Voyager 9.0 Release Notes

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Table of Contents

1	**Introduction**	**16**
	Purpose of This Document	16
	Voyager 9.0 Documentation	17
2	**General**	**18**
	Windows 8 OS Support	18
	Purpose of the Enhancement	*18*
	Description	*18*
	Reference to Technical Documentation	*18*
	Hot Fix Version Information	19
	Purpose of the Enhancement	*19*
	Description	*19*
3	**Acquisitions**	**20**
	Alternate Vendor Names	20
	Purpose of the Enhancement	*20*
	Description	*20*
	Implementation Notes	*21*
	New ISO Currencies	21
	Purpose of the Enhancement	*21*
	Description	*21*
	Implementation Notes	*21*
	Select Standard Number on Purchase Order	22
	Purpose of the Enhancement	*22*
	Description	*22*
	Implementation Notes	*23*
	Reference to Technical Documentation	*23*
	Set Duplicate Item Barcode Default to "No"	23
	Purpose of the Enhancement	*23*
	Description	*24*
	Implementation Notes	*24*
	Reference to Technical Documentation	*24*
4	**Bulk Import**	**25**

Make Addition of 035 Optional 25

Purpose of the Enhancement *25*
Description *25*
Implementation Notes *26*
Reference to Technical Documentation *26*

Change Default Setting to –X NOKEY 26

Purpose of the Enhancement *26*
Description *26*
Implementation Notes *26*
Reference to Technical Documentation *26*

5 Cataloging **27**

Set Duplicate Item Barcode Default to "No" 27

Purpose of the Enhancement *27*
Description *27*
Implementation Notes *28*
Reference to Technical Documentation *28*

Automatically Update Item Location and Item Type when Updating Holdings 28

Purpose of the Enhancement *28*
Description *28*
Implementation Notes *29*
Reference to Technical Documentation *30*

Print from Cataloging Hierarchy 30

Purpose of the Enhancement *30*
Description *30*
Implementation Notes *31*
Reference to Technical Documentation *31*

Add Item Barcode to Cataloging Hierarchy 31

Purpose of the Enhancement *31*
Description *31*
Implementation Notes *32*
Reference to Technical Documentation *32*

Link to RDA Toolkit from Cataloging 32

Purpose of the Enhancement *32*
Description *32*

Implementation Notes *33*
Reference to Technical Documentation *34*

MARC 21 Updates 34

Purpose of the Enhancement *34*
Description *34*
Implementation Notes *34*

6 Circulation **35**

Show Patron Pop-up Notes Upon Discharge 36

Purpose of the Enhancement *36*
Description *36*
Implementation Notes *36*
Reference to Technical Documentation *36*

Option to Edit Fines/Fees 36

Purpose of the Enhancement *36*
Description *36*
Implementation Notes *37*
Reference to Technical Documentation *37*

Make Patron's Last Name Obvious on Hold Slips 37

Purpose of the Enhancement *37*
Description *37*
Implementation Notes *38*
Reference to Technical Documentation *38*

Option to Limit Number of Holds Placed 38

Purpose of the Enhancement *38*
Description *38*
Implementation Notes *39*
Reference to Technical Documentation *39*

Option to Limit Types of Holds and Recalls 39

Purpose of the Enhancement *39*
Description *39*
Implementation Notes *39*
Reference to Technical Documentation *40*

Automatically Remove Fines/Fees When Lost Item Is Discharged 40

Purpose of the Enhancement *40*

Description 40
Implementation Notes 41
Reference to Technical Documentation 42

Cancel Requests on "Duplicate" Copies When Item Is Put In Transit 42

Purpose of the Enhancement 42
Description 42
Implementation Notes 42
Reference to Technical Documentation 43

Block Holds on Missing and Lost Items 43

Purpose of the Enhancement 43
Description 43
Implementation Notes 44
Reference to Technical Documentation 45

Provide A Block When An Item Has Pending Holds 45

Purpose of the Enhancement 45
Description 45
Implementation Notes 45

Set Duplicate Item Barcode Default to "No" 46

Purpose of the Enhancement 46
Description 46
Implementation Notes 46
Reference to Technical Documentation 46

Send SMS Messages with Time Delay 46

Purpose of the Enhancement 46
Description 46
Implementation Notes 47
Reference to Technical Documentation 47

7 Global Data Change (GDC) 48

Suppress and Unsuppress Bibs and Holdings using GDC 48

Purpose of the Enhancement 48
Description 49
Implementation Notes 49
Reference to Technical Documentation 49

Enhance Status Information in GDC Preview 50

Purpose of the Enhancement *50*
Description *50*
Implementation Notes *50*
Reference to Technical Documentation *50*

Delete All Records in a Hierarchy 50

Purpose of the Enhancement *50*
Description *50*
Implementation Notes *51*
Reference to Technical Documentation *51*

Create A Record Set by Matching MARC Records in a File 51

Purpose of the Enhancement *51*
Description *51*
Implementation Notes *52*
Reference to Technical Documentation *52*

Create a Record Set Using Owning Record Criteria 52

Purpose of the Enhancement *52*
Description *52*
Implementation Notes *53*
Reference to Technical Documentation *53*

Export Record Sets from GDC 53

Purpose of the Enhancement *53*
Description *53*
Implementation Notes *53*
Reference to Technical Documentation *54*

Export Files of MARC Records 54

Purpose of the Enhancement *54*
Description *54*
Implementation Notes *54*
Reference to Technical Documentation *54*

8 Media Scheduling & Media System Administration 55

Configuration of the Day View 56

Purpose of the Enhancement *56*
Description *56*
Implementation Notes *56*
Reference to Technical Documentation *57*

Add Titles of Media Items to Day View 57

Purpose of the Enhancement *57*
Description *57*
Implementation Notes *58*
Reference to Technical Documentation *58*

Display Patron Notes in Media Scheduling 58

Purpose of the Enhancement *58*
Description *58*
Implementation Notes *58*
Reference to Technical Documentation *59*

Remove SSN from Patron Display 59

Purpose of the Enhancement *59*
Description *59*
Implementation Notes *59*
Reference to Technical Documentation *59*

Show Available Equipment When Creating a Booking 59

Purpose of the Enhancement *59*
Description *59*
Implementation Notes *60*
Reference to Technical Documentation *60*

Display Current Bookings and Patron Counters 60

Purpose of the Enhancement *60*
Description *60*
Implementation Notes *61*
Reference to Technical Documentation *61*

Display Advanced Booking Warning 61

Purpose of the Enhancement *61*
Description *62*
Implementation Notes *62*
Reference to Technical Documentation *62*

Show Status of an Item in Media Scheduling 62

Purpose of the Enhancement *62*
Description *62*
Implementation Notes *64*
Reference to Technical Documentation *64*

Display Alert When Lost Items Are Discharged 64

Purpose of the Enhancement *64*
Description *65*
Implementation Notes *65*
Reference to Technical Documentation *66*

Enhanced Display of Equipment in Bookings 66

Purpose of the Enhancement *66*
Description *66*
Implementation Notes *67*
Reference to Technical Documentation *67*

Show Booking Warning Interval in Days 67

Purpose of the Enhancement *67*
Description *68*
Implementation Notes *68*
Reference to Technical Documentation *68*

Color-code Tabs When Data is Present 68

Purpose of the Enhancement *68*
Description *69*
Implementation Notes *69*
Reference to Technical Documentation *69*

9 OpenURL 70

Support for OpenURL 1.0 70

Purpose of the Enhancement *70*
Description *70*
Implementation Notes *70*
Reference to Technical Documentation *71*

Combine Multiple Subfields in One OpenURL Tag 71

Purpose of the Enhancement *71*
Description *71*
Implementation Notes *71*
Reference to Technical Documentation *71*

Remove Non-filing Characters from OpenURL Title Tags 72

Purpose of the Enhancement *72*
Description *72*
Implementation Notes *72*

Reference to Technical Documentation 72

Include Genre Information in OpenURL Links 72

Purpose of the Enhancement 72
Description 72
Implementation Notes 73
Reference to Technical Documentation 73

10 Pick and Scan 74

New Update Options to Pick and Scan 74

Purpose of the Enhancement 74
Description 74
Implementation Notes 76
Reference to Technical Documentation 77

Ability to Update 852 Subfield 'K' in the Holdings Record 77

Purpose of the Enhancement 77
Description 77
Implementation Notes 78
Reference to Technical Documentation 78

Ability to Delete Bibliographic and Holdings Records 78

Purpose of the Enhancement 78
Description 78
Implementation Notes 79
Reference to Technical Documentation 79

Ability to Use Item IDs, Holding IDs, and Bibliographic IDs with Pick and Scan 79

Purpose of the Enhancement 79
Description 79
Implementation Notes 79
Reference to Technical Documentation 79

Ability to Update Related Records 80

Purpose of the Enhancement 80
Description 80
Implementation Notes 80
Reference to Technical Documentation 80

Display Call Number in the Processing Report 80

Purpose of the Enhancement 80

Description *81*
Implementation Notes *81*
Reference to Technical Documentation *81*

Use Pick and Scan in Preview Mode 81

Purpose of the Enhancement *81*
Description *81*
Implementation Notes *81*
Reference to Technical Documentation *82*

Logging Options 82

Purpose of the Enhancement *82*
Description *82*
Implementation Notes *83*
Reference to Technical Documentation *83*

11 Primo Integration 84

Display Voyager ILL Requests in My Account 84

Purpose of the Enhancement *84*
Description *84*
Implementation Notes *84*
Reference to Technical Documentation *85*

Change Patron PINs 85

Purpose of the Enhancement *85*
Description *85*
Implementation Notes *85*
Reference to Technical Documentation *86*

Update SMS Number from Primo 86

Purpose of the Enhancement *86*
Description *86*
Implementation Notes *86*
Reference to Technical Documentation *86*

Sort Locations in Primo Display 87

Purpose of the Enhancement *87*
Description *87*
Implementation Notes *87*
Reference to Technical Documentation *87*

Patron Self-Registration 87

Purpose of the Enhancement *87*
Description *87*
Implementation Notes *88*
Reference to Technical Documentation *88*

12 Self-check (SIP2) 89

Customization of On-screen Messages 89

Purpose of the Enhancement *89*
Description *89*
Implementation Notes *90*
Reference to Technical Documentation *90*

Configuration for Automatic Override of Item Blocks 90

Purpose of the Enhancement *90*
Description *90*
Implementation Notes *90*
Reference to Technical Documentation *90*

Add Patron Birthdate to the Patron Information Response 90

Purpose of the Enhancement *90*
Description *91*
Implementation Notes *91*
Reference to Technical Documentation *91*

13 System Administration 92

Configuration to Record Browse Date and Time 92

Purpose of the Enhancement *92*
Description *93*
Implementation Notes *93*
Reference to Technical Documentation *93*

Configuration for Limit Types of Holds 94

Purpose of the Enhancement *94*
Description *94*
Implementation Notes *94*
Reference to Technical Documentation *94*

Configuration for Limit Number of Holds 95

Purpose of the Enhancement *95*
Description *95*
Implementation Notes *95*

Reference to Technical Documentation *95*

Configuration for Automatically Removing Lost Item Fines and Fees 96

Purpose of the Enhancement *96*
Description *96*
Implementation Notes *96*
Reference to Technical Documentation *97*

Configuration for Cancelling Requests on Duplicate Items 97

Purpose of the Enhancement *97*
Description *97*
Implementation Notes *97*
Reference to Technical Documentation *98*

Configuration to Block Holds on Missing and Lost Items 98

Purpose of the Enhancement *98*
Description *98*
Implementation Notes *99*
Reference to Technical Documentation *100*

Configuration for Limiting the Number of Holds Placed 100

Purpose of the Enhancement *100*
Description *100*
Implementation Notes *101*
Reference to Technical Documentation *101*

Edit Multiple Circulation Policies at Once 101

Purpose of the Enhancement *101*
Description *101*
Implementation Notes *103*
Reference to Technical Documentation *103*

14 Technical Enhancements 104

Solaris 11 104

Purpose of the Enhancement *104*
Description *104*
Reference to Technical Documentation *105*

Monitoring for Index Regens 105

Purpose of the Enhancement *105*
Description *105*

Implementation Notes *105*
Reference to Technical Documentation *105*

Monitoring Oracle Tablespace and Data File Size 105

Purpose of the Enhancement *105*
Description *106*
Implementation Notes *106*
Reference to Technical Documentation *106*

Retention of Log Files 106

Purpose of the Enhancement *106*
Description *106*
Implementation Notes *106*
Reference to Technical Documentation *106*

Improvements to the Regen Process 107

Purpose of the Enhancement *107*
Description *107*
Implementation Notes *107*

Monitoring and Alerts for Dynamic File Size 107

Purpose of the Enhancement *107*
Description *107*
Implementation Notes *107*

15 Voyager Reporting: Access Reports and Voyager Analyzer 108

Report Historical Browses by Date and Time 108

Purpose of the Enhancement *108*
Description *108*
Implementation Notes *109*
Reference to Technical Documentation *109*

Add New Tables to Access Reports and Analyzer 109

Purpose of the Enhancement *109*
Description *109*
Implementation Notes *109*
Reference to Technical Documentation *109*

Update Various Presentation Layers in Voyager Analyzer 110

Purpose of the Enhancement *110*
Description *110*
Implementation Notes *110*

16 Web Admin 111

Catalog: Bulk Import MARC Records 111

Purpose of the Enhancement 111
Description 111
Implementation Notes 112
Reference to Technical Documentation 112

System Administration: Report Files 112

Purpose of the Enhancement 112
Description 112
Reference to Technical Documentation 112

System Administration: EDI File Maintenance 112

Purpose of the Enhancement 112
Description 112
Implementation Notes 113
Reference to Technical Documentation 113

FPC Admin 113

Purpose of the Enhancement 113
Description 113
Implementation Notes 113
Reference to Technical Documentation 113

17 WebVoyáge 114

Warning for Patron Card Expiration 114

Purpose of the Enhancement 114
Description 114
Implementation Notes 115
Reference to Technical Documentation 115

Customization of Time Format on Media Request Forms 115

Purpose of the Enhancement 115
Description 115
Implementation Notes 116
Reference to Technical Documentation 116

1

Introduction

Voyager 9.0 offers customers new features that enrich existing functionality, improve system performance, and provide tighter integration with third-party systems.

Specific enhancements in this release:

- Enhance batch update capabilities
- Improve OPAC via Primo integration
- Satisfy user group enhancements priorities
- Extend SIP2 integration
- Improve OpenURL link syntax

Purpose of This Document

This document lists the various enhancements and changes that are new in Voyager 9.0. You can find them listed under the following topics:

- General on page 18
- Acquisitions on page 20
- Bulk Import on page 25
- Cataloging on page 27
- Circulation on page 35
- Global Data Change (GDC) on page 48

- Media Scheduling & Media System Administration on page 55
- OpenURL on page 70
- Pick and Scan on page 74
- Primo Integration on page 84
- Self-check (SIP2) on page 89
- System Administration on page 92
- Technical Enhancements on page 104
- Voyager Reporting: Access Reports and Voyager Analyzer on page 108
- Web Admin on page 111
- WebVoyáge on page 114

Voyager 9.0 Documentation

The following is a list of the primary documentation for Voyager 9.0:

- Voyager 9.0 Release Notes
- Voyager 9.0 User's Guides
- The Road to Voyager 9.0
- Voyager 9.0 Installation and Upgrade Requirements

2

General

This section includes the following enhancements:

- Windows 8 OS Support
- Hot Fix Version Information

Windows 8 OS Support

Purpose of the Enhancement

Support for the Windows 8 operating system.

Description

Voyager 9.0 has been certified to run on the Windows 8 operating system.

Reference to Technical Documentation

Refer to *Supported Software and PC Requirements* in the Ex Libris Documentation Center for more information.

Hot Fix Version Information

Purpose of the Enhancement

The Voyager client displays the version information when a hot fix has been applied.

Description

Version information for a hot fix will be displayed in the "About" window in the Voyager clients if a hot fix has been applied to the Voyager system. This will be useful information if a customer needs to report an issue to Ex Libris Support.

3

Acquisitions

This section includes the following enhancements:

- Alternate Vendor Names
- New ISO Currencies
- Select Standard Number on Purchase Order
- Set Duplicate Item Barcode Default to "No"

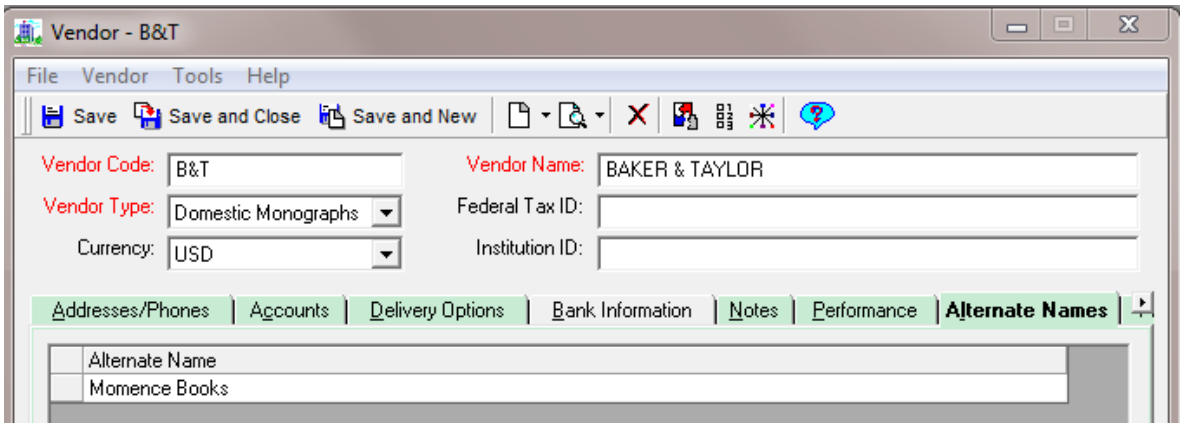
Alternate Vendor Names

Purpose of the Enhancement

The purpose of this enhancement is to make it possible to reference vendors by alternate names.

Description

A new tab has been added to the Vendor record to facilitate searching vendors by alternate names.



Implementation Notes

Alternate names must be entered on the new tab in the vendor record.

New ISO Currencies

Purpose of the Enhancement

Updated the list of ISO currencies in Voyager

Description

The currency table in Voyager has been updated to include several new currency types. These currency values can be used to enter new exchange rates in Voyager.

Implementation Notes

The following currency types have been added to the Voyager currency table:

AFN Afghanistan Afghani
AOA Angola Kwanza
AZN Azerbaijan New Manat
BAM Bosnia and Herzegovina Convertible Marka
BGN Bulgaria Lev
BYR Belarus Ruble
CDF Congo/Kinshasa Franc
CUC Cuba Convertible Peso
ERN Eritrea Nakfa
GGP Guernsey Pound
GHS Ghana Cedi
IMP Isle of Man Pound

JEP Jersey Pound
MGA Madagascar Ariary
MZN Mozambique Metical
RON Romania New Leu
RSD Serbia Dinar
RUB Russia Ruble
SDG Sudan Pound
SPL Seborga Luigino
SRD Suriname Dollar
TJS Tajikistan Somoni
TMT Turkmenistan Manat
TRY Turkey Lira
TVD Tuvalu Dollar
UAH Ukraine Hryvna
VEF Venezuela Bolivar Fuerte
XDR International Monetary Fund (IMF) Special Drawing Rights

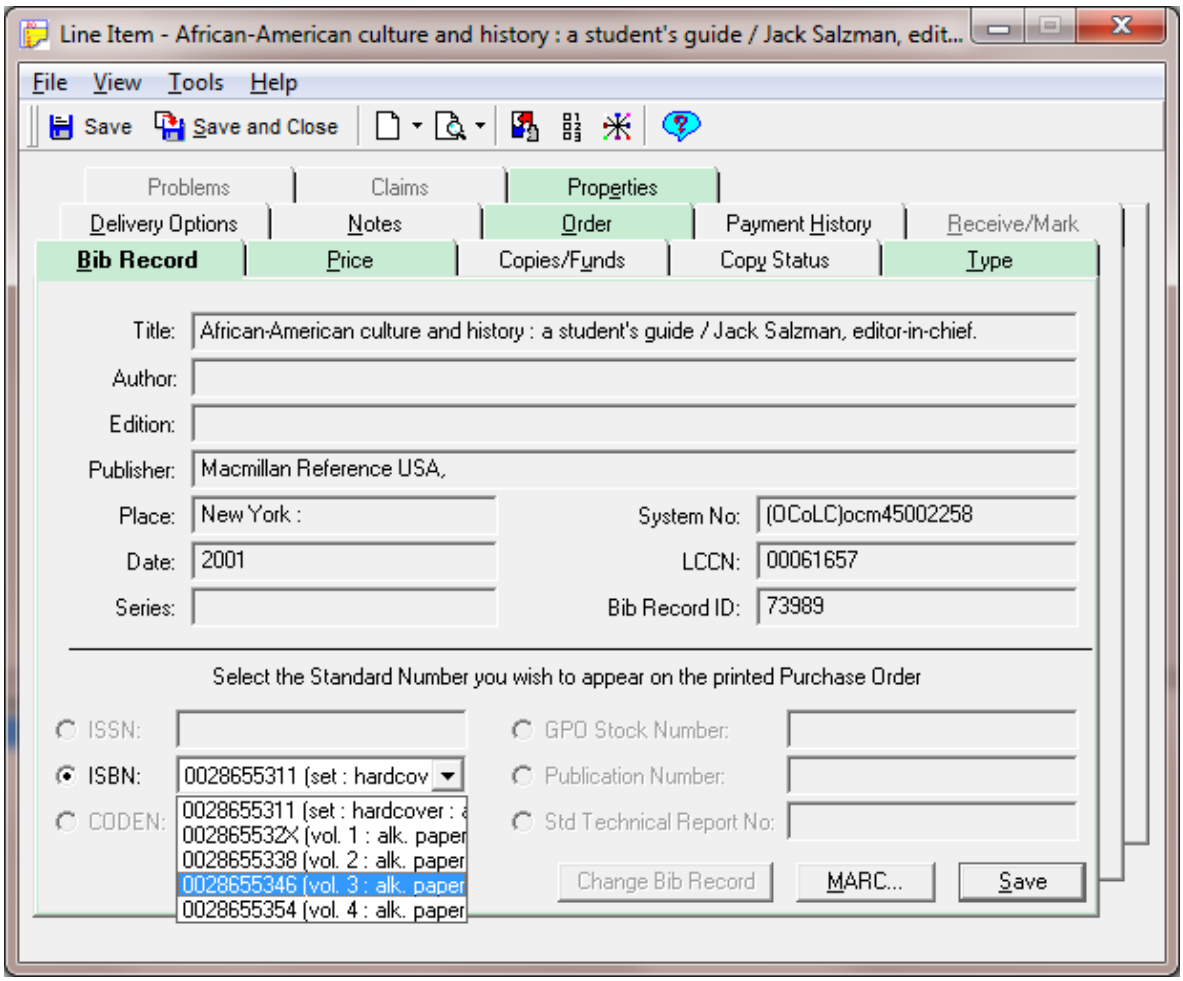
Select Standard Number on Purchase Order

Purpose of the Enhancement

The purpose of this enhancement is to display multiple standard numbers and let the operator determine which one to display on a purchase order.

Description

The standard number section of the purchase order line item window has been enhanced to show all occurrences of various standard number types. When multiple instances of a standard number exist, the user will see a drop-down arrow and can select which instance of the standard number will be used on the purchase order.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Acquisitions User's Guide* for more information.

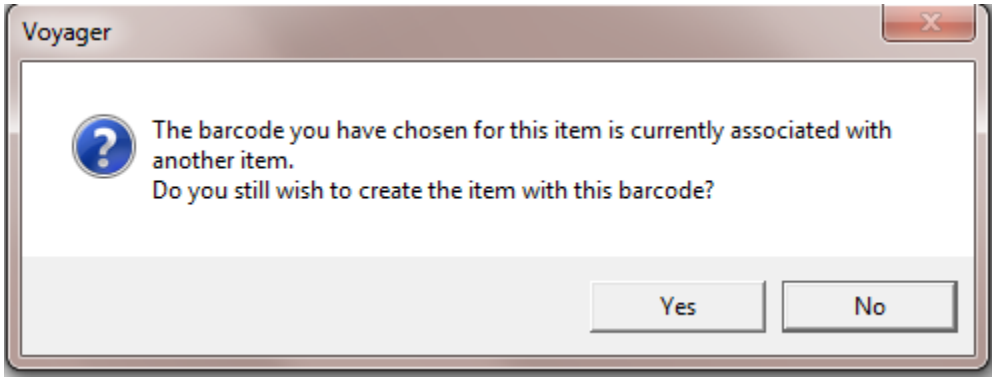
Set Duplicate Item Barcode Default to "No"

Purpose of the Enhancement

The purpose of this enhancement is to change the default setting when checking for duplicate barcodes.

