

Using Pick and Scan in Voyager 9.1.1

Overview

Pick and Scan is a client-based tool that enables operators with permissions in the Voyager Cataloging or Circulation clients to make one or multiple changes to item records, their associated holdings, and/or associated bibliographic records in a single process. This tool may additionally be used to delete items and their associated MFHDs and bibliographic records. Item records must be present in the hierarchy to run Pick and Scan. Jobs can be run using item barcodes or record IDs (item, holding, or bib IDs). Records may be processed individually or from a file. Results of preview and production changes are saved to the server and can be saved locally.

Who Can Use Pick and Scan?

User security permissions set in the System Administration module determine which capabilities a user has in Pick and Scan.

Privileges in the Cataloging client are directly tied to the *Security – Cataloging Profiles – Profile Values* tab settings. For full privileges, users need permissions to:

- update and delete items
- update and delete holdings
- delete bibs

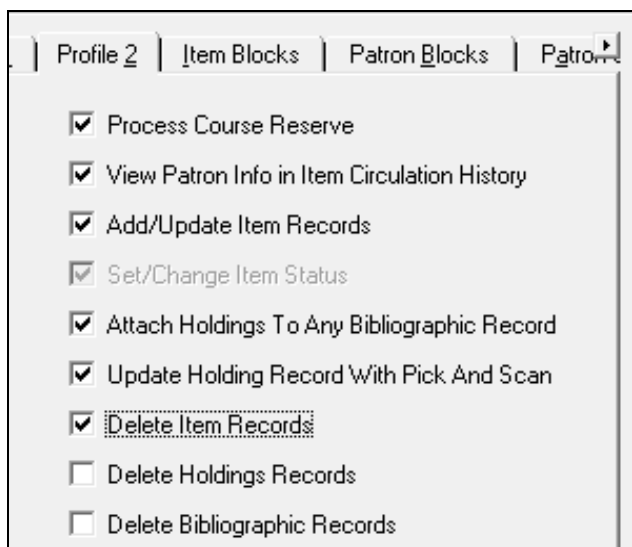
The screenshot shows the 'Edit Cataloging Profile' dialog box with the 'Profile Values' tab selected. The dialog is divided into four quadrants, each representing a different record type. Each quadrant contains a 2x2 grid of checkboxes for 'Add', 'Delete', 'Update', and 'View'. Additionally, 'Export OK' is listed below the 'Delete' checkbox in the Bibliographic, Holding, and Authority record sections. All checkboxes are checked. At the top left, there is a checkbox for 'Use Templated Forms' which is currently unchecked. The dialog has a title bar 'Edit Cataloging Profile:' and several tabs: 'Profile Name', 'Operator', 'Profile Values' (selected), 'Profile Values Cont.', and 'Locations'.

System Administration module - Security – Cataloging Profiles – Profile Values tab

Specific permissions not selected in a user's profile will be greyed out (unavailable) in Pick and Scan. For users with "View Only" permissions, the tool will be unavailable on the File menu.

Privileges in the Circulation client are directly tied to the *Security – Circulation Profiles – Profile 2* tab settings. For full privileges, users need permissions to:

- Add/Update Item Records
- Set/Change Item Status
- Update Holding Record with Pick and Scan
- Delete Item Records
- Delete Holdings Records
- Delete Bibliographic Records



System Administration Module – Security – Circulation Profiles – Profile 2 tab

Specific permissions not selected in a user’s profile will be greyed out (unavailable) in Pick and Scan.

It’s possible that Catalogers may have greater permissions for Pick and Scan in the Cataloging client than in the Circulation client if they have fewer security permissions in Circulation, and vice versa for Circulation Staff using the Cataloging client.

Workspace Tabs

Pick and Scan contains three workspace tabs: *Changes to Make*, *Records to Change*, and *Logs*. For first time use on a workstation, operators should set their preferences on the *Logs* tab as described below. Once these settings are established, jobs are typically processed in the following order:



