Voyager 9.1 Release Notes

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1

Introduction

Voyager 9.1 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 authority loader capabilities
- Strengthen Voyager's integration with Primo
- Improve service to users
- Simplify staff workflows, and
- Increase system stability and performance

Purpose of This Document

This document lists the various enhancements and changes that are new in Voyager 9.1. You can find them listed under the following topics:

- General on page 10
- Acquisitions on page 12
- Authority Control on page 16
- Batch Jobs on page 20
- Bulk Import on page 22
- Cataloging on page 25

- Circulation on page 30
- Global Data Change (GDC) on page 32
- MARC Export on page 34
- Voyager InterCirc - NCIP on page 36
- Primo Integration on page 38
- Reporter on page 42
- System Administration on page 45
- Technical Enhancements on page 48
- XML Patron Utilities on page 50

Voyager 9.1 Documentation

The following is a list of the primary documentation for Voyager 9.1:

- The Road to Voyager 9.1
- Voyager 9.1 Release Notes
- Voyager 9.1 Installation and Upgrade Requirements
- Voyager 9.1 User's Guides

2

General

This section includes the following enhancements:

- Show More Information in File > Login
- Suppressed Records in Call Number Search Results

Show More Information in File > Login

Purpose of the Enhancement

Add database information to the File > Login Information in the Voyager clients.

Description

Server, database, and circulation cluster information have been added to the File > Login Information display in the Voyager clients.

Reference to Technical Documentation

Refer to "Login information" in various *Voyager 9.1 User's Guides* in the Ex Libris Documentation Center for more information.

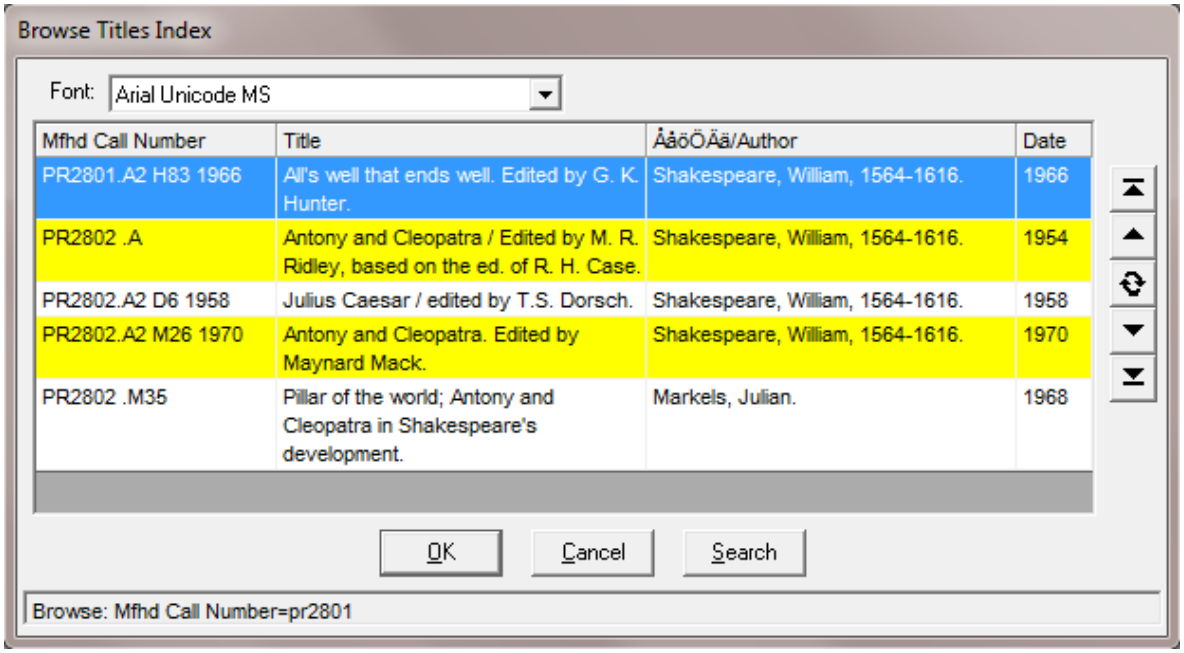
Suppressed Records in Call Number Search Results

Purpose of the Enhancement

The Voyager clients displays suppressed records in call number search results.

Description

Suppressed records will be highlighted in the search results when conducting a call number search in the Voyager staff clients. The user's preference setting for suppressed records in the various Voyager clients will control the highlighting shown in the results display.



3

Acquisitions

This section includes the following enhancements:

- Extended Fund Allocations Using Specific Amounts
- Piece Identifier in EDI Invoices
- Sorting EDI Messages

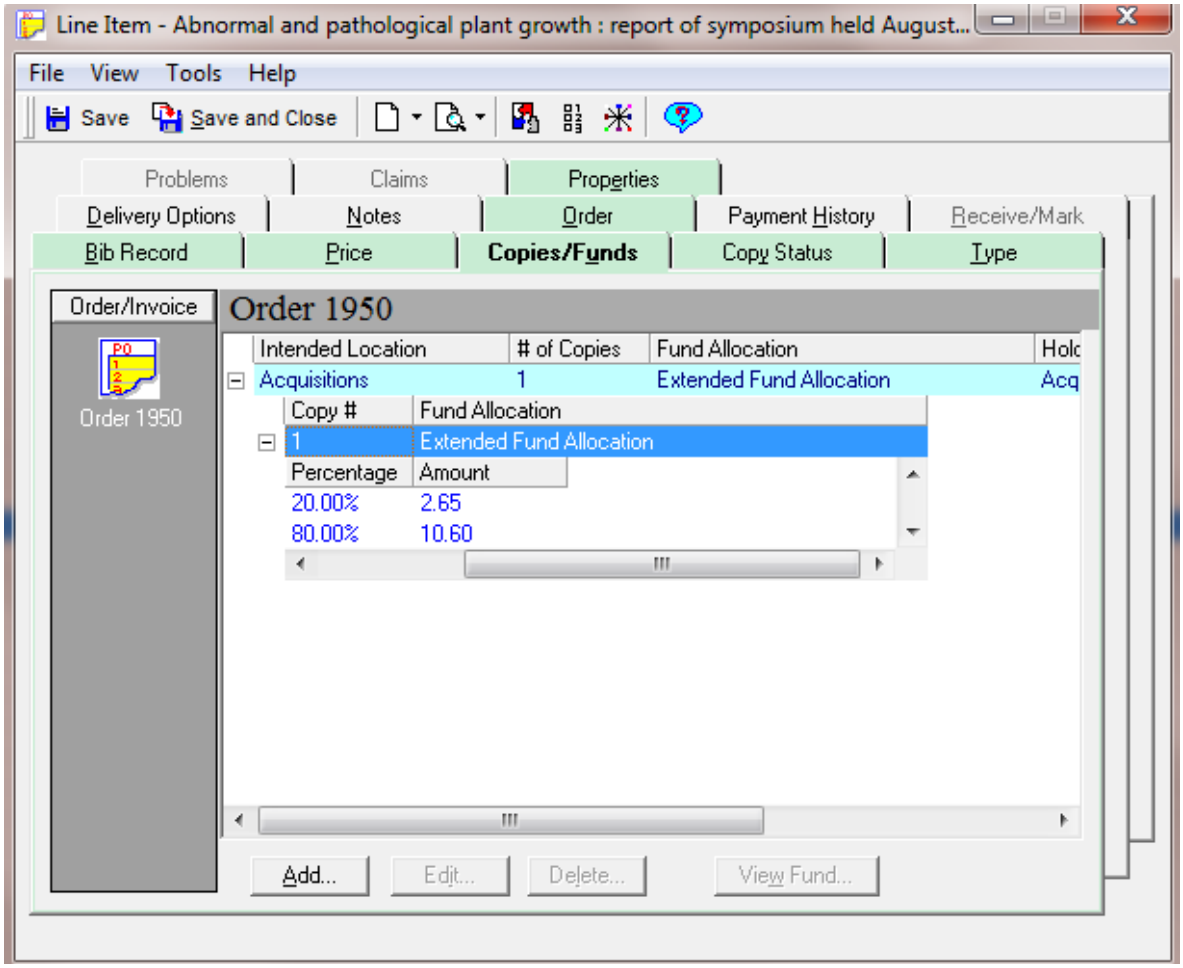
Extended Fund Allocations Using Specific Amounts