Description

The Voyager Acquisitions client can be set to check for duplicate item barcodes when saving a record. When a duplicate item barcode is detected, the prompt now defaults to "No" to prevent saving an item record with a duplicate barcode. This will make it easier to assign a new barcode to an item without creating duplicates.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Acquisitions User's Guide* for more information.

4

Bulk Import

This section includes the following enhancements:

- Make Addition of 035 Optional
- Change Default Setting to –X NOKEY

Make Addition of 035 Optional

Purpose of the Enhancement

The purpose of this enhancement is to include a parameter in Bulk Import that will suppress the creation of the 035 field with the bibliographic record ID.

Description

A new parameter has been added to Bulk Import to suppress creation of the MARC 035 field from the bibliographic record ID. When -C is supplied as a parameter, the 035 is not created when importing or replacing a bibliographic record.

Implementation Notes

User must specify the –C parameter on the command line or via WebAdmin to suppress the creation of the 035 tag. The parameter is case sensitive.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

Change Default Setting to –X NOKEY

Purpose of the Enhancement

The purpose of this enhancement is to set the default to disable keyword generation and maintenance while loading records.

Description

The default settings for bulk import processes now disables the keyword generation and maintenance activities during a bulk import. This change improves performance of the bulk import process and makes the user take a more active role in running keyword regens.

For customers who want to enable keyword generation and maintenance activities during bulk import, the parameter –K ADDKEY can be specified.

These changes have been applied to bulk imports run from the command line and from WebAdmin, as well as to the import process used during Global Data Change activities.

Implementation Notes

-X NOKEY is now the default setting during bulk import processing. –K ADDKEY can be specified to enable keyword generation activities during bulk import.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

5

Cataloging

This section includes the following enhancements:

- Set Duplicate Item Barcode Default to "No"
- Automatically Update Item Location and Item Type when Updating Holdings
- Print from Cataloging Hierarchy
- Add Item Barcode to Cataloging Hierarchy
- Link to RDA Toolkit from Cataloging

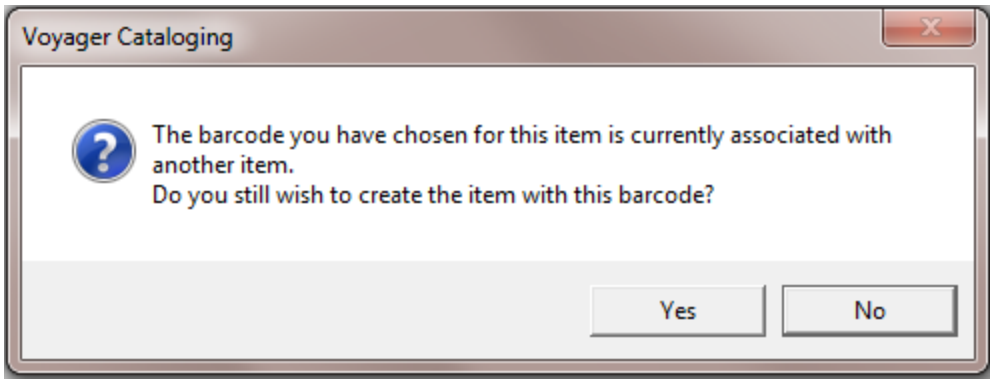
Set Duplicate Item Barcode Default to "No"

Purpose of the Enhancement

The purpose of this enhancement is to change the default setting when checking for duplicate barcodes.

Description

The Voyager Cataloging client can be set to check for duplicate item barcodes when saving a record. When a duplicate item barcode is detected, the prompt now defaults to "No" to prevent saving an item record with a duplicate barcode. This will make it easier to assign a new barcode to an item without creating duplicates.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

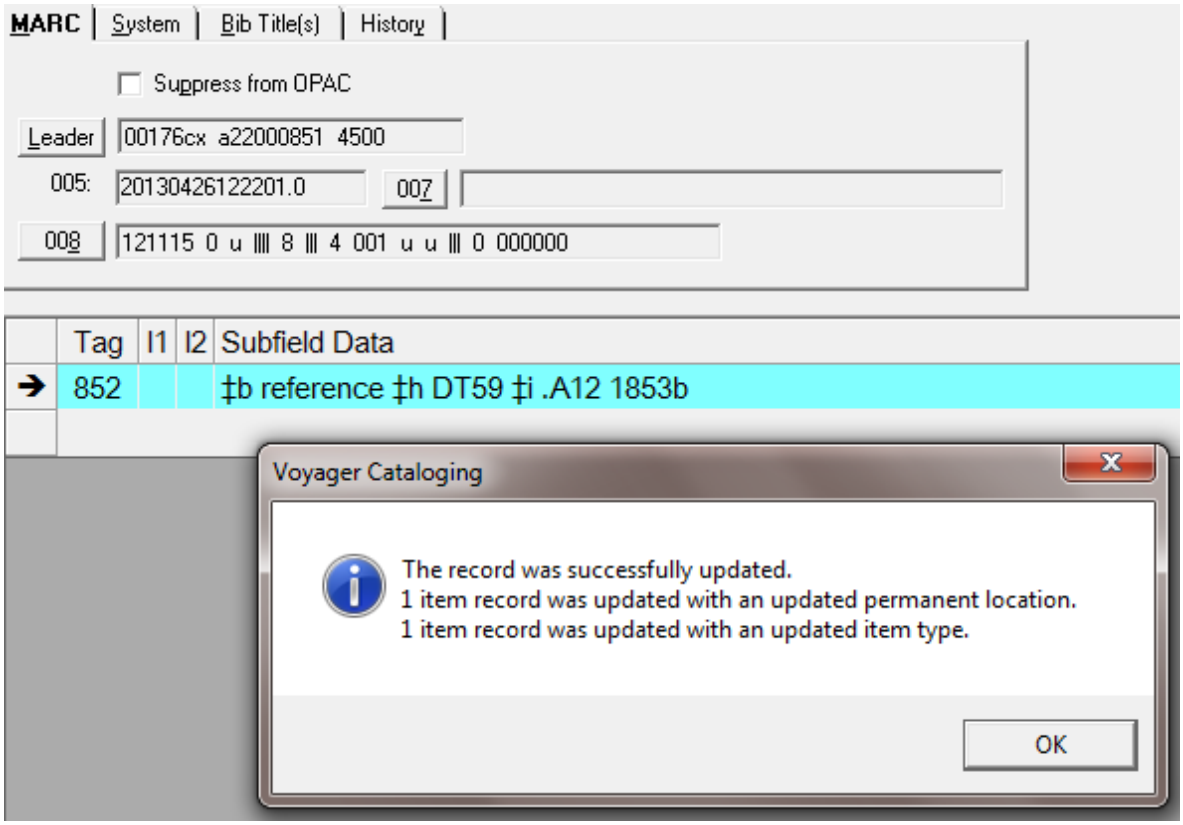
Automatically Update Item Location and Item Type when Updating Holdings

Purpose of the Enhancement

The purpose of this enhancement is to automatically update location and type on the item record when updating a holding record.

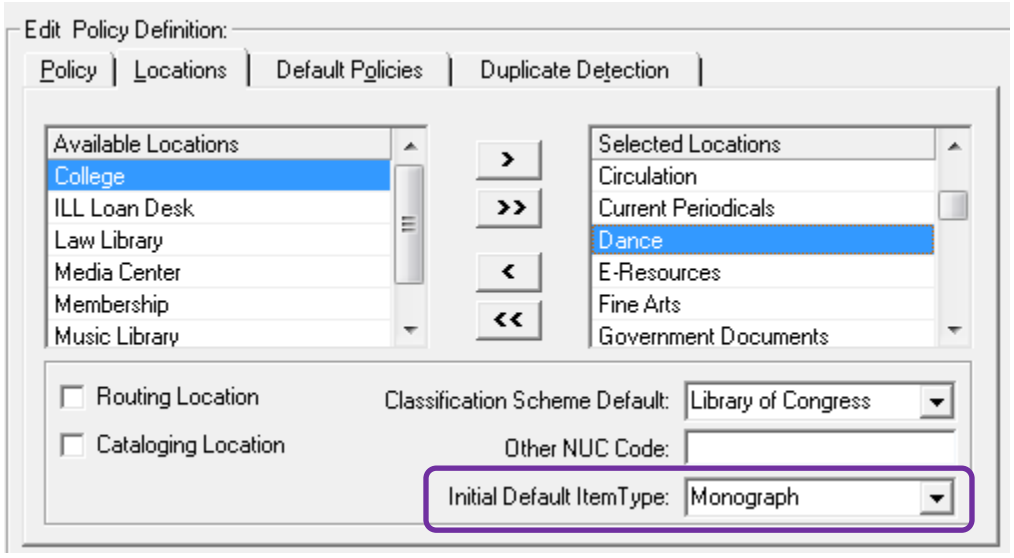
Description

Item records contain location and item type fields that can be updated independently of the location on the MARC holdings record. This feature uses preferences and default settings to automatically update the item permanent location and item type when the location in the holdings record is saved.

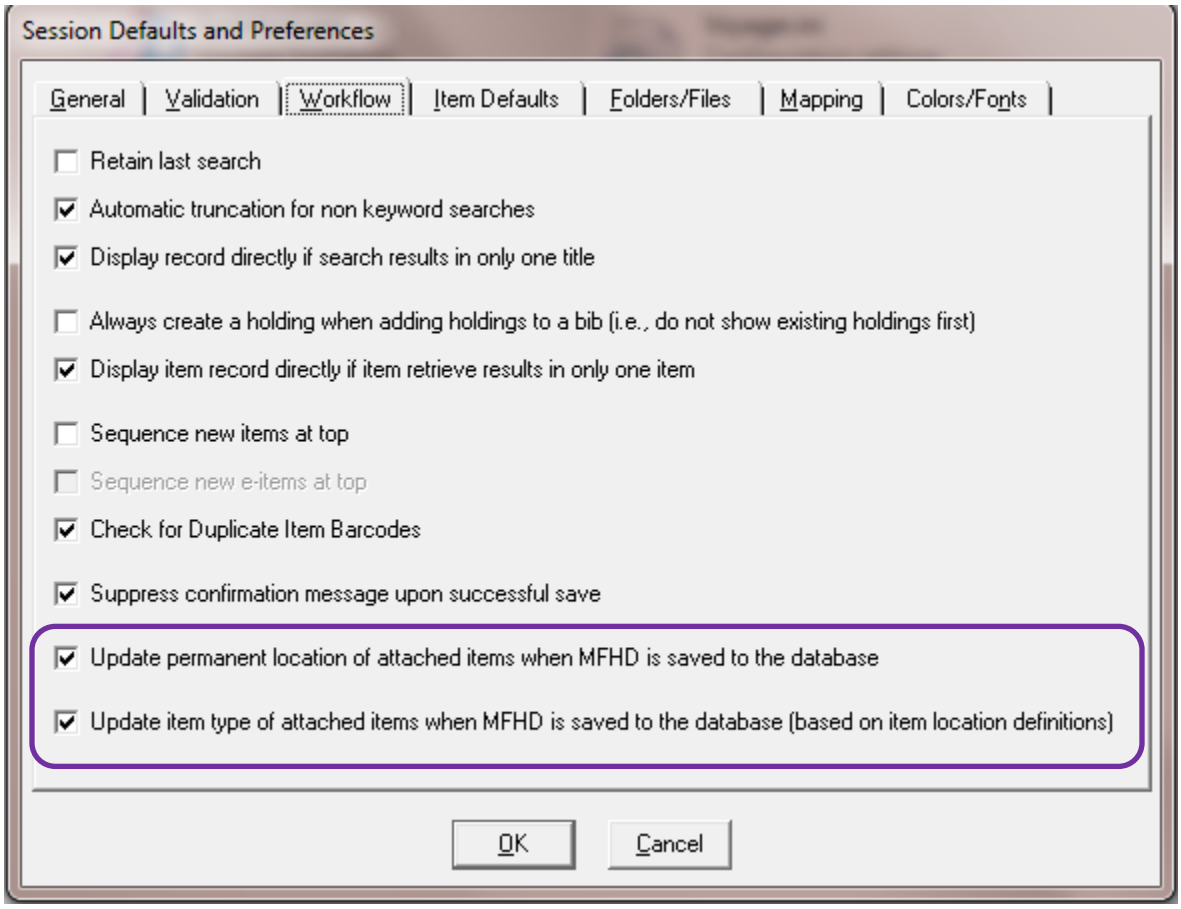


Implementation Notes

The "Initial Default Item Type" must be specified for each location in the Cataloging Policy configuration in System Administration.



Additionally, the user must set preferences in the Cataloging client to use this new feature.



The item type can only be updated automatically if the permanent location is being updated.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

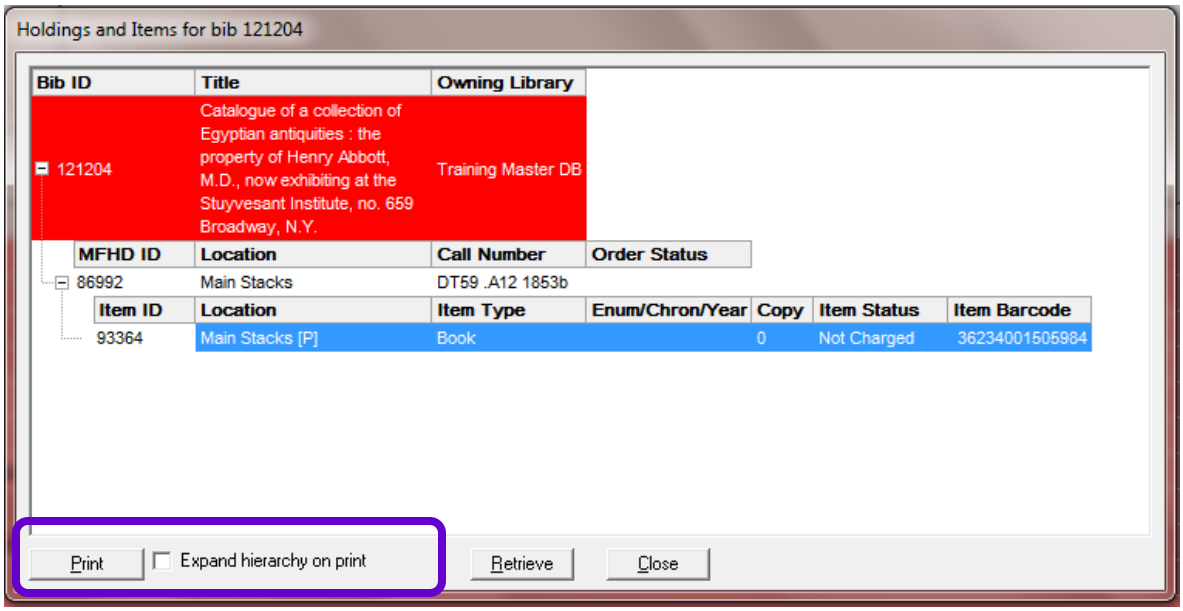
Print from Cataloging Hierarchy

Purpose of the Enhancement

The purpose of this enhancement is to print the contents of the Cataloging Hierarchy display.

Description

It is now possible to print the contents of the Cataloging Hierarchy display.



A check box has been provided to expand the hierarchy when printed.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

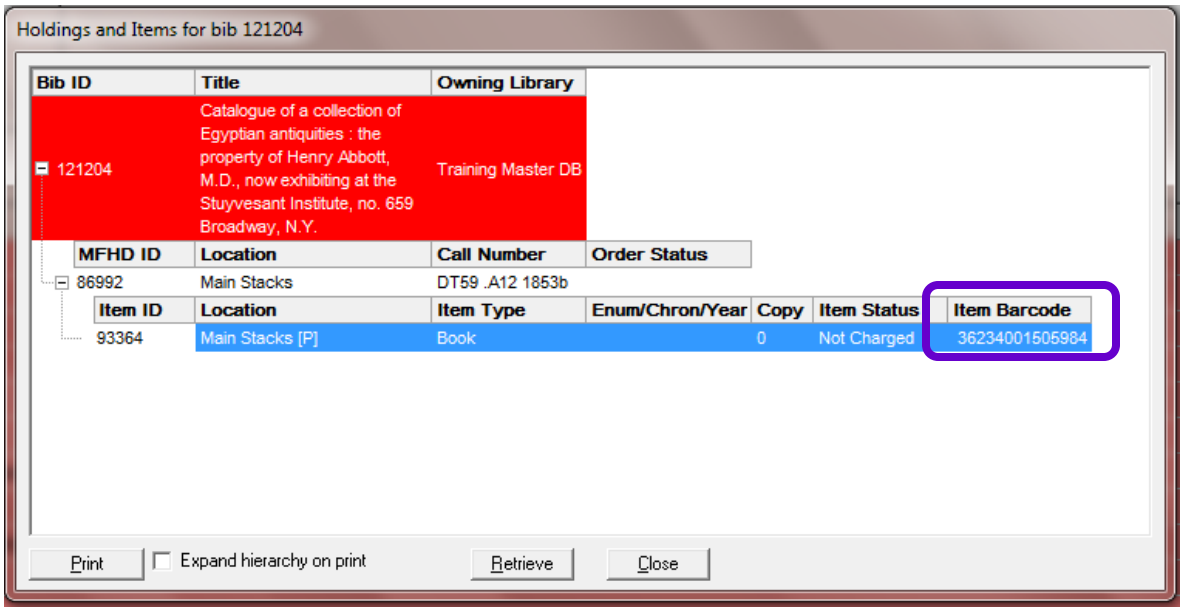
Add Item Barcode to Cataloging Hierarchy

Purpose of the Enhancement

The purpose of this enhancement is show the active item barcode in the Cataloging Hierarchy display.

Description

The active item barcode has been added to the item information displayed in the Cataloging Hierarchy.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

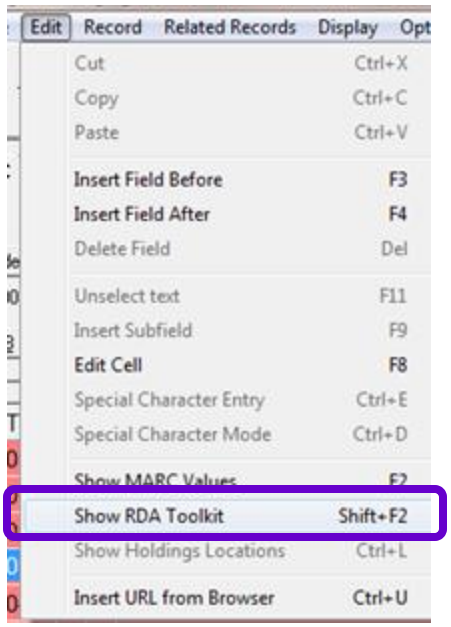
Link to RDA Toolkit from Cataloging

Purpose of the Enhancement

The purpose of this enhancement is to provide access to the RDA Toolkit from the Voyager Cataloging client.

Description

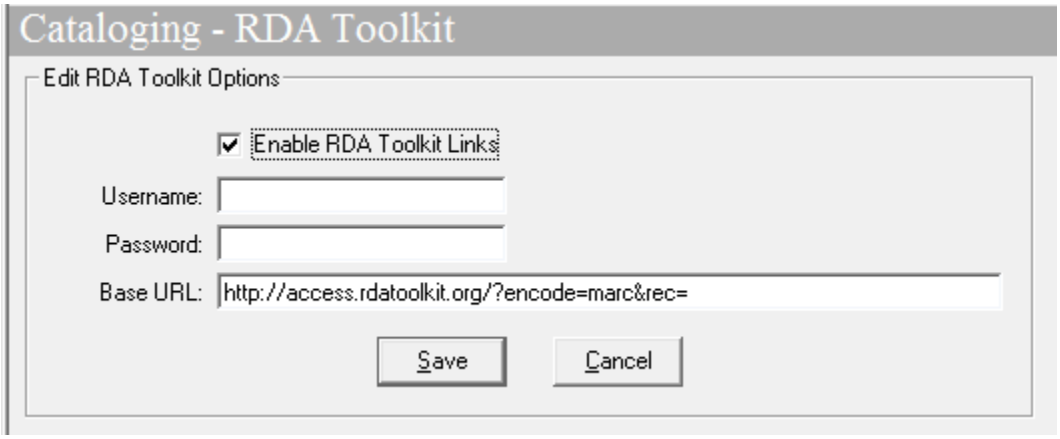
A context-sensitive link to the RDA Toolkit can now be accessed directly from the Voyager Cataloging client. Depending on your subscription, the access may be provided at the individual level or the institutional level. Once configured, you can use Shift-F2 or select "Show RDA Toolkit" from the Edit menu to make a link to the RDA Toolkit.



Implementation Notes

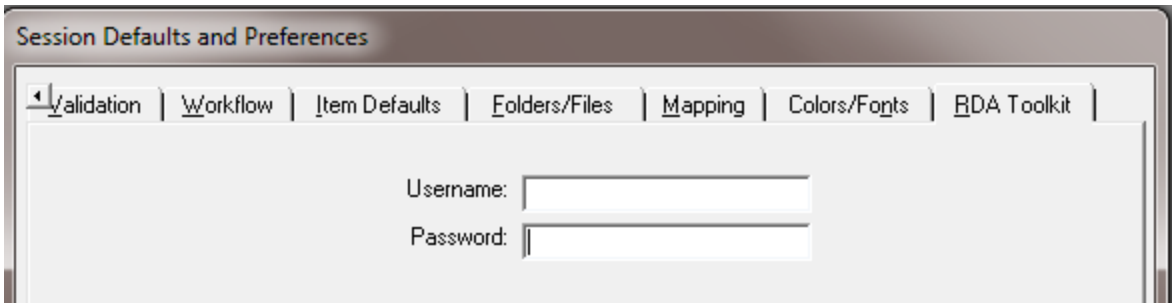
Depending on your subscription, access to the RDA Toolkit may be configured in different places.

Access to the RDA Toolkit must first be enabled in System Administration (> Cataloging).



The Username and Password are optional in System Administration. If a username and password are stored in System Administration, no configuration is needed in Voyager Cataloging.

If a username and password are not supplied in System Adminstration, a tab appears in session preferences in Cataloging to store the username and password.



When done using the RDA Toolkit, users should logout of the Toolkit in order to re-use sessions.

Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* and the *Voyager 9.0 Cataloging User's Guide* for more information.

MARC 21 Updates

Purpose of the Enhancement

The purpose of this enhancement is to include the latest MARC 21 updates in Voyager.

Description

The Voyager tag tables have been updated to reflect the most recent changes in the MARC 21 standard.

The MARC 21 tag tables have been updated through MARC 21 Update 16 (April 2013) and the OCLC tag tables have been updated through OCLC Technical Bulletin 262 (June 2013).

Implementation Notes

New tag tables will be installed with your clients during the upgrade. If you have any locally-defined fields, you will need to add your customizations to the new tag tables as appropriate.

6

Circulation

This section includes the following enhancements:

- Show Patron Pop-up Notes Upon Discharge
- Option to Edit Fines/Fees
- Make Patron's Last Name Obvious on Hold Slips
- Option to Limit Number of Holds Placed
- Option to Limit Types of Holds and Recalls
- Automatically Remove Fines/Fees When Lost Item Is Discharged
- Cancel Requests on "Duplicate" Copies When Item Is Put In Transit
- Block Holds on Missing and Lost Items
- Provide A Block When An Item Has Pending Holds
- Set Duplicate Item Barcode Default to "No"
- Send SMS Messages with Time Delay

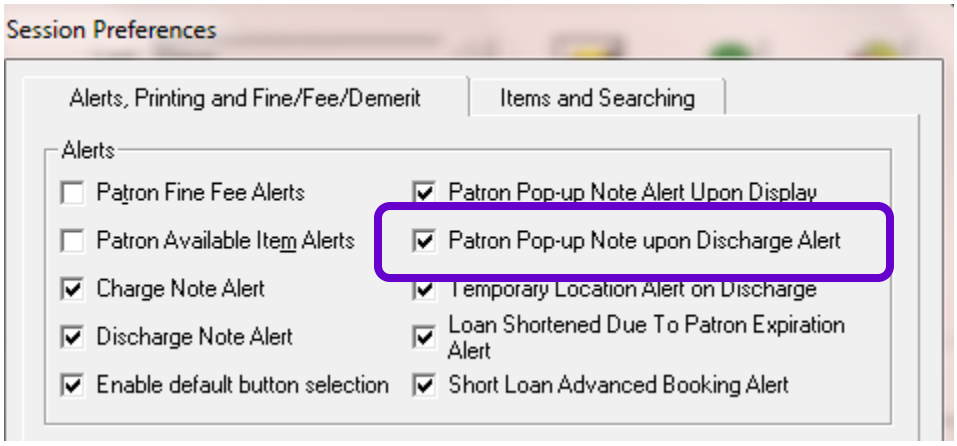
Show Patron Pop-up Notes Upon Discharge

Purpose of the Enhancement

The purpose of this enhancement is to provide an option to display a patron pop-up note when an item is discharged.

