



Voyager Product Update

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Agenda

- Voyager today
 - Highlights of 9.0
- A sneak peek
 - New features in 9.1
- Voyager's roadmap
 - Future releases



Agenda

- Voyager today
 - Highlights of 9.0
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- Voyager's roadmap
 - Future releases



What's New in Voyager?



- Version 7.x
 - 114 customer-requested enhancements
 - Re-designed WebVoyáge
 - Web Services
 - Linux platform
 - OPAC via Primo
 - Voyager Installation Kit (The VIK)
- Voyager 8.x
 - 154 customer-requested enhancements
 - GDC module
 - Client Auto-Update
 - Enhanced operator security
 - XML patron loader
 - UTIL menu
- Voyager 9.x
 - 79+ customer-requested enhancements
 - Pick & Scan 2.0
 - GDC Export
 - Updated support for standards
 - New patron request workflows
 - And more to come...



Voyager 9

- “Big Bang” project in Voyager 9
 - Enrich batch update features
- Additional highlights in this release:
 - Improve service to users
 - Fulfill customer requests
 - Increase support for standards
 - Enhance stability and system performance
- Release announced **18 March 2014**



Overview - Batch Update Enhancements in v9

- Started a series of projects to enhance batch update capabilities in Voyager
- New features incorporated into existing functionality
 - Bulk import
 - Pick and Scan
 - Global Data Change
- More to come in future releases



Bulk Import Enhancements in v9

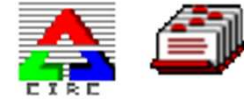
- Bulk Import
 - Option to NOT create an 035 tag upon import
 - Option to check for 035 upon import/replace
 - New **-C** parameter (note case)
 - Says to check for 035 and if one is found, do not create a new one

Don't create 035 during import of bib ? optional -- default: create 035 when importing bib

- Change Default Setting to -X NOKEY
 - Keyword indexes off by default for imports
 - Use -K ADDKEY now to index, instead of -X NOKEY
 - Applies to command-line imports and when using WebAdmin (also default in GDC)

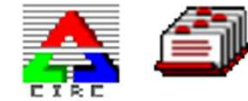
Generate Keyword Index? Default is no keyword index generated

Introducing Voyager Pick & Scan 2.0



- Pick and Scan
 - More update/delete options
 - Options to delete empty holdings and bibs
 - Input by Item Barcode, Item ID, MFHD ID, or Bib ID
 - Ability to change related records
 - Preview changes
 - New logging options
 - Manage logs via the clients

Introducing Pick & Scan 2.0



- New update/delete options, new layout, new tabs

Pick And Scan

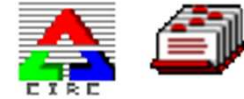
Changes To Make	Records To Change	Logs
<p>Locations</p> <p>Permanent: <input type="text" value="No Change"/></p> <p>Temporary: <input type="text" value="No Change"/></p>	<p>Copy Number</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Reset to 0 (zero) <input type="radio"/> Replace with: <input type="text"/></p>	<p>Delete</p> <p><input type="checkbox"/> Item <input type="checkbox"/> Empty holdings <input type="checkbox"/> Empty bibs</p>
<p>Types</p> <p>Permanent: <input type="text" value="No Change"/></p> <p>Temporary: <input type="text" value="No Change"/></p> <p>Media: <input type="text" value="No Change"/></p>	<p>Item Status</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Add selected <input type="radio"/> Remove selected <input type="radio"/> Delete existing, add selected</p> <p><input type="text" value="In Transit"/> <input type="text" value="Missing"/> <input type="text" value="Lost--Library Applied"/> <input type="text" value="Claims Returned"/> <input type="text" value="Damaged"/> <input type="text" value="Withdrawn"/> <input type="text" value="At Bindery"/> <input type="text" value="Cataloging Review"/></p> <p>0 selected <input type="button" value="Clear"/></p>	<p>Suppress from OPAC</p> <p>Bib: <input type="text" value="No Change"/></p> <p>MFHD: <input type="text" value="No Change"/></p>
<p>Self Check</p> <p>Magnetic Media: <input type="text" value="No Change"/></p> <p>Sensitize: <input type="text" value="No Change"/></p>	<p>Pieces</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Reset to 1 (one) <input type="radio"/> Replace with: <input type="text"/></p>	<p>Holding Location</p> <p><input type="text" value="No Change"/></p>
<p>Item Price</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Reset to 0 (zero) <input type="radio"/> Replace with: <input type="text" value="\$0.00"/></p>	<p>Statistical Categories</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Add selected <input type="radio"/> Remove selected <input type="radio"/> Delete existing, add selected</p> <p><input type="text" value="Art"/> <input type="text" value="Mathematics"/> <input type="text" value="History"/> <input type="text" value="Literature"/> <input type="text" value="Sociology"/> <input type="text" value="Psychology"/> <input type="text" value="Theology"/> <input type="text" value="Philosophy"/></p> <p>0 selected <input type="button" value="Clear"/></p>	<p>852 subfield k</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Delete <input type="radio"/> Replace with:</p> <p><input type="text"/></p>
<p>Item Free Text</p> <p><input checked="" type="radio"/> No Change <input type="radio"/> Clear <input type="radio"/> Append: <input type="radio"/> Replace with:</p> <p><input type="text"/></p>		

Security for Pick & Scan 2.0



- **Cataloging** and **Circulation** operators need to be able to:
 - Add/update item records
 - Set/change item status (sep. in Circ only)
 - Delete item records
 - Update holdings records
 - Delete holdings records
 - Delete bibliographic records
- Pick & Scan will check permissions to know what the user can do and display options accordingly

Pick & Scan 2.0

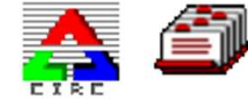


- Some new features require new settings in Sys Admin for **Circulation** operators

- Pre-9.0:
 - Update Holding Location With Pick And Scan
 - Delete Item Records

- 9.0 +:
 - Update Holding Record With Pick And Scan
 - Delete Item Records
 - Delete Holdings Records
 - Delete Bibliographic Records

Great Power in Pick & Scan 2.0



- Use different inputs, Change related records, Preview, and "Stop processing on error"

Pick And Scan

Changes To Make | Records To Change | Logs

Record Identifier

Item Barcode Holdings ID
 Item ID Bibliographic ID

Perform changes against

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

What to do

Update Database
 Preview
 Stop processing upon first error encountered when processing a file of records

Identifier: File: ...

