

# Voyager 9.0 Release Notes



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# 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:

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

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

## 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

# General

This section includes the following enhancements:

- Windows 8 OS Support
- <u>Hot Fix Version Information</u>

## 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.

Voyager Acquisitions					
<b>Excludes</b> The bridge to knowledge 1350 E. Touhy Ave. Suite 200 East Des Plaines, IL USA 60018-4505	Version 8.2.2 Build 0409 (production version) Server = 2008.2.2 Database = 2008.2.2 HotFix Level = 1				
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## Acquisitions

This section includes the following enhancements:

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

## **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.

🏨 Vendor - B&T	<b>-</b>
File Vendor Tools Help	
📗 🗄 Save 📲 Save and Close 🔀 Save and New 🕒 🕶 🙇 🕶 🗙 👪 🛞 🧐	
Vendor Code: B&T Vendor Name: BAKER & TAYLOR	
Vendor Type: Domestic Monographs 👻 Federal Tax ID:	
Currency: USD Institution ID:	
Addresses/Phones Accounts Delivery Options Bank Information Notes Performance Alternate	ite Names 斗

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.

🔁 Line Item - African-America	n culture and history : a student's guide / Jack Salzman, edit 💶 💷 🗮 🍽
<u>File V</u> iew <u>T</u> ools <u>H</u> elp	
📙 🖶 Save 🛛 🎦 Save and Close	
Problems	Claims Prop <u>e</u> rties
Delivery Options	Notes Order Payment History Receive/Mark
<u>B</u> ib Record P	rice Copies/F <u>u</u> nds Copy Status <u>T</u> ype
Title: African-America	an culture and history : a student's guide / Jack Salzman, editor-in-chief.
Author:	
Edition:	
Publisher: Macmillan Refe	rence USA,
Place: New York :	System No: (OCoLC)ocm45002258
Date: 2001	LCCN: 00061657
Series:	Bib Record ID: 73989
Coloct the Sta	andard Number you wish to appear on the printed Purchase Order
C ISSN:	C GPO Stock Number:
ISBN: 0028655311 (set	: hardcov 🗸 C Publication Number:
C CODEN: 0028655311 (set 002865532X (vol.	
0028655338 (vol. 0028655346 (vol.	2: alk. paper
0028655354 (vol.	

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.

Voyager		x
?	The barcode you have chosen for this iter another item. Do you still wish to create the item with t	-
		Yes No

### **Implementation Notes**

No configuration is necessary.

### **Reference to Technical Documentation**

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



## **Bulk Import**

This section includes the following enhancements:

- <u>Make Addition of 035 Optional</u>
- <u>Change Default Setting to –X NOKEY</u>

## 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.

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.

# Cataloging

This section includes the following enhancements:

- <u>Set Duplicate Item Barcode Default to "No"</u>
- Automatically Update Item Location and Item Type when Updating Holdings
- <u>Print from Cataloging Hierarchy</u>
- 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.



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.

MARC System Bib Title(s) History	1
Suppress from OPAC	
Leader 00176cx a22000851 4500	
005: 20130426122201.0 007	
00 <u>8</u> 121115 0 u      8     4 001 u u     0 000000	

	Tag	11	12	Subfield Data
•	852			‡b reference ‡h DT59 ‡i .A12 1853b
				Voyager Cataloging  The record was successfully updated.  1 item record was updated with an updated permanent location. 1 item record was updated with an updated item type.
				ОК

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

olicy <u>L</u> ocations Defaul	t P <u>o</u> licies	Dupiicat	e De <u>t</u> ection
Available Locations	•		Selected Locations
College		>	Circulation
ILL Loan Desk	-	>>	Current Periodicals
Law Library	=		Dance
Media Center		<	E-Resources
Membership		~	Fine Arts
Music Library	Ψ.	~	Government Documents
Routing Location	Classific	cation Sche	eme Default: Library of Congress
Cataloging Location		Other	NUC Code:

Session Defaults and Preferences
General Validation Workflow Item Defaults Folders/Files Mapping Colors/Fonts
Retain last search
Automatic truncation for non keyword searches
Display record directly if search results in only one title
Always create a holding when adding holdings to a bib (i.e., do not show existing holdings first)
✓ Display item record directly if item retrieve results in only one item
Sequence new items at top
Sequence new e-items at top
Check for Duplicate Item Barcodes
Suppress confirmation message upon successful save
Update permanent location of attached items when MFHD is saved to the database
Update item type of attached items when MFHD is saved to the database (based on item location definitions)
<u>OK</u> <u>Cancel</u>

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.

Holdi	ings and Items f	or bib 121204						
Bit	b ID	Title	Owning Library					
-	121204	Catalogue of a collection of Egyptian antiquities : the property of Henry Abbott, M.D., now exhibiting at the Stuyvesant Institute, no. 659 Broadway, N.Y.	Training Master DB					
	MFHD ID	Location	Call Number	Order Status				
E	- 86992	Main Stacks	DT59 .A12 1853b			-		
	Item ID	Location	Item Type	Enum/Chron/Year	Сору	Item Status	Item Barcode	
	93364	Main Stacks [P]	Book			Not Charged	36234001505984	
	Print E	xpand hierarchy on print	<u>R</u> etrieve	<u>C</u> lose				

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.

