



Voyager 9.2 Release Notes

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1

Introduction

Voyager 9.2 offers customers new features that enrich existing functionality, improve services to users, and simplify staff workflows.

Purpose of This Document

This document lists the various enhancements and changes that are new in Voyager 9.2. You can find them listed under the following topics:

- [General](#) on page [11](#)
- [Acquisitions](#) on page [13](#)
- [Authority Control](#) on page [16](#)
- [BatchCat.dll](#) on page [23](#)
- [Cataloging](#) on page [24](#)
- [Circulation](#) on page [35](#)
- [Global Data Change \(GDC\)](#) on page [37](#)
- [System Administration](#) on page [43](#)
- [WebVoyáge](#) on page [49](#)

Voyager 9.2 Documentation

The following is a list of the primary documentation for Voyager 9.2:

- The Road to Voyager 9.2
 - Voyager 9.2 Release Notes
 - Voyager 9.2 Index Changes
-

- Voyager 9.2 Installation and Upgrade Requirements
- Voyager 9.2 User's Guides

2

General

This section includes the following enhancements:

- [Support for Windows 8.1](#)
- [Country and Language Limits in Voyager Clients](#)

Support for Windows 8.1

Purpose of the Enhancement

Support Voyager on the Windows 8.1 operating system.

Description

The Voyager 9.2 clients have been certified to run on the Windows 8.1 operating system.

Reference to Technical Documentation

Refer to *Voyager 9.2 Supported Software and PC Requirements* in the Ex Libris Documentation Center for more information.

Country and Language Limits in Voyager Clients

Purpose of the Enhancement

Update the country and language limits in the Voyager staff clients.

Description

The **country.cfg** and **limits.ini** files have been updated to reflect recent changes in the countries and languages that are used to limit search results in the Voyager staff clients.

Implementation Notes

The new configuration files will be updated when the new Voyager clients are installed on the user's workstation.

Reference to Technical Documentation

Refer to <http://www.loc.gov/marc/countries/> and <http://www.loc.gov/marc/languages/> for more information.

3

Acquisitions

This section includes the following enhancements:

- [Copy Ledger/Fund Notes During Fiscal Period Rollover](#)
- [Warning for Duplicate Invoice Numbers](#)

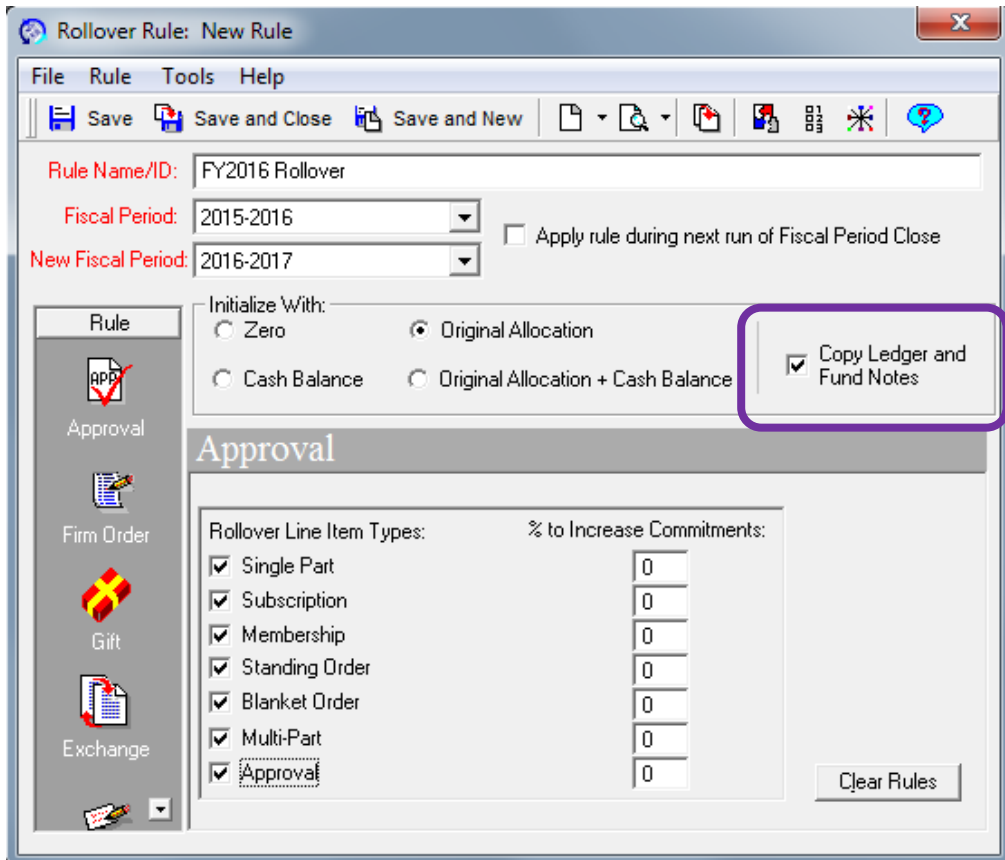
Copy Ledger/Fund Notes During Fiscal Period Rollover

Purpose of the Enhancement

The purpose of this enhancement is to make it possible to copy ledger and fund notes from the previous fiscal period to the new one.

Description

New functionality has been added to the Fiscal Period Close (FPC) process to allow users to copy the ledger and fund notes from the previous fiscal period to the ledger(s) and funds created during fiscal period rollover.



Reference to Technical Documentation

Refer to the *Voyager 9.2 Acquisitions User's Guide* for more information.

Warning for Duplicate Invoice Numbers

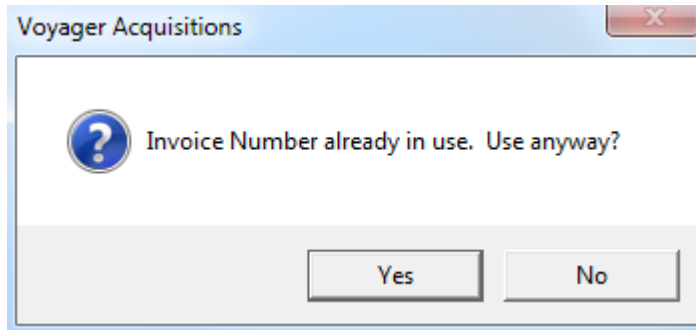
Purpose of the Enhancement

The system will alert the operator when a duplicate invoice number is entered.

Description

Voyager will warn the operator when a duplicate invoice number is entered. If the invoice is created manually, the warning will appear when the invoice header is saved. If the invoice is created from the purchase order or via EDI, the warning will appear when the operator approves the invoice.

The operator will have the chance to make the invoice number unique, or he may continue to save or approve the invoice with the duplicate number.



Reference to Technical Documentation

Refer to the *Voyager 9.2 Acquisitions User's Guide* for more information.

4

Authority Control

This section includes the following enhancements:

- [Option to Create an 035 in an Authority Record](#)
- [Identify Matching Authorities based on 1xx Fields](#)
- [Track Former Headings in 688](#)
- [Use Latest Update Date to Choose Best Record](#)
- [Discard Rule for Authority Subdivision Records](#)
- [Review and Resolve Authority Record Issues](#)

Option to Create an 035 in an Authority Record

Purpose of the Enhancement

The purpose of this enhancement is to provide an option to generate an 035 for an authority record.

Description

A new option has been added to the **Submit Auth Load Match Job** display in GDC that allows the user to choose whether or not to create an 035 tag in the authority record during the match process.