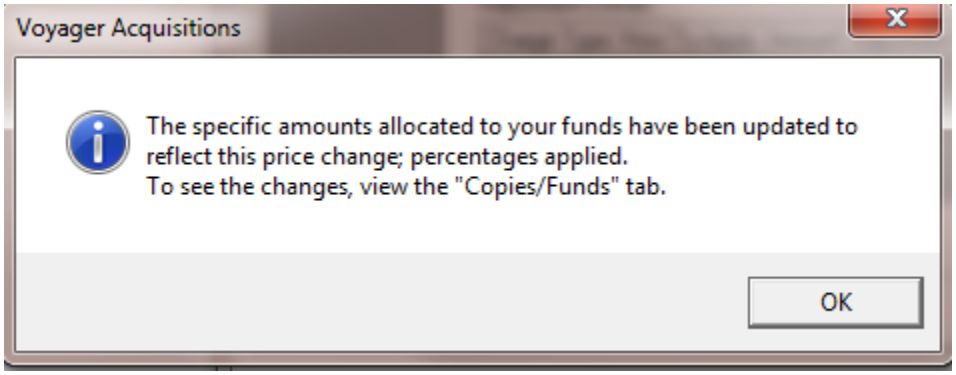
Purpose of the Enhancement

The purpose of this enhancement is to make it possible to allocate specific amounts when splitting a purchase across multiple funds.

Description

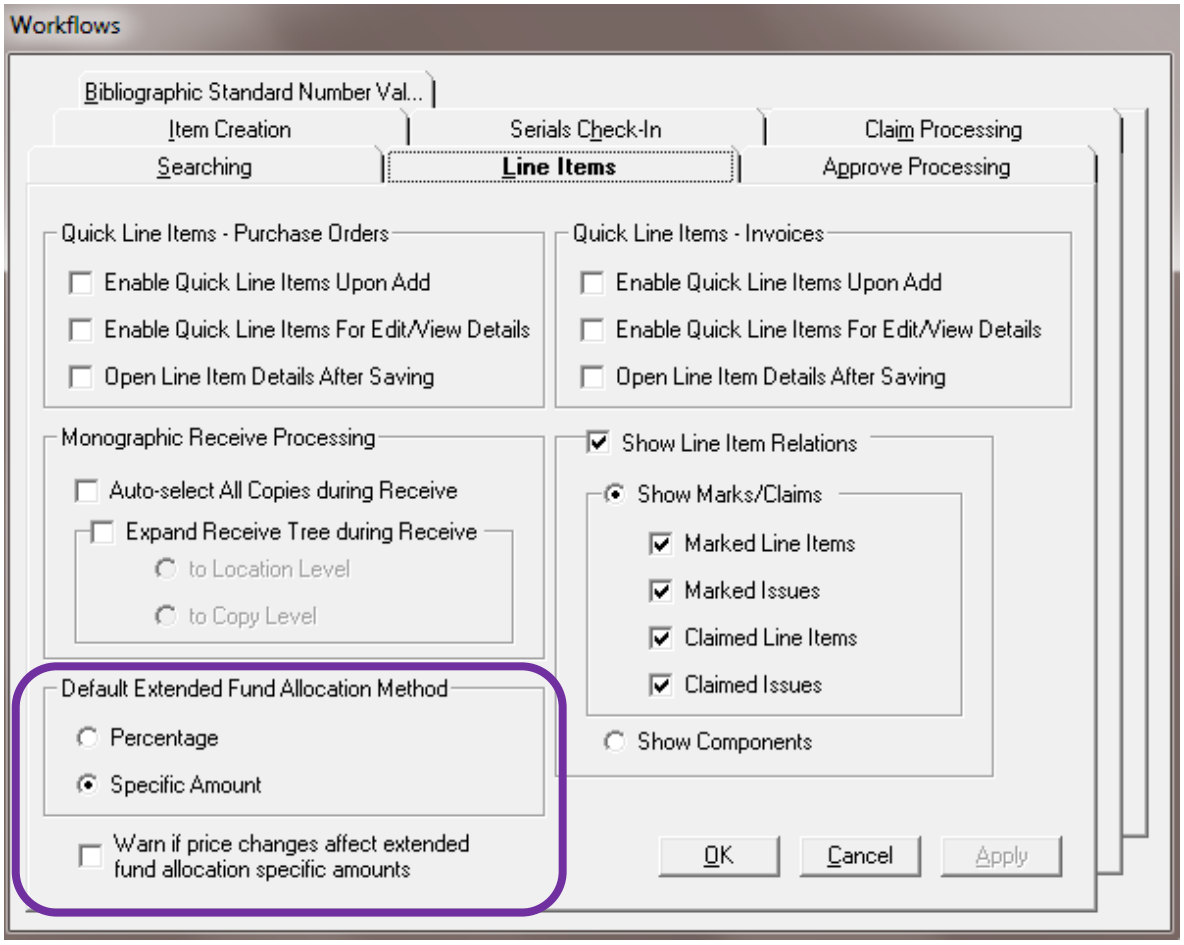
New functionality has been added to allow users to specify exact amounts when splitting a purchase across multiple funds. This allows the user to be very precise as to the amount allocated to the purchase from various funds. When using specific amounts, Voyager will calculate the percentage of the total amount. A warning message will display if the allocation amounts must be changed due to a price change.





Implementation Notes

A new option has been added to the Workflows settings for Line Items to specify the default settings for the user.



Piece Identifier in EDI Invoices

Purpose of the Enhancement

The piece identifier in EDI invoices will be saved in the Piece Identifier field in Voyager.

Description

The mapping for EDI invoice information has been updated to take the piece identifier information from the IMD fields in the EDI invoice and put it in the piece identifier field in the Voyager invoice. Previously this piece information was taken from the FTX field and stored in a free text note field in Voyager.

Implementation Notes

The size of the PIECE_IDENTIFIER field in the INVOICE_LINE_ITEM table was increased from 50 to 500 characters to accommodate this change.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Acquisitions User's Guide* for more information.