	Before	After (if changed)
Item ID:	77100	
Barcode:	45601	
Title:	African-American culture and history : a student's guide / Jack Salzman, editor-in-chief.	
Enum/Chron:	v.1	
Call Number:	E185 .A2527 2001	
Call Number Prefix:		
Holding Location:	Juvenile Education	Main Stacks
Permanent Location:	Juvenile Education	Main Stacks
Temporary Location:		
Permanent Type:	1 week reserve item	Book
Temporary Type:		
Media Type:		
Item Status:	Overdue, Lost--System Applied	
Statistical Categories:		
Magnetic Media:	No	
Sensitize:	Yes	
Free Text:		
Copy Number:	1	
Pieces Number:	1	
Price:	0.00	
MFHD ID 71599:	Unsuppressed	
Bib ID 73989:	Unsuppressed	
Update Bib Status:	N/A	
Update Holding Status:	Processed.	
Update Item Status:	Processed.	

New Logging in Pick & Scan 2.0



Pick And Scan

Changes To Make | Records To Change | Logs

Logging Preferences

- Locally log any problems
- Locally log QCLC numbers for deleted & suppressed bibliographic records

Log Folder: C:\Voyager900\Logs

Save

Server Logs

- PASLog.3017.20131008141547
- PASLog.3182.20131008144319
- PASLog.3182.20131008144546
- PASLog.3182.20131008144908
- PASLog.3182.20131008145113
- PASLog.3338.20131008145356
- PASLog.3338.20131008145535
- PASLog.3338.20131008150115
- PASLog.3694.20131008152918
- PASLog.3694.20131008153006
- PASLog.3958.20131008154648
- PASLog.3958.20131008154721
- PASLog.8286.20131011144859
- PASLog.27987.20131009081337
- PASLog.27987.20131009081452
- PASLog.27987.20131009081532
- PASLog.27987.20131009081649
- PASLog.27987.20131009081717
- PASLog.27987.20131009081750
- PASLog.27987.20131009081845
- PASLog.27987.20131009081957
- PASLog.28365.20131009092336
- PASLog.28365.20131009092448
- PASLog.28587.20131009095500
- PASLog.28867.20131009095755
- PASLog.31351.20131009101100
- PASLog.31351.20131009101153
- PASLog.31351.20131009101301
- PASLog.31351.20131009101351
- PASLog.31811.20131009102806
- PASLog.31811.20131009102844

Select All

Unselect All

Get Log

Delete

Close

Global Data Change



- Global Data Change enhancements
 - New record set creation options
 - Improvements in record delete
 - Options to suppress/unsuppress bibs and holdings
 - Export record sets and MARC files

Create Record Sets Using GDC



- Record selection criteria currently includes:
 - Select records by create and update date
 - Select records by create and update operator
 - Select records by record number range
 - Select records by call number prefix (MFHD 852\$k)
 - Select records by MFHD location (852\$b)
 - Select records by record type and bibliographic level
 - Select records by call number type based on indicator value
 - Select records by headings values
 - And many others...

New Ways to Create Record Sets Using GDC



- Create record set by matching external MARC file
 - Useful when working with vendor-supplied files
 - Record set will be created for all matches found, even if there are duplicate records in the db

Job Management - Submit Match Job

Job Parameters

Job Name:

Record **T**ype: Bib

Source File: ...

Save Matching Records Into

Existing Set:

New Set:

New Ways to Create Record Sets Using GDC



- New 'Scan' options to create record sets by specifying owning library criteria
 - Owning library
 - Bib
 - MFHD
- Use criteria to include or exclude records from record sets

Rule Condition Template

Condition: Owning Library

Include
 Exclude

Owning Libraries:

- Law Library
- Main Library
- Medical Library
- Music Library

Save Cancel

New Delete, Suppress, Unsuppress in GDC



- New options for rule consequences
- Possible to delete hierarchies of records
- Records that can't be deleted will automatically be suppressed

Rule Consequence Template

Consequence: Record Disposition

Changed

Delete

Delete All

Suppress

Suppress All

Unsuppress

Unsuppress All

Error

Save Cancel

Export Records from GDC to Use Elsewhere



- Export Record Sets or MARC records – or both

Record Sets - View/Edit

Name	Record Type	Records In Set
J17856	Bib	93
J1N27858	Bib	987
J1N47859	Bib	994
Journal of Company Law (and other large sets)	Bib	2
library has	Mfhd	5
Mark Before Date Scan Set	Bib	54659
Mark Date Scan Test	Bib	2973
Mark Scan Date After	Bib	47206
MarkBeforeAfter	Bib	101865
Mark's Export/Import test	Bib	82909
match job 1	Bib	3
match dedupe test	Bib	55

Buttons: Copy, Edit, Delete, Export

Job Result Files

File Type	File Name
Before	gdc.14433.DRSVYG2413datacollection201308200206.20130820140850.marc_before.1

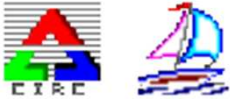
Export

Improving Service: Patron Requests

- Projects to improve the management and processing of patron requests
 - Limit # of hold requests
 - Limit hold request types (title vs. copy)
 - Block holds for lost & missing items
 - Block charging of items on hold for other users
 - Cancel “duplicate” requests for items in transit
 - Emphasize patron’s last name on hold slips



Block Holds on Missing/Lost Items



Item Settings

Item Type: Book

Short Loan

Replacement Cost: \$0.02

Order Quantity: 5

Reorder Point: 5

Allow request on items with 'missing' status:

OPAC Hold OPAC Recall

Circ Hold Circ Recall

Allow request on items with 'Lost - System Applied' status:

OPAC Hold OPAC Recall

Circ Hold Circ Recall

Allow request on items with 'Lost - Library Applied' status:

OPAC Hold OPAC Recall

Circ Hold Circ Recall

OK Cancel

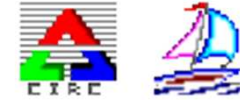
Voyager Circulation

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

Cancel



Block Holds on Missing/Lost Items



- New circulation policy group decisions for bibs with no items

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 request

Allow title level holds on bibs with no items - OPAC Allow title level holds on bibs with no items - Circ

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

Save Cancel

Block Holds on Missing/Lost Items

- “missing” error message remains the same
- New and modified error messages in webvoyage.properties and vxws.properties:

page.patronRequests.message.requestblocked5=The item has a lost status.