Description

A new session preference allows the user to view a patron pop-up note when an item is discharged.



Implementation Notes

The privilege to use this feature is controlled by a session preference in the Circulation client.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* for more information.

Option to Edit Fines/Fees

Purpose of the Enhancement

The purpose of this enhancement is to enable the editing of current fines and fees.

Description

Authorized Circulation staff may now edit current fines and fees charged to a patron. A "Modify" button has been added to the Patron Fines/Fees window. When clicked, the

operator can update the fee type, original amount, item barcode, and description of an outstanding amount. Historical fines and fees cannot be edited.

Implementation Notes

In order to edit fines and fees, an operator must have the Circulation security profile setting to modify outstanding fines and fees.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* for more information.

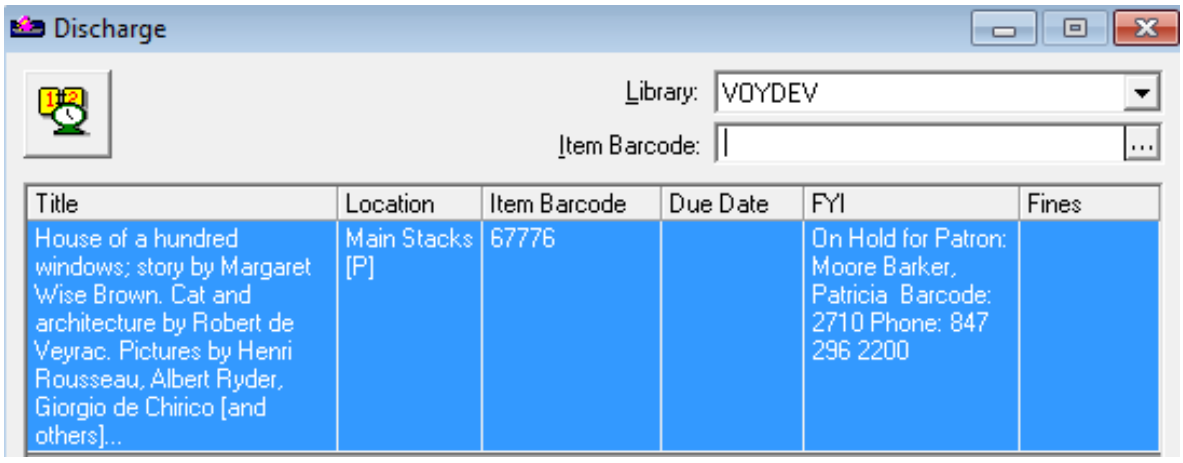
Make Patron's Last Name Obvious on Hold Slips

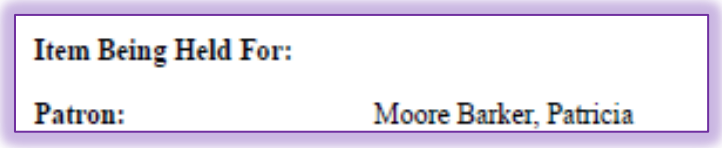
Purpose of the Enhancement

This enhancement makes it easy to identify a patron's surname for a held item.

Description

The patron's name will now be displayed as last name, first name in the FYI column of the discharge window and on a printed hold slip. This makes it easier to identify a patron's surname for ordering of items on the hold shelf.





Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* for more information.

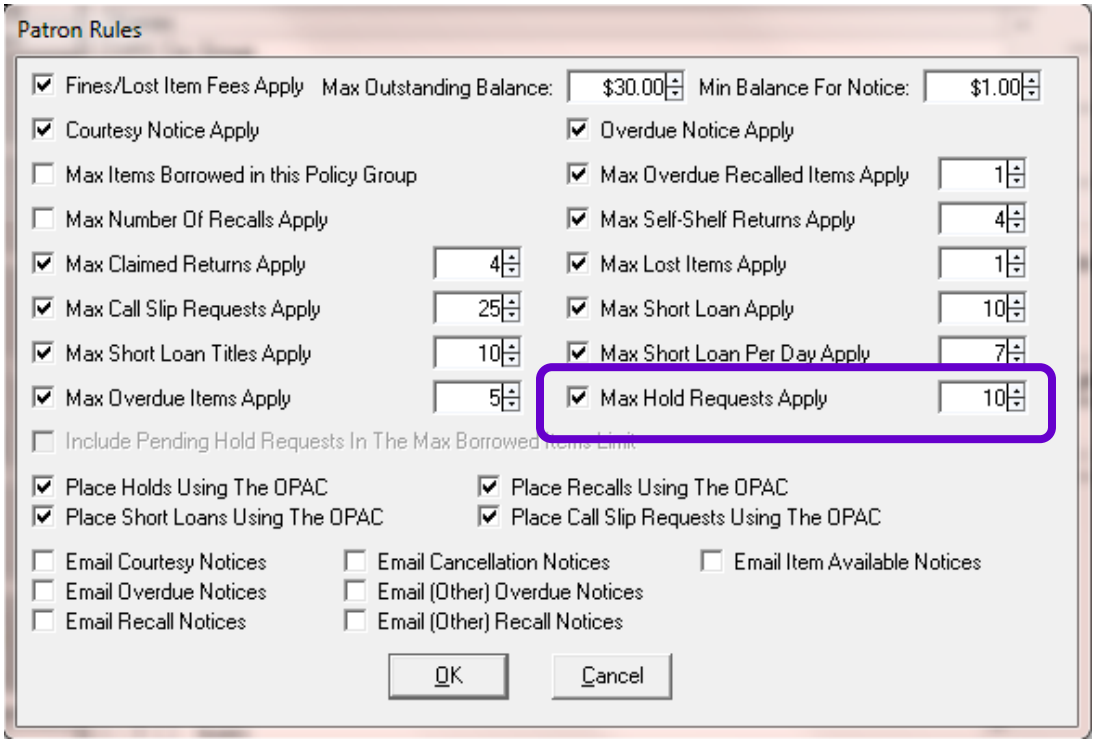
Option to Limit Number of Holds Placed

Purpose of the Enhancement

The purpose of this enhancement is to limit the number of holds that can be placed by a patron.

Description

The library can define a limit on the number of holds a patron can place. Once the patron has reached the limit, he will be blocked from placing more holds until some are fulfilled or expire. Limits are set by patron groups, and can be different from one patron group to another.



Implementation Notes

The holds limit is defined in the Circulation policy settings in System Administration. Additionally, new circulation blocks have been added in System Administration; operators will need to be given permission to override these blocks as necessary. New block messages have also been added to vwebv.properties and vxws.properties.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* for more information.

Option to Limit Types of Holds and Recalls

Purpose of the Enhancement

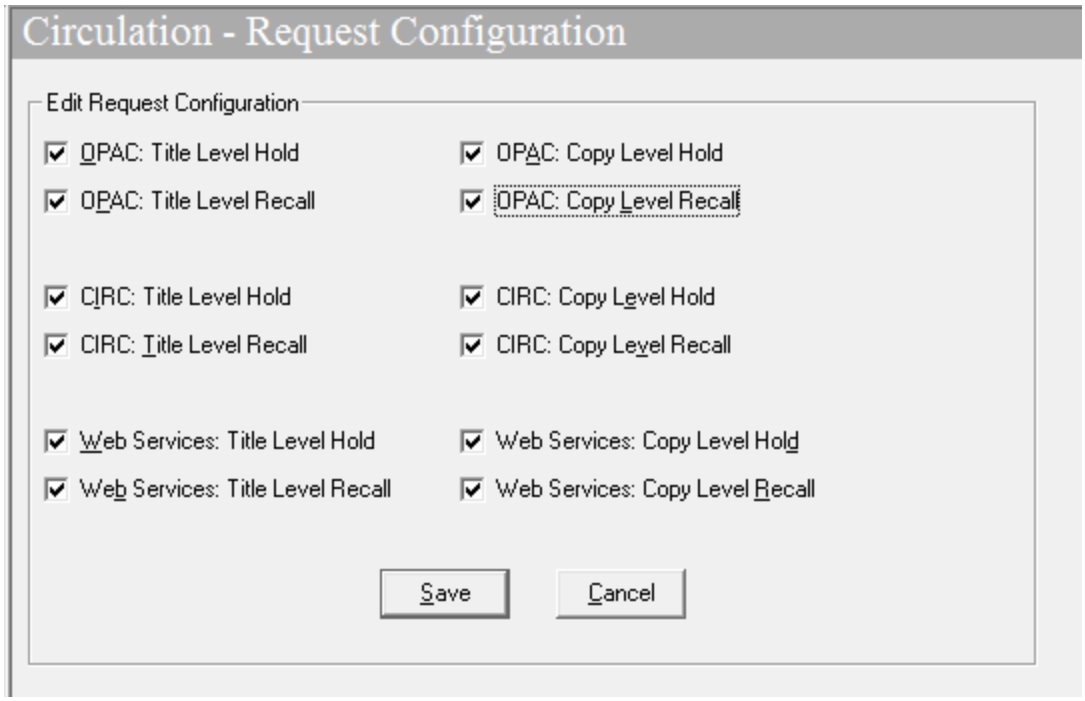
This enhancement allows the library to restrict the placement of copy-level or title-level holds and recalls.

Description

The library can now configure the types of holds and recalls that can be placed from WebVoyáge, a discovery interface, and Voyager Circulation. Using these settings, a library can offer title-level holds or copy-level requests, or both. Request group configuration is still managed separately.

Implementation Notes

By default, all options are allowed upon upgrade. Libraries can configure these settings in System Administration > Circulation > Request Configuration.



Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* for more information.

Automatically Remove Fines/Fees When Lost Item Is Discharged

Purpose of the Enhancement

This enhancement automatically adjusts a user's fines and fees, lost item counter, and updates the item's status when a lost item is returned.

Description

An authorized operator can automatically adjust a user's fines and fees and decrement the patron's lost item counter when a lost item is returned. Additionally, the item's status may be automatically updated when the item is checked in.

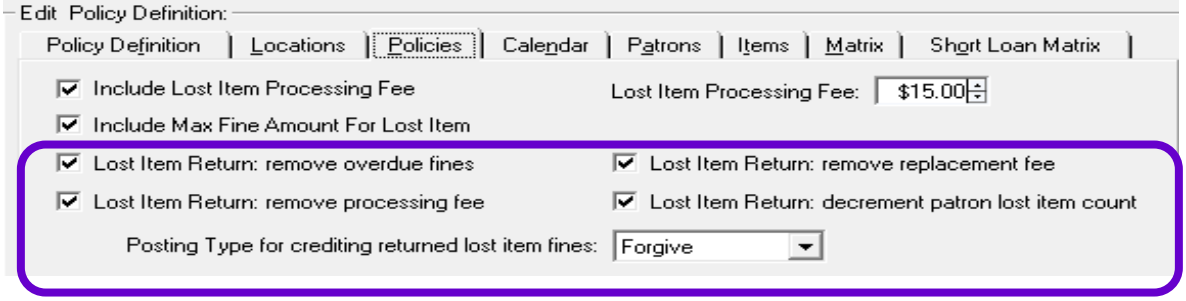
As a final step, the operator can choose to check or uncheck various options at the transaction level when the lost item is discharged.

Implementation Notes

All options are controlled by policy-level and operator security settings in Voyager System Administration.

- The operator must be in a security profile that gives him permission to automatically update lost item charges and counters:

- And the operator must be working in a policy group that allows him to automatically update the fines, fees, and lost item counter:



Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* and the *Voyager 9.0 System Administration User's Guide* for more information.

Cancel Requests on "Duplicate" Copies When Item Is Put In Transit

Purpose of the Enhancement

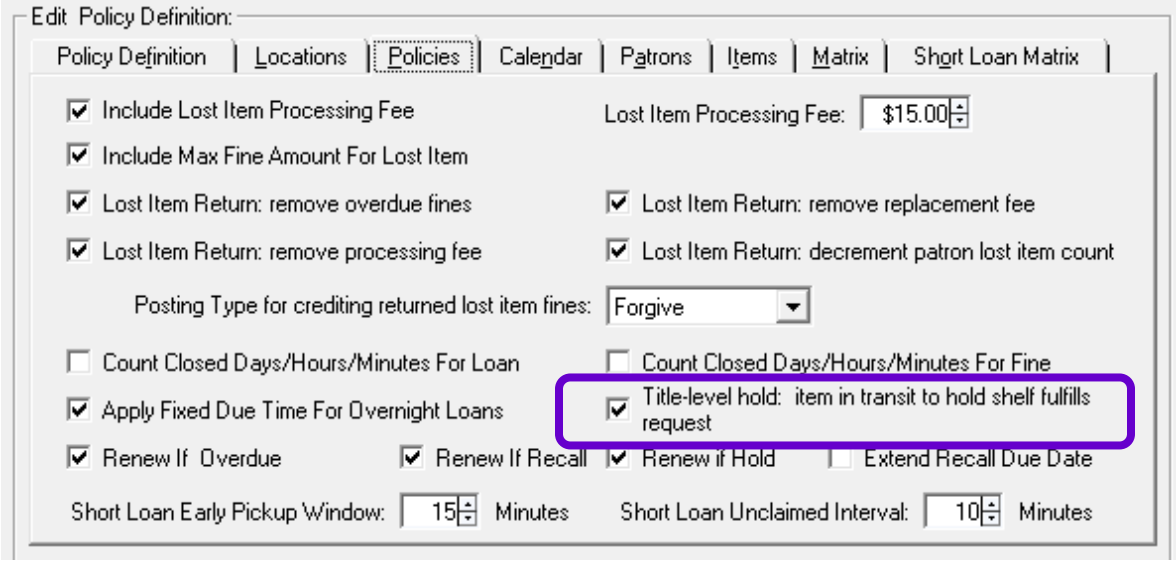
The purpose of this enhancement is to release "duplicate" copies of a title when a copy is put in transit to fulfill a request.

Description

The library can configure Voyager such that the first copy discharged can be used to fulfill a request, and prevent remaining copies from being sent to fill the same request.

Implementation Notes

Configuration for this feature is done in Voyager System Administration > Circulation > Policy Definitions > Policies.



Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* and *Voyager 9.0 System Administration User's Guide* for more information.

Block Holds on Missing and Lost Items

Purpose of the Enhancement

The purpose of this enhancement is to block patrons from placing holds on missing or lost items.

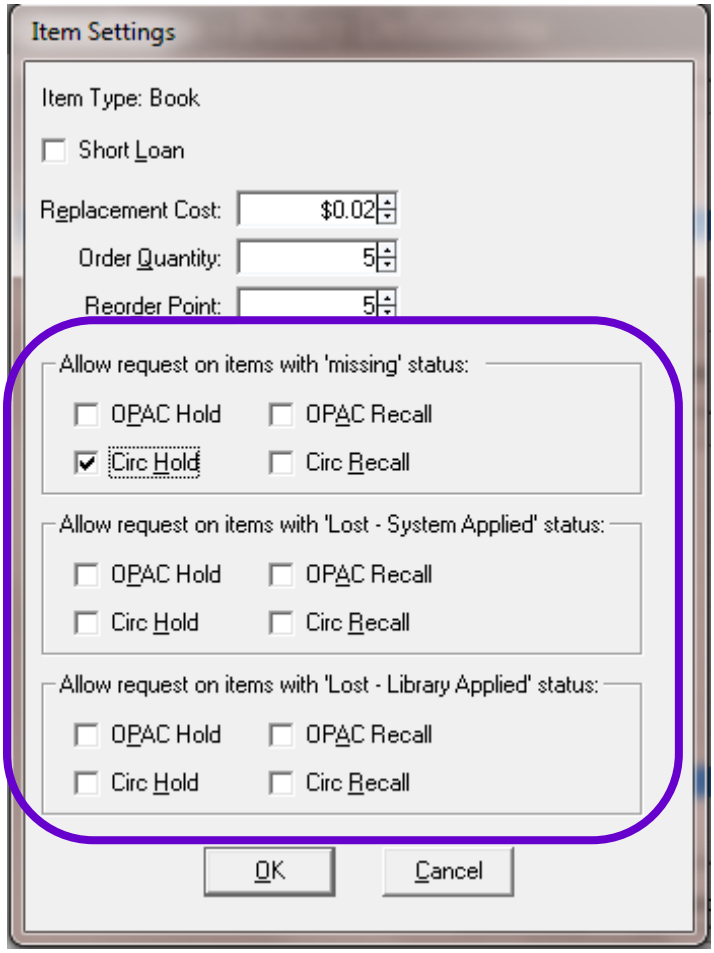
Description

The library can determine if patrons should be allowed to place requests on missing or lost items. Statuses can be configured independently for maximum control.

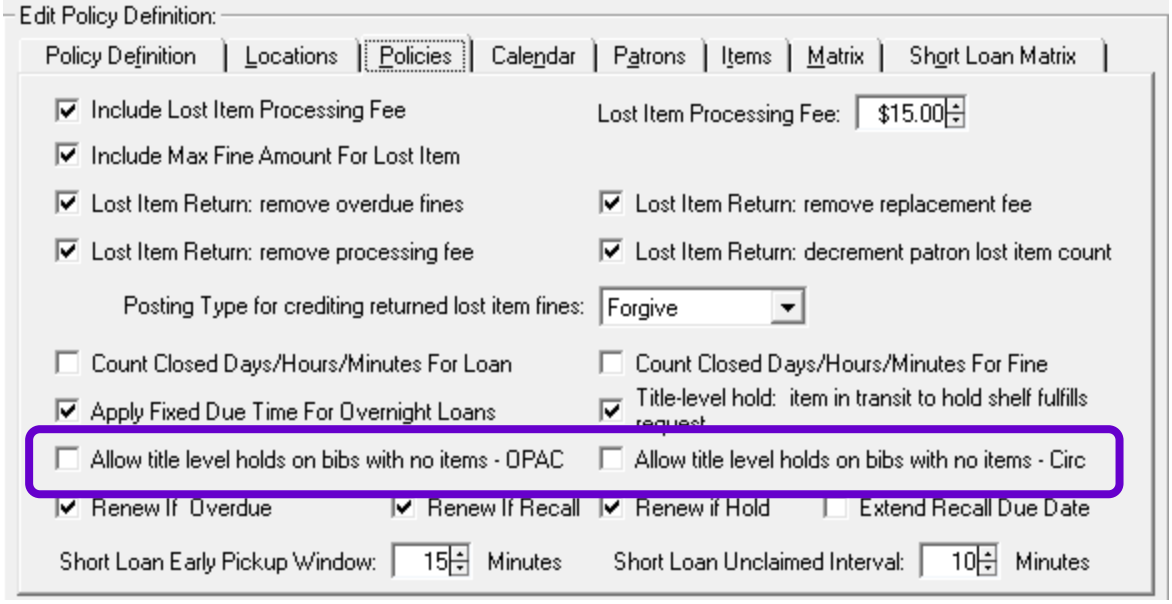
This feature can be used in conjunction with the feature that limits the types of requests that can be placed.

Implementation Notes

Configuration options in Voyager System Administration control whether or not holds and recalls can be placed via the Voyager Circulation client or through the library's OPAC or discovery interface on missing and lost items.



Title-level requests have additional configurations that need to be applied in System Administration:



Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* and the *Voyager 9.0 System Administration User's Guide* for more information.

Provide A Block When An Item Has Pending Holds

Purpose of the Enhancement

This enhancement displays a block whenever a patron tries to charge out an item that has a pending hold request.

Description

Voyager now displays a block whenever a patron tries to charge out an item that has a pending hold request. The block can be overridden by an authorized operator to allow the charge transaction. This block will be displayed even if the item has not yet been discharged to fulfill the request.

Implementation Notes

No configuration is necessary to display the block messages. Operator security profiles can be configured to allow/deny override capabilities for the charge transaction.

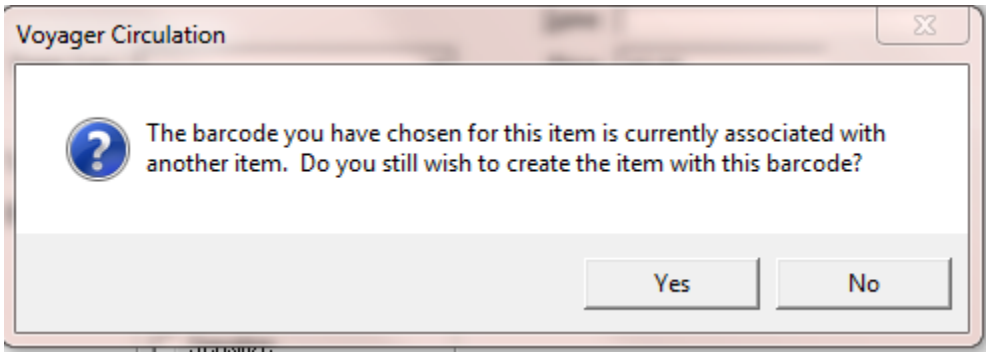
Set Duplicate Item Barcode Default to "No"

Purpose of the Enhancement

The purpose of this enhancement is to change the default setting when checking for duplicate barcodes.

Description

The Voyager Circulation client can be set to check for duplicate item barcodes when saving a record. When a duplicate item barcode is detected, the prompt now defaults to "No" to prevent saving an item record with a duplicate barcode. This will make it easier to assign a new barcode to an item without creating duplicates.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Circulation User's Guide* for more information.

Send SMS Messages with Time Delay

Purpose of the Enhancement

This enhancement allows the library to delay the delivery of SMS messages to patrons.

Description

A time delay parameter has been added to the message syntax to provide a delivery delay between the time when the circjobs are run and the delivery of the text message to the

patron. The <ProviderDeliveryDelay>, specified in minutes, is configured as part of the Institution settings.

Implementation Notes

This option is only supported by Clickatell.

Reference to Technical Documentation

Refer to the *SMS Proxy User's Guide* for more information.

7

Global Data Change (GDC)

This section includes the following enhancement:

- Suppress and Unsuppress Bibs and Holdings using GDC
- Enhance Status Information in GDC Preview
- Delete All Records in a Hierarchy
- Create A Record Set by Matching MARC Records in a File
- Create a Record Set by Identifying a Standard Number Type and Range
- Create a Record Set Using Owning Record Criteria
- Export Record Sets from GDC
- Export Files of MARC Records

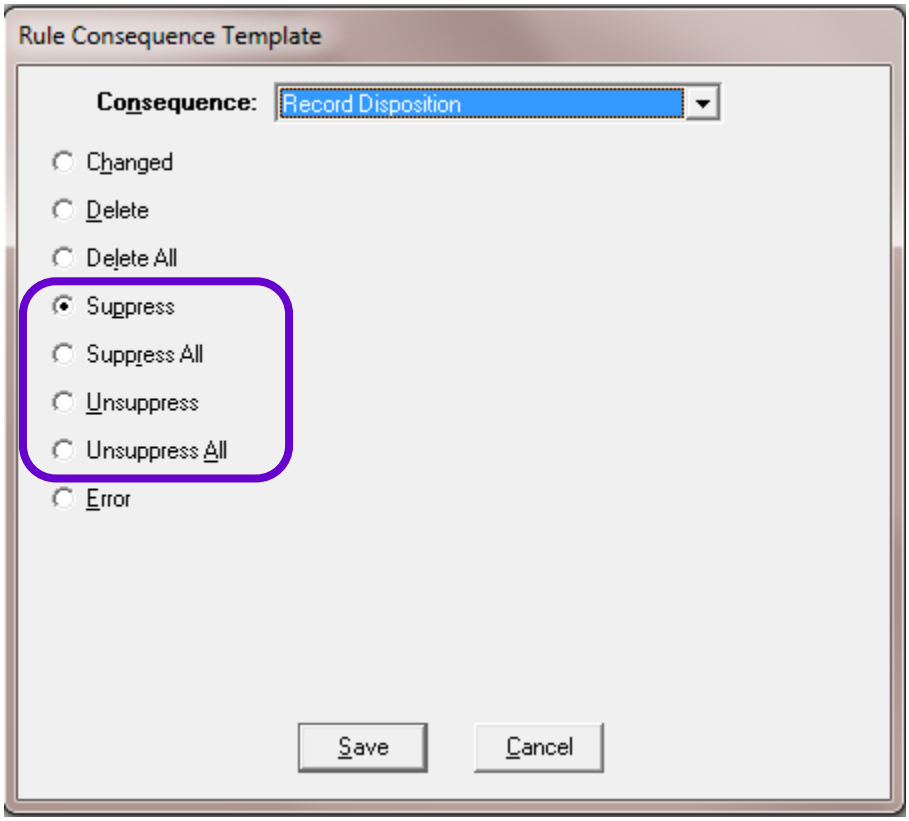
Suppress and Unsuppress Bibs and Holdings using GDC

Purpose of the Enhancement

The purpose of this enhancement is to add options to suppress and unsuppress bib and holdings records using GDC.