Job Management - Submit Auth Load Match Job

Job Parameters

Job Name: Weekly authority update 2015-23

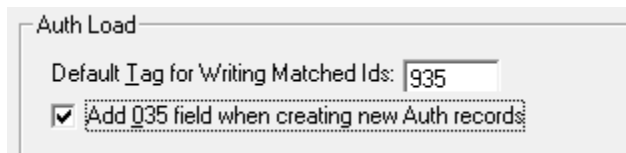
Source File: c:\users\mdicus\desktop\101096-unsub14_utf8.aut

Source File Encoding: MARC21 UTF-8

Match Configuration: Mike's auth match test load

Add 035 field when creating new Auth records

The option has also been added to the Session Defaults and Preferences in the GDC client.



Implementation Notes

When the box is checked, an 035 is generated from the 001/003 MARC fields and added to the record saved to the no-match file.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

Identify Matching Authorities Based on 1xx Fields

Purpose of the Enhancement

The purpose of this enhancement is to identify matching authority records based on 1xx field information.

Description

Thirteen new indexes have been added to Voyager to allow the user to match authority records by the headings themselves, rather than by matching standard number fields. Matching by headings is useful when authority records have been created locally and lack standard number fields.

The new indexes are:

- Auth Personal Name (100)
- Auth Corporate Name (110)
- Auth Meeting Name (111)
- Auth Uniform Title (130)
- Auth Chronological Term (148)
- Auth Topical Term (150)
- Auth Geographic Name (151)
- Auth Genre/Form Term (155)
- Auth Med of Perf Term (162)

- Auth General Subdivision (180)
- Auth Geographic Subdivision (181)
- Auth Chron Subdivision (182)
- Auth Form Subdivision (185)

Implementation Notes

As part of the upgrade process, a check is run on each database to see if the authority indexes already exist. If so, a conflict worksheet is generated. Any conflicts need to be resolved as part of the upgrade.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide*, the *Voyager 9.2 Global Data Change User's Guide*, and *Voyager Index Changes for Voyager 9.2* for more information.

Track Former Headings in the 688

Purpose of the Enhancement

This enhancement provides the option to retain an historical record of previous headings.

Description

A new option has been added to the Authority Load Merge Configuration that allows the user to copy a previous heading to the MARC 688 tag in the record.

Merge Rules:

Rule	Retention	Add \$5	Apply Only To Fields
<input type="checkbox"/> Retain Local 008/06			
<input type="checkbox"/> Retain Local 008/12			
<input type="checkbox"/> Retain Local 008/13			
043 Retention	Use incoming field		
09X Retention	Use incoming field	<input type="checkbox"/>	
0XX Retention	Use incoming field	<input type="checkbox"/>	
1XX Retention	Move old heading to 688	<input type="checkbox"/>	
2XX Retention	Use incoming field	<input type="checkbox"/>	
3XX Retention	Use incoming field	<input type="checkbox"/>	
4XX Retention	Use incoming field	<input type="checkbox"/>	
5XX Retention	Use incoming field	<input type="checkbox"/>	
6XX Retention	Retain existing field and incoming field	<input type="checkbox"/>	

Implementation Notes

This feature is available only when the merge rule is configured to retain the existing field and the incoming field.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

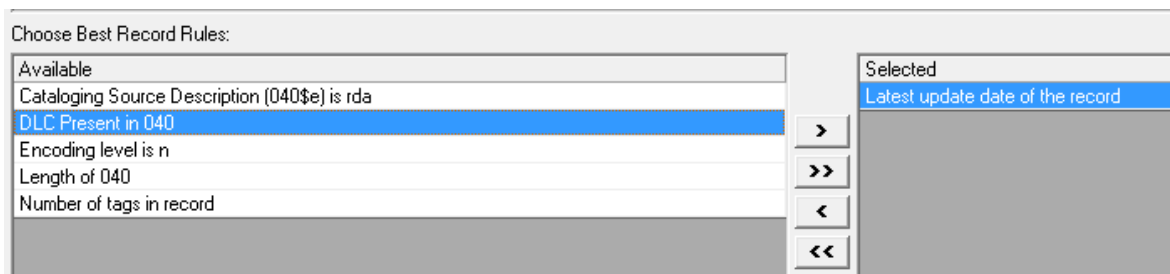
Use Latest Update Date to Choose Best Record

Purpose of the Enhancement

The purpose of this enhancement is to add a new option to identify the best record when multiples exist.

Description

A new option has been added to the Authority Load Merge Configuration that allows the user to use the **Latest Update Date** as criterion for selecting the best record.



Implementation Notes

If a record has not been updated since it was created, the create date is used for comparison.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

Discard Rule for Authority Subdivision Records

Purpose of the Enhancement

The purpose of this enhancement is to add an option to filter out subdivision records during processing.

Description

A new rule has been added to the Authority Load Match Configuration that allows the user to discard subdivision records when processing a file of authority records.

Implementation Notes

A subdivision record is defined as one that contains a 18x tag and has d in the 09 position of the MARC 008 tag.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

Review and Resolve Authority Record Issues

Purpose of the Enhancement

The purpose of this enhancement is to provide a workflow to review and resolve authority records that require some type of manual review.

Description

An Authority Load Reviewer has been added to the Cataloging module that allows the user to retrieve the output files of authority load jobs and review the results. The actions that can be taken depend on the type of result file. Generally, the user may import the record manually, find related bibliographic records, or retrieve the matching records when multiples exist. Additional buttons allow the user to claim ownership of the record, mark it as **Done** or **Do Not Process**, or clear the record status. Certain actions are only relevant for certain result types.

Authority Load Reviewer

Select Job: Auth Load Test 101 Get Job Results

Select Result Type:

- No Match (480)
- Multi-Match (3)**
- Split (0)
- Delete (0)
- Reject (0)

Filter by Bulk: All

Filter by Status: All

Filter by Owner: All

Select Record:

- Record 1 (20671)
- Record 2 (20690)**
- Record 3 (21000)

Record Status: Open Record Owner: Dicus, Mike

Tag	I1	I2	Subfield Data
000			03951nz a2200637n 4500
001			n 79129204
003			DLC
005			20121130080825.0
008			140903n azannaabn b aaa
010			‡a n 79129204 ‡z no 98020932
035			‡a (OCoLC)oca00360706
040			‡a DLC ‡b eng ‡e rda ‡c DLC ‡d DLC ‡d CtY-Mus ‡d DLC ‡d PPI-MA ‡d DLC ‡d OCoLC ‡d DLC ‡d ICU ‡d UPB ‡d DLC
046			‡f 16850223 ‡g 17590414
053	0		‡a ML410.H13 ‡c Biography
100	1		‡a Handel, George Frideric, ‡d 1685-1759
370			‡a Halle, Germany ‡b London, England
372			‡a Music
374			‡a Composer
375			‡a male
400	1		‡a Haendel, Georges-Frédéric, ‡d 1685-1759
400	1		‡a Gendel', Georg Fridrikh, ‡d 1685-1759
400	1		‡a Khendel, G. F. ‡q (Georg Fridrikh), ‡d 1685-1759
400	1		‡a Khendel, Georg Fridrikh, ‡d 1685-1759
400	1		‡w nna ‡a Händel, Georg Friedrich, ‡d 1685-1759

Import Record
 Find Related Bibs...
 Retrieve Matches
 Claim Ownership
 Do Not Process
 Mark As Done
 Clear Status

Records can be edited directly in the Cataloging module as necessary. Depending on the actions taken, further processing of the records may be done as part of the authority loader workflow in the GDC module.