Ho	oldings	s and Items f	for bib 121204						
	Bib ID		Title	Owning Library					
	<b>1</b> 21204		Catalogue of a collection of Egyptian antiquities : the property of Henry Abbott, M.D., now exhibiting at the Stuyvesant Institute, no. 659 Broadway, N.Y.	Training Master DB					
1	N	MFHD ID	Location	Call Number	Order Status				
	8	6992	Main Stacks	DT59 .A12 1853b					
		Item ID	Location	Item Type	Enum/Chron/Year	Сору	Item Status	Item Barcode	
		93364	Main Stacks [P]	Book			Not Charged	36234001505984	
	Pr	rint 🗌 🗖 E	Expand hierarchy on print	<u>R</u> etrieve	Close				

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.



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).

Cataloging - RDA Toolkit	
Edit RDA Toolkit Options	٦
Enable RDA Toolkit Links	
Username:	
Password:	
Base URL: http://access.rdatoolkit.org/?encode=marc&rec=	
<u>S</u> ave <u>C</u> ancel	

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.

Session Defaults and Preferences
Username:
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.

# Circulation

This section includes the following enhancements:

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

## 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.

ion Preferences	
Alerts, Printing and Fine/Fee/Dem	nerit Items and Searching
Alerts	
Patron Fine Fee Alerts	Patron Pop-up Note Alert Upon Display
Patron Available Item Alerts	🔽 Patron Pop-up Note upon Discharge Alert
Charge Note Alert	I emporary Location Alert on Discharge
Discharge Note Alert	Loan Shortened Due To Patron Expiration Alert
Enable default button selection	🔽 Short Loan Advanced Booking Alert

### **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.

🏜 Discharge					
<b>2</b>		Lib Item Barc	rary: VOYDE	V	<b>.</b>
Title	Location	Item Barcode	Due Date	FYI	Fines
House of a hundred windows; story by Margaret Wise Brown. Cat and architecture by Robert de Veyrac. Pictures by Henri Rousseau, Albert Ryder, Giorgio de Chirico [and others]	Main Stacks [P]	67776		On Hold for Patron: Moore Barker, Patricia Barcode: 2710 Phone: 847 296 2200	

Item Being Held For:	
Patron:	Moore Barker, Patricia

#### **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.

Patron Rules		
Fines/Lost Item Fees Apply Max Outstanding Balance	: \$30.00 Hin Balance For Notice: \$1.00 H	
Courtesy Notice Apply	✓ Overdue Notice Apply	
Max Items Borrowed in this Policy Group	Max Overdue Recalled Items Apply	
Max Number Of Recalls Apply	Max Self-Shelf Returns Apply	
Max Claimed Returns Apply	Max Lost Items Apply	
Max Call Slip Requests Apply	I Max Short Loan Apply 10 €	
Max Short Loan Titles Apply	☞ Max Short Loan Per Day Apply 7늱	
Max Overdue Items Apply	Max Hold Requests Apply	
🔲 Include Pending Hold Requests In The Max Borrowed	toms Linit	
<ul> <li>✓ Place Holds Using The OPAC</li> <li>✓ Place Recalls Using The OPAC</li> <li>✓ Place Short Loans Using The OPAC</li> <li>✓ Place Call Slip Requests Using The OPAC</li> </ul>		
Email Courtesy Notices     Email Courtesy Notices     Email Overdue Notices     Email Overdue Notices     Email Recall Notices     Email (Other) Recall	ue Notices	
<u>K</u>	Cancel	

# **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.

#### 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:

— F	Edit Policy Definition:	
-	Lak Folicy Demiliant.	
	Policy Definition <u>Locations</u> <u>Policies</u> Cale <u>n</u> dar	Patrons   Items   <u>M</u> atrix   Short Loan Matrix
	Include Lost Item Processing Fee	Lost Item Processing Fee: \$15.00
	Include Max Fine Amount For Lost Item	
	Lost Item Return: remove overdue fines	The Level I are Determined and the second for
	I Lost item hetum, remove overdue intes	Lost Item Return: remove replacement fee
	<ul> <li>Lost trem Return: remove processing fee</li> </ul>	<ul> <li>Lost Item Return: remove replacement ree</li> <li>Lost Item Return: decrement patron lost item count</li> </ul>
		Lost Item Return: decrement patron lost item count

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.

] P <u>a</u> trons ] I <u>t</u> ems ] <u>M</u> atrix ] Sh <u>o</u> rt Loan Matrix ]
Lost Item Processing Fee: \$15.00 🛨
☑ Lost Item Return: remove replacement fee
☑ Lost Item Return: decrement patron lost item count
Forgive
Count Closed Days/Hours/Minutes For Fine
✓ Title-level hold: item in transit to hold shelf fulfills request
I Renew if Hold I Extend Recall Due Date
Short Loan Unclaimed Interval: 10+ Minutes

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.

Voyager Circulation
HOLD BLOCKED. Patron not authorized to place a hold for the selected item.

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.