Description

This feature provides options to suppress and unsuppress bibliographic and holdings records using GDC. The new options are available as record disposition consequences for data change rules. "Suppress" and "Unsuppress" affect only the specified record in the record set, while "Suppress All" and "Unsuppress All" affect all records related to the record in the specified record set.



The suppress/unsuppress options have no effect on authority records.

Implementation Notes

This functionality can be used by any operator authorized to run data change jobs on bibliographic or holdings records.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

Enhance Status Information in GDC Preview

Purpose of the Enhancement

This enhancement provides additional status information during GDC preview.

Description

The status information that displays during GDC Preview has been enhanced to include multiple messages about the record being viewed.

Implementation Notes

This feature is available to any authorized operator who is allow to preview GDC jobs.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

Delete All Records in a Hierarchy

Purpose of the Enhancement

The purpose of this enhancement is to provide an option that can delete all records in a record hierarchy.

Description

A new "Delete All" consequence has been added to the data change rule consequences in GDC. This feature provides enhanced delete record capabilities that can delete all related records in a record hierarchy. Records that can not be deleted will be automatically suppressed from OPAC display.

The job log file has been enhanced to report the number of hierarchies that had records deleted as a result of the "Delete All" rule being used.

When used in combination with GDC Preview, the record disposition will be displayed in the status, even though record deletes will not occur.

Implementation Notes

This functionality is controlled by the security privilege to delete the entire record.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

Create A Record Set by Matching MARC Records in a File

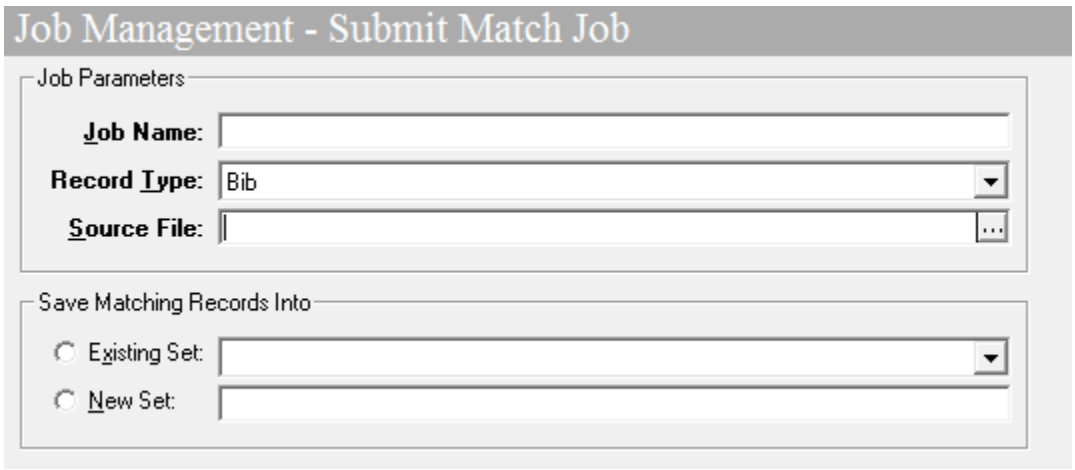
Purpose of the Enhancement

This enhancement allows an operator to create a GDC record set by matching records in a file of MARC records.

Description

An operator can add records to a record set by matching against a files of MARC bibliographic or authority records. Often such files are supplied by third-party vendors, and may be used to delete records from your Voyager catalog.

Voyager constructs an 035 tag from the 001 and 003 tags for the records in the external MARC file. The 035 tag is then compared to the records in your Voyager database. When a match is found, the resulting record ID is written to the record set. If multiple records are found, all matching records are added to the record set.



All records in the file must be of the same type – either bibliographic or authority records – for the match job to succeed.

A client preference can be set to indicate the preferred directory for the external MARC files.

Implementation Notes

This functionality can be used by any operator who is authorized to add or update a bibliographic or authority record set.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

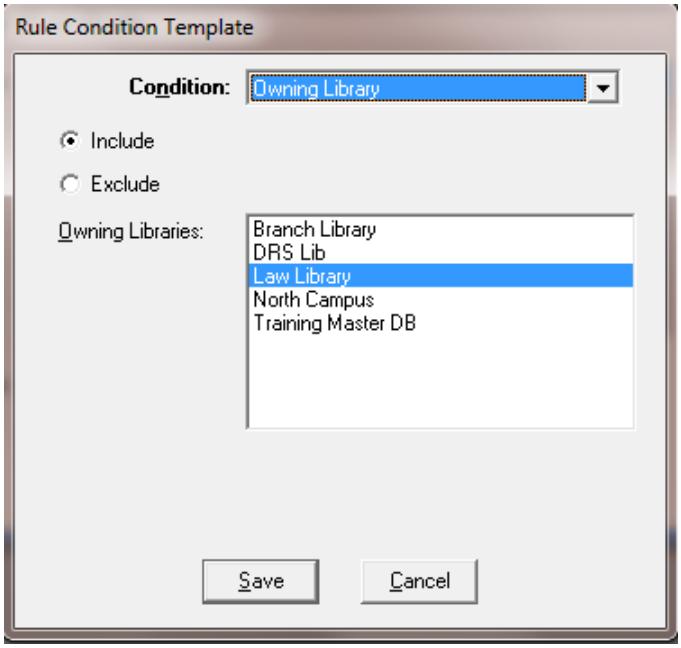
Create a Record Set Using Owning Record Criteria

Purpose of the Enhancement

This enhancement allows an operator to include or exclude records in a record set by specifying owning library criteria.

Description

An operator can add records to a record set by scanning records and using criteria that includes or excludes records based on owning library criteria. Owning library criteria can be based on the bibliographic or the holdings record.



Implementation Notes

This functionality can be used by any operator who is authorized to add or update a record set in GDC.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

Export Record Sets from GDC

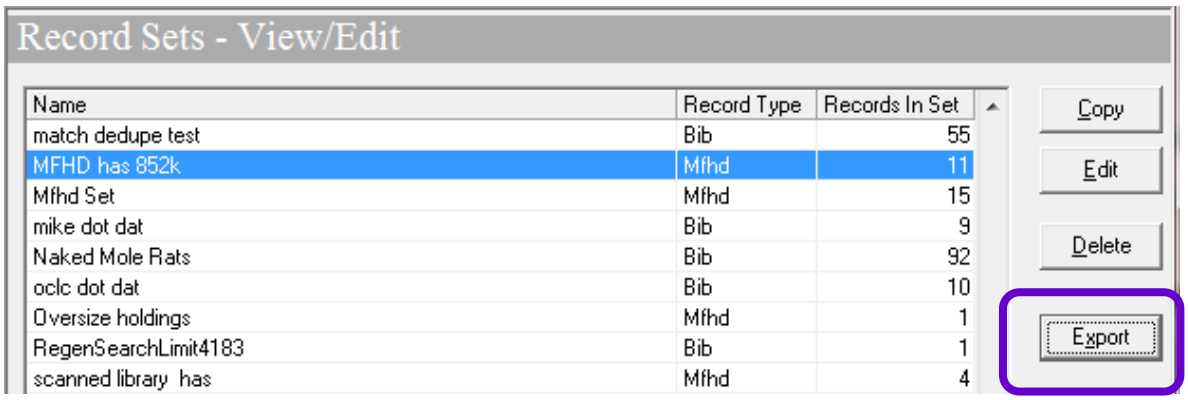
Purpose of the Enhancement

The purpose of this enhancement is to provide an option to export records sets (IDs) from the GDC client.

Description

This feature allows the operator to export a record set from GDC. The record set (IDs) can then be used for another purpose, such as processing via Pick and Scan.

Exporting the record set can be done from the View/Edit screen under Record Sets in the GDC client.



The file name and location can be specified by the operator. By default, the name of the record set will be used as the name of the exported file.

Implementation Notes

Any operator with "View" permission for the file type can use the export functionality.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

Export Files of MARC Records

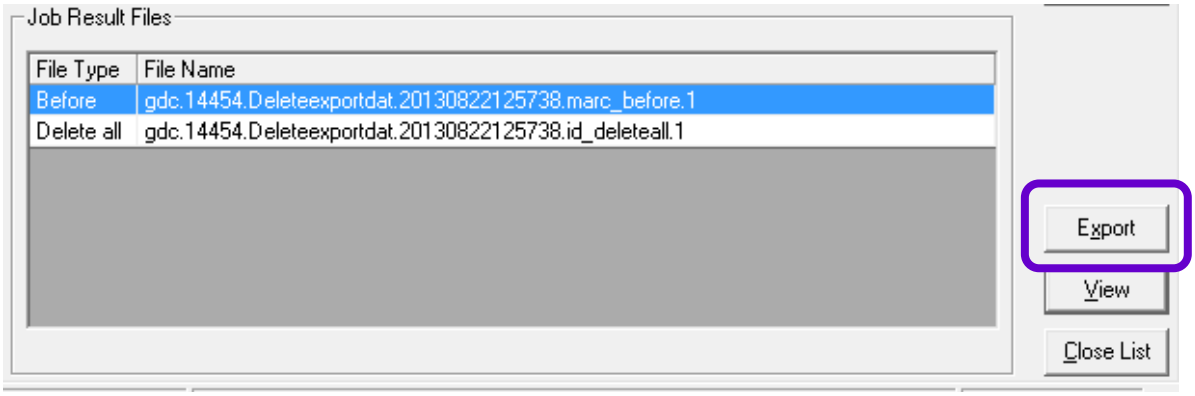
Purpose of the Enhancement

The purpose of this enhancement is to provide an option to export files of MARC records from the GDC client.

Description

This feature allows the operator to export a file of MARC records from GDC. The records can then be used for another purpose.

Exporting the records can be done from the Job Result Files section of the Job Management / View Running/Complete Jobs page in the GDC client.



The file name and location can be specified by the operator. By default, the name of the MARC file in GDC will be used as the name of the exported file.

Implementation Notes

Any operator with permission to "View Job History" for the record type can use the export functionality.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Global Data Change User's Guide* for more information.

8

Media Scheduling & Media System Administration

This section includes the following enhancements:

- Configuration of the Day View
- Add Titles of Media Items to Day View
- Display Patron Notes in Media Scheduling
- Remove SSN from Patron Display
- Show Available Equipment When Creating a Booking
- Display Current Bookings and Patron Counters
- Display Advanced Booking Warning
- Show Status of an Item in Media Scheduling
- Display Alert When Lost Items Are Discharged
- Enhanced Display of Equipment in Bookings
- Show Booking Warning Interval in Days
- Color-code Tabs When Data is Present

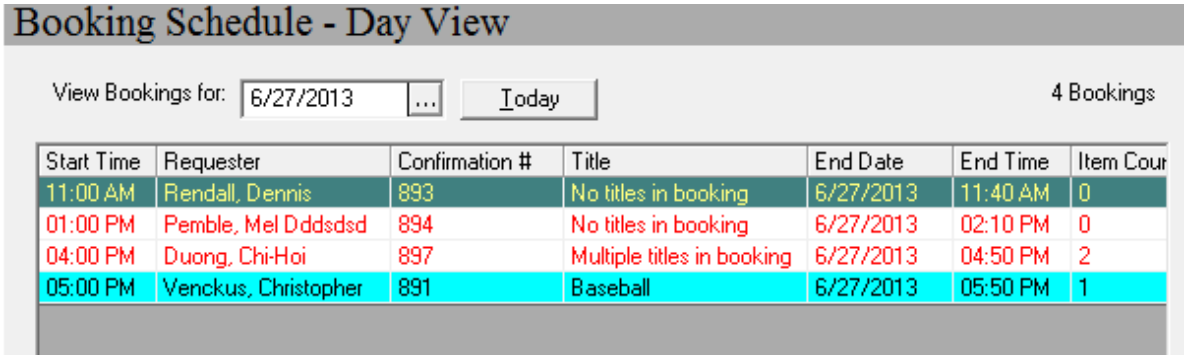
Configuration of the Day View

Purpose of the Enhancement

Users can configure the "Day View" display in Media Scheduling.

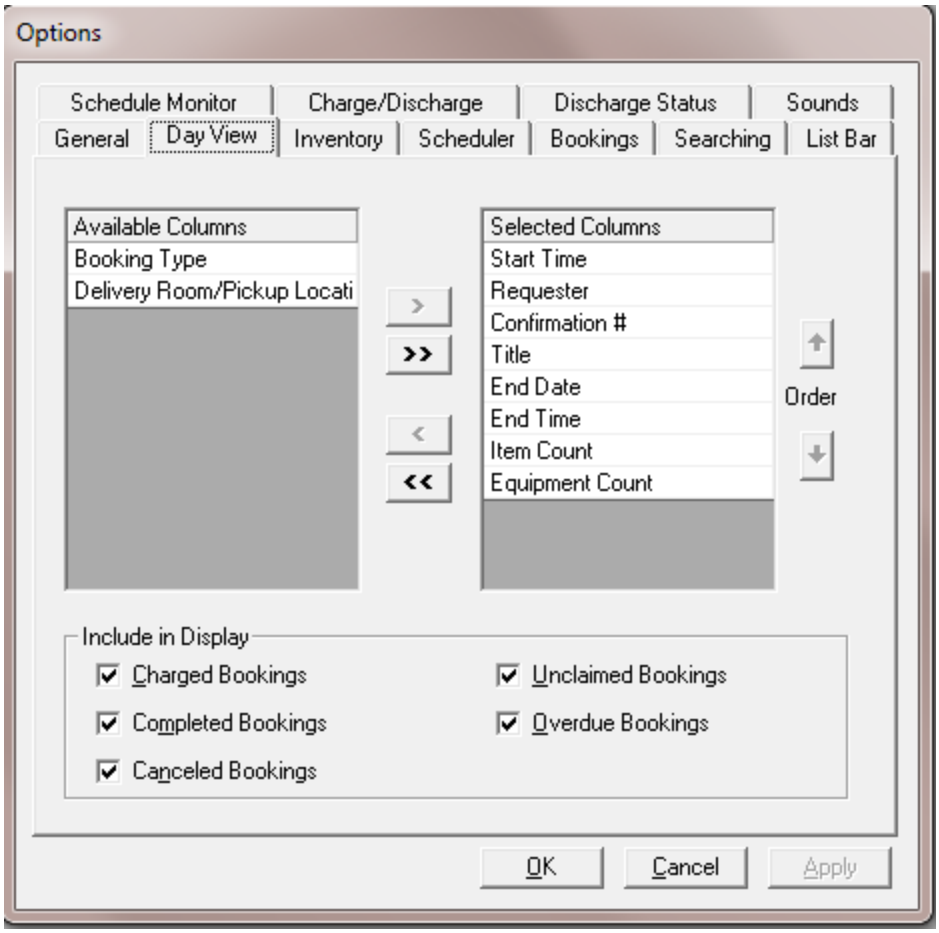
Description

The "Day View" in Media Scheduling can now be configured to include the details the user wants to see, in the order he wants to see them.



Implementation Notes

The display is configured in the Media Scheduling client under Tools > Options > Day View.



Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

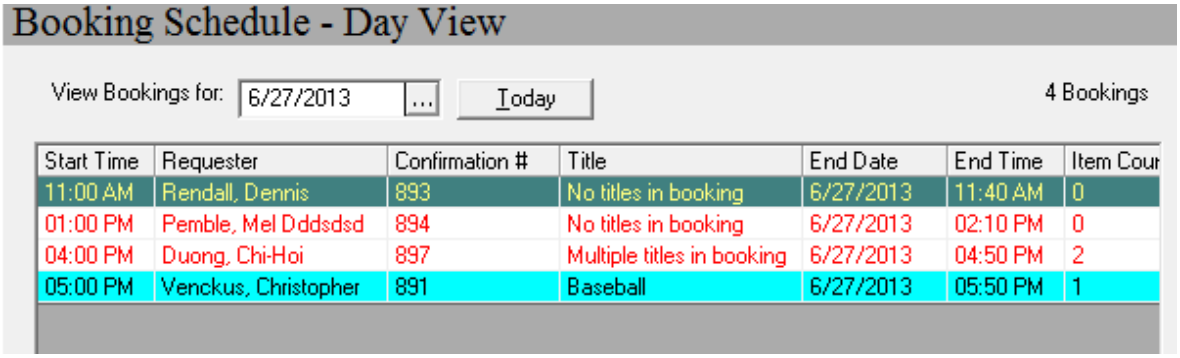
Add Titles of Media Items to Day View

Purpose of the Enhancement

The purpose of this enhancement is to show the titles of media items in bookings on the Day View.

Description

The Day View can be configured to display the titles of media items in bookings.



- The title will be displayed if the booking contains one media item
- "Multiple titles in booking" will be displayed if the booking contains more than one media item
- "No titles in booking" will be displayed if the booking contains no media items

Implementation Notes

The title field must be added to the Day View using the Tools > Options > Day View configuration described above.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

Display Patron Notes in Media Scheduling

Purpose of the Enhancement

The purpose of this enhancement is display patron notes in the Media Scheduling client.

Description

Patron notes that have been added to the patron's record in Circulation will now display in the Media Scheduling client during the booking process and when reservations are charged or discharged.

Pop-up notes will be displayed for the patron when he is either the requester or the pick-up patron. All types of patron notes may be accessed from the "View" menu of a reservation.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information

Remove SSN from Patron Display

Purpose of the Enhancement

This enhancement improves patron privacy by removing the SSN from the patron display.

Description

To increase patron privacy and reduce security concerns, the SSN has been removed as a search option and from the display of information as a result of a patron search.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

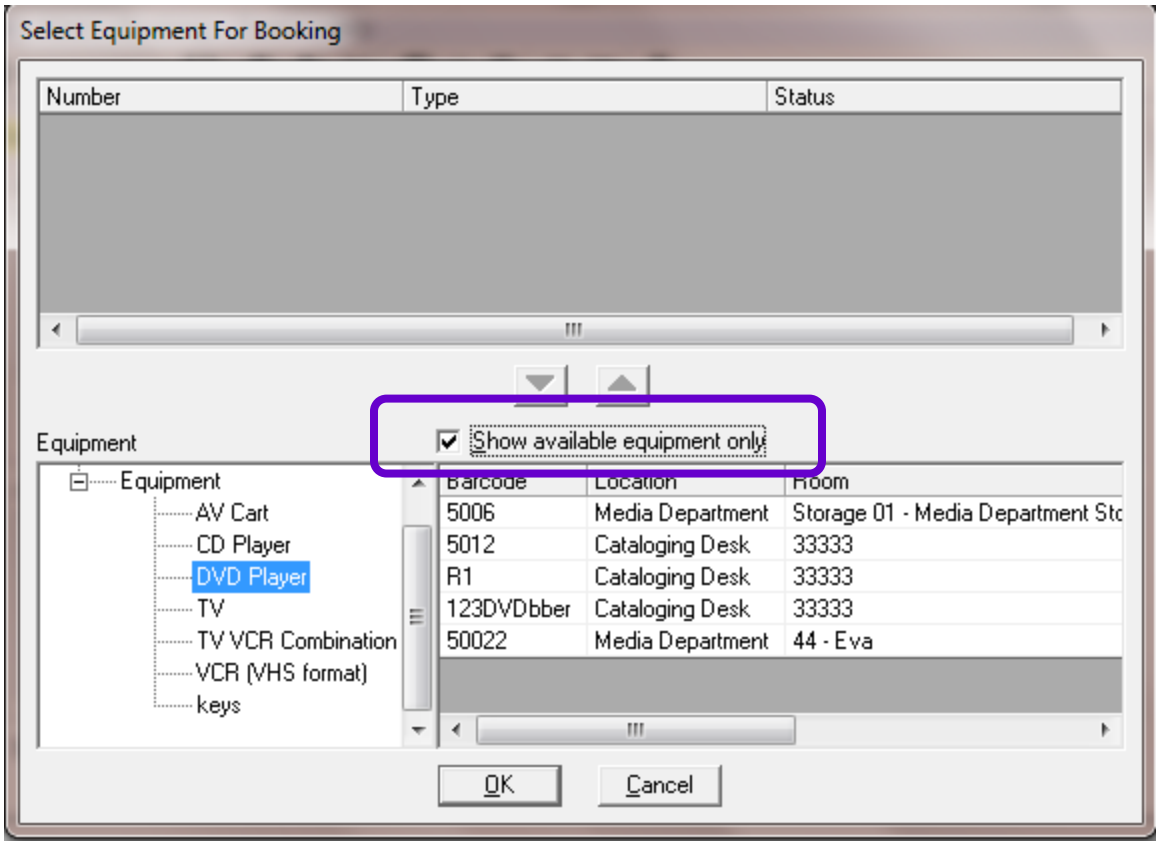
Show Available Equipment When Creating a Booking

Purpose of the Enhancement

The purpose of this enhancement is to filter the equipment list to show only items that are available.

Description

The "Select equipment for booking" display now includes an option to limit the equipment list to available items. When this option is checked, only available equipment is shown to be added to a booking.



Implementation Notes

The option must be checked in order to filter the equipment list.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

Display Current Bookings and Patron Counters

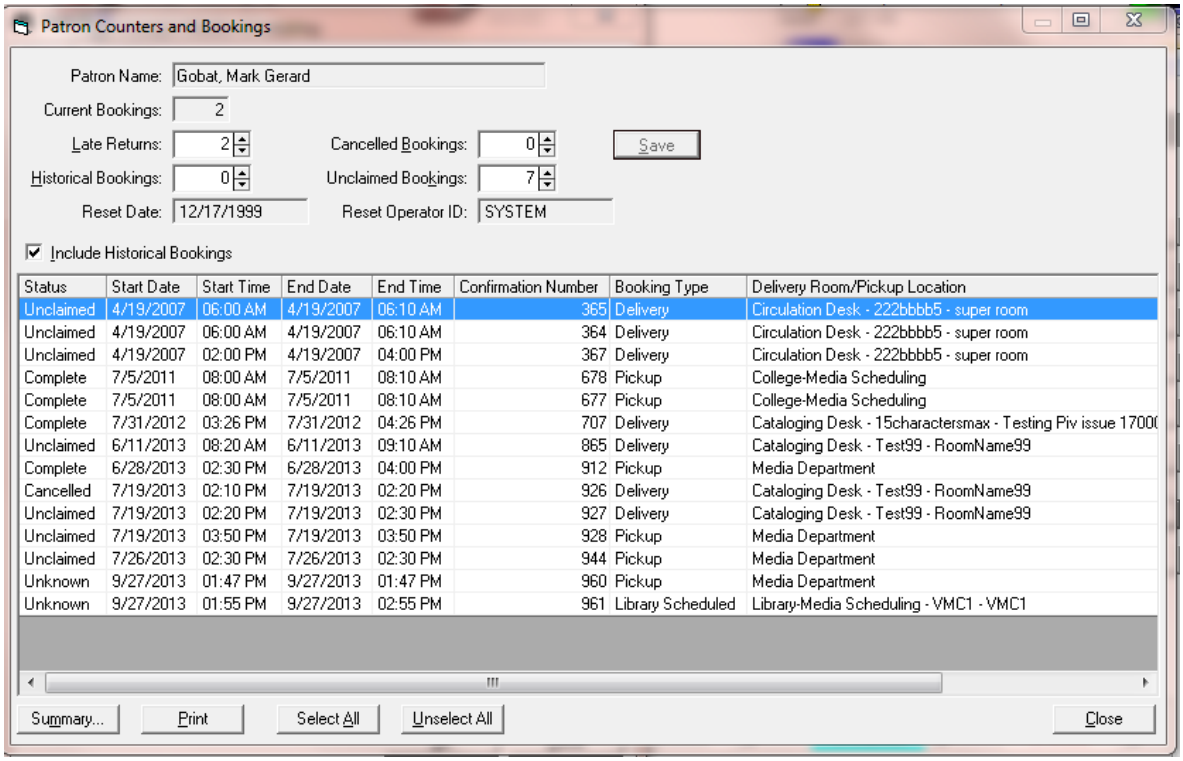
Purpose of the Enhancement

The purpose of this enhancement is to provide a summary view of a patron's bookings and counter information.