Implementation Notes

In order to use these features, the Cataloging operator's profile must include the following:

- **Authority Load Reviewer** requires *Authority Record – View* permission
- **Import Record** requires *Authority Record – Add* permission
- **Find Related Bibs** requires *Bibliographic Record – View* permission
- **Retrieve Matches** requires *Authority Record – View* permission
- **Claim Ownership** requires *Authority Record – Update* permission
- **Do Not Process** requires *Authority Record – Update* permission
- **Mark as Done** requires *Authority Record – Update* permission
- **Clear Status** requires *Authority Record – Update* permission

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

5

BatchCat.dll

This section includes the following enhancements:

- [Include the “OK to Export” Flag in the BatchCat.dll](#)

Include the OK to Export Flag in the BatchCat.dll

Purpose of the Enhancement

Users will be able to update the **OK to Export** flag in MARC records using the BatchCat.dll.

Description

New optional Boolean parameters have been added to various Voyager APIs to allow the user to set the **OK to Export** flag in bibliographic, holdings, or authority records. The Add... and Update... APIs have been updated to include this new functionality.

Implementation Notes

The new parameters are called **OKtoExport** and **ExportDateToday**.

Reference to Technical Documentation

Refer to the *Voyager 9.2 BatchCat.dll Technical User's Guide* for more information.

6

Cataloging

This section includes the following enhancements:

- [Sort Tags in MARC Records](#)
- [Color Preference for MARC Tags](#)
- [Enhanced Record Navigation when Editing Records](#)
- [“Select All” Headings for GHC Processing](#)
- [Print Title on MFHD Printout](#)
- [Update “OK to Export” via Pick and Scan](#)
- [Pick and Scan Completion Message](#)
- [Preference for Overlaying a Bibliographic Record](#)
- [Find Bibs Related to an Authority Record](#)
- [MARC 21 Tag Table Updates](#)
- [Headings Thesauri Updates](#)

Sort Tags in MARC Records

Purpose of the Enhancement

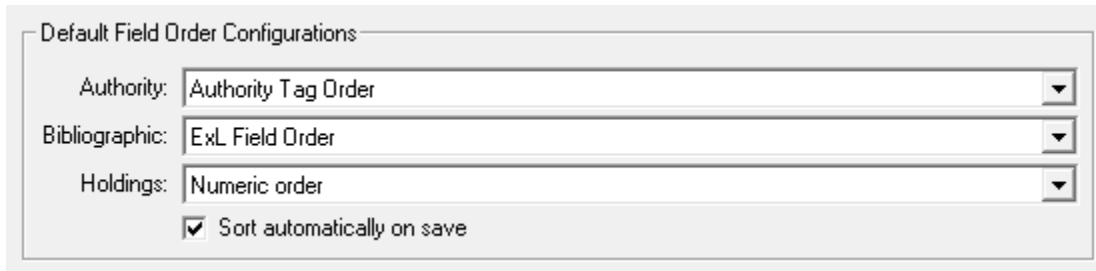
The purpose of this enhancement is to sort MARC tags into a user-defined order.

Description

Configurable options have been added to Voyager to re-order MARC tags into a user-defined sequence. The configuration is defined in the System Administration module.

Once defined, the preferred order can be applied to MARC tags automatically as the records are saved or applied upon command from the **Record** menu in the Cataloging client.

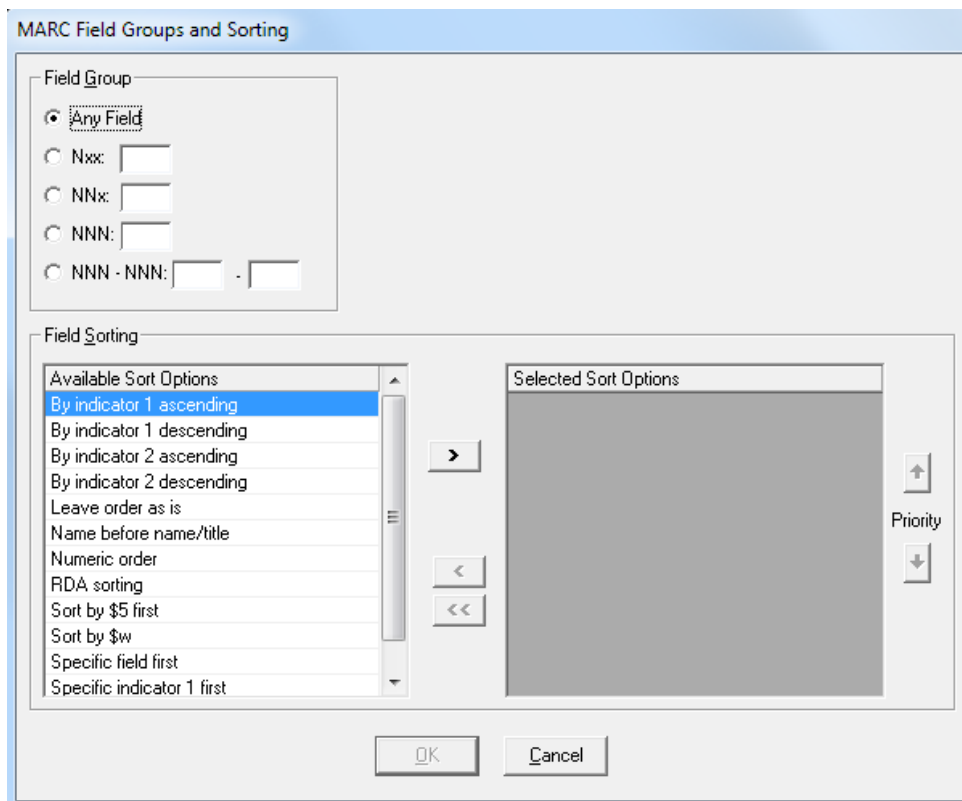
Additionally, session preferences can be set in the Cataloging client to specify the default MARC sort profile to be applied to authority, bibliographic, and holdings records.



The screenshot shows a dialog box titled "Default Field Order Configurations". It contains three dropdown menus: "Authority:" set to "Authority Tag Order", "Bibliographic:" set to "ExL Field Order", and "Holdings:" set to "Numeric order". Below these is a checked checkbox labeled "Sort automatically on save".

Implementation Notes

The library must define one or more sort order profiles in the System Administration module.



The screenshot shows a dialog box titled "MARC Field Groups and Sorting". It has two main sections: "Field Group" and "Field Sorting".

The "Field Group" section has a radio button selected for "Any Field". Below it are four other options, each with a radio button and a text input field: "Nxx:", "NNx:", "NNN:", and "NNN - NNN:". The "Any Field" option is currently selected.

The "Field Sorting" section contains two list boxes. The "Available Sort Options" list box has the following items: "By indicator 1 ascending" (highlighted), "By indicator 1 descending", "By indicator 2 ascending", "By indicator 2 descending", "Leave order as is", "Name before name/title", "Numeric order", "RDA sorting", "Sort by \$5 first", "Sort by \$w", "Specific field first", and "Specific indicator 1 first". The "Selected Sort Options" list box is currently empty. Between the list boxes are navigation buttons: a right arrow (>), a left arrow (<), and a double left arrow (<<). To the right of the "Selected Sort Options" list box are "Priority" buttons: an up arrow (↑) and a down arrow (↓).

At the bottom of the dialog box are "OK" and "Cancel" buttons.

Additionally, the IP (or domain name) and port (typically 7014) for the VXWS web services must be defined in the **Cataloging – Miscellaneous** section in Voyager System Administration.



The Voyager Tomcat services must be running to sort tags in MARC records. If you change the reorder service URL, you may need to restart the Voyager Tomcat services to see the change take effect.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* and the *Voyager 9.2 System Administration User's Guide* for more information.