Changes to Make Tab

The screenshot shows a complex web interface for managing library records. It is organized into three main columns: 'Changes To Make', 'Records To Change', and 'Logs'.
- **Changes To Make:** Contains several groups of controls. 'Locations' has dropdowns for 'Permanent' and 'Temporary', both set to 'No Change'. 'Types' has dropdowns for 'Permanent', 'Temporary', and 'Media', also set to 'No Change'. 'Self Check' has dropdowns for 'Magnetic Media' and 'Sensitize', set to 'No Change'. 'Item Free Text' has radio buttons for 'No Change', 'Clear', 'Append', and 'Replace with:'.
- **Records To Change:** Features radio buttons for 'Copy Number' (No Change, Reset to 0 (zero), Replace with:), 'Pieces' (No Change, Reset to 1 (one), Replace with:), and 'Item Price' (No Change, Reset to 0 (zero), Replace with: \$0.00). It also has two lists: 'Item Status' (At Bindery, Cataloging Review, Circulation Review, Claims Returned, Damaged, In Process, In Transit, Lost-Library Applied) and 'Statistical Categories' (Arnstein, Black Bk Rev, Booklist, Boshart, Brasel, Catalog, CCHistSoc, Choice). Both lists have '0 selected' and a 'Clear' button.
- **Logs:** Includes a 'Delete' section with checkboxes for 'Item', 'Empty holdings', and 'Empty bibs'. It also has 'Suppress from OPAC' dropdowns for 'Bib' and 'MFHD', both set to 'No Change'. A 'Holding Location' dropdown is set to 'No Change'. At the bottom, there's an '852 subfield k' section with radio buttons for 'No Change', 'Delete', and 'Replace with:'.

Pick and Scan - Changes to Make Tab

The **Changes to Make** tab is where you select those changes you wish to make to one or more records. By default, all options are either set as “No Change” or unselected.

Locations

Change item record permanent or temporary locations by selecting from the available locations. Anytime item permanent locations are changed, CARLI recommends changing the *Holdings Location* simultaneously to ensure the holding record’s 852 \$b location is kept in sync with the item record’s permanent location. Temporary location data has a “clear” option to remove any data temporarily added.

Types

Change permanent, temporary, or media item types by selecting from those available. Use the *Clear* option to remove any item types currently set in temporary or media item types.

Self Check

Change magnetic media and sensitize flags on item records by selecting *Yes* or *No*. These settings are used as alerts with third-party self-check machines during check in, check out, and renewal transactions.

Item Free Text

Select *Clear* to remove data in item records’ free text field. Select *Append* to add additional text to the existing content in the field or select *Replace with* to overwrite the existing data with the text you enter in the text box provided.

Copy Number

Adjust item copy numbers using the *Replace with* command. CARLI strongly recommends you avoid selecting the *Reset to copy 0* option and instead start copy number increments with copy 1. A default of copy 1 can be set in your Cataloging client Session Defaults and Preferences (*Options-Preferences-Item Defaults tab*).

Pieces

The number of pieces designation on the item record can be cleared using the *Reset to 1* option or changed to a specified number using the *Replace with* command.

Item Price

Replace the existing price(s) with a specified amount using the *Replace with* command. Or, you can select *Reset to 0 (zero)* to clear any existing item prices.

If your library has a default Lost Item Replacement Fee set in the System Administration module, you may not typically add prices to item records unless the copy costs more than the replacement fee. (This default is set in *System Administration – Circulation – Policy Definitions – Items tab – Item settings “Replacement Cost”*.)

Item Status

Select from the list of item statuses and specify if you wish to *Add selected, Remove selected, or Delete existing, add selected*. This final option will replace the existing statuses with the statuses you select.

Item statuses available to select include: *At Bindery, Cataloging Review, Circulation Review, Claims Returned, Damaged, In Process, In Transit, Lost-Library Applied, Missing, and Withdrawn*.

Hold down the Ctrl key in order to select multiple statuses. The *Clear* option will only clear the statuses you have selected on the list.

Statistical Categories

Select from the list of statistical categories defined in the Voyager System Administration module and specify if you wish to *Add selected, Remove selected, or Delete existing, add selected*. This final option will replace existing statistical categories with those you select from the list.

Hold down the Ctrl key in order to select multiple categories. The *Clear* option will only clear the categories you have selected on the list.

Delete

Item records, and if desired, their associated holdings and bibliographic records can all be deleted in a single process. Deletions follow the hierarchy of item – holding – bib. All items attached to a holding must be removed before the holding can be deleted. Similarly, all holdings attached to a bib must be deleted before a bib can be deleted. Item records must be present in order to delete holdings and bibs.

CARLI recommends against using Pick and Scan to delete records with bound withs in the hierarchy, note *Known Issues* below.

Suppress from OPAC

Select *Suppressed* or *Unsuppressed* for Bibs or MFHDs to change the suppress flag on the record's MARC tab. Note, MFHDs cannot be unsuppressed with Pick and Scan if their location is suppressed in the System Administration module.

Holding Location

Change the 852 \$b location data by selecting the appropriate available location. CARLI recommends changing the (item) *Locations* setting simultaneously to ensure location data in the MFHD and item record remain in sync.