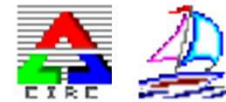
(existing msg) For Lost-System Applied

page.patronRequests.message.requestblocked13=The item has a lost status.

(new msg) For Lost-Library Applied



Cancel 'Duplicate' Requests When Item In Transit



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 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

Prevents Extra Items From Being Trapped



Item Record

Title
Baseball : an illustrated history / narrative by Geoffrey C. Ward ; based on a documentary filmscript by Geoffrey C. Ward and Ken Burns ; preface by Ken Burns and Lynn Novick ; with an introduction by Roger Angell ; contributions by John Thorn ... [et al.]

1 0

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Main Stacks	Book	Hold Request+			0	38161
2	Main Stacks	Book	Hold Request+			1	226486

Discharge

Library: VOYDEV
Item Barcode: |

Title	Location	Item Barcode	Due Date	FYI	Fines
Baseball : an illustrated history / narrative by Geoffrey C. Ward ; based on a documentary filmscript by Geoffrey C. Ward and Ken Burns ; preface by Ken Burns and Lynn Novick ; with an introduction by Roger Angell ; contributions by John Thorn ... [et al.]	Main Stacks [P]	226486		On Hold for Patron: Moore, Patricia Barcode: 2710 Phone: 847 296 2200	

Item Record

Title
Baseball : an illustrated history / narrative by Geoffrey C. Ward ; based on a documentary filmscript by Geoffrey C. Ward and Ken Burns ; preface by Ken Burns and Lynn Novick ; with an introduction by Roger Angell ; contributions by John Thorn ... [et al.]

1 0

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Main Stacks	Book	Not Charged			0	38161
2	Main Stacks	Book	On Hold			1	226486



Limit Number Of Holds



Patron Rules

Fines/Lost Item Fees Apply Max Outstanding Balance: \$100.00 Min Balance For Notice: \$10.00

Courtesy Notice Apply Overdue Notice Apply

Max Items Borrowed in this Policy Group 100 Max Overdue Recalled Items Apply 5

Max Number Of Recalls Apply 5 Max Self-Shelf Returns Apply 5

Max Claimed Returns Apply 5 Max Lost Items Apply 5

Max Call Slip Requests Apply 5 Max Short Loan Apply

Max Short Loan Titles Apply 2 Max Short Loan Per Day Apply

Max Overdue Items Apply 5 Max Hold Requests Apply 5

Include Pending Hold Requests In The Max Borrowed Items 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 Overdue Notices

Email Overdue Notices Email (Other) Overdue Notices Email Recall Notices

Email Recall Notices Email (Other) Recall Notices

OK Cancel

Patron Blocked

Name: John Smith

Barcode: 8876

Blocked due to...	Current	Group Limit
Hold items limit	9	5

Override Cancel



Make Patron's LN Obvious in FYI/on Hold Slip



Patron's name is Patricia Moore Barker

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



Improving Service: **Primo** Integration



Voyager Primo

- Projects to improve the end-user experience for libraries using **Primo** and **Voyager**
 - Patron self-registration
 - Change PIN and SMS number via Primo UI
 - Sort order of holdings locations
 - Display ILL Requests in Primo “My Account”

Patron Self Registration Service



Voyager

Primo

Web Services - Patron Self-Registration

Edit Patron Self-Registration:

Enable Web Service?

Set Purge: days Default Patron Group:

Registration Fields:

Field	Visible?	Required?	Identifier Type
Identifier:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Institution Id"/>
Title:	<input type="checkbox"/>	<input type="checkbox"/>	
City:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
First Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	State: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Middle Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Country: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Last Name:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zip Code: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Primary Phone:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email Address: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Other Phone:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SMS Number: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Address Line 1:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Department: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Address Line 2:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Major: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Address Line 3:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Birth Date: <input checked="" type="checkbox"/> Visible? <input type="checkbox"/> Required?
Address Line 4:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Address Line 5:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Web Services: Patron Self-Registration 2:03 PM



Patron Self Registration Service



- Service: **http://<server>:<port>/vxws/patron**, both GET and PUT
 - User will automatically be logged into Primo.
 - Capabilities limited to those of the patron group assigned to PSR patrons.
 - **vxws.properties:** sites can define their own messages
 - selfReg.message.0=Patron successfully registered.
 - selfReg.message.47=Missing mandatory field
 - selfReg.message.49=Address field is empty.
 - selfReg.message.50=Birth date field is invalid.
 - selfReg.message.58=Patron is already registered. Please log in again or choose a different ID.
 - selfReg.message.60=The service is not available.
 - selfReg.message.61=An error occurred while adding patron information. Please consult the Circulation Desk for assistance.
- Note that if the text for selfReg.message.0 contains the character sequence `\\b`, that character sequence will be replaced with the newly generated patron barcode.



Other Web Services



A screenshot of the Voyager System Administration web interface. The browser window title is "Voyager System Administration". The main content area is titled "Web Services - Service Configuration" and contains an "Edit Service Configuration:" section. This section includes two checkboxes: "Enable Change PIN Service" and "Enable Change SMS Service". The "Enable Change PIN Service" checkbox is checked, and a "Default PIN:" text box is visible to its right. Below the checkboxes are "Save" and "Cancel" buttons. On the left sidebar, the "Web Services" menu is expanded, and the "Service Configuration" option is highlighted with a purple box. The "Service Configuration" option is represented by a document icon with two red checkmarks.