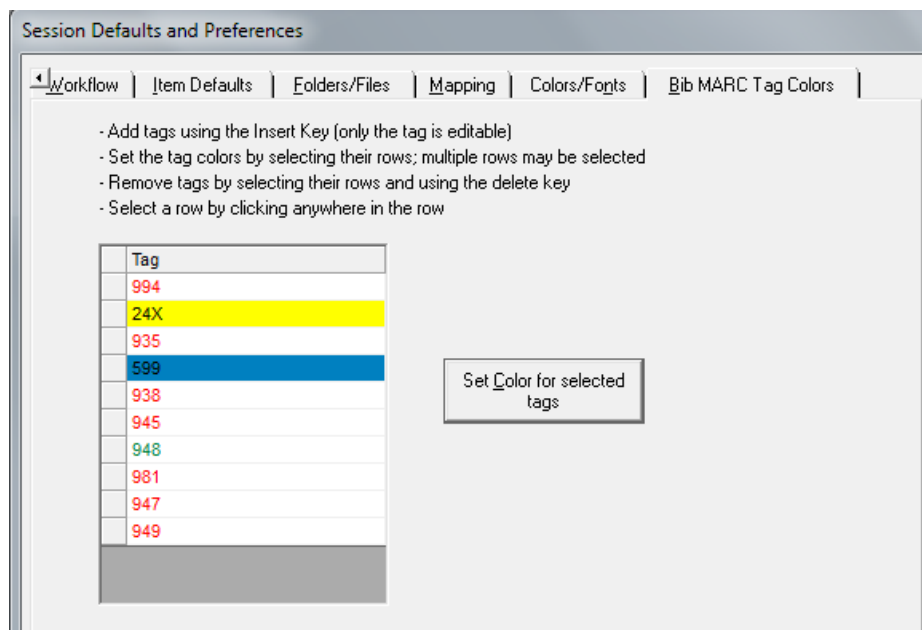
Color Preference for MARC Tags

Purpose of the Enhancement

The user can highlight various tags in the MARC record display using color preferences.

Description

The Voyager Cataloging client allows the user to define session preferences to highlight the tag numbers in the record display of MARC bibliographic records.



Once set, the tag numbers will display according to the color preferences defined by the staff user.

Tag	I1	I2	Subfield Data
015			‡a GBA469083 ‡2 bnb
016	7		‡a 012997674 ‡2 Uk
020			‡a 0812694554 (pbk.)
020			‡a 9780812694550 (pbk.)
035			‡a (OCoLC)ocm56654878
040			‡a UKM ‡c UKM
082	0	4	‡a 823.914 ‡2 22
245	0	0	‡a Harry Potter and philosophy / ‡c edited by David Baggett, Shawn Klein, William Irwin.
260			‡a Chicago, Ill. : ‡b Open Court, ‡c 2004.
→ 300			‡a 250 p. ; ‡c 23 cm.
504			‡a Includes bibliographical references and index.
600	1	0	‡a Rowling, J. K. ‡x Philosophy.
600	1	0	‡a Rowling, J. K. ‡x Characters ‡x Harry Potter.
650	0		‡a Potter, Harry (Fictitious character)
945			‡f bks
947			‡n 20040826 ‡p 20070305 ‡m 3 ‡s N
948			‡a US ‡b UT ‡c lehic ‡d LEHI CITY PUB LIBR
948			‡a GB ‡b EU ‡c ukm ‡d BRITISH LIBR ‡c reabc ‡d READING LIBRARIES
949			‡i b ‡x b ‡h 3
935			‡a (OCoLC)ocm56654878

The color preference affects only the tag column of the record display. If color preferences have been set for the MARC record display, those preferences apply to the remainder of the record display.

Implementation Notes

The MARC tags can be entered in any order in the configuration display. Multiple tags can be defined using wildcard characters (such as 1XX or 65X).

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

Enhanced Record Navigation When Editing Records

Purpose of the Enhancement

The purpose of this enhancement is to make it easier to navigate through records when editing a set of records in the Cataloging client.

Description

The Cataloging Hierarchy display has been enhanced to make editing a group of records easier. The Hierarchy display is now a free-floating window and can remain open while editing a group of records. The Hierarchy has also been made resizable so that it can be sized to display a maximum number of records.

New buttons on the Hierarchy allow the user to expand or collapse the record hierarchy with one click, and to refresh the Hierarchy display for the active record. The **Print** button allows the user to print the record hierarchy as displayed (either expanded or collapsed).

A new option has been added to Session Defaults and Preferences > Workflow to **Retain hierarchy selections**. When this option is checked, records highlighted in the Hierarchy window will still be selected when the user returns to the Hierarchy display. When this option is not checked, no records are highlighted when the user returns to the Hierarchy display, thus allowing the user to select and retrieve new records each time.

Bib ID	Title	Owning Library
73989	African-American culture and history : a student's guide / Jack Salzman, editor-in-chief.	Training Master DB

MFHD ID	Location	Call Number	Order Status
71599	Main Stacks	E185 .A2627 2001	
71600	Reference Department	E185 .A2627 2001	

Item ID	Location	Item Type	Enum/Chron/Year	Copy	Item Status	Item Barcode
77100	Main Stacks [P]	Book	v.1	1	Not Charged	45601
77101	Main Stacks [P]	Book	v.2	1	Not Charged	45603
77102	Main Stacks [P]	Book	v.3	1	Not Charged	45605
77103	Main Stacks [P]	Book	v.4	1	Not Charged	45609
77107	Reference Department [P]	nocirc	v.1	1	Not Charged	999902
77106	Reference Department [P]	nocirc	v.2	1	Not Charged	999904
77105	Reference Department [P]	nocirc	v.3	1	Not Charged	999906
77104	Reference Department [P]	nocirc	v.4	1	Not Charged	999908

Implementation Notes

Only one record hierarchy can be displayed at a time.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

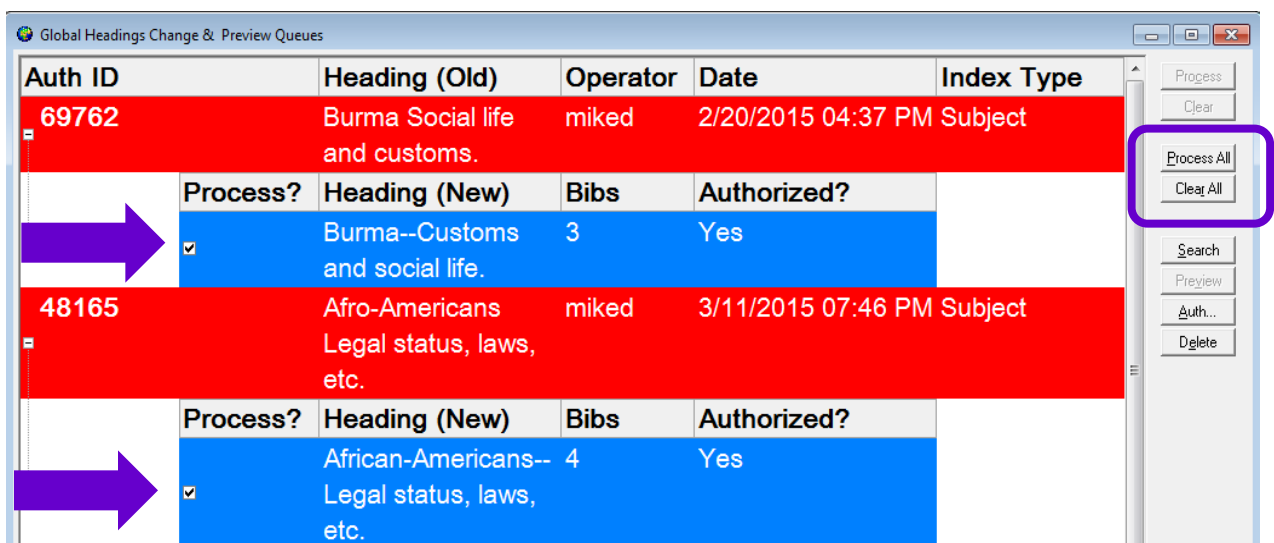
Select All Headings for GHC Processing

Purpose of the Enhancement

The purpose of this enhancement is to allow the user to select or unselect all headings for GHC processing.