852 subfield k

Change call number prefixes in the 852 \$k of holdings records by either selecting *Delete* to remove the 852 \$k entirely, or using the *Replace with* option to overlay the existing prefix with the new prefix you enter in the available text box. *Note, if multiple 852 \$k's exist, only the first will be changed.*

Records to Change Tab

The screenshot shows the 'Records to Change' tab in the 'Pick And Scan' software. The interface is divided into three main sections: 'Changes To Make', 'Records To Change', and 'Logs'. The 'Records To Change' section is active and contains several options:

- Record Identifier:** Radio buttons for 'Item Barcode' (selected), 'Holdings ID', 'Item ID', and 'Bibliographic ID'.
- Perform changes against:** Radio buttons for 'This item only' (selected), 'All items on this holdings record', and 'All items on all holdings records'.
- What to do:** Radio buttons for 'Update Database' and 'Preview' (selected). There is also a checkbox for 'Stop processing upon first error encountered when processing a file of records'.

Below these options are two input fields: 'Identifier:' with a dropdown arrow and 'File:' with a file selection button and a 'Process File' button. The main area of the tab is a large grey rectangle with a vertical scrollbar on the right, divided into 'Before' and 'After (if changed)' columns. At the bottom of the interface, there are three buttons: 'Print List', 'Save to File', and a red text label 'NO RECORDS CHANGED'. A red text label 'THIS IS ONLY A PREVIEW' is also visible at the bottom left.

Pick and Scan – Records to Change tab

The **Records to Change** tab is where you specify the records that you wish to change, indicate how those changes should be performed, and process the change.

Record identifier is where you specify if the records to change will be identified by item barcode, item ID, Holding ID, or Bibliographic ID. This setting works in conjunction with the *Identifier* or *File* field when processing a file.

Perform changes against is where you specify how to process the changes:

- This item only
- All items on this holdings record
- All items on all holdings

This item only processes changes against a single item and those records directly associated with that item.

All items on this holdings record includes all related item records associated with a single holding.

All items on all holdings processes all items and holdings records attached to a bib.

CARLI cautions you to use the *all items on this holding* and *all items on all holdings* features wisely. Be sure you have reviewed your data well before selecting these options to avoid any accidental deletion or change to records that should not have been processed. When selecting these options, **always run a preview of the job first since there is no undo option.**

What to do

Here you can indicate if the job should run in **Preview** mode or **Update Database** mode. **Always run Preview first since there is no undo option** once a job has run against your database. A warning of “THIS IS ONLY A PREVIEW – NO RECORDS CHANGED” displays when a job is run in *Preview* mode. After reviewing the *Preview* logs, select *Update Database* to process the changes against your database.

Stop processing upon first error encountered when processing a file of records can be used for both *Preview* and *Update Database* modes. This setting will usually cause a pop up warning to stop the process when errors occur. Check the log files for additional information about the error (ex. “Unable to delete. Item is currently charged”).

Identifier

This option allows one-by-one processing of jobs using a barcode scanner or manually copying barcodes or record IDs into the field. Click the check mark icon to process the changes.

File

Select the ellipsis to choose the file of barcodes or record IDs to process. Each barcode or record ID must be on a separate line or row in the file. When processing jobs with multiple changes, CARLI recommends separating larger jobs into files of 500 records or less. This will help avoid significant client slowdown while the job processes.

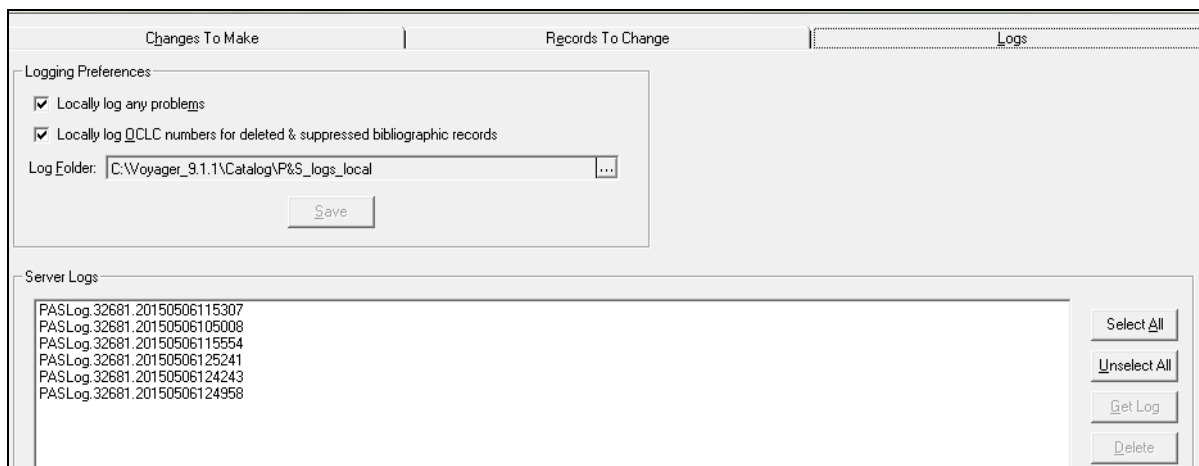
Print List

Click this option to print the processing information report displayed in the before/after window on the *Records to Change* tab. If unclear, use the server logs to differentiate an Update job vs. a Preview job.