Other Web Services



- **Existing service augmented for use with Primo**
 - URL
=http://<server>:<port>/vxws/patron/{patid}/patron
Information/address, both GET and PUT
 - Can now be used to update the patron PIN and/or SMS
number.
 - PIN optionally encrypted, controlled by Primo.

Location Sort Order



[LocationSortOrder]

#Indicate how locations in the availability statements should be sorted when displayed in Primo.

#The following example shows the location main is ranked 1, biology is ranked second, and music is

#ranked third.

#If you do not include locations in the list below, they will be sorted alphabetically

#after the locations that are listed. The location is the location code.

#

1=main

2=biology

3=music



Location Sort Order



```

- <datafield tag="949" ind1=" " ind2=" " >
  <subfield code="a">dev900ncdb</subfield>
  <subfield code="b">Main Library</subfield>
  <subfield code="c">Branch General</subfield>
  <subfield code="d">QA1 .N3 1993</subfield>
  <subfield code="e">available</subfield>
  <subfield code="f">1</subfield>
  <subfield code="g">0</subfield>
  <subfield code="h">N</subfield>
  <subfield code="i">0</subfield>
  <subfield code="j">Bgen</subfield>
  <subfield code="k">0</subfield>
</datafield>
- <datafield tag="949" ind1=" " ind2=" " >
  <subfield code="a">dev900ncdb</subfield>
  <subfield code="b">Main Library</subfield>
  <subfield code="c">Juvenile Education Stacks</subfield>
  <subfield code="d">QA1 .N3 1993</subfield>
  <subfield code="e">available</subfield>
  <subfield code="f">2</subfield>
  <subfield code="g">0</subfield>
  <subfield code="h">N</subfield>
  <subfield code="i">0</subfield>
  <subfield code="j">edu-juv</subfield>
  <subfield code="k">0</subfield>
  <subfield code="p">2</subfield>
</datafield>
- <datafield tag="949" ind1=" " ind2=" " >
  <subfield code="a">dev900ncdb</subfield>
  <subfield code="b">Main Library</subfield>
  <subfield code="c">main:Main Collection</subfield>
  <subfield code="d">QA1 .N3 1993</subfield>
  <subfield code="e">available</subfield>
  <subfield code="f">2</subfield>
  <subfield code="g">0</subfield>
  <subfield code="h">N</subfield>
  <subfield code="i">0</subfield>
  <subfield code="j">main</subfield>
  <subfield code="k">0</subfield>
  <subfield code="p">1</subfield>
</datafield>
  
```



ILL Requests in My Account



- http://server:port/vxws/patron/190/circulationActions/requests?institution=1@LOCAL&patron_homedb=1@QA20012DB20020613131313

```
▼<response>
  <reply-text>ok</reply-text>
  <reply-code>0</reply-code>
  ▼<requests>
    ▼<institution id="1@LOCAL">
      <instName>VOYDEV</instName>
      ▼<request type="HoldRequest">
        href="http://10.100.3.87:58814/vxws/patron/190/circulationActions/requests/holds?
        institution=1@LOCAL&patron_homedb=1@QA20012DB20020613131313">
          <number>2</number>
        </request>
      ▼<request type="IllRequests">
        href="http://10.100.3.87:58814/vxws/patron/190/circulationActions/requests/illRequests?
        institution=1@LOCAL&patron_homedb=1@QA20012DB20020613131313">
          <number>1</number>
        </request>
      ▼<request type="Bookings">
        href="http://10.100.3.87:58814/vxws/patron/190/circulationActions/requests/bookings?
        institution=1@LOCAL&patron_homedb=1@QA20012DB20020613131313">
          <number>1</number>
        </request>
      </institution>
    </requests>
  </response>
```



User Group Enhancement Priorities

- Determined by Customer voting process
- Balloting took place in March 2012
- Voyager PWG worked with PM to define requirements
- Two categories of enhancements were developed
 - General Voyager = 15 projects
 - Media Scheduling = 13 projects



Edit Multiple Circulation Policy Matrix Settings



Edit Policy Definition:

Policy Definition | Locations | Policies | Calendar | Patrons | Items | Matrix | Short Loan Matrix

Patron Group	Item Type
Graduate Student	record
Graduate Student	score
Graduate Student	serial
Graduate Student	software
Graduate Student	three dimensional object
Graduate Student	video
Inter-Library Loan	2 day reserve item
Inter-Library Loan	archival material
Inter-Library Loan	atlas
Inter-Library Loan	audiotape

Buttons: Add... Modify... Modify Multiple... Remove Copy

Buttons: Select All Unselect All



Edit Multiple Circulation Policy Matrix Settings



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

<input type="checkbox"/> Modify?	Loan Period:	<input type="text" value="0"/>	Day	<input type="checkbox"/> Modify?	Charge/Renew	<input type="checkbox"/>
<input type="checkbox"/> Modify?	Renewal Period:	<input type="text" value="0"/>	Day	<input type="checkbox"/> Modify?	Recall	<input type="checkbox"/>
<input type="checkbox"/> Modify?	Max # of Sequential Renewals:	<input type="text" value="0"/>		<input type="checkbox"/> Modify?	Hold	<input type="checkbox"/>
<input type="checkbox"/> Modify?	Fine Interval:		Day	<input type="checkbox"/> Modify?	Call Slip	<input type="checkbox"/>
<input type="checkbox"/> Modify?	Fine Rate:	<input type="text" value="\$0.00"/>				
<input type="checkbox"/> Modify?	Max Fine Amount:	<input type="text" value="\$0.00"/>				
<input type="checkbox"/> Modify?	Max Fine for Recalls:	<input type="text" value="\$0.00"/>				
<input type="checkbox"/> Modify?	Min Loan Period for Recalled Items:	<input type="text" value="0"/>	Days			
<input type="checkbox"/> Modify?	Recall Fine Interval:		Day			
<input type="checkbox"/> Modify?	Recall Fine Rate:	<input type="text" value="\$0.00"/>				
<input type="checkbox"/> Modify?	Grace Period:	<input type="text" value="0"/>	Days			
<input type="checkbox"/> Modify?	Recall Return Interval:	<input type="text" value="0"/>				
<input type="checkbox"/> Modify?	Recall Grace Period:	<input type="text" value="0"/>				
<input type="checkbox"/> Modify?	<input type="checkbox"/> Max Items Borrowed for this Patron Group & Item Type	<input type="text" value="1"/>				
<input type="checkbox"/> Modify?	Renew From:	<input checked="" type="radio"/> Original Due Date <input type="radio"/> Renewal Date				