Item Settings
Item Type: Book
🖵 Short Loan
R <u>e</u> placement Cost: \$0.02÷
Order <u>Q</u> uantity: 5÷
Reorder Point: 5+
Allow request on items with 'missing' status:
CPAC Hold CPAC Recall
Circ Hold Circ Becall
Allow request on items with 'Lost - System Applied' status:
CPAC Hold CPAC Recall
Circ Hold Circ Becall
Allow request on items with 'Lost - Library Applied' status:
CPAC Hold CPAC Recall
□ Circ <u>H</u> old □ Circ <u>B</u> ecall
<u>Q</u> K <u>C</u> ancel

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

- Edit Policy Definition:	
Policy Definition Locations Policies Calendar	Patrons Items Matrix Short Loan Matrix
✓ Include Lost Item Processing Fee	Lost Item Processing Fee: \$15.00
Include Max Fine Amount For Lost Item	
Lost Item Return: remove overdue fines	Lost Item Return: remove replacement fee
Lost Item Return: remove processing fee	Lost Item Return: decrement patron lost item count
Posting Type for crediting returned lost item fines:	Forgive
Count Closed Days/Hours/Minutes For Loan	Count Closed Days/Hours/Minutes For Fine
Apply Fixed Due Time For Overnight Loans	Title-level hold: item in transit to hold shelf fulfills
Allow title level holds on bibs with no items - OPAC	Allow title level holds on bibs with no items - Circ
I✓ Renew If Overdue I✓ Renew If Recall	I Renew if Hold I Extend Recall Due Date
Short Loan Early Pickup Window: 15 Minutes	Short Loan Unclaimed Interval: 10 🕺 Minutes

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.

Voyager Circulation	and the second s	23
The barcode you have chosen for this another item. Do you still wish to cre		
	Yes	No

# **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.

# Global Data Change (GDC)

This section includes the following enhancement:

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

# 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.

R	e Consequence Template	
ſ	Consequence: Record Disposition	
	C Changed	
	○ <u>D</u> elete	
	O Delete All	
1	<ul> <li>Suppress</li> </ul>	
	C Supp <u>r</u> ess All	
	C <u>U</u> nsuppress	
	C Unsuppress <u>A</u> ll	
	<u>Save</u> <u>C</u> ancel	

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.

Preview Record: Bibliographic 5

Item 5 will be deleted. Holding 5 will be deleted. Item 69376 is blocked: Item has remote storage request Item 69377 is blocked: Item has remote storage request

# **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.

#### Job Management - Submit Match Job

Job Parameters	
<u>J</u> ob Name:	
Record <u>T</u> ype:	Bib
<u>S</u> ource File:	
⊂Save Matching Re C E <u>x</u> isting Set: C <u>N</u> ew Set:	ecords Into

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.

Rule Condition Templa	te
Co <u>n</u> dition:	Owning Library
Include	
C Exclude	
Owning Libraries:	Branch Library DRS Lib Law Library North Campus Training Master DB

# **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.

Record Sets - View/Edit				
Name	Record Type	Records In Set	*	<u>С</u> ору
match dedupe test	Bib	55		
MFHD has 852k	Mfhd	11		<u>E</u> dit
Mfhd Set	Mfhd	15		
mike dot dat	Bib	9		
Naked Mole Rats	Bib	92		<u>D</u> elete
ocle dot dat	Bib	10		
Oversize holdings	Mfhd	1	ſ	(
RegenSearchLimit4183	Bib	1		E <u>xport</u>
scanned library has	Mfhd	4		

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.

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.

Γ	Job Result I	Files	]	
	File Type	File Name		
	Before	gdc.14454.Deleteexportdat.20130822125738.marc_before.1		
	Delete all	gdc.14454.Deleteexportdat.20130822125738.id_deleteall.1		
			E <u>x</u> port	
			⊻iew	J
			<u>C</u> lose List	

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.

# Media Scheduling & Media System Administration

This section includes the following enhancements:

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

# 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.

ooking	Schedule - Da	ay View				
View Book	ings for: 6/27/2013	<u>I</u> oday			4	Bookings
Start Time	Requester	Confirmation #	Title	End Date	End Time	Item Cou
11:00 AM	Rendall, Dennis	893	No titles in booking	6/27/2013	11:40 AM	0
01:00 PM	Pemble, Mel Dddsdsd	894	No titles in booking	6/27/2013	02:10 PM	0
04:00 PM	Duong, Chi-Hoi	897	Multiple titles in booking	6/27/2013	04:50 PM	2
05:00 PM	Venckus, Christopher	891	Baseball	6/27/2013	05:50 PM	1

# Implementation Notes

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

Options		
Schedule Monitor Charge/Discharg General Day View Inventory Sche Available Columns Booking Type Delivery Room/Pickup Locati	· · · · · · · · · · · · · · · · · · ·	Sounds List Bar Order
Include in Display Charged Bookings Completed Bookings Canceled Bookings	<ul> <li>✓ Unclaimed Bookings</li> <li>✓ Overdue Bookings</li> </ul>	
	<u>O</u> K <u>C</u> ancel	Apply

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.