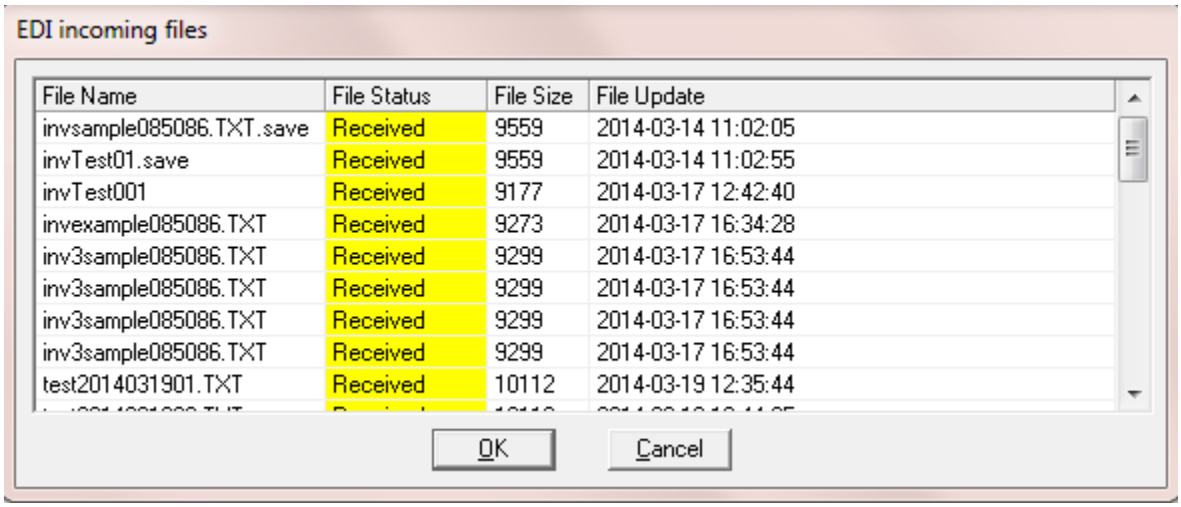
Sorting EDI Messages

Purpose of the Enhancement

The purpose of this enhancement is to allow the user to sort incoming EDI messages.

Description

Incoming EDI files are now sorted by the "File Update" column upon form load. The most recent file is selected. The list may be resorted by clicking on any of the column headers.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Acquisitions User's Guide* for more information.

4

Authority Control

This section includes the following enhancements:

- Authority File Processing Enhancements
- Authority Record Match and Merge Routines
- Authority Record Automatic Loading
- Managing Deleted Authority Records

Authority File Processing Enhancements

Purpose of the Enhancement

The purpose of this enhancement is to process an authority file and prepare sets of records to be used to update authority records in Voyager.

Description

A new workflow has been added to the Global Data Change module that allows the user to upload a file of authority records to the server, analyzes the file using library-defined rules, and creates a set of files to be used in the match, merge, and delete processes. Additional files are created to allow for manual review of exceptions.

Implementation Notes

New permissions have been added to the security profiles for Global Data Change operators to restrict access to these features.

Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* and the *Voyager 9.1 Global Data Change User's Guide* for more information.

Authority Record Match and Merge Routines

Purpose of the Enhancement

The purpose of this enhancement is to create new match and merge routines to update authority records in Voyager.

Description

Staff users can create new match and merge profiles in the Global Data Change module to be used to process files of authority records.

The match profiles can be configured to load authority records of a particular type, while excluding others. The output of the match process is a set of files that will be used to add records to and remove records from the Voyager database. Different files will be created for new records, records with a single match, records with multiple matches, discards, deletes, rejects, etc.

The merge profiles can be configured to merge records where only one match exists, and to merge multiple records into a best record. Alternately, merge routines can be set up to prevent certain types of records from being merged. At the end of the merge process, some records will have been added to or deleted from Voyager, and some exception files will have been created for records that require manual review.

Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* and the *Voyager 9.1 Global Data Change User's Guide* for more information.

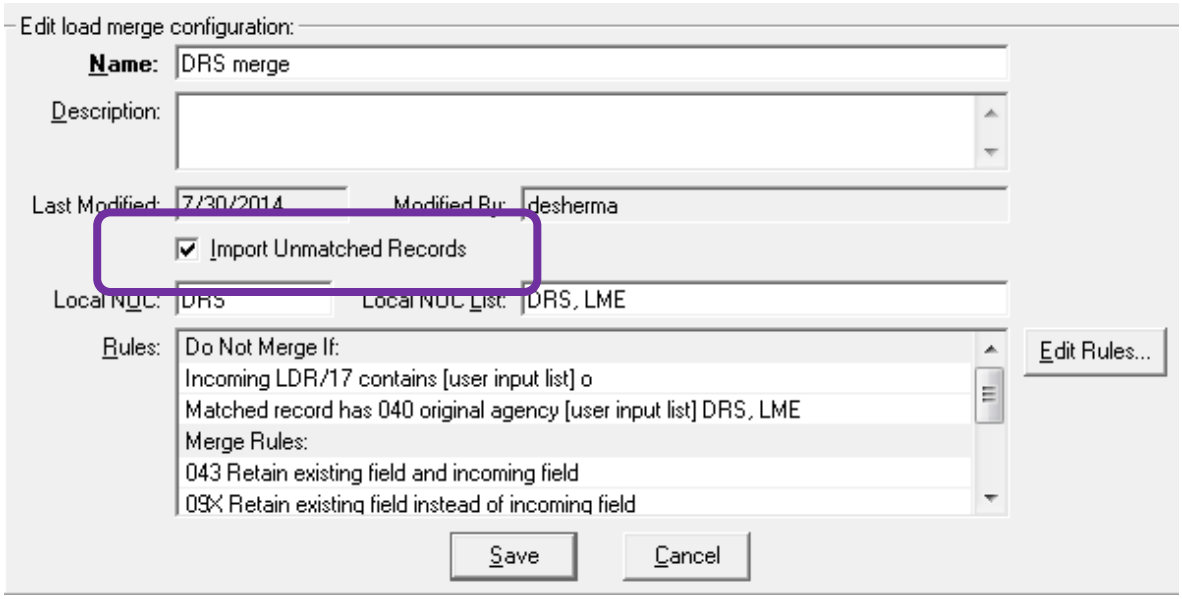
Authority Record Automatic Loading

Purpose of the Enhancement

The purpose of this enhancement is to automatically load new authority records into Voyager during the merge process.

Description

Authority records that have been identified as new (i.e. do not match an existing authority record in Voyager) can be automatically loaded into Voyager. This is done as part of the authority record load merge job. It is an optional step that can be enabled by the staff user.



Reference to Technical Documentation

Refer to the *Voyager 9.1 Global Data Change User's Guide* for more information.

Managing Deleted Authority Records

Purpose of the Enhancement

The purpose of this enhancement is to use automatically delete obsolete authority records from Voyager.

Description

Authority records that have been identified for deletion can be automatically deleted from Voyager when an authority merge job is run. This is done as part of the authority record load merge job.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Global Data Change User's Guide* for more information.

5

Batch Jobs

This section includes the following enhancements:

- Bursar Transfer by Fine/Fee Type

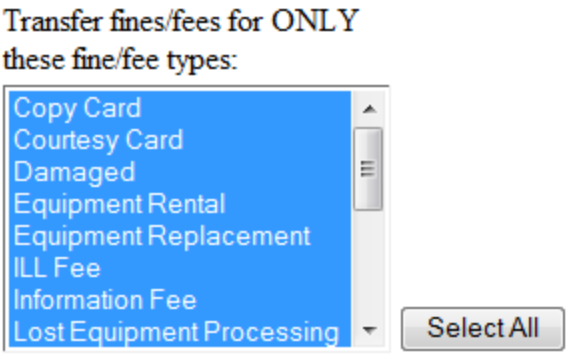
Bursar Transfer by Fine/Fee Type

Purpose of the Enhancement

The purpose of this enhancement is to add new options to the bursar transfer batch job.

Description

Logic has been added to the bursar transfer to extract records by fine and fee type. The enhancement applies to bursar transfers processed from the Pbursar command line as well as from Web Admin.



Implementation Notes

A new stanza **[Fine Fee Type]** has been created in the bursar transfer configuration file. **ALL** in the stanza indicates transfer all fine/fee types, and overrides individual ones specified.