Save Cancel



Edit Multiple Item Settings



Item Settings Multiple Edit

Modify only those settings you wish to update on all selected item types. Any setting not modified below will be left as is.

Item Settings

<input type="checkbox"/> Modify?	<input type="checkbox"/> Short Loan
<input type="checkbox"/> Modify?	Replacement Cost: <input type="text" value="\$0.00"/>
<input type="checkbox"/> Modify?	Order Quantity: <input type="text" value="0"/>
<input type="checkbox"/> Modify?	Reorder Point: <input type="text" value="0"/>

Allow request on items with 'missing' status:

<input type="checkbox"/> Modify?	<input type="checkbox"/> OPAC Hold
<input type="checkbox"/> Modify?	<input type="checkbox"/> OPAC Recall
<input type="checkbox"/> Modify?	<input type="checkbox"/> Circ Hold
<input type="checkbox"/> Modify?	<input type="checkbox"/> Circ Recall

Allow request on items with 'Lost - System Applied' status:

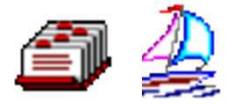
<input type="checkbox"/> Modify?	<input type="checkbox"/> OPAC Hold
<input type="checkbox"/> Modify?	<input type="checkbox"/> OPAC Recall
<input type="checkbox"/> Modify?	<input type="checkbox"/> Circ Hold
<input type="checkbox"/> Modify?	<input type="checkbox"/> Circ Recall

Allow request on items with 'Lost - Library Applied' status:

<input type="checkbox"/> Modify?	<input type="checkbox"/> OPAC Hold
<input type="checkbox"/> Modify?	<input type="checkbox"/> OPAC Recall
<input type="checkbox"/> Modify?	<input type="checkbox"/> Circ Hold
<input type="checkbox"/> Modify?	<input type="checkbox"/> Circ Recall

Ok Cancel

Update Item Location/Type Automatically



Feature relies on having default item types associated with locations in Cataloging Policy Definition

Edit Policy Definition:

Policy | Locations | Default Policies | Duplicate Detection

Available Locations		Selected Locations
Acq Plus	>	Rare Book Collection (c)
CD Test VYG 504	>>	Reference Department
CDVYG499hasright	<	Reference Maps
Circulation Desk	<<	Reserve Desk (r)
dfs location cf114823		Self Check
lawcirc		Selkirk

Routing Location Classification Scheme Default: Library of Congress

Cataloging Location Other NUC Code:

Initial Default ItemType: nocirc



New Settings in Session Defaults and Prefs



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)

OK Cancel



Example from Cataloging Hierarchy



Holdings and Items for bib 121204

Bib 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
86992	Main Stacks	DT59 .A12 1853b	

Item ID	Location	Item Type	Enum/Chron/Year	Copy	Item Status	Item Barcode
93364	Main Stacks [P]	Book		0	Not Charged	36234001505984



Change Location in MFHD and Save to DB



MARC | System | Bib Title(s) | History

Suppress from OPAC

Leader | 00176cx a22000851 4500

005: | 20130426122201.0 | 007 |

008 | 121115 0 u ||| 8 ||| 4 001 u u ||| 0 000000

	Tag	I1	I2	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.

OK

Print From Cataloging Hierarchy



Holdings and Items for bib 121204

Bib 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
86992	Main Stacks	DT59 .A12 1853b	

Item ID	Location	Item Type	Enum/Chron/Year	Copy	Item Status	Item Barcode
93364	Main Stacks [P]	Book		0	Not Charged	36234001505984

Expand hierarchy on print

- Tick box to expand hierarchy when printed
- Added active barcode to the item display & print-out

Automatically Remove Lost Fines & Fees



- Set Circulation operator profile privileges for the staff profile

The screenshot shows a configuration window with tabs for Profile 1, Profile 2, Item Blocks, Patron Blocks, and Patron. The 'Profile 1' tab is active. A list of checkboxes is shown, with the following options checked: Add Fines/Fees, Modify Outstanding Fines/Fees, Forgive/Error/Refund Fines/Fees, Accept Payments, Lost item return: refund overdue, Lost item return: refund replacement fee, Lost item return: refund processing fee, and Lost item return: decrement patron lost counter. A purple rounded rectangle highlights the last four options.

- And define policies for the Circulation Policy Group

The screenshot shows the 'Edit Policy Definition' window with tabs for Policy Definition, Locations, Policies, Calendar, Patrons, Items, Matrix, and Short Loan Matrix. The 'Policies' tab is active. A list of checkboxes is shown, with the following options checked: Include Lost Item Processing Fee (with a value of \$15.00), Include Max Fine Amount For Lost Item, Lost Item Return: remove overdue fines, Lost Item Return: remove processing fee, Lost Item Return: remove replacement fee, and Lost Item Return: decrement patron lost item count. A purple rounded rectangle highlights the last four options. At the bottom, the 'Posting Type for crediting returned lost item fines' is set to 'Forgive'.



Returning Lost Items Made Easy



Lost Item Fines and Fees

Item is marked as lost. Remove the following?