Description

The global headings change queue now offers **Process All** and **Clear All** options to make it easy to mark or clear all headings in the queue for processing.



The screenshot shows a window titled "Global Headings Change & Preview Queues". It contains a table with columns: Auth ID, Heading (Old), Operator, Date, Index Type, Process?, Heading (New), Bibs, and Authorized?. The table has two main rows, each with a red header row and a blue data row. The first row has Auth ID 69762, Heading (Old) "Burma Social life and customs.", Operator "miked", Date "2/20/2015 04:37 PM", Index Type "Subject", and a blue data row with "Burma--Customs and social life.", Bibs "3", and Authorized? "Yes". The second row has Auth ID 48165, Heading (Old) "Afro-Americans Legal status, laws, etc.", Operator "miked", Date "3/11/2015 07:46 PM", Index Type "Subject", and a blue data row with "African-Americans-- Legal status, laws, etc.", Bibs "4", and Authorized? "Yes". Two purple arrows point to the "Process?" checkboxes in the blue data rows. On the right side of the window, there is a sidebar with buttons: "Process", "Clear", "Process All", "Clear All", "Search", "Preview", "Auth...", and "Delete". The "Process All" and "Clear All" buttons are circled in purple.

Auth ID	Heading (Old)	Operator	Date	Index Type	Process?	Heading (New)	Bibs	Authorized?
69762	Burma Social life and customs.	miked	2/20/2015 04:37 PM	Subject	<input type="checkbox"/>	Burma--Customs and social life.	3	Yes
48165	Afro-Americans Legal status, laws, etc.	miked	3/11/2015 07:46 PM	Subject	<input type="checkbox"/>	African-Americans-- Legal status, laws, etc.	4	Yes

Implementation Notes

Catjob 11 must be run before the records can be marked for processing.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

Print Title on MFHD Printout

Purpose of the Enhancement

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

Description

The title from the associated bibliographic record now prints at the bottom of the MFHD printout.

Update OK to Export via Pick and Scan

Purpose of the Enhancement

The purpose of this enhancement is to provide an option to update the **OK to Export** flag for a batch of records.

Description

Pick and Scan now provides the option to update the **OK to Export** flag for a group of records. The change can be applied to bibliographic and holdings records.



The screenshot shows a dialog box titled "OK to Export". Inside the dialog, there are two dropdown menus. The first is labeled "Bib:" and the second is labeled "MFHD:". Both dropdown menus are currently set to "No Change".

The update options are: No Change, No, Yes, and Yes and Change Date.

When **Yes, and change date** is selected, the **OK to Export** date is set to the current date.

Implementation Notes

The **OK to Export** flag can also be updated on a group of records via the BatchCat.dll or through Global Data Change.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

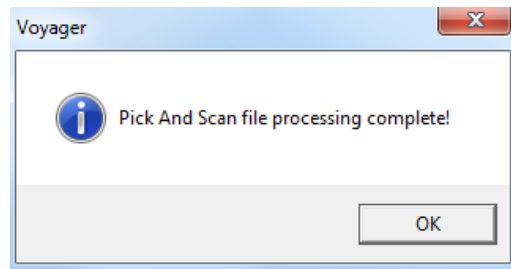
Pick and Scan Completion Message

Purpose of the Enhancement

The purpose of this enhancement is to display a message to the user when file processing is complete.

Description

Pick and Scan displays a completion message to the user when a batch file has been processed.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

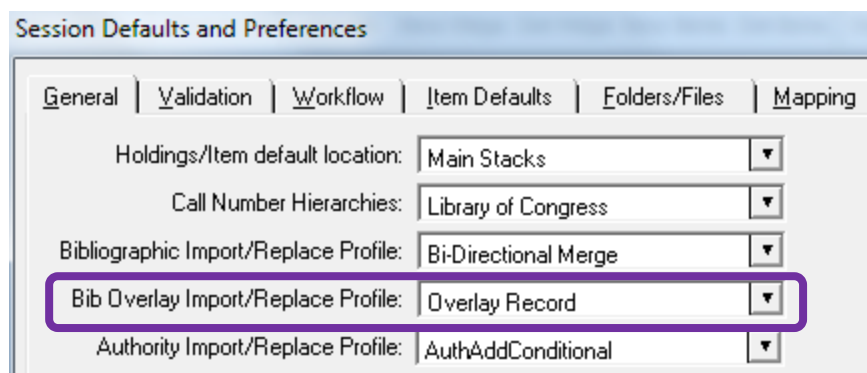
Preference for Overlaying a Bibliographic Record

Purpose of the Enhancement

The purpose of this enhancement is to set a default profile when overlaying an existing record with another.

Description

A new default option has been added to the Session Defaults and Preferences in the Cataloging client that allows the staff user to set a default profile that is used when overlaying an existing bibliographic record with another. The user still has the option to select a different duplicate detection profile during the transaction.



Implementation Notes

The user must set the **Bib Overlay Import/Replace Profile** on the General tab in the Session Defaults and Preferences.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

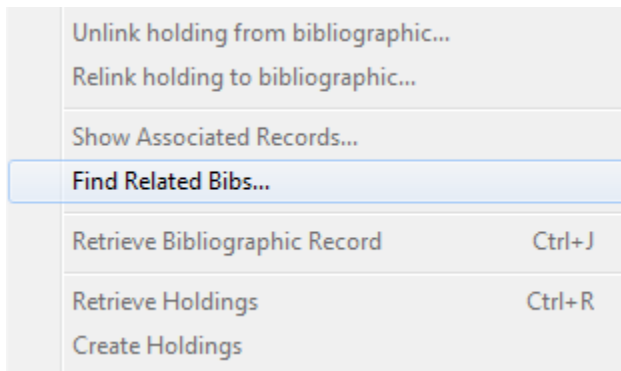
Find Bibs Related to an Authority Record

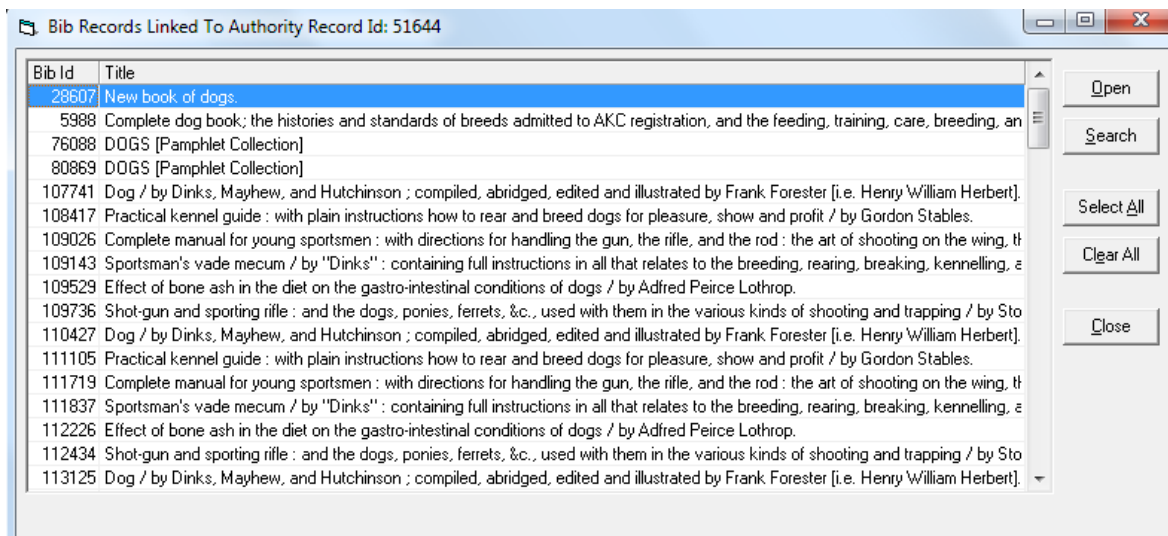
Purpose of the Enhancement

The purpose of this enhancement is to provide a list of bibliographic records that are linked to an authority record.