An empty stanza will generate an error in the log and stop. An invalid type will generate a message in the log and continue.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Technical User's Guide* for more information.

6

Bulk Import

This section includes the following enhancements:

- Logging of Deleted Records
- Copy Numbers for Volumes

Logging of Deleted Records

Purpose of the Enhancement

The purpose of this enhancement is to standardize the log files for deleted records.

Description

Logic has been added to consistently log records that are deleted from Voyager without regard to the method used for deletion. Deleted MFHD records are written to the **deleted.mfhd.marc** file, whether deleted in the Cataloging client or via Bulk Import.

The **delete.imp.*** file has been split into two files: **delete.auth.imp.*** now contains authority records to be deleted and **delete.bib.imp.*** contains cancelled bibliographic records.

Implementation Notes

The new log files will be created automatically, even if no records are added to the files.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Technical User's Guide* for more information.

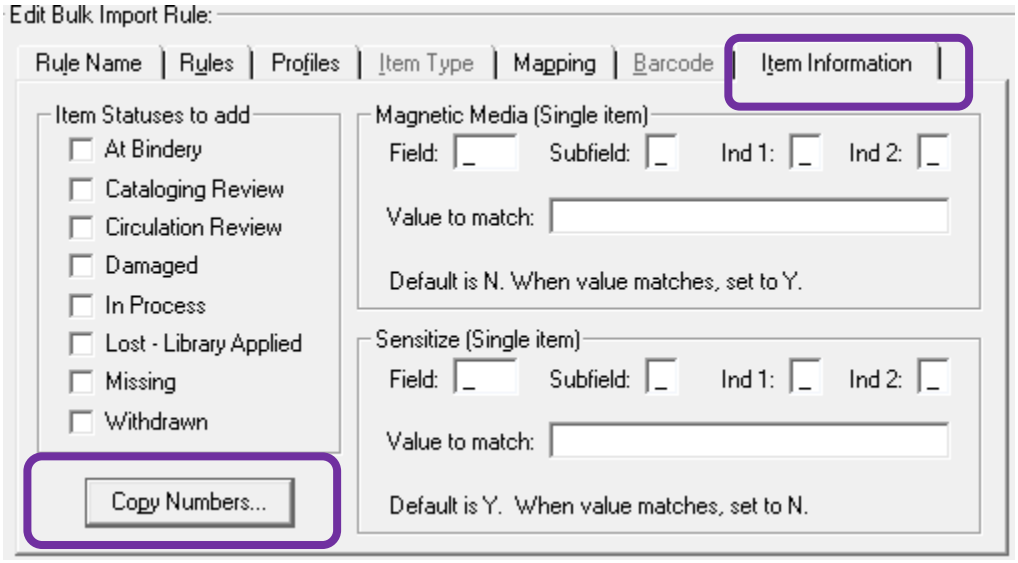
Copy Numbers for Volumes

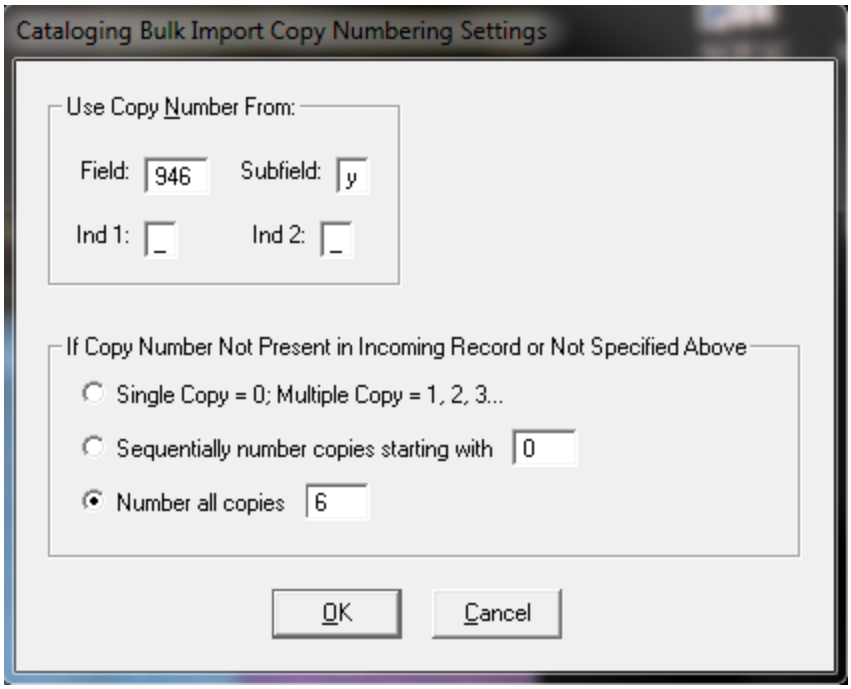
Purpose of the Enhancement

The purpose of this enhancement is to set the copy number in the item record based on information in the MARC record.

Description

Options have been added to the bulk import profiles to use information in the MARC record to set the copy number on item records created by bulk import. If no copy number is specified in the MARC record, Voyager can use a default configuration setting to determine the copy number for the item. This feature makes it possible to bulk load MARC records and create item records for multiple volumes, all having the same copy number.





Implementation Notes

Ex Libris strongly recommends that the same MARC fields are used to specify holdings/item information as well as copy numbers.

Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* for more information.

7

Cataloging

This section includes the following enhancements:

- Duplicate Detection for RDA Records
- Font Size Configuration
- Item Record Printing

Duplicate Detection for RDA Records

Purpose of the Enhancement

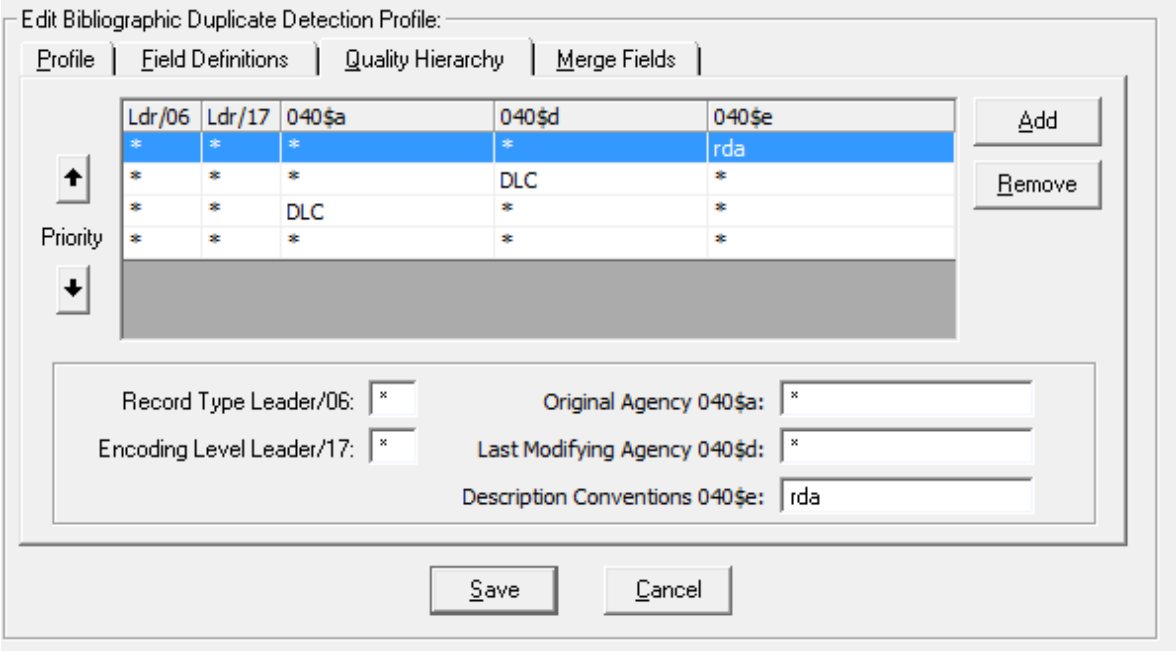
The purpose of this enhancement is to add the 040 subfield e (040 $e) to the quality hierarchy logic in duplicate detection.