- Remove Overdue Fine
- Remove Lost Item Replacement Fee
- Remove Lost Item Processing Fee
- Decrement the Patron Lost Item Counter



Automatically Remove Lost Fines & Fees



- Exceptions are logged if the circ policy group says that we SHOULD remove the fines, but the operator did not have permission
- If the circ policy group says we should remove the fines, and the operator had the choice, we do not log an exception because the operator already made the decision.
- When the circ policy group says we should not remove the fines, no exceptions are logged.

56 Overdue Fine Not Removed

57 Processing Fee Not Removed

58 Replacement Fee Not Removed

59 Patron Counter Not Decrementing

60 Lost Item Return – Historical Fines Present

61 Lost Item Return – Lost Status not removed



Message For Patron Whose Card Is Expiring

Webvoyage.properties:

page.myAccount.expireNotify=Y

page.myAccount.expireNotifyLead=30

page.myAccount.expireNotifyMsg=Your patron account will expire in \\d days.

page.myAccount.expireNotifyMsgWithin24Hrs=Your patron account will expire in \\h Hours \\m Minutes \\s Seconds

page.myAccount.viewPersonalInfo.hasExpiredMsg=Your patron account has expired.

page.myAccount.viewPersonalInfo.expireNotifyMsg=Your patron account will expire in \\d days. Please contact your circulation desk for assistance.

page.myAccount.viewPersonalInfo.expireNotifyMsgWithin24Hrs=Your patron account will expire in \\h Hours \\m Minutes \\s Seconds. Please contact your circulation desk for assistance.



Message For Patron Whose Card Is Expiring

The screenshot shows the ExLibris Voyager user interface. At the top left is the logo "ExLibris Voyager". To its right are four navigation buttons: "Search", "My Searches", "My List", and "My Account". Below these is a search bar with the text "New Search :", a "Go" button, and a "Search History" link. The "My Account" section is highlighted in purple. It contains a light blue box with the text "Review and update your library transactions." Below this is a prominent yellow box with a red border containing the message "Your patron account will expire in 19 days." At the bottom of the "My Account" section are two buttons: "View Personal Information" and "Edit Preferences".

Display Patron Pop-up Notes Upon Discharge



The screenshot displays the 'Discharge' window in the Ex Libris Voyager system. A 'Session Preferences' dialog box is open, showing the 'Alerts, Printing and Fine/Fee/Demerit' tab. The 'Alerts' section contains several options, with 'Patron Pop-up Note Alert upon Discharge Alert' highlighted by a purple box. Below the preferences, a 'Notes' pop-up window is visible for a patron named 'Mike Dicus'. The note text reads: 'This guy requires special attention when he visits the library.' A 'Close' button is located at the bottom of the notes window.

Session Preferences

Alerts, Printing and Fine/Fee/Demerit | Items and Searching

Alerts

- Patron Fine Fee Alerts
- Patron Available Item Alerts
- Charge Note Alert
- Discharge Note Alert
- Enable default button selection
- Patron Pop-up Note Alert Upon Display
- Patron Pop-up Note upon Discharge Alert
- Temporary Location Alert on Discharge
- Loan Shortened Due To Patron Expiration Alert
- Short Loan Advanced Booking Alert

Discharge

Title | Location | Item Barcode

Notes

Patron Name: Mike Dicus

This guy requires special attention when he visits the library.

Close

Save Date/Time For Historical Browsers



System - Events

Id	Code	Description	Retain
1	BROWSE	Historical Browse	<input checked="" type="checkbox"/>
2	UBBROWSE	UB Item Received at Pickup Location	<input checked="" type="checkbox"/>

Edit

Item Browsers by Location (within a date range)

Date Range: Between Mar 1, 2000 11:51 AM and Mar 31, 2014 11:51 AM

Event Type: Historical Browse

Location	Browse Count
Reference Department	2
Circulation Desk	1
Main Stacks	36
Electronic Collections	2
Cataloging Desk	1
Government Documents	2
Biology	1



OOTB Browse Reports



- Item Browsers by Location (within a date range)
- Item Browsers by Location and Item Type (within a date range)
- Item Browsers by Title (within a date range)
- Item Browsers by Title and Bib Format (within a date range)
- Item Browsers by Classification (within a date range)
 - Dewey, LC, NLM, and SuDoc
- Available in Access Reports and Analyzer

Option to Edit Fine/Fee Information



Patron Fines/Fees

Mike Dicus

Fines, Fees and Demerits for Location: All Locations

Outstanding Fines/Fees				Fines/Fees History			
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
4/26/2013 01:11 PM	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]...	67776	Overdue	\$26.00		\$26.00	Circulation Desk
3/20/2013 02:45 PM	House of a hundred windows; story by Margaret Wise Brown. Cat and architecture by Robert de	67776	Overdue	\$20.00			

Description:

Charge Date: 2/28/2013 02:58 PM
 Due Date: 3/31/2013 02:00 AM
 Discharge Date: 4/26/2013 01:11 PM
 Notice Sent:

Create
 Operator: demo
 Location: Circulation Desk

Item Info... Print Add... **Modify...** Post...

Modify Fine/Fee

Fee Type: Overdue

Original Amount: \$20.00

Postings: \$0.00

Balance: \$20.00

Item Barcode: 67776

Description: Fine adjusted due to library closing due to weather.

OK Cancel

Add Alternate Vendor Names



Alternate Name
Contoocook Books
Momence Books
YBP

Search Vendors

Search By:

Search For:

Vendor Name	Vendor Code	Vendor Type
BAKER & TAYLOR	B&T	Domestic Monographs



Select Standard Number On P.O.



Line Item - Introduction to cataloging and classification / Bohdan S. Wymar.