#### Booking Schedule - Day View

View Book	ings for: 6/27/2013	<u>I</u> oday			4	Bookings
Start Time	Requester	Confirmation #	Title	End Date	End Time	Item Cour
11:00 AM	Rendall, Dennis	893	No titles in booking	6/27/2013	11:40 AM	0
01:00 PM	Pemble, Mel Dddsdsd	894	No titles in booking	6/27/2013	02:10 PM	0
04:00 PM	Duong, Chi-Hoi	897	Multiple titles in booking	6/27/2013	04:50 PM	2
05:00 PM	Venckus, Christopher	891	Baseball	6/27/2013	05:50 PM	1

- 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 pickup patron. All types of patron notes may be accessed from the "View" menu of a reservation.

#### **Implementation Notes**

No configuration is necessary.

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.

5	elect Equipment For Booking	_		
ſ	Number	Туре		Status
l				
L				
	•		l.	•
l				
	Equipment	Show avail	able equipment only	
L	Equipment		Location	Room
L	AV Cart	5006	Media Department	Storage 01 - Media Department Sto
L	CD Player	5012	Cataloging Desk	33333
L	DVD Player	B1	Cataloging Desk	33333
L	TV	= 123DVDbber	Cataloging Desk	33333
L	TV VCR Combination	50022	Media Department	44 - Eva
L	VCR (VHS format)			
L	keys	-		
		•   • [	III	1
		<u>0</u> K	<u>C</u> ancel	
L				

# **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.

🔄 Patron C	ounters and	Bookings	-	-			
Patro	n Name: Go	nhat Mark Gu	erard				
Current B	ookings:	2					
<u>L</u> ate	Returns:	2 🛊	Cance	elled <u>B</u> ooking	IS: 0+	<u>S</u> ave	
Historical B	ookings:	0 🜩	Unclai	med Bookinc	IS: 7÷		
- Be	set Date: 12			et Operator II	D: SYSTEM	1	
i i i c.	ser Date.   12	01171000	1163	et operator i	5. JOIOIEM		
🔽 Include	Historical Boo	okings					
Status	Start Date	Start Time	End Date	End Time	Confirmation Number	Booking Type	Delivery Room/Pickup Location
Unclaimed	4/19/2007	06:00 AM	4/19/2007	06:10 AM	365	Delivery	Circulation Desk - 222bbbb5 - super room
Unclaimed	4/19/2007	06:00 AM	4/19/2007	06:10 AM	364	Delivery	Circulation Desk - 222bbbb5 - super room
Unclaimed	4/19/2007	02:00 PM	4/19/2007	04:00 PM	367	Delivery	Circulation Desk - 222bbbb5 - super room
Complete	7/5/2011	08:00 AM	7/5/2011	08:10 AM	678	Pickup	College-Media Scheduling
Complete	7/5/2011	08:00 AM	7/5/2011	08:10 AM	677	Pickup	College-Media Scheduling
Complete	7/31/2012	03:26 PM	7/31/2012	04:26 PM	707	Delivery	Cataloging Desk - 15charactersmax - Testing Piv issue 1700(
Unclaimed	6/11/2013	08:20 AM	6/11/2013	09:10 AM	865	Delivery	Cataloging Desk - Test99 - RoomName99
Complete	6/28/2013	02:30 PM	6/28/2013	04:00 PM	912	Pickup	Media Department
Cancelled	7/19/2013	02:10 PM	7/19/2013	02:20 PM	926	Delivery	Cataloging Desk - Test99 - RoomName99
Unclaimed	7/19/2013	02:20 PM	7/19/2013	02:30 PM	927	Delivery	Cataloging Desk - Test99 - RoomName99
Unclaimed	7/19/2013	03:50 PM	7/19/2013	03:50 PM	928	Pickup	Media Department
Unclaimed	7/26/2013	02:30 PM	7/26/2013	02:30 PM	944	Pickup	Media Department
Unknown	9/27/2013	01:47 PM	9/27/2013	01:47 PM	960	Pickup	Media Department
Unknown	9/27/2013	01:55 PM	9/27/2013	02:55 PM	961	Library Scheduled	Library-Media Scheduling - VMC1 - VMC1
•					III		4
Summary	<u> </u>	int	Select <u>A</u> ll	<u>U</u> nsele	ect All		Close

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 libraryspecified 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.

5	Selected Bibliographic Records, Holdings, and Items	
	Select items for booking: - any item for the bib by selecting a bibliographic record - any item for a holdings record by selecting a holdings record - a particular item by selecting an item record	
	541 dalmatians [videorecording] / Walt Disney Pictures presents an Edwards.Feldman production.     Location     Call Number	
	☐ Media Department other           Media Type         Enum         Chron         Copy         Location	
	<ul> <li>Videocassette Recording dalmatian enum dalmatian chron 0 Media Department</li> <li>Alert Item Status</li> <li>Lost-Library Applied</li> </ul>	
1		
	<u>A</u> dd <u>V</u> iew <u>C</u> ancel	

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.