Description

Duplicate detection profiles can be configured to determine a record's quality when importing a record via bulk import or through the Cataloging client. A record's quality ranking will determine if the incoming record is saved in the system or rejected based on the library's configuration.

It is now possible for the 040 $e (description conventions) to be added to the quality hierarchy calculation, thus allowing RDA records to be designated as higher quality than other types of records.

The quality hierarchy applies to replace, merge, and bi-directional merge profiles for bibliographic duplicate detection, and to replace and merge profiles for authority duplicate detection.



Implementation Notes

The library must adjust its duplicate detection profiles to use 040 $e in the quality hierarchy calculation. Any valid value in 040 $e can be used in the duplicate detection profile.

Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* for more information.

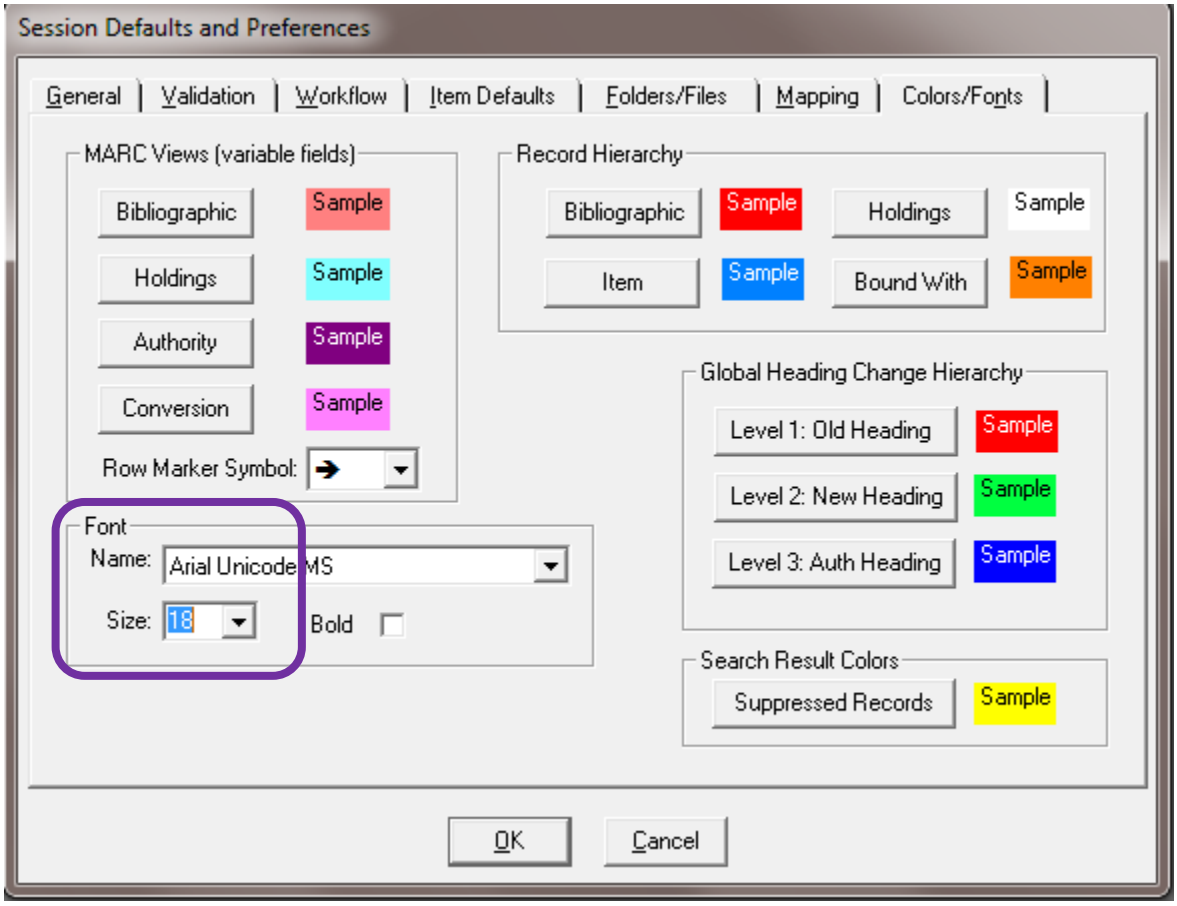
Font Size Configuration

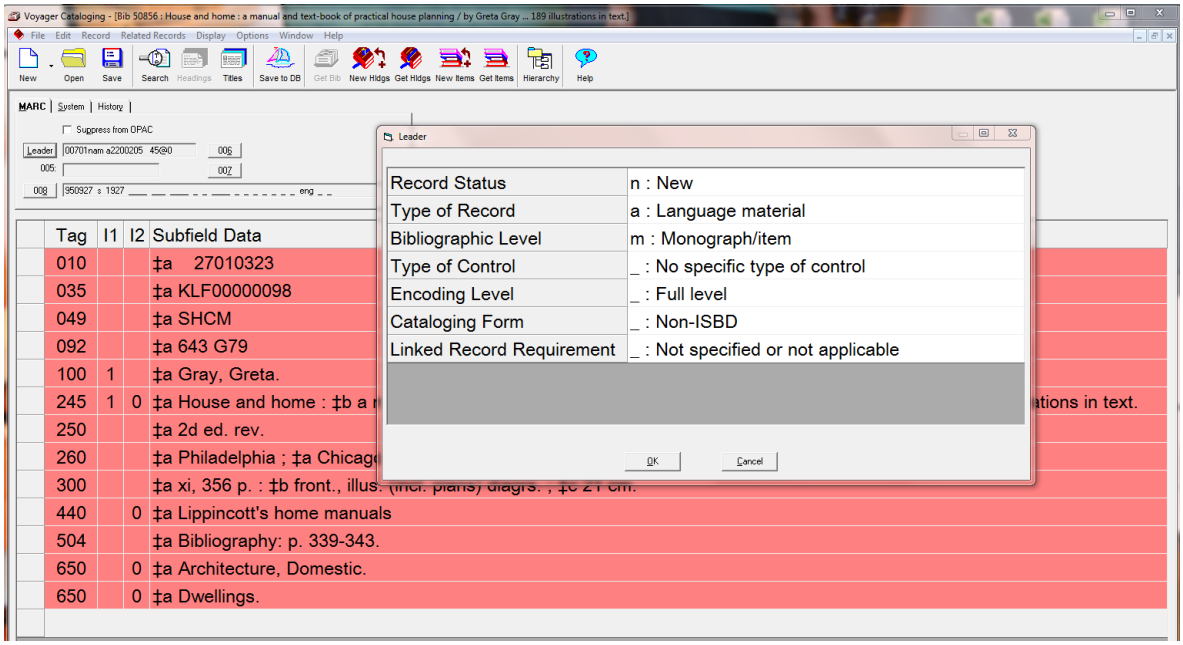
Purpose of the Enhancement

The purpose of this enhancement is to provide more font size options in the Voyager Cataloging client.