File View Tools Help

Save Save and Close

Problems Claims Properties Delivery Options Notes Order Payment History Receive/Mark Bib Record Price Copies/Funds Copy Status Type

Title: Introduction to cataloging and classification / Bohdan S. Wymar.
Author: Wymar, Bohdan S.
Edition: 8th ed. / Arlene G. Taylor.
Publisher: Libraries Unlimited,
Place: Englewood, Colo. : System No: ocm24067132
Date: 1992 LCCN: 91024851 //r92
Series: Library science text series Bib Record ID: 39235

Check the Standard Number you wish to appear on the printed Purchase Order

ISSN:
 ISBN: 0872878112 (cloth)
 CODEN: 0872878112 (cloth) 0872879674 (paper)
 GPO Stock Number:
 Publication Number:
 Std Technical Report No:

Change Bib Record MARC... Save



Link to RDA Toolkit from Cataloging



Links to RDA Toolkit at various levels, depending on cursor position when invoked

- MARC Tag level
- Indicator level
- Subfield level
- MARC tag and both indicators level, and optionally subfield level
- Uses Shift-F2 keys or menu command

Bib and Authority records only

Link to RDA Toolkit from Cataloging



The screenshot displays the Voyager System Administration interface. The main window is titled "Cataloging - RDA Toolkit" and contains an "Edit RDA Toolkit Options" section. This section includes a checked checkbox for "Enable RDA Toolkit Links", a "Username" field with the value "mdicus", a "Password" field with masked characters "xxxxxxx", and a "Base URL" field with the value "http://access.rdatoolkit.org/?encode=marc&rec". "Save" and "Cancel" buttons are located at the bottom of this section.

A secondary dialog box, "Session Defaults and Preferences", is overlaid on the main window. It has a tabbed interface with tabs for "Validation", "Workflow", "Item Defaults", "Folders/Files", "Mapping", "Colors/Fonts", and "RDA Toolkit". The "RDA Toolkit" tab is selected, showing a "Username" field with "mdicus" and a "Password" field with "xxxxxxx". "OK" and "Cancel" buttons are at the bottom of the dialog.

On the left side of the main window, a vertical navigation menu is visible, with "RDA Toolkit" highlighted. A purple line connects this menu item to the "Edit RDA Toolkit Options" section. Another purple line connects the "RDA Toolkit" tab in the dialog box to the "Edit RDA Toolkit Options" section.

Link to RDA Toolkit from Cataloging



The screenshot shows the Voyager Cataloging application window. The 'Edit' menu is open, and the 'Show RDA Toolkit' option is highlighted with a purple rectangle. The menu items include Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Insert Field Before (F3), Insert Field After (F4), Delete Field (Del), Unselect text (F11), Insert Subfield (F9), Edit Cell (F8), Special Character Entry (Ctrl+E), Special Character Mode (Ctrl+D), Show MARC Values (F2), Show RDA Toolkit (Shift+F2), Show Holdings Locations (Ctrl+L), and Insert URL from Browser (Ctrl+U). The background shows a MARC record for 'anthropological issues / ed. Willi...'. The record fields are as follows:

Field	Subfield	Value
015	1	Ne76-45
020	1	0202900355 (Aldine) : \$c fl 63.50
035	1	76382521 //r86
049	1	SHCM
050	0	P35 \$b .J5 1973
082	1	301.2/1
092	1	301.21 I611
111	2	International Congress of Anthropological and Ethnological Sciences \$n (9th : \$d 1973 : \$c Chicago, Ill.)
245	1 0	Language and man : \$b anthropological issues / \$c ed. William C. McCormack, Stephen A. Wurm.

Link to RDA Toolkit from Cataloging



Voyager Cataloging

Bib (12345) : Language and man...

MARC | System | History

Suppress from OPAC

Leader: 10366cam a2200349 i 4500

005: 20130919113815.0

008: 001127 s 1976 ____ ne_

Tag	I1	I2	Subfield Data
010			‡a 76382521
015			‡a Ne76-45
020			‡a 0202900355 (Aldine)
035			‡a 76382521 //r86
049			‡a SHCM
050	0		‡a P35 ‡b .J5 1973
082			‡a 301.2/1
092			‡a 301.21 I611
111	2		‡a International Congress 1973 : ‡c Chicago, Ill.)
→ 245	1	0	‡a Language and man : Stephen A. Wurm.

RDA Toolkit - Windows Internet Explorer

http://access.rdatoolkit.org/?encode=marc&rec=Bib&tag=245&indpos=1st&ind=1&indpos=2nd&ind=0&subfld=a

RDA TOOLKIT
RESOURCE DESCRIPTION & ACCESS

RDA TOOLS RESOURCES

- + RDA: Element Set
- + RDA Mappings
- Examples of RDA Records (JSC)
MARC Encoding
- + Workflows
- + Maps
- + Entity Relationship Diagram (ERD)
- + Schemas

MARC to RDA

MARC 21 Field Tag: 245 Subfield Code: a

Core SubElement: Title Proper
The chief name of a resource (i.e., the title normally used when

MARC 21 Field Tag: 245 Subfield Code: b

SubElement: Other Title Information
Information that appears in conjunction with, and is subordinate

SubElement: Parallel Title Proper
The title proper in another language and/or script.

SubElement: Parallel Other Title Information
Other title information in a language and/or script that differs fr

MARC 21 Field Tag: 245 Subfield Code: c





Media Scheduling



Advanced Booking Warning on Charge

Policy Group Settings

Group Name: Media Department

Booking

Warning Interval: 2 Hours
Block Interval: 1 Hours

Schedule Monitor

Cancel Unclaimed: 5
Overdue Warning: 11

Delivery Overnight Rules

Shorten at close?
Accrue fines and fees?

Patron Pickup Rules

Shorten at close?
Accrue fines and fees?

Overdue Settings (days)

First Notice: 1
Additional Notice Interval: 1
Additional Notice Count: 21
Allow Renew?

Lost Settings

Lost Interval (days): 25
Processing Fee: 25.00
Charge Maximum Fine?

