Security Permissions needed for the Circulation client:

Set in Security –
Circulation Profiles –
Profiles 2 tab





Pick & Scan: Records to Change



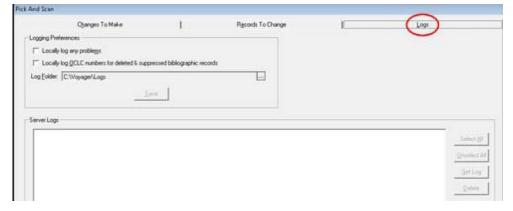


Pick & Scan: Logs

Enhancements to processing report:

Copy number, pieces, item price, item free text, 852 \$k,

MFHD call number



- Logs tab
 - Locally log any problems
 - Locally log OCLC numbers for delete and suppressed bibliographic records
 - Save to local log folder



SysAdmin Client: New Dup Detection Profile Option for RDA Records

040 \$e rda quality hierarchy option

Edit Bibliographic Duplicate Detection Profile:											
Profile	<u>Field Definitions</u> Quality Hierarchy <u>M</u> erge Fields										
	Ldr/06	Ldr/17	040\$a	040\$d	040\$e						
	*	*	*	*	rda						
+	*	*	*	DLC	*						
	*	*	DLC	*	*						
Priority	*	*	*	*	*						
+											
Record Type Leader/06: Original Agency 040\$a: *											
Encoding Level Leader/17: X Last Modifying Agency 040\$d: X											
				Description Conve	ntions 040\$e: rda						



Use of Quality Hierarchy for the UC in Voyager 7.2.5

LDR/17 encoding level ranking

Edit Bibliographic Duplicate Detection Profile:										
Profile Field Definitions Quality Hierarchy										
	Leader/06	Leader/17	Original Agency 040‡a:	Last Modifying Agency 040‡d:						
	*	_	*	*						
+	*	1	*	*						
	*	I	*	*	=					
Priority	*	L	*	*						
	*	4	*	*						
	*	7	*	*						
	*	5	*	*						
	*	K	*	*	*					
Record Type Leader/06: X Original Agency 040‡a: X										
Encoding Level Leader/17: Last Modifying Agency 040‡d: *										



Third-party Tools

- Updates to I-Share Shared Macros coming
- New versions of Gary Strawn's Utilities

http://www.carli.illinois.edu/products-services/i-share/execute



Questions?