Description

A new screen has been added to display the summary bookings and patron counter information for a patron. This screen can be displayed when a staff member searches for a

patron, and when a staff member clicks the ellipsis button next to the patron's name on the booking window.



The screen will display current and future bookings, and includes an option to display historical bookings. The summary button will display the details of selected bookings, and the details can be printed if necessary. A new Media.ini file in the client directory on the workstation controls the print layout.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

Display Advanced Booking Warning

Purpose of the Enhancement

The purpose of this enhancement is to display a warning message when a booking is charged if there are future bookings for the same items.

Description

A new warning message can be displayed to the Media staff when a reservation is charged to provide an alert if any items in the booking have a future booking within a library-specified interval. This alert can be used to inform the patron that the reservation needs to be returned promptly to make it available for a future borrower.

Implementation Notes

The interval for the warning message is defined in Media System Administration under Policy Group Settings. The display of the advanced booking alert is controlled by a preference setting in the Media Scheduling client.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* and the *Voyager 9.0 Media System Administration User's Guide* for more information.

Show Status of an Item in Media Scheduling

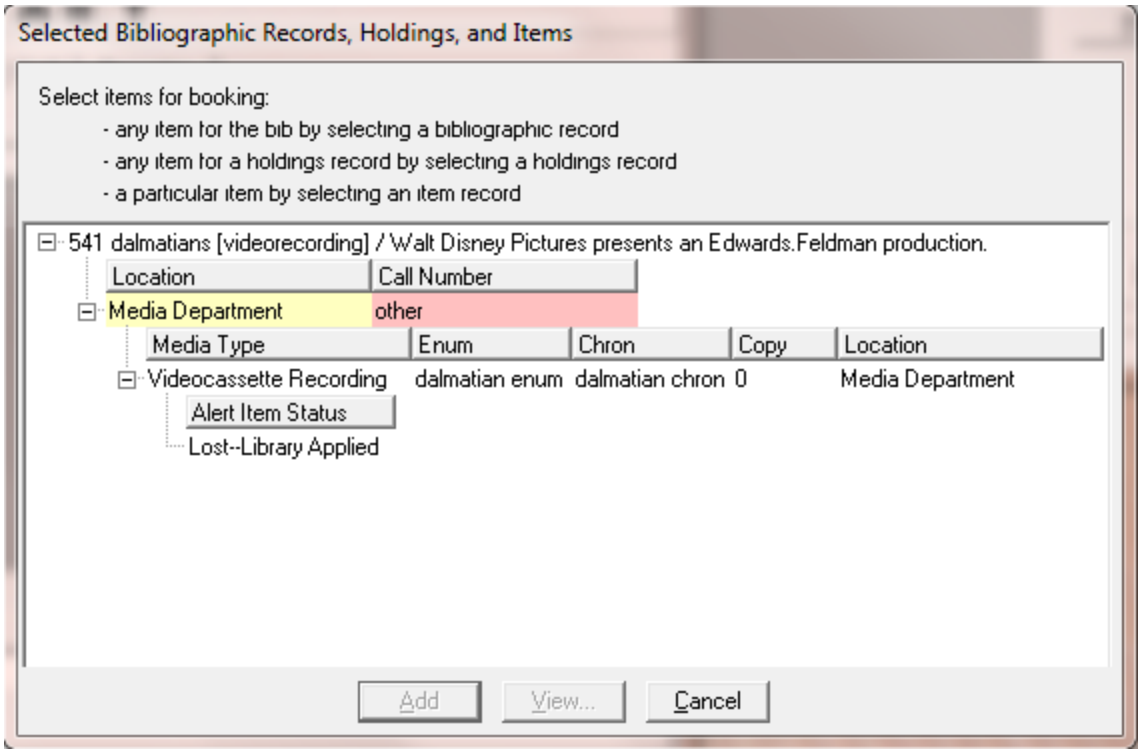
Purpose of the Enhancement

The purpose of this enhancement is to provide item status information in Media Scheduling.

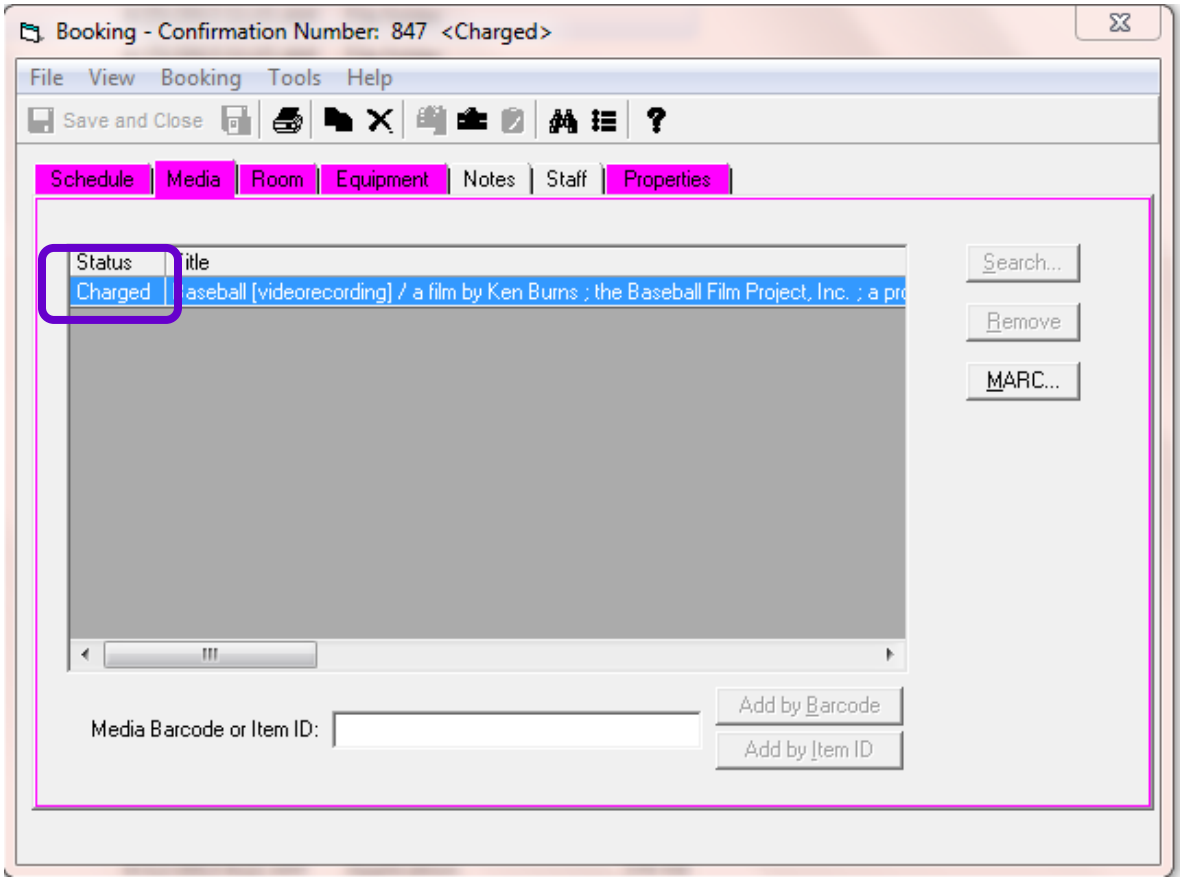
Description

Item status information can now be displayed at various places in the Media Scheduling client. The status information is often useful when creating a new booking, and when reviewing existing bookings to see if all items have been returned.

Item status information has been added to the search results displays when creating a booking.



The Media tab also includes the current status of items in the reservation. This can be used to determine if all items have been returned, or if items are overdue, lost, etc.



Implementation Notes

Item statuses are displayed based on user preferences (Options > Tools > Discharge Status).

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

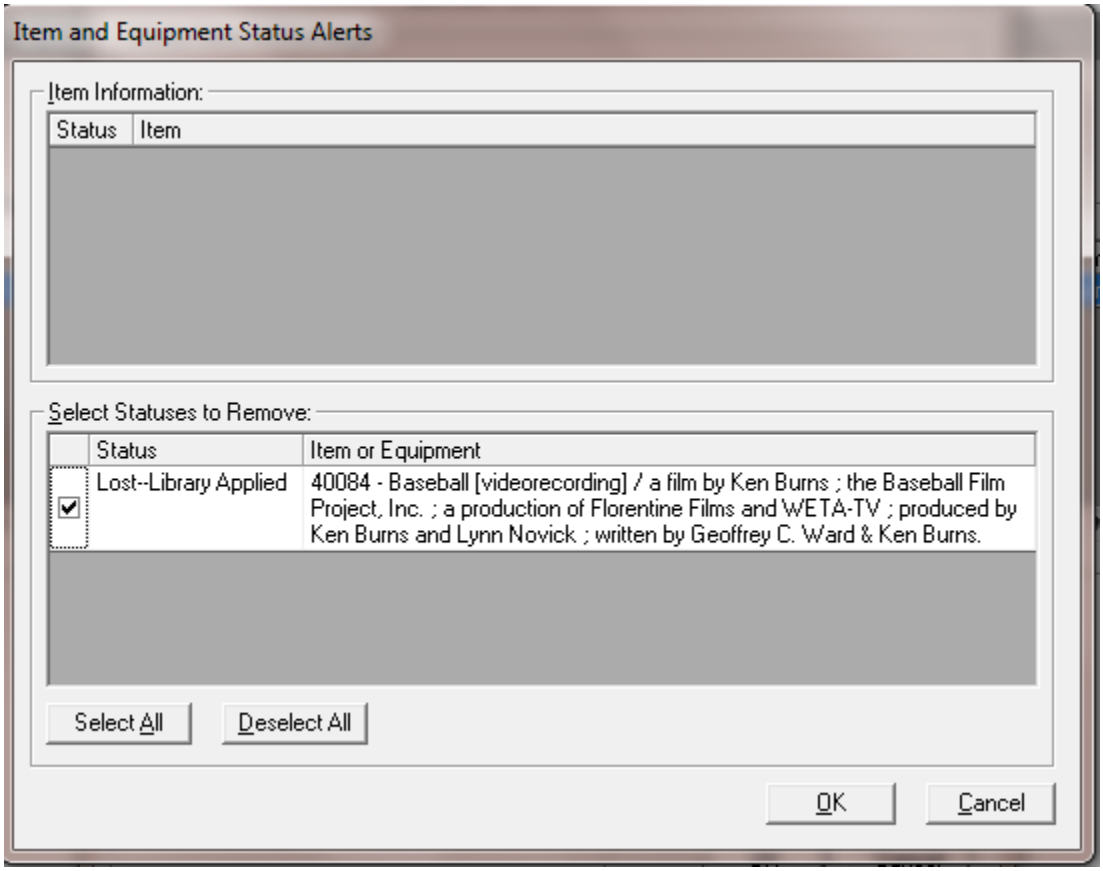
Display Alert When Lost Items Are Discharged

Purpose of the Enhancement

The purpose of this enhancement is to provide additional alerts to staff when items with exceptional statuses are discharged.

Description

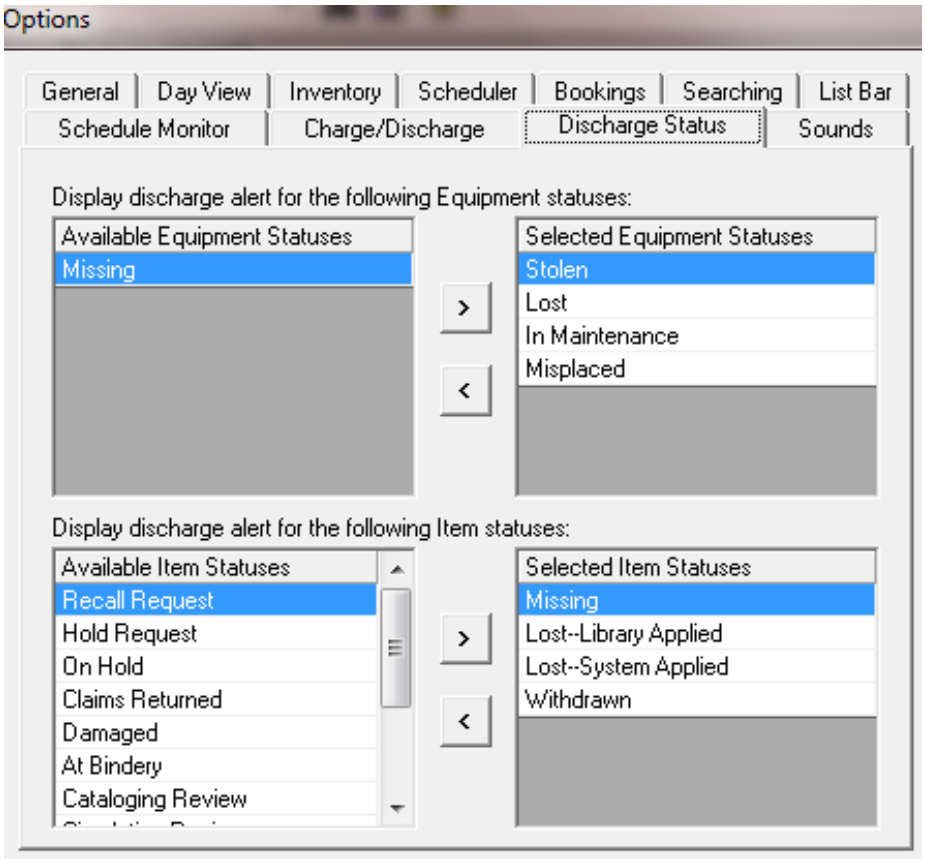
In combination with the item status information, new alerts have been added to inform staff when something discharged has a status of lost, missing, etc. Alerts can be triggered for both equipment and items.



Authorized operators have an option to remove exceptional statuses at the time of discharge.

Implementation Notes

Item and equipment alert statuses are displayed based on user preferences (Options > Tools > Discharge Status).



Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

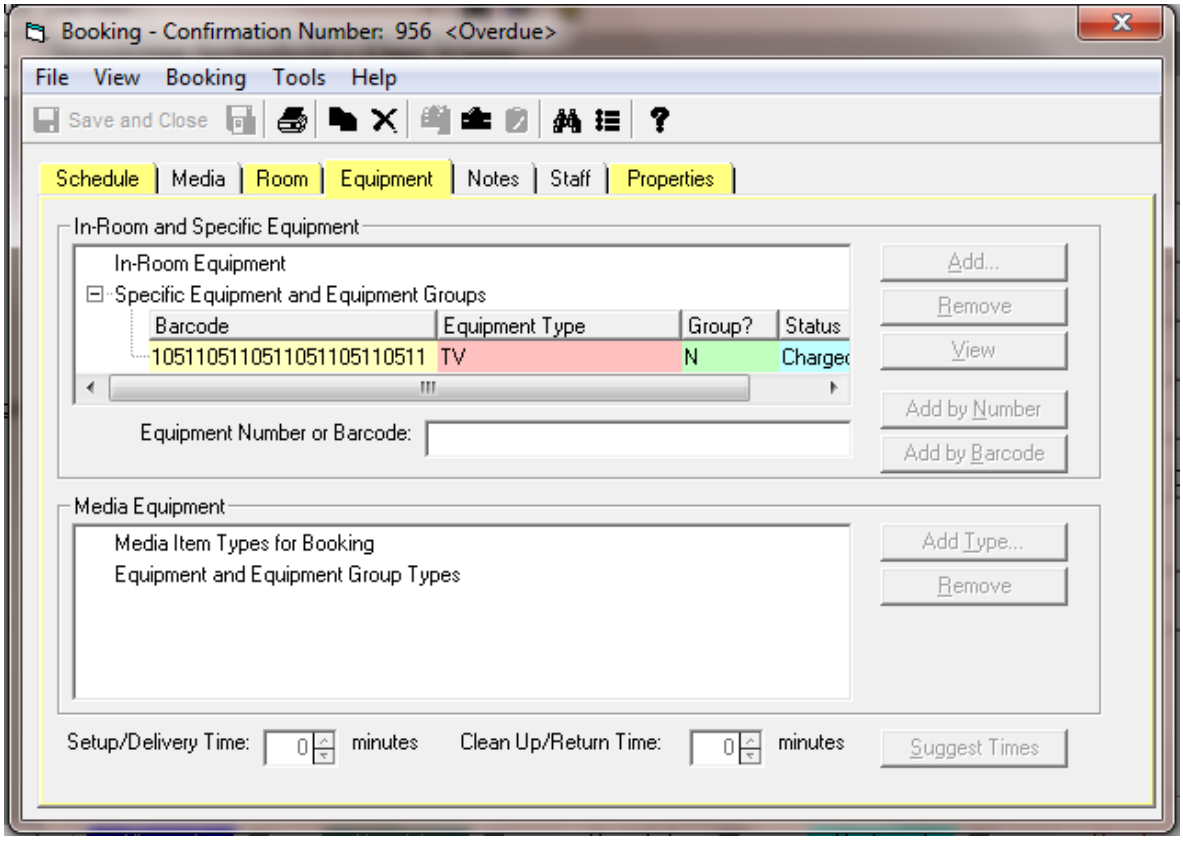
Enhanced Display of Equipment in Bookings

Purpose of the Enhancement

The purpose of this enhancement is enhance the display of equipment details in bookings.

Description

The display of booking information has been enhanced. A preference setting has been added to automatically expand equipment trees when they are displayed, and the barcode field has been configured to automatically adjust to show the full barcode number on the display.



Implementation Notes

The display of the barcode field will automatically adjust to show the entire barcode. The preference setting to expand the equipment trees is located under Tools > Options > Bookings > Expand equipment trees.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

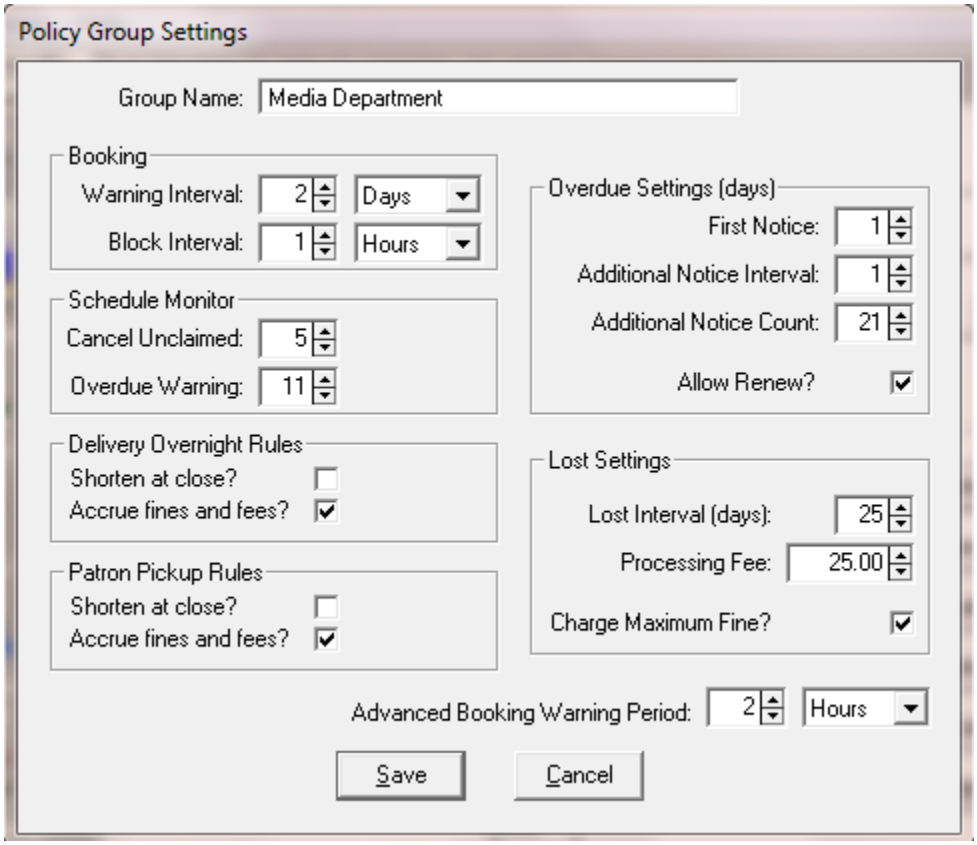
Show Booking Warning Interval in Days

Purpose of the Enhancement

The purpose of this enhancement is to allow the booking warning interval to be set in terms of days.

Description

The booking warning interval can now be set in terms of days, hours, or minutes. In previous releases, the booking warning interval could only be expressed in minutes.



Implementation Notes

The booking warning interval is set in Media System Administration > Policy Groups > Settings.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Media System Administration User's Guide* for more information.

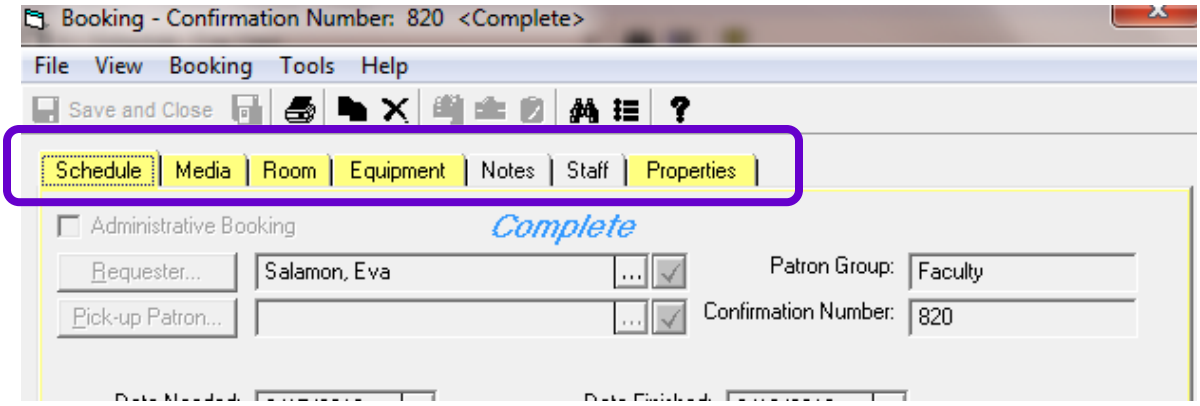
Color-code Tabs When Data is Present

Purpose of the Enhancement

The purpose of this enhancement is to indicate when tabs in bookings contain booking information.

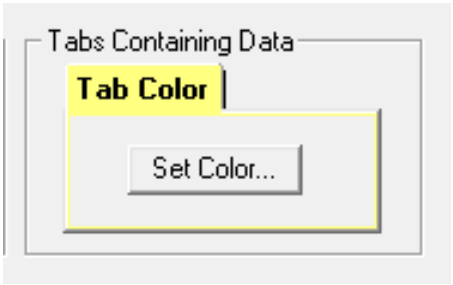
Description

Tabs in media bookings can be color-coded when they contain booking information.



Implementation Notes

The preference setting can be found in the Media Scheduling client under Tools > Options > Bookings.



Reference to Technical Documentation

Refer to the *Voyager 9.0 Media Scheduling User's Guide* for more information.

9

OpenURL

This section includes the following enhancements:

- Support for OpenURL 1.0
- Combine Multiple Subfields in One OpenURL Tag
- Remove Non-filing Characters from OpenURL Title Tags
- Include Genre Information in OpenURL Links

Support for OpenURL 1.0

Purpose of the Enhancement

The purpose of this enhancement is to update Voyager's OpenURL syntax to support OpenURL 1.0.

Description

Voyager can create OpenURL links using OpenURL 1.0 syntax.

Implementation Notes

Configuration of the OpenURL syntax is in yyydb/tomcat/vwebv/context/vwebv/ui/en_US/linkresolver.properties.

Reference to Technical Documentation

Refer to the *Voyager 9.0 WebVoyáge Architecture Overview and Configuration Models* for more information.

Combine Multiple Subfields in One OpenURL Tag

Purpose of the Enhancement

The purpose of this enhancement is to improve the link syntax for OpenURL links.

Description

Voyager can be configured to use multiple subfields from a MARC tag when constructing the link syntax.