Booking - Confirmation Number: 847 <charged></charged>	23
File View Booking Tools Help	
🔄 Save and Close 🖬 🎒 🏝 🗙 🎒 🛳 😰 🁬 🏭 ?	
Schedule Media Room Equipment Notes Staff Properties	
Status itle Search	
Charged aseball [videorecording] / a film by Ken Burns ; the Baseball Film Project, Inc. ; a pro	
MARC	
4	
Add by <u>B</u> arcode	
Media Barcode or Item ID: Add by Item ID	

# **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.

Item and Equipment Status	Alerts
<u>I</u> tem Information:	
Status Item	
Select Statuses to Remove	
Status	Item or Equipment
LostLibrary Applied	40084 - Baseball [videorecording] / a film by Ken Burns ; the Baseball Film Project, Inc. ; a production of Florentine Films and WETA-TV ; produced by
	Ken Burns and Lynn Novick ; written by Geoffrey C. Ward & Ken Burns.
Select <u>All</u> <u>D</u> esele	ect All
	<u> </u>

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).

General 📔 Day View 📗 Inver	ntory Sc	heduler	
Schedule Monitor Cha	arge/Disch	arge	Discharge Status Sounds
Diselas diselas a stat (as the	(		
Display discharge alert for the		: quipme	
Available Equipment Statuse	es		Selected Equipment Statuses
Missing			Stolen
		>	Lost
			In Maintenance
			Misplaced
		<	
Display discharge alert for the	; following l	tem stal	uses:
Display discharge alert for the Available Item Statuses	e following l	tem stal	uses: Selected Item Statuses
Available Item Statuses		tem stal	
Available Item Statuses Recall Request			Selected Item Statuses Missing
Available Item Statuses		tem stal	Selected Item Statuses Missing LostLibrary Applied
Available Item Statuses Recall Request Hold Request			Selected Item Statuses Missing
Available Item Statuses Recall Request Hold Request On Hold Claims Returned			Selected Item Statuses Missing Lost-Library Applied LostSystem Applied
Available Item Statuses Recall Request Hold Request On Hold Claims Returned Damaged		>	Selected Item Statuses Missing Lost-Library Applied LostSystem Applied
Available Item Statuses Recall Request Hold Request On Hold Claims Returned		>	Selected Item Statuses Missing Lost-Library Applied LostSystem Applied

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.

Booking - Confirmation Number: 956 <overdue></overdue>	×
File View Booking Tools Help	
🔄 Save and Close 📊 🎒 🖿 🗙 🎒 🛳 😰 👫 🏭 🤶	
Schedule Media Room Equipment Notes Staff Properties	
☐ In-Room and Specific Equipment	
In-Room Equipment	<u>A</u> dd
Specific Equipment and Equipment Groups	<u>R</u> emove
Barcode Equipment Type Group? Status 105110511051105110511 TV N Charged	⊻iew
	Add by <u>N</u> umber
Equipment Number or Barcode:	Add by <u>B</u> arcode
└─ Media Equipment	
Media Item Types for Booking	Add <u>Type</u>
Equipment and Equipment Group Types	<u>R</u> emove
Setup/Delivery Time: 0 🔄 minutes Clean Up/Return Time: 0 🚖 minutes	<u>S</u> uggest Times

#### **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.

Policy Group Settings		
Group Name: Media Department		
Booking Warning Interval: 2 Days V Block Interval: 1 Hours V Schedule Monitor Cancel Unclaimed: 5 V Overdue Warning: 11 V	Overdue Settings (days) First Notice: 1 Additional Notice Interval: 1 Additional Notice Count: 21 Allow Renew?	
Delivery Overnight Rules Shorten at close? Accrue fines and fees? Patron Pickup Rules Shorten at close? Accrue fines and fees?	Lost Settings Lost Interval (days): 25 - Processing Fee: 25.00 - Charge Maximum Fine? V	
Advanced Booking Warning Period: 2 V Hours V		

#### **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.

Booking - Confirmation Number: 820 <co< p=""></co<>	omplete>
File View Booking Tools Help	
🕞 Save and Close 📊 🎒 🍋 🗙 🎒 📤	E 😰 🏄 ☷ 📍
Schedule Media Room Equipment No	lotes Staff Properties
🗖 Administrative Booking 🖉	Complete
Requester Salamon, Eva	Patron Group: Faculty
Pick-up Patron	Confirmation Number: 820
Data Mandada Tananana di T	

# **Implementation Notes**

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

Tabs Containing Data	7
Tab Color	
Set Color	

# **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:

- <u>Support for OpenURL 1.0</u>
- <u>Combine Multiple Subfields in One OpenURL Tag</u>
- <u>Remove Non-filing Characters from OpenURL Title Tags</u>
- 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.

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
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:

- <u>New Update Options to Pick and Scan</u>
- 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
- <u>Use Pick and Scan in Preview Mode</u>
- 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.