Description

The font size can now be set to any size from 8 points up to 72 points in the Voyager Cataloging client. The drop-down displays the pre-existing options: 8, 9, 10, 11, 12. Larger font sizes can simply be keyed into the font size box.





Implementation Notes

The font size setting controls the display font in the MARC record display as well as the fixed-field grids. The font size selected also controls the font size when a record is printed from Voyager.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Cataloging User's Guide* for more information.

Item Record Printing

Purpose of the Enhancement

The purpose of this enhancement is to add more information to the print out for holdings and items.

Description

Additional entries have been added to Catalog.ini to enhance the printing of holdings and item records. The MFHD ID has been added to the item record print out, and the Item ID has been added to the item list for holdings. The ability to print the barcode in a barcode font has also been added.

Implementation Notes

The catalog.ini file has been updated. If you are using a customized version of this file, you may want to update the default file in Voyager 9.1 to include your changes.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Cataloging User's Guide* for more information.

8

Circulation

This section includes the following enhancements:

- Search by Patron ID

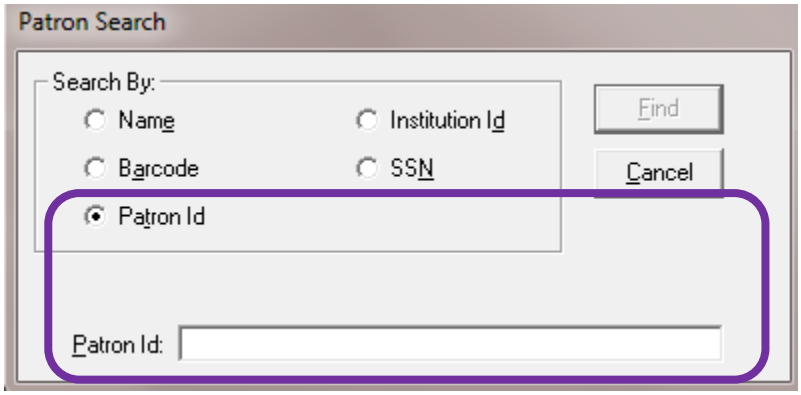
Search by Patron ID

Purpose of the Enhancement

The purpose of this enhancement is to provide an option to search for patrons by patron ID.

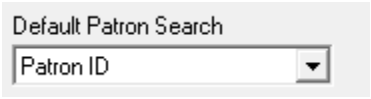
Description

A new option has been added to the patron search window to search for patrons by Patron ID.



Implementation Notes

The patron ID search can also be set as the default search method in Circulation's Session Preferences.



Reference to Technical Documentation

Refer to the *Voyager 9.1 Circulation User's Guide* for more information.

9

Global Data Change (GDC)

This section includes the following enhancement:

- Copy Rules in GDC

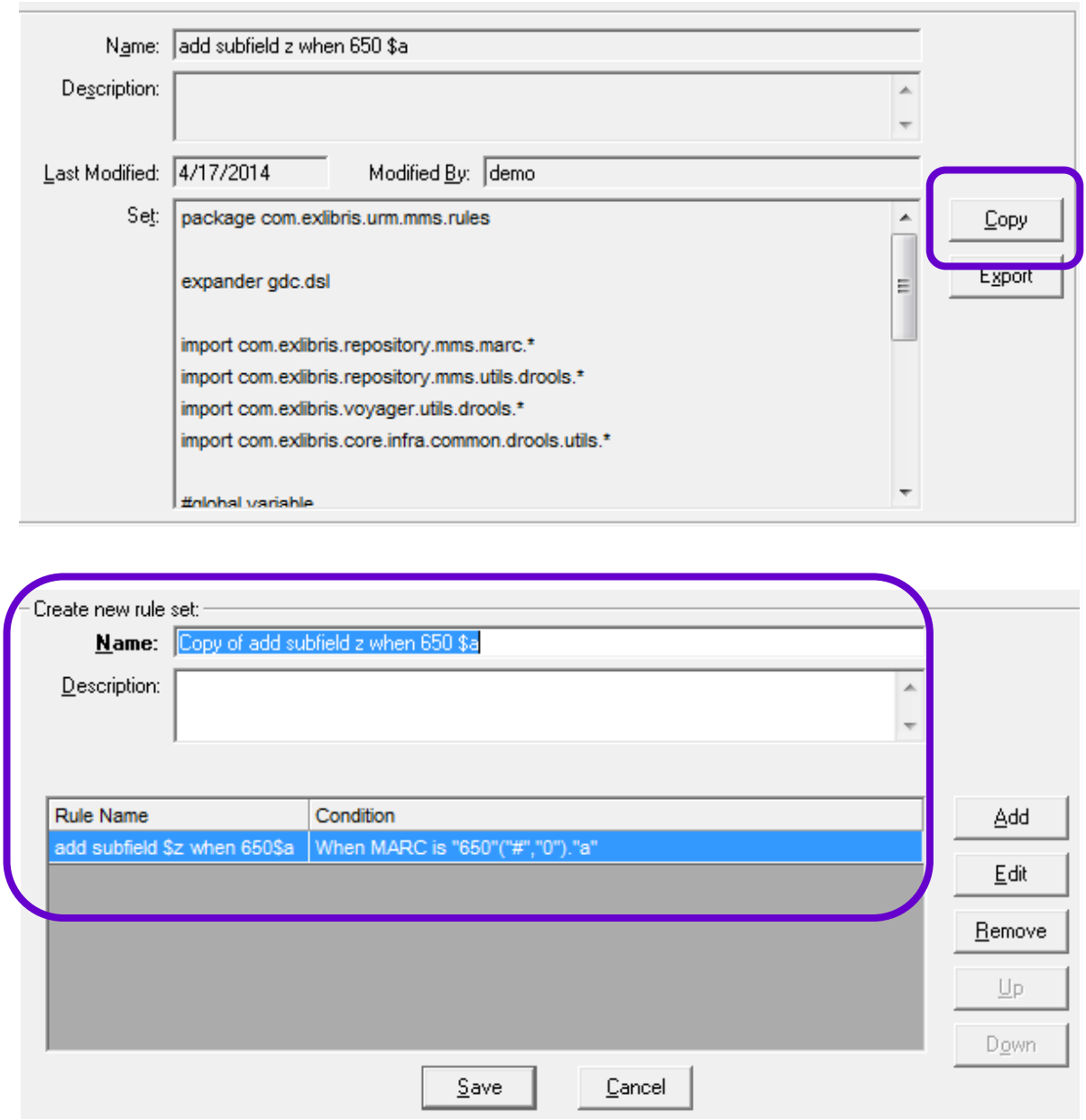
Copy Rules in GDC

Purpose of the Enhancement

The purpose of this enhancement is to add an option to copy rules in the GDC client to use in creating new rules.

Description

A new "Copy" feature has been added to the GDC client to allow the user to create a new rule by copying an existing one. The copy feature applies to data change rule sets, data change rule set groups, scan rule sets, and scan rule set groups.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Global Data Change User's Guide* for more information.

10

MARC Export

This section includes the following enhancements:

- Option to Suppress Serials Checkin Data

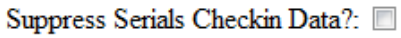
Option to Suppress Serials Checkin Data

Purpose of the Enhancement

The purpose of this enhancement is to provide an option to suppress serials checkin data when exporting holdings records.

Description

A new option (-D) has been added to MARC Export to suppress the creation of 86x fields when MARC holdings records or Bib-MFHD record groups are exported from Voyager. Use of this option does not prevent existing 86x fields from being exported in MARC holdings records.



Implementation Notes

This option is available when using MARC Export via command line and in WebAdmin. The option is also automatically used by the GDC module when holdings records are being updated.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Technical User's Guide* for more information.