For example, the following is possible:

```
#title=245/a/0///0/
openUrl.cfg.LOCAL.key1.key=title
openUrl.cfg.LOCAL.key1.tag=245
openUrl.cfg.LOCAL.key1.subfield=abcpz
openUrl.cfg.LOCAL.key1.len1=0
openUrl.cfg.LOCAL.key1.parseStart=
openUrl.cfg.LOCAL.key1.parseEnd=
openUrl.cfg.LOCAL.key1.len2=0
```

Up to 36 letters are allowed (26 in alphabet + 10 digits). An asterisk is allowed, which means take all subfields in the tag.

For example: openUrl.cfg.LOCAL.key1.subfield=*

When constructing the OpenURL, punctuation is preserved and the contents of the subfields are strung together, separated by a space.

Implementation Notes

Configuration of the OpenURL syntax is in yyydb/tomcat/vwebv/context/vwebv/ui/en_US/linkresolver.properties.

Reference to Technical Documentation

Refer to the *Voyager 9.0 WebVoyáge Architecture Overview and Configuration Models* for more information.

Remove Non-filing Characters from OpenURL Title Tags

Purpose of the Enhancement

The purpose of this enhancement is to improve the link syntax for OpenURL links.

Description

Voyager can be configured to strip the non-filing characters from the following title tags: 222, 240, 242, 243 and 245. Data in subfield 'a' will be trimmed by the parseStart value set in the configuration, otherwise the non-filing indicators in the MARC record will be used.

Implementation Notes

Configuration of the OpenURL syntax is in yyydb/tomcat/vwebv/context/vwebv/ui/en_US/linkresolver.properties.

Reference to Technical Documentation

Refer to the *Voyager 9.0 WebVoyáge Architecture Overview and Configuration Models* for more information.

Include Genre Information in OpenURL Links

Purpose of the Enhancement

The purpose of this enhancement is to improve the link syntax for OpenURL links.

Description

Modified the linkresolver.properties to include sections for genres. The following lines have been added to the current linkresolver.properties file:

```
#genre definition
openUrl.cfg.LOCAL.numGenres=7
openUrl.cfg.LOCAL.genre1=*m :book
openUrl.cfg.LOCAL.genre2=*s :journal
openUrl.cfg.LOCAL.genre3=*a :bookitem
openUrl.cfg.LOCAL.genre4=*d:bookitem
openUrl.cfg.LOCAL.genre5=*b:article
openURL.cfg.LOCAL.genre6 =*i :article
openURL.cfg.LOCAL.genre7=** :book
```

Implementation Notes

Configuration of the OpenURL syntax is in yyydb/tomcat/vwebv/context/vwebv/ui/en_US/linkresolver.properties.

Reference to Technical Documentation

Refer to the *Voyager 9.0 WebVoyáge Architecture Overview and Configuration Models* for more information.

10

Pick and Scan

This section includes the following enhancements:

- New Update Options to Pick and Scan
- Ability to Update 852 Subfield 'K' in the Holdings Record
- Ability to Delete Bibliographic and Holdings Records
- Ability to Use Item IDs, Holding IDs, and Bibliographic IDs with Pick and Scan
- Ability to Update Related Records
- Display Call Number in the Processing Report
- Use Pick and Scan in Preview Mode
- Logging Options

New Update Options to Pick and Scan

Purpose of the Enhancement

This enhancement provides more versatility in the fields that can be updated by Pick and Scan.

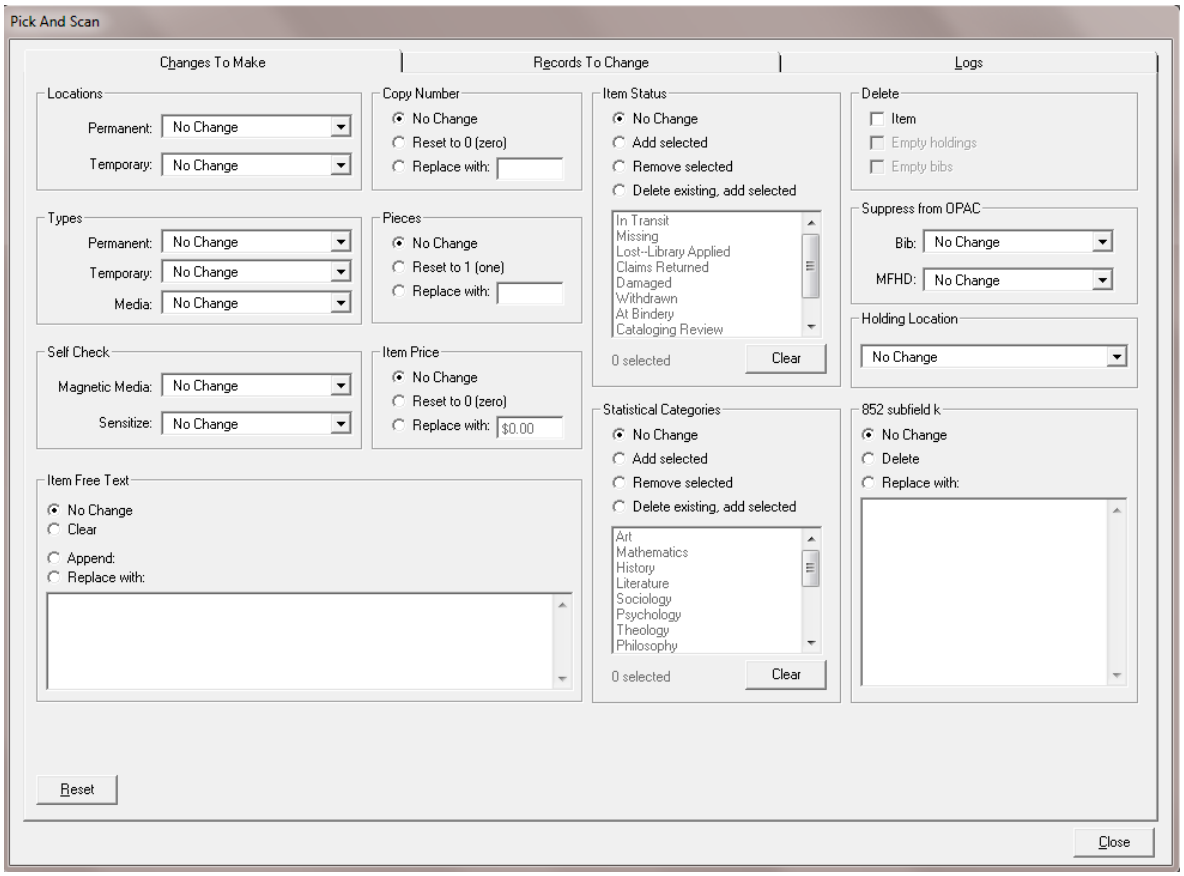
Description

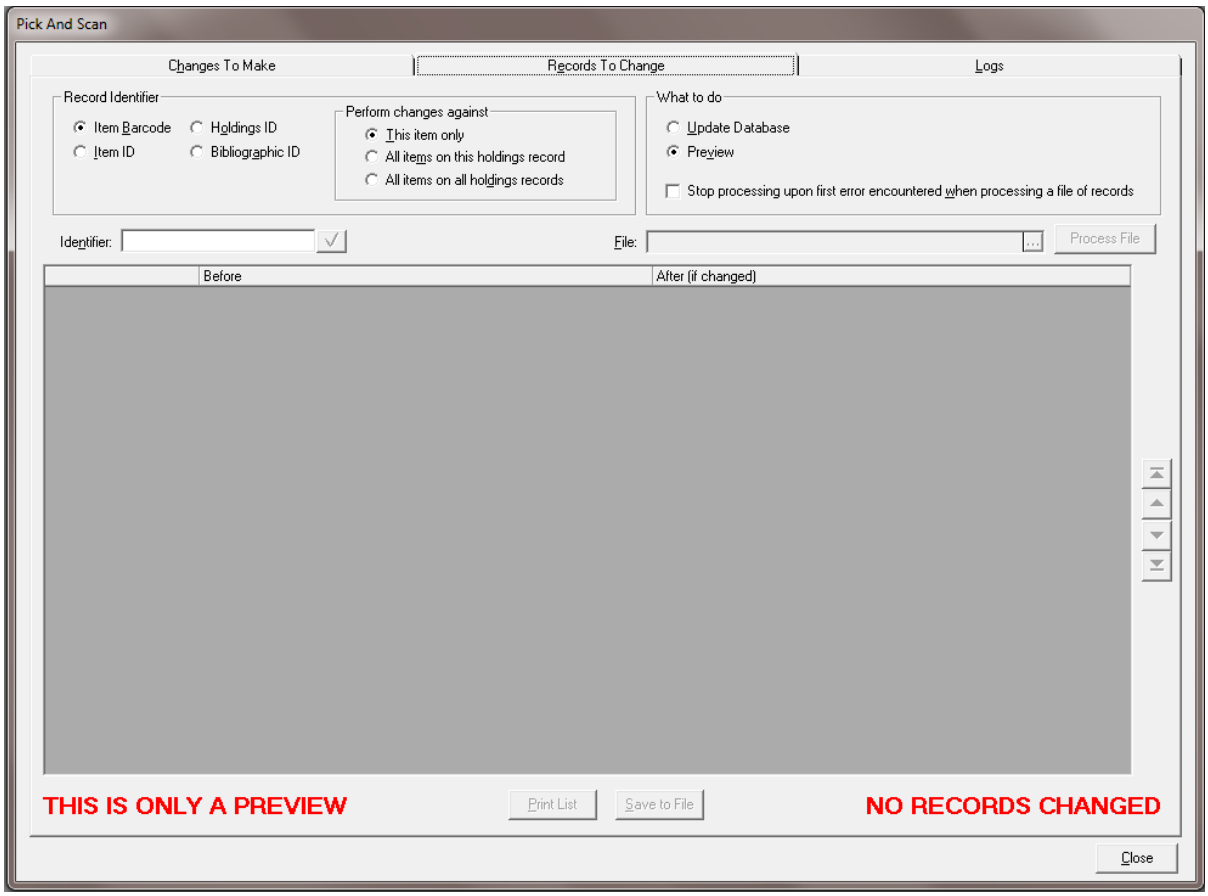
Pick and Scan has been enhanced to provide greater versatility in updating batches of item records.

Item free text, copy number, pieces, and item price have been added as new fields that can be updated. Additionally, the item status and statistical category fields have been enhanced to allow multiple changes to be applied at once, rather than one-by-one.

The screens in Pick and Scan have been renamed to better reflect the options, and fields have been re-organized to put similar changes together.

Additional new features are described below.





Note: The default option for "What to do" has been set to **Preview** to prevent unintentional updating of records. Staff members will need to select "Update Database" in order to perform changes to records.

Implementation Notes

The ability to use Pick and Scan is contingent on having one or more of the following permissions:

- In Cataloging
    - Update Item Records
    - Delete Item Records
    - Update Holdings Records
    - Delete Holdings Records
    - Delete Bibliographic Records

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

The ability to delete holdings and bibliographic records is new in Pick and Scan. In order to use these options, your security profile may need to be updated by your Voyager System Administrator.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

Ability to Update 852 Subfield 'K' in the Holdings Record

Purpose of the Enhancement

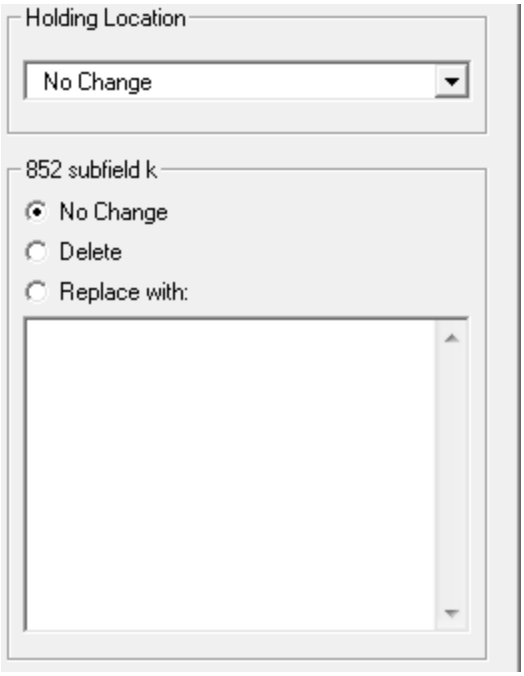
The purpose of this enhancement is to add an option to update the call number prefix in the MARC holdings record to Pick and Scan.

Description

Pick and Scan now includes the ability to update the call number prefix (852 $k) in the MARC holdings record. This feature can be used by itself, or in conjunction with other changes. For example, you may wish to remove the call number prefix of "REF" when moving items from a reference location to the main library stacks.

The option to update the 852 $k is on the "Changes to Make" tab in Pick and Scan.

Change options include "No Change", "Delete", and "Replace with:". If multiple subfield K's exist, only the first one will be changed.



Implementation Notes

The operator must have the ability to update holdings records in order to use this feature.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

Ability to Delete Bibliographic and Holdings Records

Purpose of the Enhancement

This enhancement allows an authorized operator to delete holdings and bibliographic records using Pick and Scan.

Description

Pick and Scan has always had an option for an authorized operator to delete item records. The ability to delete related holdings and bibliographic records has now been added to Pick and Scan functionality.

Items, holdings, and bibs exist in a hierarchy in Voyager, and must be deleted in order as well. Holdings can only be deleted if the related item records are deleted, and bibliographic records can only be deleted if all the related holdings are deleted. Issues

that would prevent deletion of a record in Cataloging will still apply when using Pick and Scan. Errors will be logged in the Pick and Scan processing report/log.

Implementation Notes

The operator must have the ability to delete holdings and/or bibliographic records in order to use this feature.

Note: The ability to delete holdings and bibliographic records depends on the existence of item records. To delete bibliographic and/or holdings records when items do not exist, use either bulk import or GDC functionality.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

Ability to Use Item IDs, Holding IDs, and Bibliographic IDs with Pick and Scan

Purpose of the Enhancement

This enhancement expands the identifiers that can be used with Pick and Scan.

Description

Pick and Scan now accepts item barcodes, item IDs, holdings record IDs, and bibliographic record IDs as input to identify records to change.

The default choice is "Item Barcode".

Implementation Notes

The operator must choose the appropriate input type on the "Records to Change" tab.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

Ability to Update Related Records

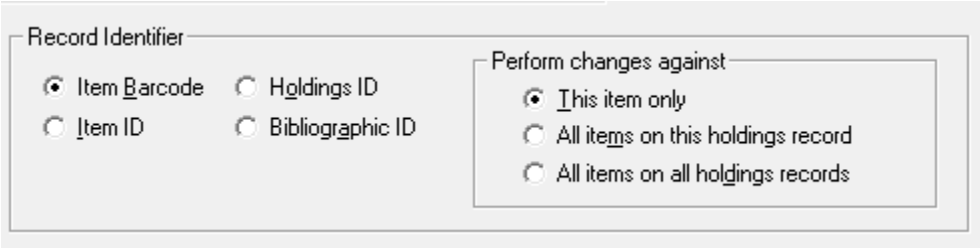
Purpose of the Enhancement

This enhancement makes it possible to update related records.

Description

Pick and Scan has the ability to update additional records related to the record identified in the input. Options on the "Records to Change" tab now allow the operator to perform changes against a single record, related item records on a single holding, or all items and holdings attached to a bib.

The possible changes are dependent on the type of record identifier being used. For example, you may wish to scan in one barcode for a set of records, and change the location and item type for all the items in the set.



Implementation Notes

An authorized operator must have the necessary permission to make the type of changes (update, delete) on the type of records (item, holdings, bibliographic).

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

Display Call Number in the Processing Report

Purpose of the Enhancement

The purpose of this enhancement is to show the call number in the Pick and Scan processing report.

Description

The call number from the MARC holdings record has been added to the Pick and Scan processing report/log.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

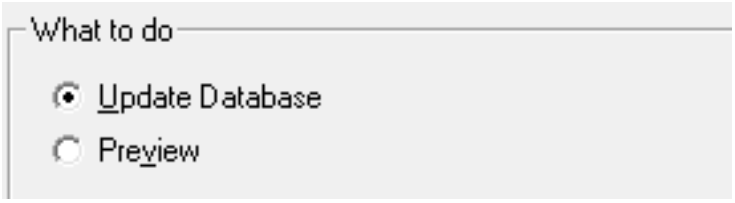
Use Pick and Scan in Preview Mode

Purpose of the Enhancement

The purpose of this enhancement is to make it possible to Preview changes in Pick and Scan before records in the database are updated.

Description

The "Records to Change" tab now provides the option to update the database in real-time, or to process the changes in preview mode without updating the database.



When using the preview mode, all changes specified on the "Changes to Make" tab are processed, but the database will not be updated. A notation appears on the screen and in the log when the records are being processed in preview mode.

Implementation Notes

To use the Preview mode, select the "Preview" option on the Records to Change tab.

Note: Preview has been made the default mode for Pick and Scan to ensure that library staff must select "Update" when they intend to change records in Voyager.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

Logging Options

Purpose of the Enhancement

This enhancement adds new options for logging transactions processed through Pick and Scan.

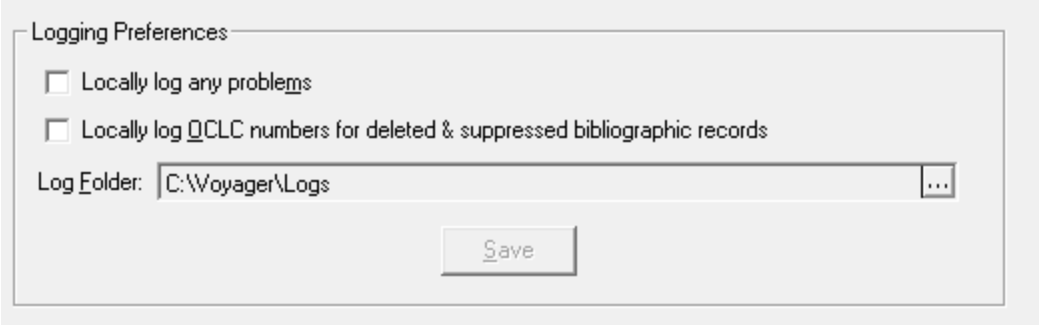
Description

The Pick and Scan processing report has been enhanced to include copy number, pieces, item price, item free text, 852 subfield k, and the MARC holdings call number. The processing report is also used to generate new logs of activities. These logs may be useful for additional processing, for troubleshooting problems, and for reviewing the results of changes processed in preview mode.

Whenever records are processed using Pick and Scan, a copy of the processing report is automatically written to the Voyager server, and becomes a record of the changes requested. The server log can be downloaded to the workstation from within Pick and Scan to review the information.

A new feature has also been added to the Pick and Scan "Logs" tab to manage these server-side logs as necessary.

Additionally, you can log only problem records or create a log file of OCLC record numbers for suppressed and deleted records locally on the user's workstation. The location of the local log files can be specified by the user.



Logging preferences are saved from session to session, and are shared between the Cataloging and the Circulation clients (according to the operator's privileges).

Implementation Notes

These features are available to any authorized user who can access Pick and Scan functionality.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Cataloging User's Guide* for more information.

11

Primo Integration

This section includes the following enhancements:

- Display Voyager ILL Requests in My Account
- Change Patron PINs
- Update SMS Number from Primo
- Sort Locations in Primo Display
- Patron Self-Registration

Display Voyager ILL Requests in My Account

Purpose of the Enhancement

This enhancement provides the display of Voyager ILL requests in the My Account display in Primo.

Description

Voyager's 'CirculationActions' service and the related 'Requests' service have been enhanced to retrieve ILL request information from the Voyager ILL database and display it in the My Account display in Primo.

Implementation Notes

This feature is available to customers who use both Primo and Voyager ILL.

Reference to Technical Documentation

Refer to the *Voyager Primo Integration Guide* for more information. The Web services are documented on EL Commons (http://www.exlibrisgroup.org).

Change Patron PINs

Purpose of the Enhancement

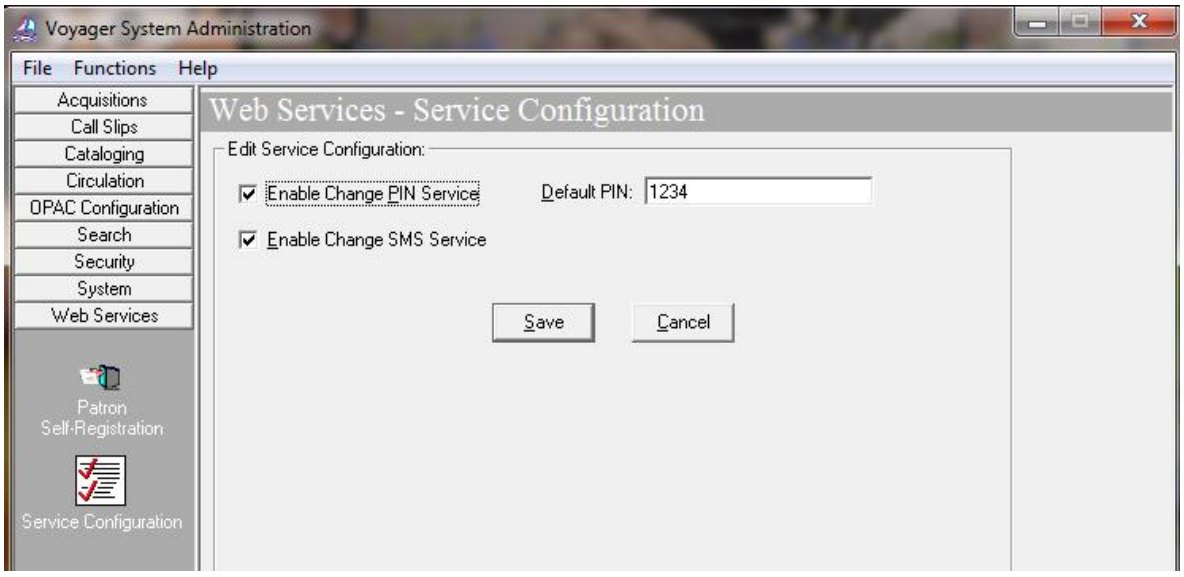
This enhancement allows patrons to change their Voyager PIN from Primo.

Description

A new Voyager Patron web service has been created to allow patrons to update their PINs from the Primo interface. The Patron service uses both GET and PUT syntax.

Implementation Notes

The web service must be enabled and a default PIN must be set via the Web Services setting in the Voyager System Administration client. Note that the default PIN can be different from the default PIN set in WebVoyáge configuration. Voyager requires a PIN that is 4-12 characters in length, and it can be alphanumeric.



Patron PIN success and error messages are configured in vxws.properties.

This service also requires the library to use PDS for login to Primo with Voyager.

Reference to Technical Documentation

Refer to the *Voyager Primo Integration Guide* and the *Voyager System Adminstration User's Guide* for more information. The Web services are documented on EL Commons (http://www.exlibrisgroup.org).

Update SMS Number from Primo

Purpose of the Enhancement

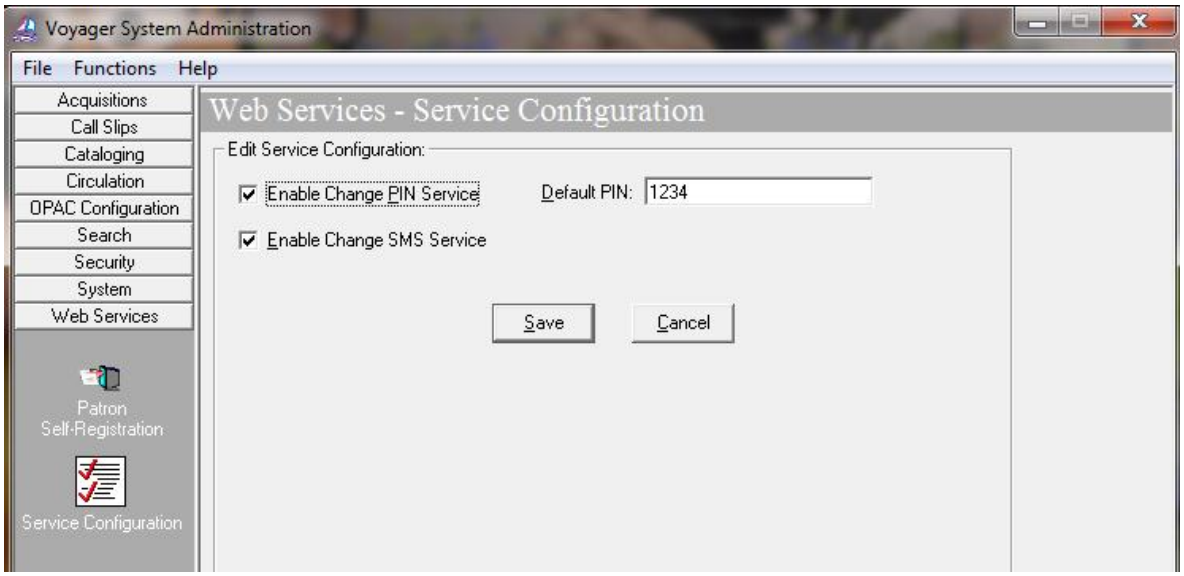
This enhancement allows patrons to update their SMS numbers from Primo.