Pick And Scan Ì Changes To Make Records To Change 1 Logs - Locations -Copy Number Item Status Delete 📀 No Change 💿 No Change 🔲 Item Permanent: No Change -C Reset to 0 (zero) Empty holdings C Add selected Temporary: No Change • C Replace with: C Remove selected 🔲 Empty bibs O Delete existing, add selected Suppress from OPAC In Transit Missing Lost-Library Applied Claims Returned Damaged Withdrawn A Diadous Pieces Type: • Permanent: No Change No Change Bib: No Change • C Reset to 1 (one) Ξ Temporary: No Change • MFHD: No Change -C Replace with: -Media: No Change At Bindery Cataloging Review Holding Location Self Check Item Price No Change • 0 selected Clear No Change -Magnetic Media: No Change C Reset to 0 (zero) 852 subfield k Statistical Categories Sensitize: No Change • C Replace with: \$0.00 No Change No Change C Add selected C Delete Item Free Text C Remove selected C Replace with: No Change O Delete existing, add selected C Clear Art Mathematics Append:
 Replace with: History Literature Sociology Psychology Ε Theology Philosophy Clear 0 selected <u>R</u>eset Close

Additional new features are described below.

	rick And Scan				
THIS IS ONLY A PREVIEW     Brint List     Save to File     NO RECORDS CHANGED	Changes T Record Identifier Item Barcode C Hol Item ID C Bib	Idings ID Iliographic ID	inst sholdings record holdings records Eile:	se g upon first error encountered when processing a file of records	
Close	THIS IS ONLY A	PREVIEW	Print List Save to File	NO RECORDS CHANGED	

**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
  - o Delete Item Records
  - Update Holdings Records
  - Delete Holdings Records
  - o Delete Bibliographic Records

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

Holding Location	
No Change	-
852 subfield k	
• No Change	
C Delete	
C Replace with:	
	*
	Ŧ

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.

Record Identifier		Perform changes against
	C Holdings ID C Bibliographic ID	<ul> <li>I his item only</li> <li>All items on this holdings record</li> <li>All items on all holdings records</li> </ul>

#### **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.

What to do	
💿 Update Database	
⊂ Pre <u>v</u> iew	

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.

_ 0	Server Logs
	rerver Logs
	PASLog.7683.20130907193203
	PASLog.7683.20130907193208
	PASLog.7683.20130907193228
	PASLog.7683.20130907193243
	PASLog.8237.20130907194022
	PASLog.8237.20130907194027
	PASLog.8237.20130907194047
	PASLog.8237.20130907194102
	PASLog.8257.20130907194251
	PASLog.8257.20130907194331
	PASLog.9155.20130907195733
	PASLog.9155.20130907195738



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				
🔲 Locally log ar	ny proble <u>m</u> s			
Locally log OI	CLC numbers for deleted & suppressed bibliographic records			
Log <u>F</u> older: C:W	/oyager\Logs			
	Save			

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
- <u>Change Patron PINs</u>
- <u>Update SMS Number from Primo</u>
- <u>Sort Locations in Primo Display</u>
- <u>Patron Self-Registration</u>

# **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 (<u>http://www.exlibrisgroup.org</u>).

# **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.

🔔 Voyager System A	idministration
File Functions H	elp
Acquisitions	Web Services - Service Configuration
Call Slips Cataloging	Edit Service Configuration:
Circulation	
OPAC Configuration	I Enable Change <u>PIN Service</u> <u>D</u> efault PIN:  1234
Search	✓ Enable Change SMS Service
Security	
System	
Web Services	Save <u>C</u> ancel
Patron Self-Registration Service Configuration	

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.

🔔 Voyager System A	dministration
File Functions H	elp
Acquisitions	Web Services - Service Configuration
Call Slips	
Cataloging	Edit Service Configuration:
Circulation	Enable Change PIN Service Default PIN: 1234
OPAC Configuration	
Search	✓ Enable Change SMS Service
Security	
System	
Web Services	Save Cancel
Patron Self-Registration Service Configuration	

#### **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 (<u>http://www.exlibrisgroup.org</u>).

# 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.

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

🔔 Voyager System A	Administration			
File Functions Help				
Acquisitions	Web Services - Patron Self-Registration			
Call Slips				
Cataloging	Edit Patron Self-Registration:			
Circulation	Enable Web Service?			
OPAC Configuration Search	Set Purge: 23 🗧 days Default Patron Group: Courtesy Patron 🗸			
Security				
System	Registration Fields:			
Web Services	Identifier: 🔽 Visible? 🔽 Required? Identifier Type: Institution Id 🗨			
	Title: ☐ Visible? ☐ Required? City: ☑ Visible? ☐ Required?			
Patron	First Name: 🔽 Visible? 🔲 Required? State: 🔽 Visible? 🔲 Required?			
Self-Registration	Middle Name: 🔽 Visible? 🗖 Required? Country: 🔽 Visible? 🗖 Required?			
5	Last Name: 🔽 Visible? 🔽 Required? Zip Code: 🔽 Visible? 🗖 Required?			
Service Configuration	Primary Phone: 🔽 Visible? 🔽 Required? Email Address: 🔽 Visible? 🗖 Required?			
	Other Phone: 🔽 Visible? 🗖 Required? SMS Number: 🔽 Visible? 🗖 Required?			
	Address Line 1: 🔽 Visible? 🔽 Required? Department: 🔽 Visible? 🔲 Required?			
	Address Line 2: 🔽 Visible? 🗖 Required? Major: 🔽 Visible? 🗍 Required?			
	Address Line 3: 🔽 Visible? 🗖 Required? Birth Date: 🔽 Visible? 🗖 Required?			
	Address Line 4: 🔽 Visible? 🔲 Required?			
	Address Line 5: 🔽 Visible? 🥅 Required?			
	<u>S</u> ave <u>C</u> ancel			