11

Voyager InterCirc - NCIP

This section includes the following enhancements:

- Configuration for Automatic Override of Item Blocks

Configuration for Automatic Override of Item Blocks

Purpose of the Enhancement

This enhancement makes it possible to control blocks that are automatically overridden during NCIP transactions.

Description

Voyager's InterCirc - NCIP module has been enhanced to automatically override the item blocks as configured for the circulation profile to which the NCIP operator 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 NCIP operator that is defined in the NCIP configuration file.

Reference to Technical Documentation

Refer to the *Voyager InterCirc-NCIP User's Guide* and the *Voyager 9.1 System Administration User's Guide* for more information.

12

Primo Integration

This section includes the following enhancements:

- Alert Messages When Signing In to Primo
- Enhanced Response Messages for Renewals and Requests
- Support for ILL Requests in OvP
- Display for Patron Status Group Messages

Alert Messages When Signing In to Primo

Purpose of the Enhancement

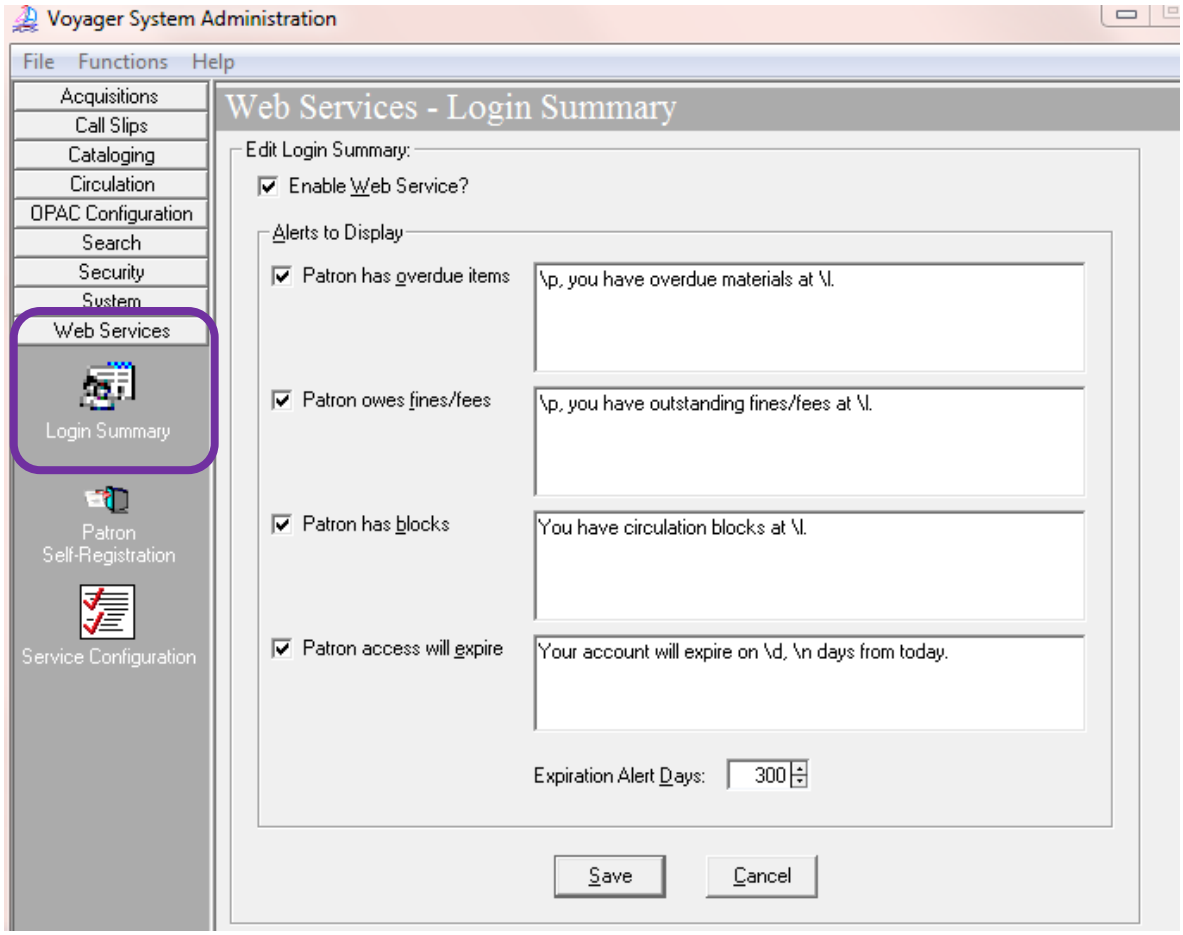
This enhancement alerts the patron to outstanding issues on his account when he signs in to Primo.

Description

Voyager's PatronStatus Web service has been enhanced to alert the patron to outstanding issues on his account when he logs in to Primo. The alerts include overdue items, outstanding fines and fees, circulation blocks, and expiration of privileges. The alert messages are configurable by the library.

Implementation Notes

The Web service must be enabled in the Voyager System Adminstration module.



Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* for more information. The Web services are documented on the Ex Libris Developer Network (https://developers.exlibrisgroup.com/). Refer to the Primo documentation for compatibility with specific versions of Primo.

Enhanced Response Messages for Renewals and Requests

Purpose of the Enhancement

This enhancement provides more information in response messages for renewals and requests made through Primo.

Description

The response messages for renewals and requests have been enhanced to provide additional information to the patron when the renewal or request is unsuccessful. Voyager will provide specific reasons when it is not possible to place a request or renew an item. The message text is configurable for each reason. If multiple blocks/errors apply, they are concatenated together in the response to Primo.

Implementation Notes

The block messages and request errors have been copied from vwebv.properties to vxws.properties to support their display in Primo.

Reference to Technical Documentation

Refer to the *Voyager Primo Integration Guide* for more information. Refer to the Primo documentation for compatibility with specific versions of Primo.

Support for ILL Requests in OvP

Purpose of the Enhancement

This enhancement provides options to use blank Voyager ILL forms in Opac Via Primo.

Description

A new option in Opac via Primo supports the ability to create Voyager ILL requests from the Primo discovery interface. Four ILL form types are supported: ILL blank loan request, ILL blank photocopy request, ARTEmail ILL request, and ARTEmail ILL photocopy request.

Implementation Notes

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

Reference to Technical Documentation

Refer to the *Voyager Primo Integration `Guide* for more information. The Web services are documented on the Ex Libris Developer Network (https://developers.exlibrisgroup.com/). Refer to the Primo documentation for compatibility with specific versions of Primo.

Display for Patron Status Group Messages

Purpose of the Enhancement

This enhancement provides new functionality for the display of patron status group messages in Primo.

Description

Messages currently exist in vxws.properties to display patron status group messages in Primo. However, no default message will be displayed in Primo if the specific status patron group is not defined in the vxws.properties file. This enhancement provides a default message that will display in Primo in cases where the patron status group message has not been defined.

Additionally, a new configuration has been added to the PrimoExp*.ini files to let the library determine which availability status should display for the items checked out to status patron groups. By default, the availability will be set to "Check holdings" (Patron Group OPAC Message=C). This default may be changed to "A" or "U" by the library; the default status will be applied to all items charged to any patron status group patron.

Implementation Notes

Voyager Tomcat must be restarted after changing the Patron Group OPAC Message= parameter in the PrimoExp*.ini.

Reference to Technical Documentation

Refer to the *Voyager Primo User's Guide* for more information. Refer to the Primo documentation for compatibility with specific versions of Primo.