Description

A new Voyager Patron web service has been created to allow patrons to update their SMS numbers from the Primo interface. The Patron service uses both GET and PUT syntax.

Implementation Notes

The Web Service must be enabled via the Web Services setting in the Voyager System Administration client.



Reference to Technical Documentation

Refer to the *Voyager Primo Integration Guide* and the *Voyager System Administration User's Guide* for more information. The Web services are documented on EL Commons (http://www.exlibrisgroup.org).

Sort Locations in Primo Display

Purpose of the Enhancement

The Voyager extract for Primo has been modified so that customers can specify the location sort order in the Locations tab in Primo. This enhancement makes it possible to customize the order of holdings information displayed in Primo.

Description

A new [LocationsSortOrder] section has been added to the PrimoExp ini files.

This optional stanza is used to provide a list of holding location codes with priority numbers. This list of codes will be used to match locations in the 949 tag for Availability. Customers can list locations of interest here with a number before the location, in the order they want them displayed in Primo.

Implementation Notes

Location codes should be listed in full; no wildcarding is possible with location codes. If locations are included in this stanza, those locations and only those locations will have a subfield $p added to the corresponding 949 tag.

Multiple locations of the same code will be mapped to the same priority number.

If no locations are listed, no map will be built and no subfield $p will be added to the 949 tag.

Reference to Technical Documentation

Refer to the *Voyager Primo Integration Guide* for more information.

Patron Self-Registration

Purpose of the Enhancement

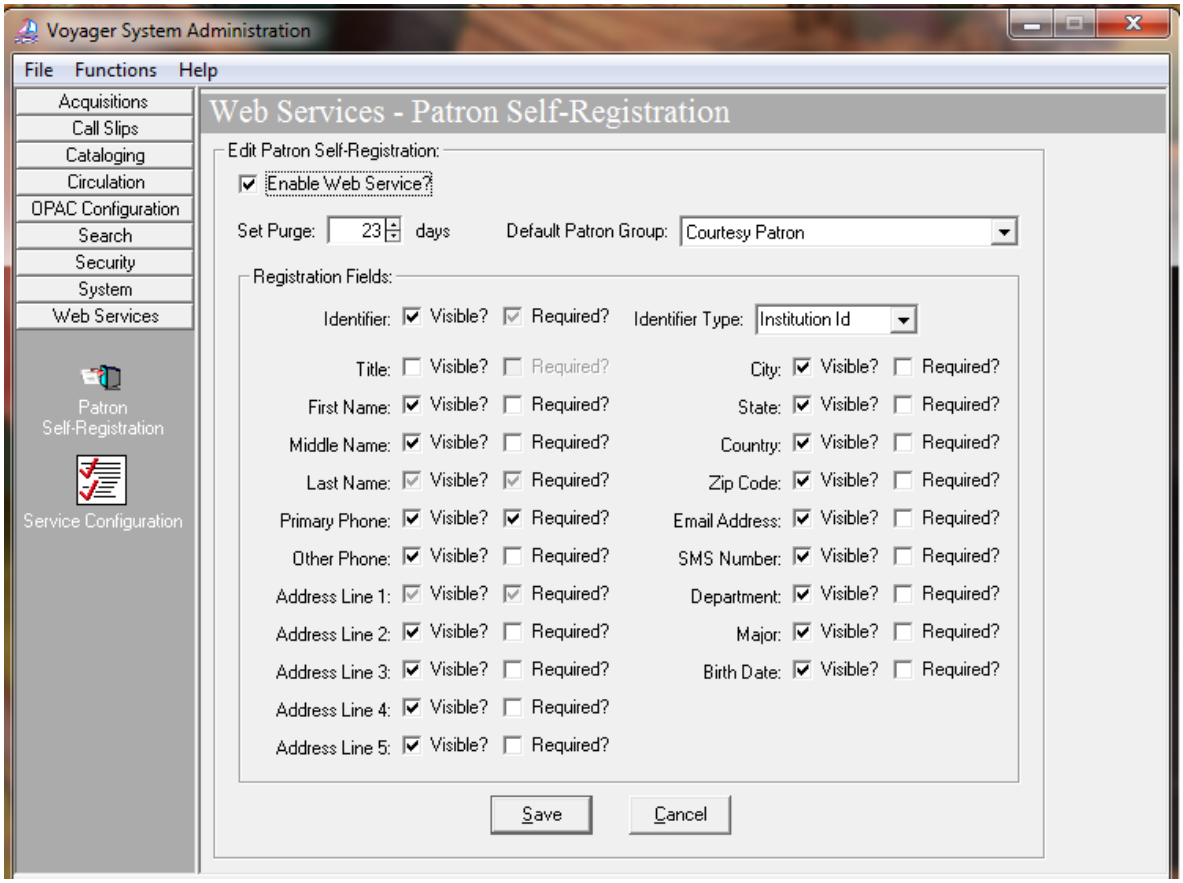
This enhancement provides patrons with the ability to create a patron account from Primo.

Description

Voyager's RESTful Patron services have been enhanced to provide GET and PUT services to facilitate patron self-registration from the Primo interface.

Implementation Notes

The Web Service must be enabled via the Web Services setting in the Voyager System Administration client.



Reference to Technical Documentation

Refer to the *Voyager System Administration User's Guide* for more information. The Web services are documented on EL Commons (http://www.exlibrisgroup.org).

12

Self-check (SIP2)

This section includes the following enhancements:

- Customization of On-screen Messages
- Configuration for Automatic Override of Item Blocks
- Add Patron Birthdate to the Patron Information Response

Customization of On-screen Messages

Purpose of the Enhancement

This enhancement provides options for the library to customize the on-screen messages displayed through self-check devices.

Description

On-screen messages are returned as the 'AF' field in various SIP2 messages. Voyager's selfchk.cfg file now includes a [Screen Messages] stanza that allows the library to customize the messages that are returned in the SIP2 response messages for display by the self-check devices. Default text for the various message has been pre-defined.

Implementation Notes

Custom-defined messages need to be configured in the selfchk.cfg file on the Voyager server.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Interface to Self Check Modules Using 3M SIP User's Guide* for more information.

Configuration for Automatic Override of Item Blocks

Purpose of the Enhancement

This enhancement makes it possible to control blocks that are automatically overridden during self-check transactions.

Description

Voyager's self-check module has been enhanced to automatically override the item blocks as configured for the circulation profile to which the self-check user is assigned. Blocks that are not overridable will result in errors that direct the patron to the circulation desk.

Implementation Notes

Library staff must review the item blocks configuration in Voyager System Administration for the self-check user that is defined in the selfchk.cfg file.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Interface to Self Check Modules Using 3M SIP User's Guide* and the *Voyager 9.0 System Administration User's Guide* for more information.

Add Patron Birthdate to the Patron Information Response

Purpose of the Enhancement

This enhancement adds the birth date to the data returned in the SIP2 patron information response.

Description

The SIP2 patron information response message now includes the birth date if it is included in the patron's record.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Interface to Self Check Modules Using 3M SIP User's Guide* for more information.

13

System Administration

This section includes the following enhancements:

- Configuration to Record Browse Date and Time
- Configuration for Limit Types of Holds
- Configuration for Limit Number of Holds
- Configuration for Automatically Removing Lost Item Fines and Fees
- Configuration for Cancelling Requests on Duplicate Items
- Configuration to Block Holds on Missing and Lost Items
- Configuration for Limiting the Number of Holds Placed
- Edit Multiple Circulation Policies at Once

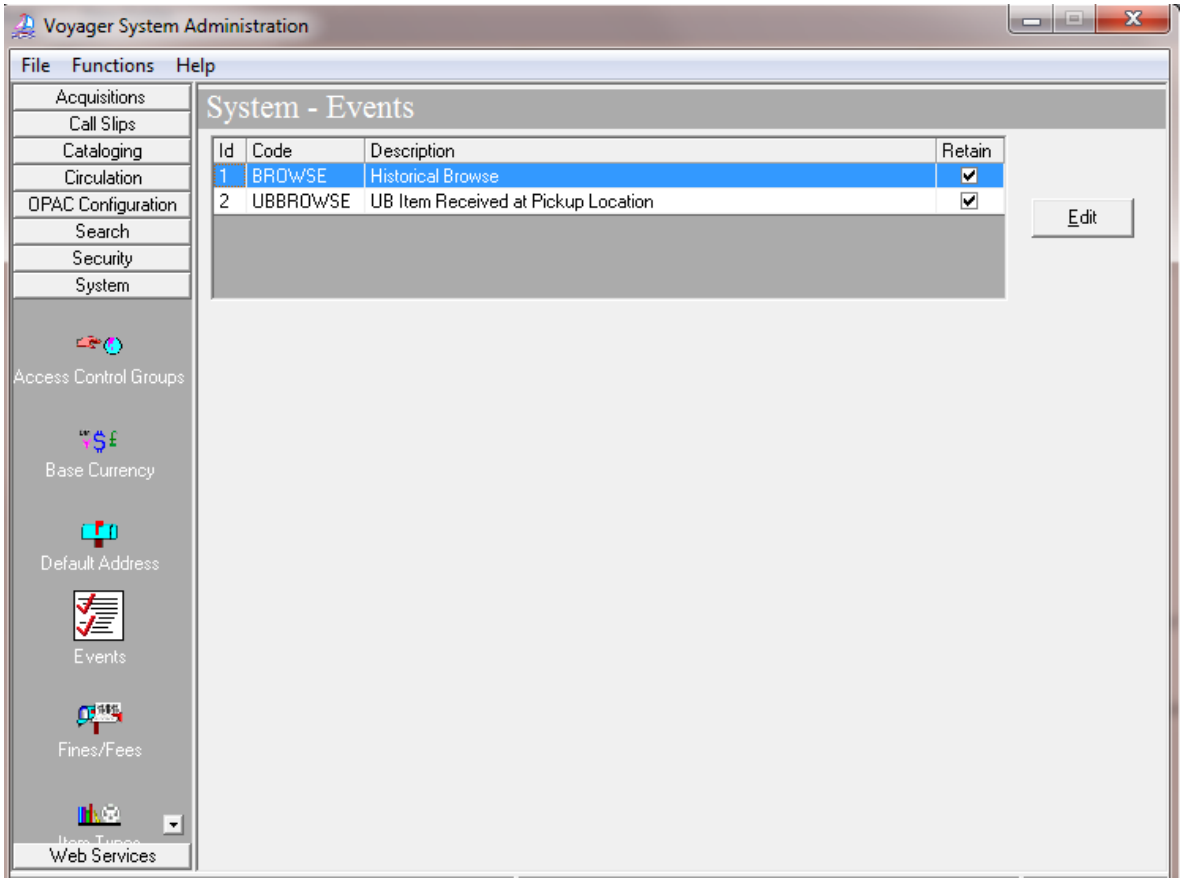
Configuration to Record Browse Date and Time

Purpose of the Enhancement

This enhancement saves the date and time in the Voyager database for browse transactions.

Description

An Events table has been added to the Voyager system to record details for specific transactions. The option must be enabled to save the date and time for browse transactions.



Implementation Notes

Place a check in the box to retain date and time for browse transactions. Once saved, the date and time of browse transactions can be used in reports.

Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

Configuration for Limit Types of Holds

Purpose of the Enhancement

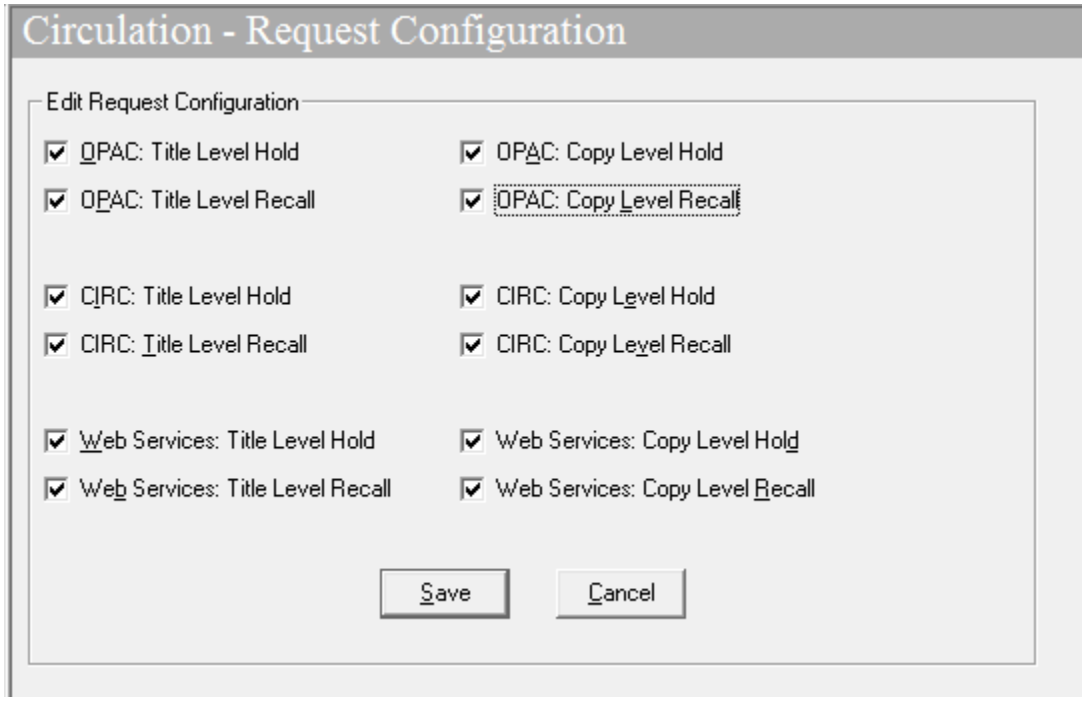
This enhancement allows the library to restrict the placement of copy-level or title-level holds and recalls.

Description

The library can now configure the types of holds and recalls that can be placed from WebVoyáge, a discovery interface, and Voyager Circulation. Using these settings, a library can offer title-level holds or copy-level requests, or both. Request group configuration is still managed separately.

Implementation Notes

By default, all options are allowed upon upgrade. Libraries can configure these settings in System Administration > Circulation > Request Configuration.



Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

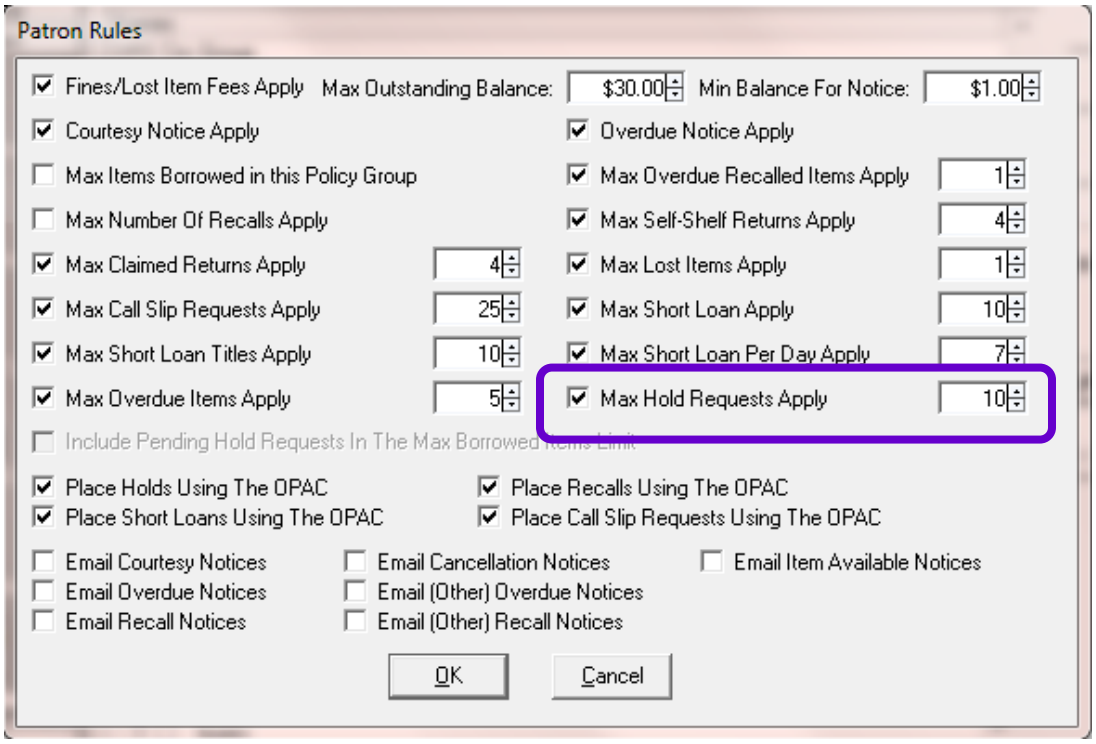
Configuration for Limit Number of Holds

Purpose of the Enhancement

The purpose of this enhancement is to limit the number of holds that can be placed by a patron.

Description

The library can define a limit on the number of holds a patron can place. Once the patron has reached the limit, he will be blocked from placing more holds until some are fulfilled or expire. Limits are set by patron groups, and can be different from one patron group to another.



Implementation Notes

The holds limit is defined in the Circulation policy settings in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

Configuration for Automatically Removing Lost Item Fines and Fees

Purpose of the Enhancement

This enhancement automatically adjusts a user's fines and fees, lost item counter, and updates the item's status when a lost item is returned.

Description

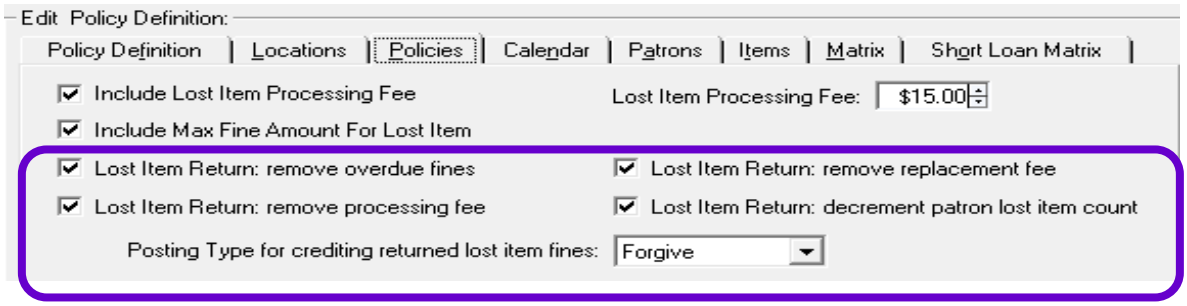
An authorized operator can automatically adjust a user's fines and fees and decrement the patron's lost item counter when a lost item is returned. Additionally, the item's status may be automatically updated when the item is checked in.

Implementation Notes

All options are controlled by policy-level and operator security settings in Voyager System Administration.

- The operator must be in a security profile that gives him permission to automatically update lost item charges and counters:

- And the operator must be working in a policy group that allows him to automatically update the fines, fees, and lost item counter:



Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

Configuration for Cancelling Requests on Duplicate Items

Purpose of the Enhancement

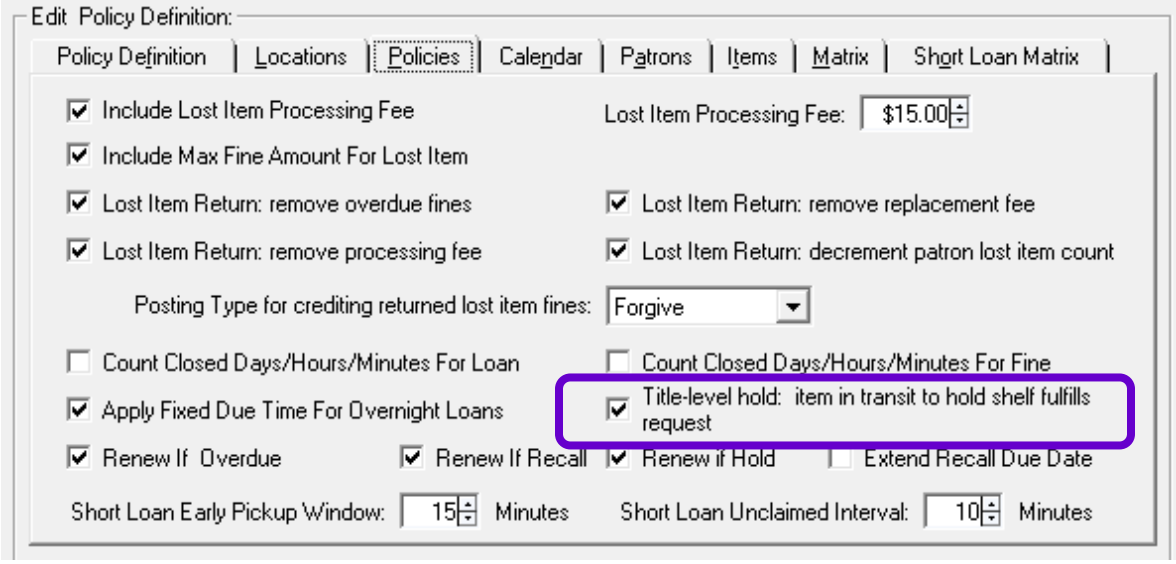
The purpose of this enhancement is to release "duplicate" copies of a title when a copy is put in transit to fulfill a request.

Description

The library can configure Voyager such that the first copy discharged can be used to fulfill a request, and prevent remaining copies from being sent to fill the same request.

Implementation Notes

Configuration for this feature is done in Voyager System Administration > Circulation > Policy Definitions > Policies.



Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

Configuration to Block Holds on Missing and Lost Items

Purpose of the Enhancement

The purpose of this enhancement is to block patrons from placing holds on missing or lost items.

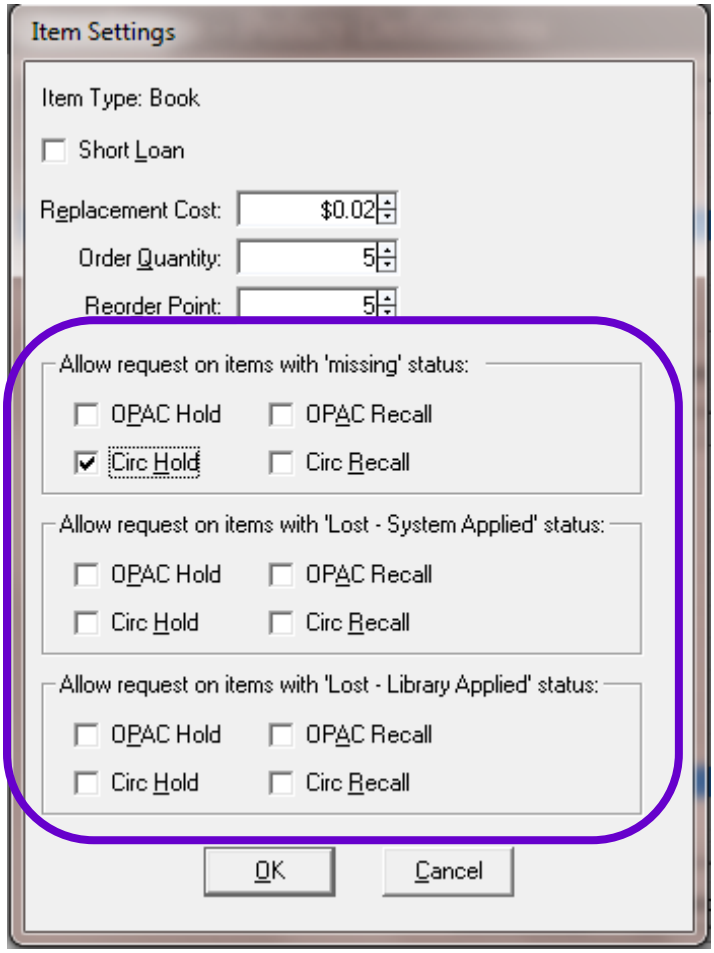
Description

The library can determine if patrons should be allowed to place requests on missing or lost items. Statuses can be configured independently for maximum control.