Save to File

Click this option to save the processing information report displayed on the *Records to Change* tab. If unclear, use the server logs to differentiate an Update job vs. a Preview job.

Logs Tab



Pick and Scan – Logs tab

The **Logs tab** is where you will set your logging preferences and access server logs. **Logging Preferences should be set up ahead of processing your first job.** These preferences are saved from session to session, and shared across the Cataloging and Circulation clients. So, if you move from one client to another, the settings will remain the same if you have the same level of permissions in both Cataloging and Circulation clients.

The Log Folder preference setting will need to be reset if the operator changes computers. All preferences will need to be set for each operator id, even when the same workstation is used.

Log Folder

Create a folder on your PC or shared network drive to locally save and view Pick and Scan logs. Then, select the Log Folder ellipses to browse and select that folder, and click *Save*.

Locally log any problems

This setting will only log problems encountered and will save the log to your designated *Log Folder*. A full log of changes and problems is saved on the server and can be retrieved using the *Get Log* feature (described below).

Locally log OCLC numbers for deleted & suppressed bibliographic records

This setting will log OCLC numbers for deleted and suppressed bibliographic records and save them directly to your designated *Log Folder*. This file can be used with OCLC Connexion Client's batch feature to remove your library's holdings from WorldCat.

Get Log

This feature will retrieve the highlighted server log and save it to your local *Log Folder*. The server log identifies all changes and problems encountered in a specific Pick and Scan run. If the *Get Log* button does not appear on your screen, you will need to temporarily adjust your Voyager.ini file's [GlobalLogs] stanza to Encrypt=N (note below) in order to enable the feature.

For security reasons, CARLI recommends you usually set your Voyager.ini [GlobalLogs] stanza for Encrypt=Y. This ensures sensitive information such as that during Circulation and Acquisitions transactions remains encrypted. However, you will not be able to use the *Get Logs* feature in Pick and Scan with this setting.

Prior to retrieving Pick and Scan logs, you may temporarily set Encrypt=N, or you may change this setting indefinitely for workstations where users will not be working in the Acquisitions or Circulation clients. Be aware that when Encrypt= is set to N, only password strings are encrypted, all other data is visible over the network.

Server Logs

The naming convention for server logs follows the following structure:

"PASLog." + Process ID + "." + Timestamp

The Process ID is automatically generated by Voyager and is used to keep the log names unique. The timestamp will likely be most useful for identification.

Known Issues:

- When "stop processing upon first error encountered when processing a file of records" is selected, Pick and Scan will not stop processing for Update Database runs if a PO is attached. However, it will stop in Preview runs if a PO is attached. This means that for Update Database runs for deletes, MFHDs and Bibs will be blocked from being deleted, but the items will be removed without warning.
- Issue VYG-6738 is in Development: Update Item Status: "Unable to delete. Item is currently blocked." appears in log for preview mode when item will be deleted.

The Preview mode log for deletes incorrectly states items are blocked when using the "all items and holdings" feature, but a run against the database does indeed delete all associated records.

- Issue VYG-6840 is in Development: [RTE 457/440 when entering record ids from Bound With hierarchy in Pick and Scan in Development](#)

Both error 457 followed by error 440 occur for the following conditions: bound withs are included in a record hierarchy, perform changes against all items on all holdings is selected, and records linked to the bound with are used for processing by item barcode, item id, or MFHD id. This occurs both for record changes and deletes.

- Issue in Development: When deleting a record hierarchy that includes a bound with, if a bib id other than the bound with bib is used for Update Database processing, the bound-with is not deleted from the database, although the processing log indicates it was deleted.

- Regular functionality: For bound-with items, selecting delete bib will delete other bibs linked to the item. However, when perform changes against all items on all holdings records is selected, if a bound with bib id is specifically entered, only those records directly linked are processed, not all records in the hierarchy.
- To suppress bibs with Pick and Scan via the Cataloging client, Voyager requires the operator to be in a Cataloging Profile with “Allow Bibliographic Ownership Change” selected in the System Administration Module – Security – Cataloging Profile – Profile Values Cont. tab. I-Share libraries that use more than one Owning Library should consider carefully whether to include this permission for staff performing Pick and Scan in the cataloging client.