Description

A new feature has been added to the **Record** menu in the Cataloging client. When viewing an authority record, an option to **Find Related Bibs** is available. This new option gives the staff user a list of bibliographic records that are linked to the authority, and lets the user select one or more of the bibliographic records to view or edit.





Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

MARC 21 Tag Table Updates

Purpose of the Enhancement

The MARC 21 tag tables have been updated based on recent changes to the MARC standard.

Description

The MARC 21 tag tables have been updated as a result of MARC 21 Update 20 (April 2015) and MARC 21 Update 21 (September 2015).

Implementation Notes

Tag table changes were implemented for MARC 21 bibliographic, holdings, and authority records.

Reference to Technical Documentation

Refer to <http://www.loc.gov/marc/status.html> for more information.

Headings Thesauri Updates

Purpose of the Enhancement

The HEADING_TYPE table has been updated with the latest additions and changes to thesaurus names.

Description

Additional headings thesauri have been added to the HEADING_TYPE table based on changes through March 13, 2015.

Implementation Notes

The new headings types are suppressed by default. Libraries that want to use a particular thesaurus or thesauri need to unsuppress them via System Administration.

Reference to Technical Documentation

Refer to <http://www.loc.gov/marc/marcginf.html> for more information.

7

Circulation

This section includes the following enhancements:

- [Update OK to Export via Pick and Scan](#)
- [Pick and Scan Completion Message](#)

Update OK to Export via Pick and Scan

Purpose of the Enhancement

The purpose of this enhancement is to provide an option to update the **OK to Export** flag for a batch of records.

Description

Pick and Scan now provides the option to update the **OK to Export** flag for a group of records. The change can be applied to bibliographic and holdings records.



The screenshot shows a dialog box titled "OK to Export". Inside the dialog, there are two dropdown menus. The first is labeled "Bib:" and the second is labeled "MFHD:". Both dropdown menus currently display "No Change".

The update options are: No Change, No, Yes, and Yes and Change Date.

When **Yes, and change date** is selected, the **OK to Export** date is set to the current date.

Implementation Notes

The **OK to Export** flag can also be updated on a group of records via the BatchCat.dll or through Global Data Change.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

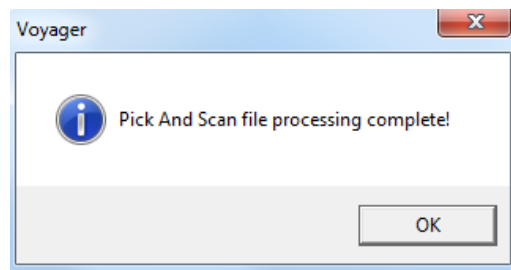
Pick and Scan Completion Message

Purpose of the Enhancement

The purpose of this enhancement is to display a message to the user when file processing is complete.

Description

Pick and Scan displays a completion message to the user when a batch file has been processed.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Cataloging User's Guide* for more information.

8

Global Data Change (GDC)

This section includes the following enhancement:

- [Update OK to Export via GDC](#)
- [Change Owning Library via GDC](#)
- [Process Records with Different Encodings in GDC](#)
- [Sort Tags in MARC Records](#)

Update OK to Export via GDC

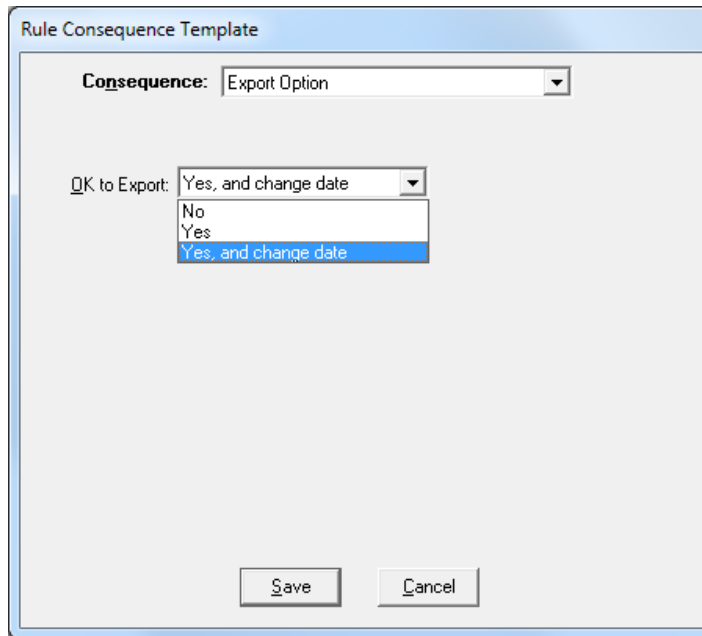
Purpose of the Enhancement

The purpose of this enhancement is to provide an option to update the **OK to Export** flag for a batch of records.

Description

Global Data Change (GDC) now provides the option to update the **OK to Export** flag for a group of records. The change can be applied to bibliographic or holdings records, or both.

The update is made by selecting the rule consequence of **Export option** and then selecting from the **OK to Export** options. The update options are: No, Yes, and Yes, and change date.



When **Yes, and change date** is selected, the **OK to Export** date is set to the current date.

Implementation Notes

The **OK to Export** flag can also be updated on a group of records via the BatchCat.dll or Pick and Scan.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

Change Owning Library via GDC

Purpose of the Enhancement

The purpose of this enhancement is to add an option to change the owning library for a batch of records.

Description

A new rule consequence has been added to the GDC client to allow the user to change the owning library for a set of records.

Rule Consequence Template

Consequence: Change Owning Library

Change Owning Library

The owning library must be submitted when the data change rule is run.

Job Management - Submit Data Change Job

Job Parameters

Job Name: Change owning library from A to B

Record Set Name: Chemistry books

Rule Set Group Name: Update Owning Library

Field Order Configuration: MD sort by groups

Update Location: Cataloging Desk

Change Owning Library: North Campus

Run Job: Now Later: 6/18/2015 11:46 AM

Implementation Notes

The Change Owning Library rule must be included in a rule set in order for the Owning Library dropdown to appear.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

Process Records with Different Encodings in GDC

Purpose of the Enhancement

The purpose of this enhancement is to allow the user to process files of MARC records with different encodings (MARC-8, UTF-8, etc.)

Description

A new parameter has been added to Job Management that allows the user to specify the file encoding of the source file being submitted through GDC. The options are:

- Latin-1 (non-Unicode)
- MARC21 MARC-8 (non-Unicode)
- MARC21 UTF-8
- OCLC (non-Unicode)
- RLIN legacy (non-Unicode)
- Voyager legacy (non-Unicode)

The encoding can be specified for files of records submitted for creating a record set by matching or for authority files submitted for processing.

Job Management - Submit Match Job

Job Parameters

Job Name:

Record **T**ype: Bib

Source **F**ile:

Source **F**ile **E**ncoding: MARC21 UTF-8

Job Management - Submit Auth Load Match Job

Job Parameters

Job Name:

Source **F**ile:

Source **F**ile **E**ncoding: MARC21 UTF-8

Match **C**onfiguration:

Add 035 field when creating new Auth records

Run **J**ob: Now Later:

Implementation Notes

A session preference has also been added to the GDC client to allow the user to set a default value for source file encoding.