13

Reporter

This section includes the following enhancements:

- Enhancements to Fine/Fee Notice and Statement of Fines and Fees
- Enhancements to Overdue Notices
- Configuration of Emails from Reporter

Enhancements to Fine/Fee Notice and Statement of Fines and Fees

Purpose of the Enhancement

This enhancement adds due dates to the Fines and Fee Notice and the Statement of Fines and Fees.

Description

Two new fields ("Due Date" and "Due Date when Fined") have been added to the Fines and Fees notice and the Statement of Fines and Fees produced by Voyager's Reporter module. The new due date fields have also been added to the configuration file for emailed notices.

Implementation Notes

Voyager's Circulation Notices SIF file has been updated, along with the default notice templates. A new Circnotes.mdb is provided with this release. Customers who have modified the Fines and Fees notice or Statements of Fines and Fees templates will need to add these modifications to their customized files.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Reporter User's Guide* for more information.

Note: Due to changes in the SIF, archived Circulation notices created on earlier versions of Voyager will not work with the Reporter module in version 9.1. All previous notices should be processed through Reporter before the upgrade to Voyager 9.1 begins.

Enhancements to Overdue Notices

Purpose of the Enhancement

This enhancement adds copy numbers to overdue notices.

Description

Copy numbers have been added to the overdue notices produced by Voyager's Reporter module. The new copy number field has also been added to the configuration file for emailed notices.

Implementation Notes

Voyager's Circ Notices SIF and Media Notices SIF files have been updated, along with the default notice templates. New Circnotes.mdb and MedNotes.mdb file are provided with this release. Customers who have modified the overdue notice templates will need to add this modification to their customized files.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Reporter User's Guide* for more information.

Note: Due to changes in the SIF, archived Circulation and Media notices created on earlier versions of Voyager will not work with the Reporter module in version 9.1. All previous notices should be processed through Reporter before the upgrade to Voyager 9.1 begins.

Configuration of Emails from Reporter

Purpose of the Enhancement

This enhancement provides options to customize the email notices produced by Reporter.

Description

The [Common] stanza of the NoticeEmail.cfg file controls the inclusion or exclusion of details, along with the order of information in emailed notices. The order of fields in the common stanza is the order in which the fields will be included in the email notice, with the exception of Salutation, LastLine, ContactLoc, and Phone.

If an entry is excluded, it will not appear in any of the email notices.

Some entries in the [Common] section apply to certain notices; their inclusion is not a guarantee that they will display for ALL notice email types.

Implementation Notes

The NoticeEmail.cfg file is stored in the Voyager > Reporter folder on individual staff workstations.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Reporter User's Guide* for more information.

14

System Administration

This section includes the following enhancements:

- Updating Multiple Calendars
- Authority Duplicate Detection Profiles for GDC

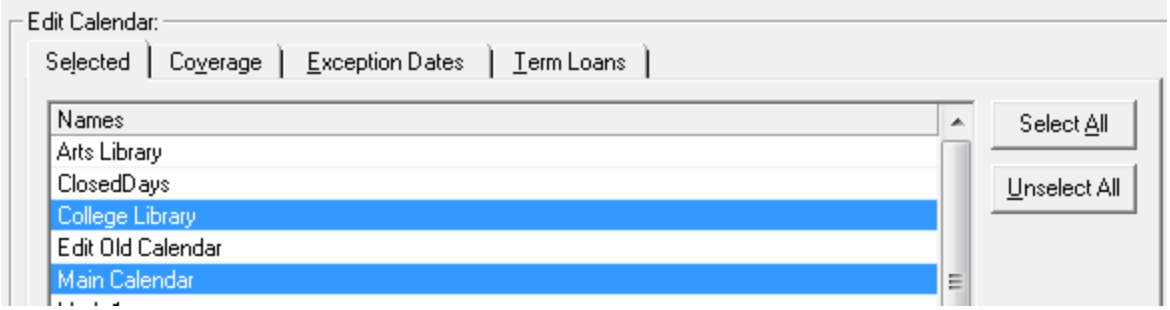
Updating Multiple Calendars

Purpose of the Enhancement

This enhancement provides the ability to update multiple circulation calendars at once.

Description

The ability to edit multiple circulation calendars has been added to the Voyager System Administration module. The fields that can be edited include start date, end date, fixed due date, exception dates (e.g. holidays), and term loans.



Implementation Notes

The "Edit Multiple" button will be active only when multiple calendars have been selected.

Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* for more information.

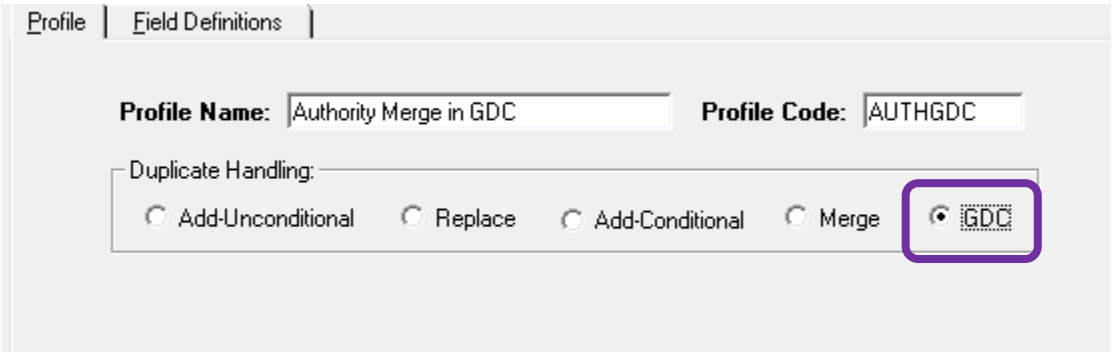
Authority Duplicate Detection Profiles for GDC

Purpose of the Enhancement

This enhancement supports the creation of authority duplicate detection profiles for use in GDC.

Description

A new option has been added to the Authority Duplicate Detection profiles to enable their use in GDC when matching a file of authority records against the Voyager database.



The "GDC" radio button must be selected for a profile to be displayed in the "Dedupe Profile" drop down in the Load Match Configuration settings in GDC.

Implementation Notes

One or more new authority duplicate detection profiles must be created for use in GDC.

Reference to Technical Documentation

Refer to the *Voyager 9.1 System Administration User's Guide* for more information.

15

Technical Enhancements

This section includes the following enhancement:

- Startup Scripts
- Index Regen

Startup Scripts

Purpose of the Enhancement

This enhancement resolves an issue that can leave Voyager disabled after a reboot.

Description

For Solaris servers, the startup script has been enhanced to automatically start Voyager upon reboot of the server after Voyager was stopped manually.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Technical User's Guide* for more information.

Index Regen

Purpose of the Enhancement

This feature checks the server to make sure adequate space exists before starting an index regen.

Description

The regen.indexes process has been enhanced to check for sufficient disk space prior to executing a regen.

Implementation Notes

This feature is automatically implemented during the regen process.

16

XML Patron Utilities

This section includes the following enhancement:

- Patron Purge by Patron ID

Patron Purge by Patron ID

Purpose of the Enhancement

This enhancement provides an option to purge patrons by patron ID.

Description

The XML patron purge program has been enhanced to include an option to purge patrons based on patron ID. A new command-line option (-i) is now available that will purge patrons based on an input file of patron IDs. This new option is also available in the WebAdmin interface.

Implementation Notes

The file of patron IDs should be supplied as a text file, one entry per line. If no file path is specified, the progam looks under $DATABASE/local.

Reference to Technical Documentation

Refer to the *Voyager 9.1 Technical User's Guide* for more information.