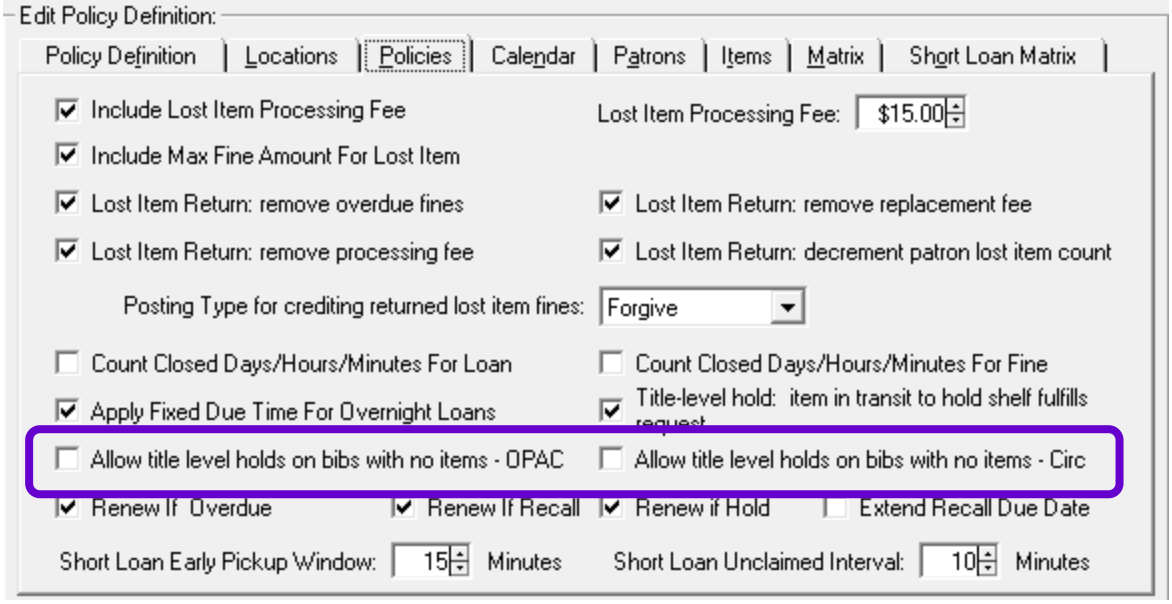
This feature can be used in conjunction with the feature that limits the types of requests that can be placed.

Implementation Notes

Configuration options in Voyager System Administration control whether or not holds and recalls can be placed via the Voyager Circulation client or through the library's OPAC or discovery interface on missing and lost items.



Title-level requests have additional configurations that need to be applied in System Administration:



Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

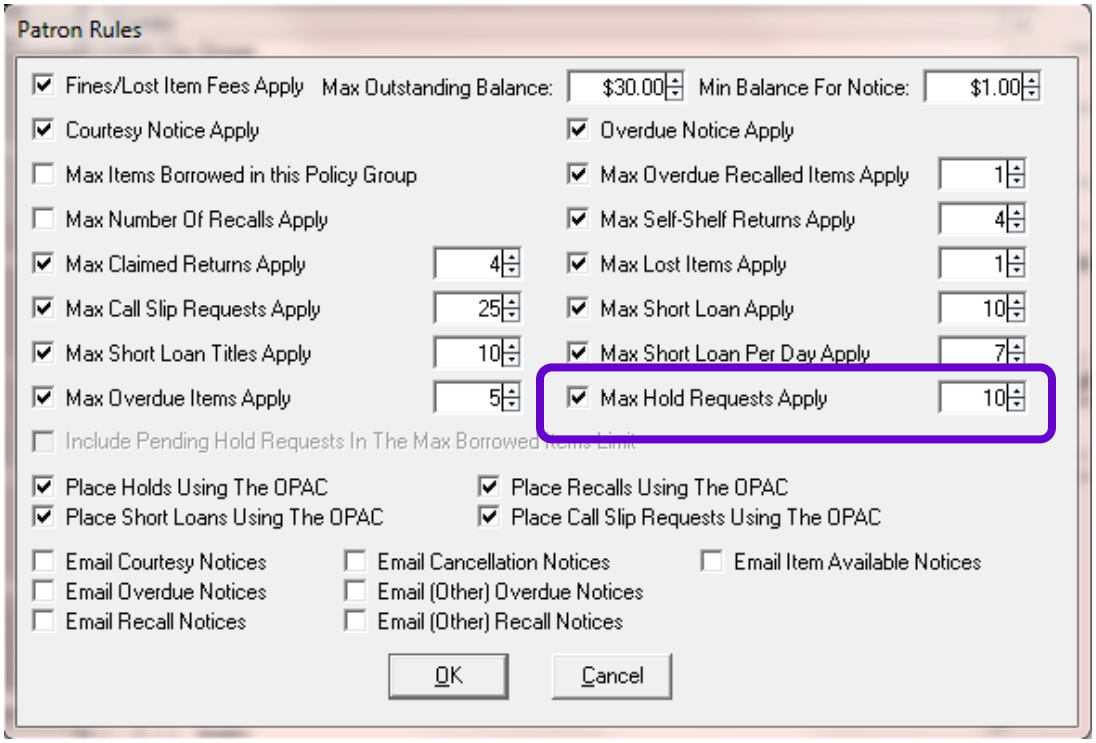
Configuration for Limiting the Number of Holds Placed

Purpose of the Enhancement

The purpose of this enhancement is to limit the number of holds that can be placed by a patron.

Description

The library can define a limit on the number of holds a patron can place. Once the patron has reached the limit, he will be blocked from placing more holds until some are fulfilled or expire. Limits are set by patron groups, and can be different from one patron group to another.



Implementation Notes

The holds limit is defined in the Circulation policy settings in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration Guide* for more information.

Edit Multiple Circulation Policies at Once

Purpose of the Enhancement

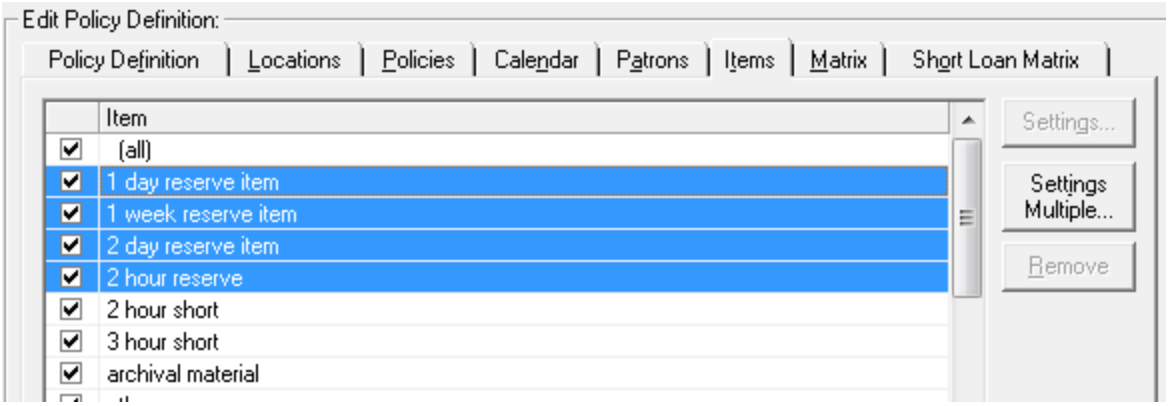
This enhancement makes it easier to update multiple circulation policies at once.

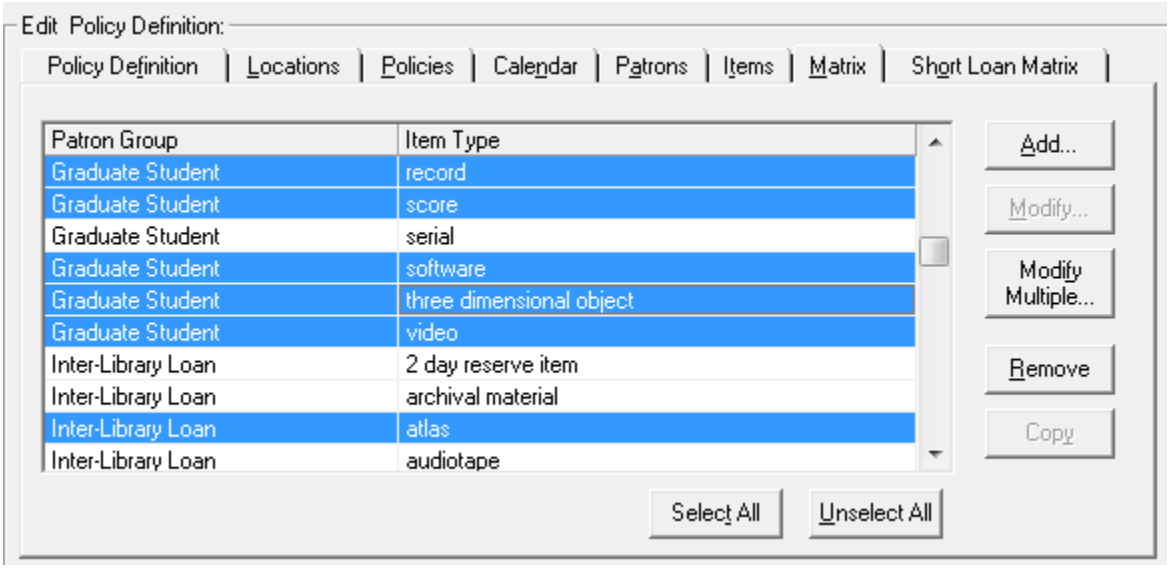
Description

Voyager's Circulation policy settings have been enhanced to provide the ability for system adminstrators to update multiple circulation policies at one time.

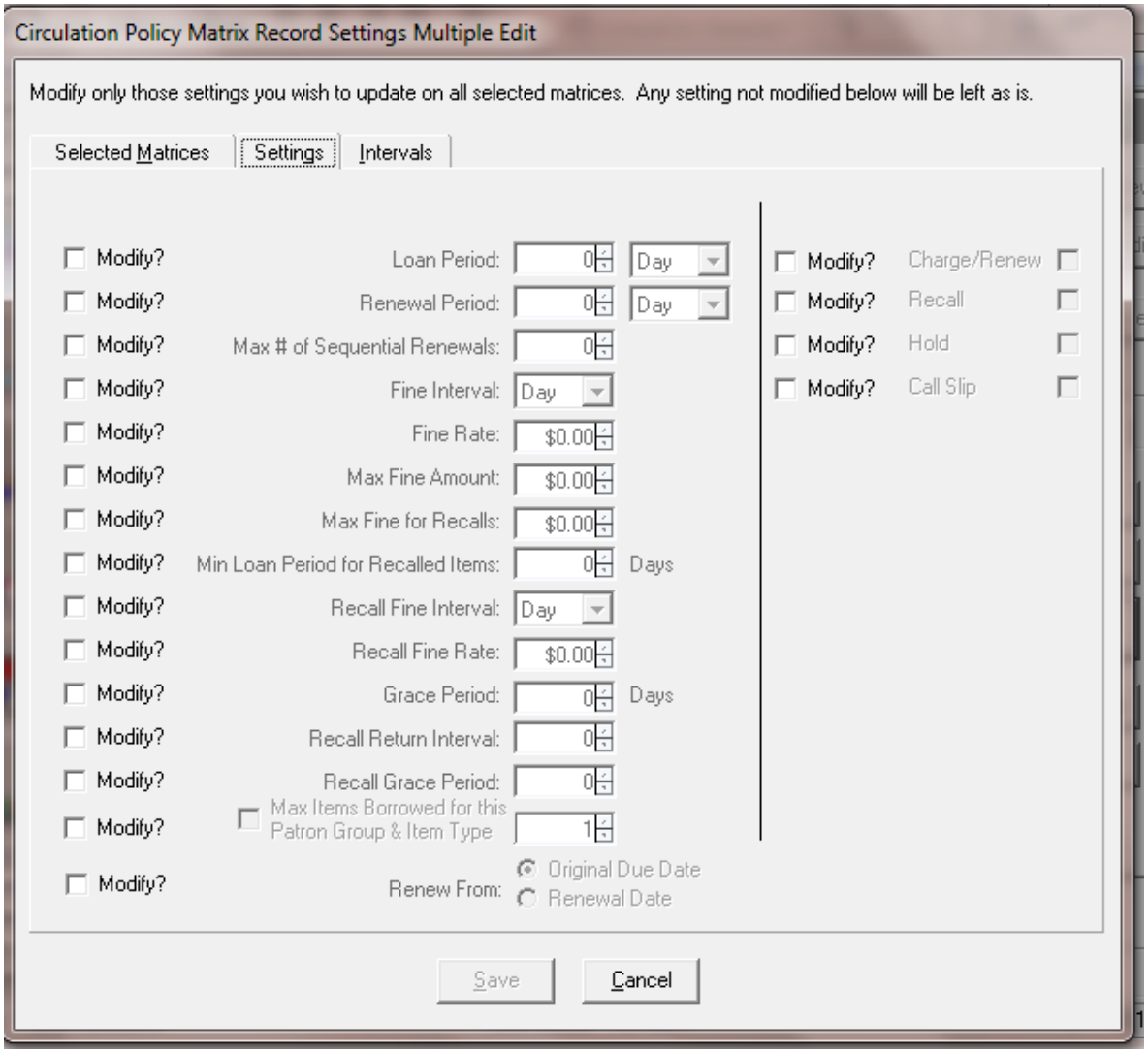
A new button has been added to the Items, Matrix, and Short Loan Matrix tabs to allow multiple policies to be edited at the same time.

Policies edited may be contiguous or non-contiguous.





Once the policies to edit have been selected, the values can be modified.



To modify a value, check the box in the "Modify?" column, then edit the value. Multiple values can be modified at the same time.

All policy combinations except the "All/All" policy can be changed using this functionality.

Implementation Notes

Configurations can be changed in System Administration > Circulation > Policy Definitions.

Reference to Technical Documentation

Refer to the *Voyager 9.0 System Administration User's Guide* for more information.

14

Technical Enhancements

This section includes the following enhancement:

- Solaris 11
- Monitoring for Index Regens
- Monitoring Oracle Tablespace and Data File Size
- Retention of Log Files
- Improvements to the Regen Process
- Monitoring and Alerts for Dynamic File Size

Solaris 11

Purpose of the Enhancement

This enhancement provides support for Solaris 11.

Description

Voyager is supported running in the Solaris 11 environment.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Supported Software and PC Requirements* document for more information.

Monitoring for Index Regens

Purpose of the Enhancement

This enhancement provides a system monitoring job for server activities.

Description

A system monitoring job has been added to Voyager.

The system monitoring job provides a way for a Voyager system administrator to obtain information about the server. It can be set to alert a system administrator via email when a threshold is met for:

- Free space
- Oracle table space
- Free space on the file system

It can be run from either the command line interactively, a cronjob, or a scheduled task on Windows to send automatic email messages to a specified email address.

Implementation Notes

The monitoring job requires set up for each database where it will be used.

Note: The system monitoring job is also available in Voyager 8.2.2.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

Monitoring Oracle Tablespace and Data File Size

Purpose of the Enhancement

This enhancement provides an option to monitor Oracle tablespace using the UTIL menu.

Description

Functionality has been added to the Voyager UTIL menu and to the Voyager Installation Kit (VIK) to check Oracle tablespace statistics and add data files if necessary.

The UTIL menu will check the Oracle Tablespace for your Voyager database. If it finds that your tablespace is more than 80% utilized, it adds an additional datafile for this tablespace.

```
Tablespace <DB> used space is OK.  It is using 70%.
The maximum recommended used space is 80%.
```

Implementation Notes

This feature is available in the Voyager UTIL menu and as part of the Voyager Installation Kit.

Note: The Oracle monitoring job is also available in Voyager 8.2.2.

Reference to Technical Documentation

Refer to the *Voyager 9.0 UTIL Menu Guide* or the *Voyager 9.0 Installation Kit* documentation for more information.

Retention of Log Files

Purpose of the Enhancement

This enhancement automates the cleanup of Tomcat log files to improve system performance.

Description

The WebVoyage tsvrctl script will now retain log files from last 7 days instead of deleting all log files when Tomcat starts.

Implementation Notes

This feature is automatically implemented during the upgrade.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

Improvements to the Regen Process

Purpose of the Enhancement

This enhancement restores update mode to the Voyager database in the event that a regen fails.

Description

The index regen script will now restore update mode for the database if the regen script ends due to a problem while running.

Implementation Notes

This feature is automatically implemented during the upgrade.

Monitoring and Alerts for Dynamic File Size

Purpose of the Enhancement

This enhancement provides alerts if the dynamic file size reaches a pre-set threshhold.

Description

A monitoring job will check whether the dynamic keyword file is approaching 2 GB in size. If the file size has reached a pre-set threshhold, Voyager will alert the system administrator that a regen may be necessary.

This message will be emailed to the user:

> The dynamic keyword file [/m1/voyager/2009.0.0/xxxdb/data/dynamic.dc] size is NN mb. Consider performing a keyword index regen. Contact Voyager Support if you require assistance.

A shorter message will be reported with the monitor.

The keysvr will continue to operate in a degraded mode if the dynamic.dc file reaches 2 GB. When this happens, updates to the keyword files will not be allowed until a keyword index regen has been performed.

Implementation Notes

This feature is automatically implemented during the upgrade.

15

Voyager Reporting: Access Reports and Voyager Analyzer

This section includes the following enhancement:

- Report Historical Browses by Date and Time
- Add New Tables to Access Reports and Analyzer
- Update Various Presentation Layers in Voyager Analyzer

Report Historical Browses by Date and Time

Purpose of the Enhancement

This enhancement provides several new reports for browse statistics by date range.

Description

Voyager 9.0 introduces a new event table that stores a date and time for browse transactions. Statistics for traditional browse transactions can be kept separately from browse statistics resulting from Universal Borrowing transactions.

To make use of these new statistics, several reports have been added to the Access Reports database and to Voyager: Analyzer. Libraries can also create other reports as desired.

The new reports are:

- Item browses by classification and date range
- Item browses by location and item type within a date range
- Item browses by location within a date range
- Items browsed by bib format within a date range
- Items browsed by title with a date range

Implementation Notes

The report names may vary slightly between Access Reports and Voyager: Analyzer.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Reporter User's Guide* for more information.

Add New Tables to Access Reports and Analyzer

Purpose of the Enhancement

This enhancement makes new Voyager tables available for reporting use.

Description

New tables that have been added to Voyager have been added to the VoyagerTables table in the Access Reports databases so that the tables will be linked for reporting use. The new tables have also been added to the various presentation layers in Voyager: Analzyer so that they can be used for reports.

Implementation Notes

Tables in the Voyager database must be re-linked to make them available in the Access Reports database.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Reporter User's Guide* and Ex Libris' ODBC driver installation instructions for more information.

Update Various Presentation Layers in Voyager Analyzer

Purpose of the Enhancement

This enhancement adds new fields in existing tables to the various presentation layers in Voyager: Analyzer.

Description

Various fields have been added to the Acquisitions, Cataloging, and Circulation presentation layers in Voyager: Analyzer. These additions include new fields added to support various enhancements in Voyager 9.0, as well as existing fields that have been added to the presentation layers to fulfill customer enhancement requests.

Implementation Notes

No additional configuration is necessary.

16

Web Admin

This section includes the following enhancement:

- Catalog: Bulk Import MARC Records
- System Administration: Report Files
- System Administration: EDI File Maintenance
- FPC Admin

Catalog: Bulk Import MARC Records

Purpose of the Enhancement

New options have been added to the MARC Record Bulk Import screen

Description

New options to "Generate Keyword Index?" and "Don't create 035 during import of bib?" have been added to the Voyager Batch Upload Information display. These options facilitate the use of new features by staff members who use Web Admin to run bulk import.

Implementation Notes

The "Generate Keyword Index?" option determines if the –K ADDKEY command is used to index the records during record import.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

System Administration: Report Files

Purpose of the Enhancement

This enhancement enables users to manage and clean up the report files stored on the Voyager server.

Description

Users of Web Admin can select files that they want to remove from the server and delete those files via the Web Admin interface.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

System Administration: EDI File Maintenance

Purpose of the Enhancement

This enhancement enables users to upload, manage, and delete EDI files using the Web Admin interface.

Description

Web Admin provides options for authorized staff members to upload, edit, rename, or delete EDI messages using the Web Admin interface. Both incoming and outgoing messages can be managed via Web Admin.

Users can:

- upload files to the EDI directory
- download files from the EDI directory
- delete files from the EDI directory

Implementation Notes

Customers who do not use EDI may wish to comment out this section in the Web Admin configuration files in the index.html file.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

FPC Admin

Purpose of the Enhancement

This enhancement enables authorized staff members to manage the fiscal period close (FPC) process via Web Admin.

Description

Voyager's Fiscal Period Close (FPC) process is used to create a new ledger/fund structure and move open orders from one fiscal period to the next. New options have been added to Web Admin to enable authorized users to run FPC without having to log on to the Voyager server. From the Web Admin user interface, a staff member can now:

- Disable access to Acquisitions
- Backup the Acquisitions files before running FPC
- Run fiscal period close
- Generate the optional reports for fiscal period close, if desired, and
- Re-enable access to Acquisitions

Implementation Notes

This feature is commented out by default. To enable this feature, uncomment the FPC Admin section in the index.html file.

Reference to Technical Documentation

Refer to the *Voyager 9.0 Technical User's Guide* for more information.

17

WebVoyáge

This section includes the following enhancement:

- Warning for Patron Card Expiration
- Customization of Time Format on Media Request Forms

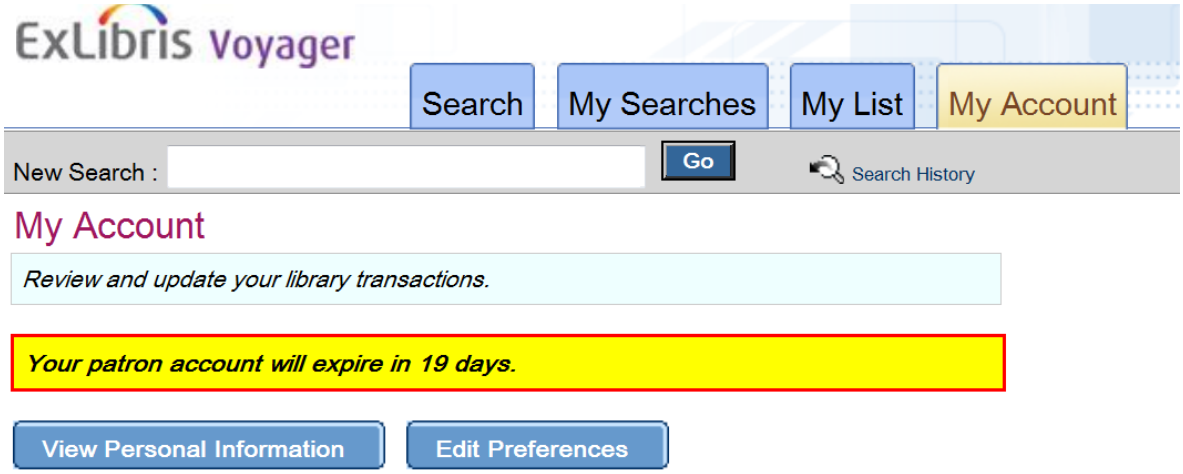
Warning for Patron Card Expiration

Purpose of the Enhancement

This enhancement provides a warning on the My Account display in WebVoyage when the patron's card is about to expire.

Description

WebVoyage can be configured to display a warning message N days before a patron's library card expires. This allows the patron the option to have his card renewed before it expires.



Implementation Notes

This feature is configured in the webvoyage.properties file (xxxdb/vwebv/context/vwebv/ui/<skin>/webvoyage.properties). The main property is **page.myAccount.expireNotify=N**.

Reference to Technical Documentation

Refer to the *Voyager 9.0 WebVoyáge Basic User's Guide* for more information.

Customization of Time Format on Media Request Forms

Purpose of the Enhancement

This enhancement allows the time in Media request forms to be set to 12- or 24-hour format.

Description

Voyager's Media Item Request and Media Equipment Request forms require a time in order to place a reservation. This enhancement allows the library to display the time using 12-hour or 24-hour format.

For example, a reservation may begin at 14:00 or 2:00 pm.

Implementation Notes

A new configuration option has been added to **xxdb/vwebv/context/vwebv/ui/<skin>/xsl/common/constants.xsl** to control the time format.

Reference to Technical Documentation

Refer to the *Voyager 9.0 WebVoyáge Architecture Overview and Configuration Models* documentation for more information.