Default MARC Records **E**ncoding:

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* for more information.

Sort Tags in MARC Records

Purpose of the Enhancement

The purpose of this enhancement is to sort MARC tags into a user-defined order.

Description

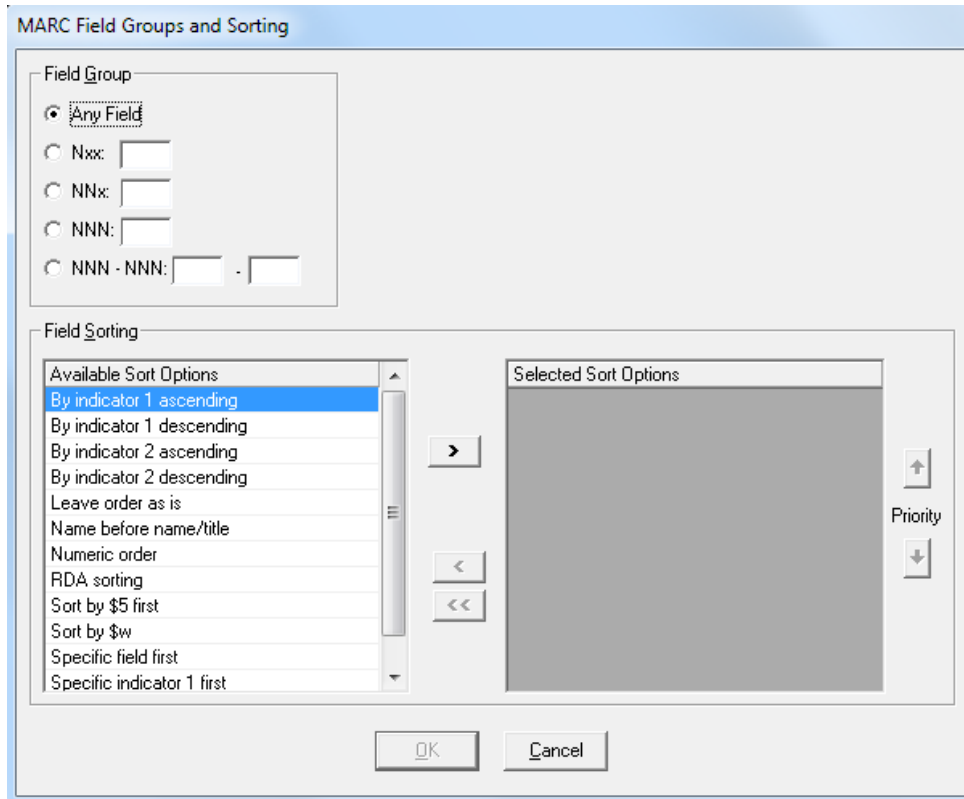
Configurable options have been added to Voyager to reorder MARC tags into a user-defined sequence. The configuration is defined in the System Administration module.

The field order configuration is selected when a Data Change job is submitted.

Records processed by data change jobs put the MARC fields in order according to the field order profile selected.

Implementation Notes

The library must define one or more field order profiles in the System Administration module.



Additionally, the IP (or domain name) and port (typically 7014) for the VXWS web services must be defined in the **Cataloging – Miscellaneous** section in Voyager System Administration.



The Voyager Tomcat services must be running to sort tags in MARC records. If you change the reorder service URL, you may need to restart the Voyager Tomcat services to see the change take effect.

Reference to Technical Documentation

Refer to the *Voyager 9.2 Global Data Change User's Guide* and the *Voyager 9.2 System Administration User's Guide* for more information.

9

System Administration

This section includes the following enhancements:

- [Enhance Search Results to Display RDA Data](#)
- [Block Operators from Changing Their Passwords](#)
- [Security for Deleting Serials Components](#)
- [Security for Overlaying Existing Bibliographic Records](#)
- [Display the Call Number Hierarchy in the Mapping Tab for Bulk Import](#)
- [Enhanced Mapping for Item Information in Bulk Import](#)

Enhance Search Results to Display RDA Data

Purpose of the Enhancement

This enhancement provides the ability to include RDA data with the title information in the search results display.

Description

The search results display can be configured to include content type, media type, and carrier type information along with the title information in the Voyager staff client and the WebVoyage OPAC.

To include the RDA information, the search results must include the Title field, and the relevant information must be present in the record.

The library may configure the search results to display the text (subfield a), the code (subfield b), or both values. If the MARC field is repeated, only the first value will be displayed.

Implementation Notes

The record must also contain `rda` in an 040 subfield `e` in order for the information to be displayed.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

Block Operators from Changing Their Passwords

Purpose of the Enhancement

This enhancement allows the library to restrict certain operators from changing their login passwords via the client.

Description

A new option has been added to the operator security profiles to restrict a user's ability to change his password.

The screenshot shows the 'Edit Operator Profile' window with the 'Operator' tab active. The 'First Name' field contains 'Student' and the 'Last Name' field contains 'Worker'. The 'ID' field contains 'student'. The 'Status' is set to 'Active'. A 'Change Password...' button is located to the right of the ID field. Below the ID field, there are two checkboxes: 'This password never expires' (unchecked) and 'Restrict password change' (checked). The 'Restrict password change' checkbox is highlighted with a purple border. At the bottom of the window, there are buttons for 'Lockout Status...' and 'Expire Account Now'.

When the **Restrict password change** option is checked, the **Change password** option is hidden in the staff client menus when this operator is logged in.

Implementation Notes

The restrict password change option must be set on operator profiles as necessary after upgrade.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

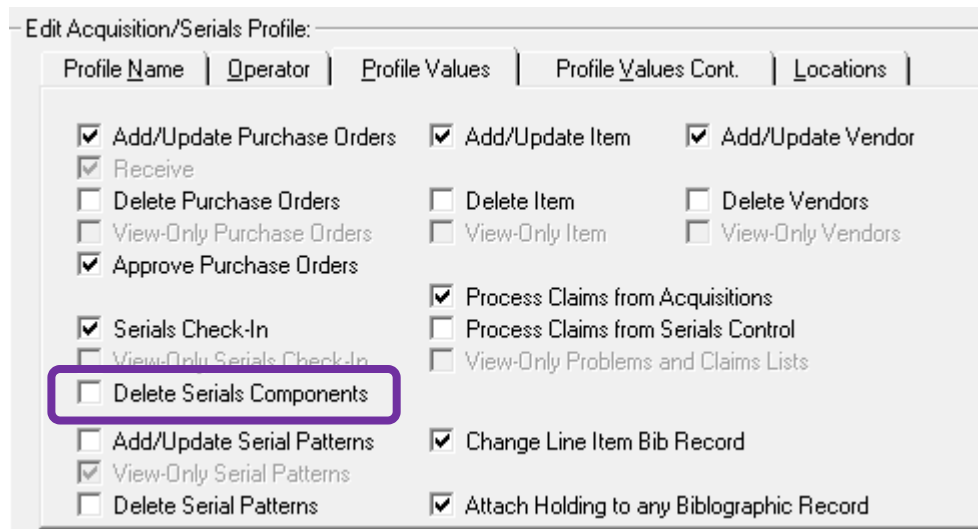
Security for Deleting Serials Components

Purpose of the Enhancement

A new security option has been added to control who can delete a serial component.

Description

A new option has been added to the Acquisitions operator profiles to give operators the ability to delete serials components.