#### **Reference to Technical Documentation**

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

# 12

# Self-check (SIP2)

This section includes the following enhancements:

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

# **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.

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:

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

### 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**

# **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.

Circulation - Request Configuration Edit Request Configuration OPAC: Title Level Hold ▼ OPAC: Copy Level Hold ▼ OPAC: Copy Level Recal ✓ OPAC: Title Level Recall CIRC: Title Level Hold CIRC: Copy Level Hold CIRC: Title Level Recall CIRC: Copy Level Recall Veb Services: Title Level Hold Veb Services: Copy Level Hold Veb Services: Title Level Recall Web Services: Copy Level Recall <u>S</u>ave Cancel

#### **Reference to Technical Documentation**

# **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.

Patron Rules				
Fines/Lost Item Fees Apply Max Outstanding Balance:	\$30.00 Min Balance For Notice: \$1.00 \$			
Courtesy Notice Apply	Overdue Notice Apply			
Max Items Borrowed in this Policy Group	Max Overdue Recalled Items Apply			
Max Number Of Recalls Apply	Max Self-Shelf Returns Apply			
Max Claimed Returns Apply	Max Lost Items Apply			
Max Call Slip Requests Apply	✓ Max Short Loan Apply			
Max Short Loan Titles Apply	🔽 Max Short Loan Per Day Apply 🛛 🛛 🖓			
Max Overdue Items Apply	✓ Max Hold Requests Apply			
🔲 Include Pending Hold Requests In The Max Borrowed	toms Linit			
	e Recalls Using The OPAC e Call Slip Requests Using The OPAC			
Email Courtesy Notices     Email Cancellation N     Email Overdue Notices     Email (Other) Overdu     Email Recall Notices     Email (Other) Recall	ue Notices			
<u>0</u> K	<u>C</u> ancel			

#### **Implementation Notes**

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

#### **Reference to Technical Documentation**

# 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:

— F	- Edit Policy Definition:					
	· · · · · · · · · · · · · · · · · · ·					
	Policy Definition   Locations   Policies   Calendar	P <u>a</u> trons   I <u>t</u> ems   <u>M</u> atrix   Sh <u>o</u> rt Loan Matrix				
	Include Lost Item Processing Fee	Lost Item Processing Fee: \$15.00+				
	Include Max Fine Amount For Lost Item					
	Lost Item Return: remove overdue fines	Lost Item Return: remove replacement fee				
	<ul> <li>Lost Item Return: remove overdue fines</li> <li>Lost Item Return: remove processing fee</li> </ul>	<ul> <li>Lost Item Return: remove replacement fee</li> <li>Lost Item Return: decrement patron lost item count</li> </ul>				

#### **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.

Г	Edit Policy Definition:
	Policy De <u>f</u> inition <u>L</u> ocations <u>Policies</u> Cale <u>n</u> dar P <u>a</u> trons <u>Items</u> <u>M</u> atrix Sh <u>o</u> rt Loan Matrix
	✓ Include Lost Item Processing Fee Lost Item Processing Fee: \$15.00 ÷
	✓ Include Max Fine Amount For Lost Item
	✓ Lost Item Return: remove overdue fines ✓ Lost Item Return: remove replacement fee
	✓ Lost Item Return: remove processing fee ✓ Lost Item Return: decrement patron lost item count
	Posting Type for crediting returned lost item fines: Forgive
	Count Closed Days/Hours/Minutes For Loan Count Closed Days/Hours/Minutes For Fine
	Apply Fixed Due Time For Overnight Loans Title-level hold: item in transit to hold shelf fulfills request
	Renew If Overdue Renew If Recall Renew if Hold Extend Recall Due Date
	Short Loan Early Pickup Window: 15 + Minutes Short Loan Unclaimed Interval: 10 + Minutes

#### **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.

Voyager Ci	rculation
<u> </u>	HOLD BLOCKED. Patron not authorized to place a hold for the selected item.

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

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.

Item Settings						
Item Type: Book						
☐ Short <u>L</u> oan						
R <u>e</u> placement Cost: \$0.02 €						
Order <u>Q</u> uantity: 5						
Reorder Point: 5+						
Allow request on items with 'missing' status:						
CPAC Hold CPAC Recall						
Circ Hold Circ Becall						
Allow request on items with 'Lost - System Applied' status:						
C OPAC Hold C OPAC Recall						
Circ Hold Circ Recall						
Allow request on items with 'Lost - Library Applied' status:						
CPAC Hold CPAC Recall						
☐ Circ <u>H</u> old ☐ Circ <u>R</u> ecall						
<u> </u>						