Implementation Notes

The **Delete Serials Components** option must be enabled on operator profiles as necessary after upgrade.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

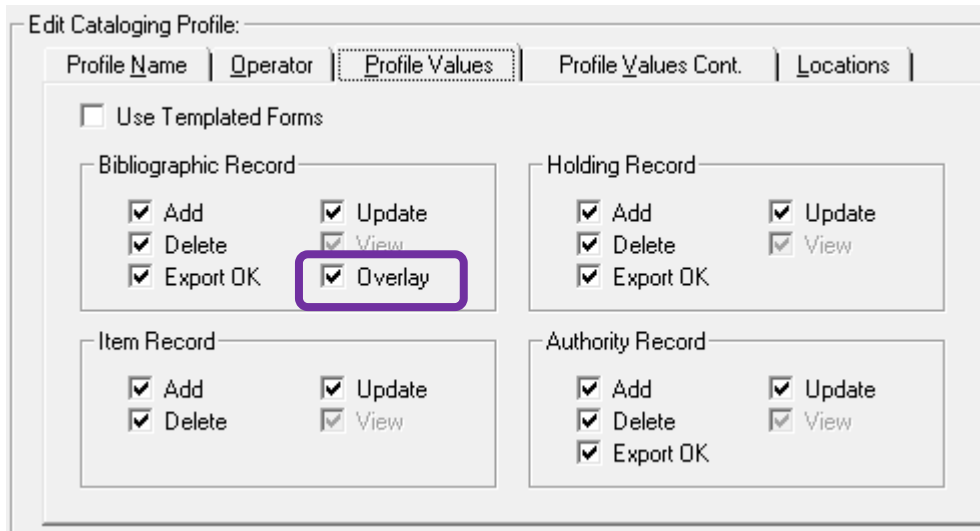
Security for Overlaying Existing Bibliographic Records

Purpose of the Enhancement

A new security option has been added to control who can overlay or merge existing bibliographic records.

Description

A new option has been added to the Cataloging operator profiles to explicitly give operators the ability to overlay or merge existing bibliographic records.



Implementation Notes

The **Overlay** option must be enabled on operator profiles as necessary after upgrade.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

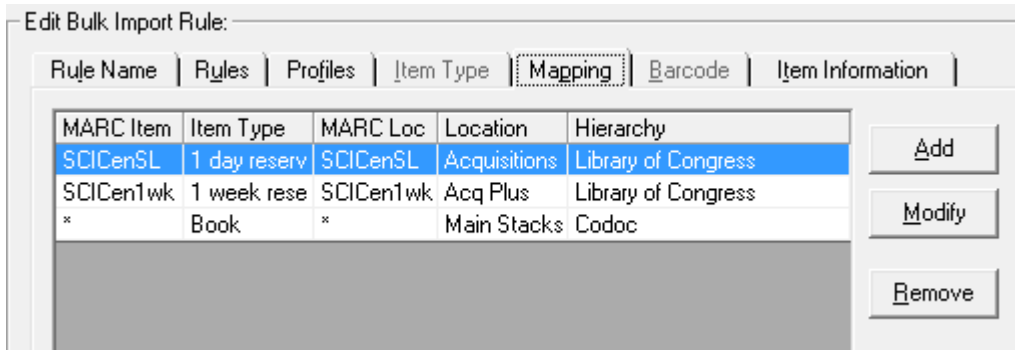
Display the Call Number Hierarchy in the Mapping Tab for Bulk Import

Purpose of the Enhancement

This enhancement makes it easy for an operator to identify which call number hierarchy is used in a bulk import profile.

Description

The selected call number hierarchy is now displayed on the Mapping tab in the bulk import profile. This makes it easy for an operator to know which call number hierarchy will be used when importing a file of MARC records.



Implementation Notes

The call number hierarchy must be selected through the **Add** or **Modify** button on the Mapping tab.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

Enhanced Mapping for Item Information in Bulk Import

Purpose of the Enhancement

Additional fields have been added to the bulk import profile to allow mapping of more item and holdings data.

Description

New mapping fields have been added to the bulk import profile to facilitate creating holdings and items using the **Multiple MFHD** configuration.

New fields have been added to save holdings information in various 852 subfields, as well as new item fields for price, charge note, copy number, pieces, caption, and free text. To remain consistent with recent developments, the copy number may be mapped from a specific MARC field, or it may be generated based on a library-defined configuration.

Multiple MFHD

MFHD

Main Tag:

Main Tag ind1: Main Tag ind2:

Subfields for Item Fields

Location code: Barcode:

Item type: Item note:

Enum: Charge note:

Chron: Caption:

Year: Freetext:

Pieces: Price:

Copy number:

If Copy Number Not Present or Not Specified Above

Single Copy = 0; Multiple Copy = 1, 2, 3...

Sequentially number copies starting with

Number all copies

Additional 852 Subfields, if desired

When MFHD grouping is used, the information from the first item tag of the group will be used in the following subfields:

- \$b is assigned from the location mapping
- call numbers in \$h and \$i are assigned through the Call Number hierarchy

Indicate the item tag subfield whose contents will be placed in the following 852 subfields. For example, if the item tag subfield c contains the copy number, you want that to be put into 852 \$t - so place 'c' in the box next to 'copy number (\$t)'.

Shelving control number (\$i): Shelving form of title (\$l):

Call number prefix (\$k): Call number suffix (\$m):

Non-public note (\$x): Public note (\$z):

Copy number (\$t):

Piece designation, e.g. barcode, if you want the barcode in the holding record (\$p):

Create a MFHD for each location and group items with same location under that MFHD

Create a MFHD for each instance of a location code tag

Implementation Notes

After upgrade, existing bulk import profiles should be reviewed and adjusted as necessary.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

10

WebVoyage

This section includes the following enhancements:

- [Display Content Type, Media Type, and Carrier Type in Search Results](#)
- [Country and Language Limits in WebVoyage](#)

Display Content Type, Media Type, and Carrier Type in Search Results

Purpose of the Enhancement

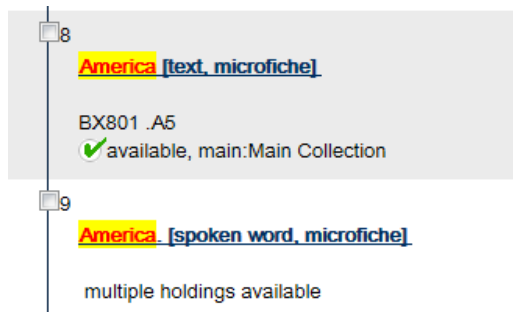
This enhancement provides the ability to include RDA data with the title information in the search results display.

Description

The search results display can be configured to include content type, media type, and carrier type information along with the title information in the WebVoyage OPAC.

To include the RDA information, the search results must include the Title field, and the relevant information must be present in the record. The record must also contain `rda` in an 040 subfield `e` in order for the information to be displayed.

The library may configure the search results to display the text (subfield `a`), the code (subfield `b`), or both values. If the MARC field is repeated, only the first value is displayed.



Implementation Notes

The RDA values can be added to the search results via the System Administration module > Search > Indexes... configuration.

Reference to Technical Documentation

Refer to the *Voyager 9.2 System Administration User's Guide* for more information.

Country and Language Limits in WebVoyage

Purpose of the Enhancement

Update the country and language limits in the Voyager OPAC.

Description

The **limits.xml** files has been updated to reflect recent changes in the countries and languages that are used to limit search results in WebVoyage.

Implementation Notes

The library may restore previous WebVoyage skin files during the upgrade. If the previous files were restored, the new **limits.xml** file will need to be copied into the configuration files for WebVoyage.

Reference to Technical Documentation

Refer to <http://www.loc.gov/marc/countries/> and <http://www.loc.gov/marc/languages/> for more information.