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

- Edit Policy Definition:	
Policy Definition Locations Dolicies Calendar	Patrons Items Matrix Short Loan Matrix
✓ Include Lost Item Processing Fee	Lost Item Processing Fee: \$15.00
Include Max Fine Amount For Lost Item	
✓ Lost Item Return: remove overdue fines	✓ Lost Item Return: remove replacement fee
Lost Item Return: remove processing fee	☑ Lost Item Return: decrement patron lost item count
Posting Type for crediting returned lost item fines:	Forgive
🔲 Count Closed Days/Hours/Minutes For Loan	Count Closed Days/Hours/Minutes For Fine
Apply Fixed Due Time For Overnight Loans	Title-level hold: item in transit to hold shelf fulfills
Allow title level holds on bibs with no items - OPAC	Allow title level holds on bibs with no items - Circ
I Renew If Overdue I Renew If Recall	Renew if Hold Extend Recall Due Date
Short Loan Early Pickup Window: 15 Minutes	Short Loan Unclaimed Interval: 10+ Minutes

#### **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.

Patron Rules					
Fines/Lost Item Fees Apply Max Outstanding Balance:	\$30.00 € Min Balance For Notice: \$1.00 €				
Courtesy Notice Apply	🔽 Overdue Notice Apply				
Max Items Borrowed in this Policy Group	Max Overdue Recalled Items Apply				
Max Number Of Recalls Apply	Max Self-Shelf Returns Apply				
Max Claimed Returns Apply	Max Lost Items Apply				
Max Call Slip Requests Apply	Max Short Loan Apply				
Max Short Loan Titles Apply	☞ Max Short Loan Per Day Apply 7분				
Max Overdue Items Apply 5+	Max Hold Requests Apply				
🔲 Include Pending Hold Requests In The Max Borrowed Terms Limit					
✓       Place Holds Using The OPAC       ✓       Place Recalls Using The OPAC         ✓       Place Short Loans Using The OPAC       ✓       Place Call Slip Requests Using The OPAC					
Email Courtesy Notices       Email Cancellation Notices       Email Item Available Notices         Email Overdue Notices       Email (Other) Overdue Notices       Email Recall Notices         Email Recall Notices       Email (Other) Recall Notices       Email Notices					
<u>O</u> K <u>C</u> ancel					

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.

	icy Definition:		
Polic	yDe <u>f</u> inition   <u>L</u> ocations   <u>P</u> olicies   Cale <u>n</u> dar   P <u>a</u> trons   I <u>t</u> ems   <u>M</u> atrix   Sh	ort Lo	an Matrix 🛛
	Item	•	Settings
✓	(all)		
✓	1 day reserve item		Settings
✓	1 week reserve item	E	Multiple
✓	2 day reserve item		_
	2 hour reserve		<u>R</u> emove
✓	2 hour short		
✓	3 hour short		
✓	archival material		

Patron Group	Item Type	*	<u>A</u> dd
Graduate Student	record		
Graduate Student	score		Modify
Graduate Student	serial		
Graduate Student	software		Modi <u>f</u> y
Graduate Student	three dimensional object		Multiple
Graduate Student	video		
Inter-Library Loan	2 day reserve item		<u>R</u> emove
Inter-Library Loan	archival material		
Inter-Library Loan	atlas		Copy
Inter-Library Loan	audiotape	<b>T</b>	

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

Circulation Policy Matrix Record Settings Multiple Edit						
Modify only those settings you wish to update on all selected matrices. Any setting not modified below will be left as is.						
Selected Matrices Settings Intervals						
				I		
☐ Modify?	Loan Period:		Day 👻	Modify?	Charge/Renew	с
☐ Modify?	Renewal Period:	, (1)	Day 🔻	Modify?	Recall	
Modify?	Max # of Sequential Renewals:		,	Modify?	Hold	
🔲 Modify?	Fine Interval:	Day 🔻		Modify?	Call Slip	
🔲 Modify?	Fine Rate:	\$0.00				
Modify?	Max Fine Amount:	\$0.00				
Modify?	Max Fine for Recalls:	\$0.00				
🔲 Modify?	Min Loan Period for Recalled Items:		Days			
🔲 Modify?	Recall Fine Interval:	Day 🔻				
🔲 Modify?	Recall Fine Rate:	\$0.00				
🔲 Modify?	Grace Period:		Days			
🔲 Modify?	Recall Return Interval:	07				
Modify?	Recall Grace Period: Max Items Borrowed for this					
🔲 Modify?	Patron Group & Item Type	12				
☐ Modify?	Renew From:	Original [ C Renewal				
<u>Save</u>						

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 <u>except</u> 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**

# 14

# **Technical Enhancements**

This section includes the following enhancement:

- Solaris 11
- <u>Monitoring for Index Regens</u>
- Monitoring Oracle Tablespace and Data File Size
- Retention of Log Files
- <u>Improvements to the Regen Process</u>
- 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 threshold.

#### 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 threshold, 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
- <u>Update Various Presentation Layers in Voyager Analyzer</u>

# **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:

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

# 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.

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

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.

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# WebVoyáge

This section includes the following enhancement:

- <u>Warning for Patron Card Expiration</u>
- <u>Customization of Time Format on Media Request Forms</u>

# 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.

ExLibris Voyager	Search	My Searches	My List	My Account
New Search :		Go	Rearch Hist	ory
My Account				
Review and update your library transac	ctions.			
Your patron account will expire in a	19 days.			
View Personal Information	Edit Prefere	ences		

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.

A new configuration option has been added to **xxxdb/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.