Advanced Booking Warning Period: 2 Hours

Options

General | Day View | Inventory | Scheduler | Bookings | Searching | List Bar
Schedule Monitor | Charge/Discharge | Discharge Status | Sounds

Charge

Default Charge Search Type: Requester Barcode

Clear after successful Charge
 Print Confirmations after successful Charge
 Advanced Booking Alert

Discharge

Default Discharge Search Type: Requester Barcode

Clear after successful Discharge
 Automatically select all media and equipment for Discharge

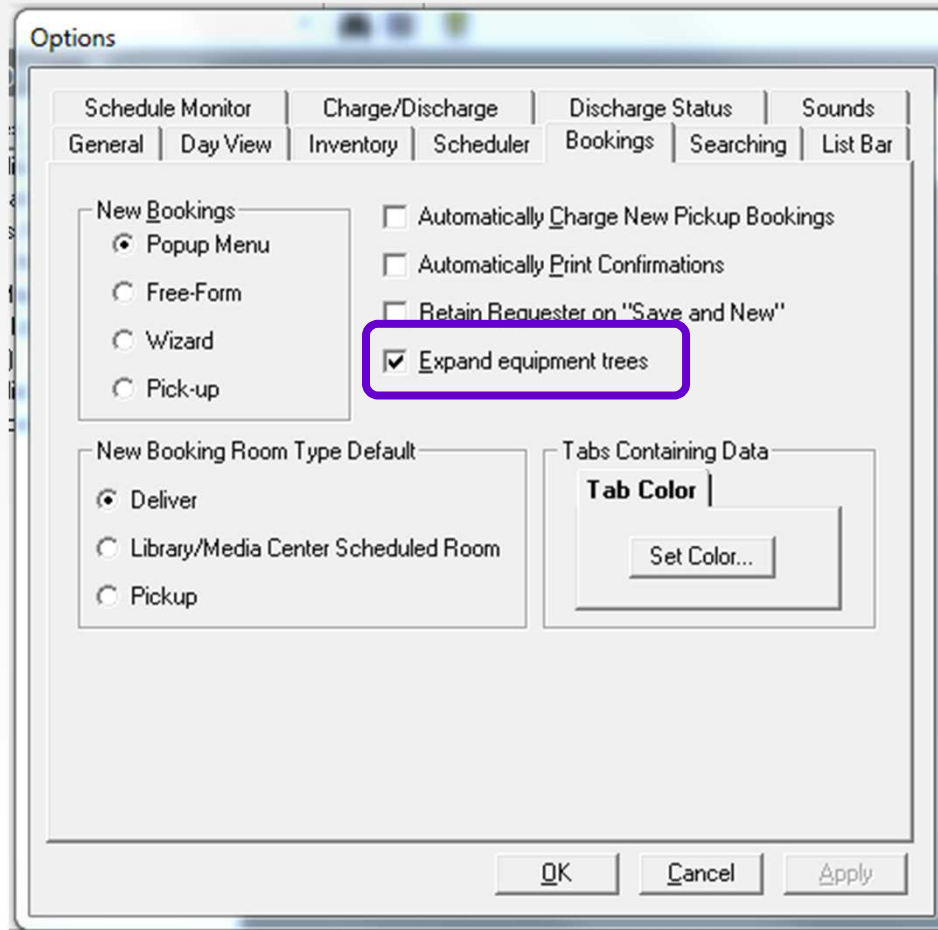
Voyager Media Scheduling

i The following materials are needed for another booking during the warning interval:

102 dalmatians [videorecording] / Walt Disney Pictures presents an Edwards.Feldman production. - 777888
ROOMNAME99 - TEST99

OK

Display of Equipment in Booking



Effective in:

- “Equipment” tab of the standard booking form
- “Equipment” tab of the Immediate Pickup Booking form
- “Equipment” panel of the booking wizard
- “Select Equipment for Booking” form
- “Add Equipment Type to Booking” form

Display of Equipment Barcode in Booking



Select Equipment For Booking

Number	Type	Status
--------	------	--------

Equipment

- Equipment
 - AV Cart
 - CD Player
 - DVD Player
 - TV
 - TV VCR Combination
 - VCR (VHS format)
 - keys

Show available equipment only

Barcode	Location	Room
5012	Cataloging Desk	33333
R1	Cataloging Desk	
123DVDbber	Cataloging Desk	
50022	Library	
vyg529-barcode1	Cataloging Desk	
YVG-535ALONGBAR	Cataloging Desk	

OK Cancel

Automatically expand barcode column to display largest value

Booking - Confirmation Number: 977 <Complete>

File View Booking Tools Help

Save and Close

Schedule | Media | Room | Equipment | Notes | Staff | Properties

In-Room and Specific Equipment

Barcode	Equipment Type	Group?	Status
YVG2145BK01	CD Player	N	Stolen
YVG-535ALONGBAR	DVD Player	N	Missing

Equipment Number or Barcode:

Booking Warning Interval Options in Media



Policy Group Settings

Group Name:

Booking

Warning Interval:

Block Interval:

Schedule Monitor

Cancel Unclaimed:

Overdue Warning:

Delivery Overnight Rules

Shorten at close?

Accrue fines and fees?

Patron Pickup Rules

Shorten at close?

Accrue fines and fees?

Overdue Settings (days)

First Notice:

Additional Notice Interval:

Additional Notice Count:

Allow Renew?

Lost Settings

Lost Interval (days):

Processing Fee:

Charge Maximum Fine?

Advanced Booking Warning Period:

Interval Scale Options:

- Minutes
- Hours
- Days

Display Media Title on Day View in MS



Booking Schedule - Day View

View Bookings for: ...

6 Bookings

Start Time	Requester	Confirmation #	Title	End Date	End Time	Item Cour
10:20 AM	Salamon, Eva	820	Multiple titles in booking	3/19/2013	11:10 AM	3
11:00 AM	Salamon, Eva	816	No titles in booking	3/15/2013	12:00 PM	0
11:38 AM	Hochfellner, Robert	814	You can teach hitting	3/15/2013	11:49 AM	1
11:40 AM	Steelberg, Jeremy E.	815	Multiple titles in booking	3/15/2013	11:50 AM	2
02:00 PM	Steelberg, Jeremy E.	818-1	Multiple titles in booking	3/15/2013	02:20 PM	2
02:30 PM	Steelberg, Jeremy E.	818-2	Multiple titles in booking	3/15/2013	02:50 PM	2

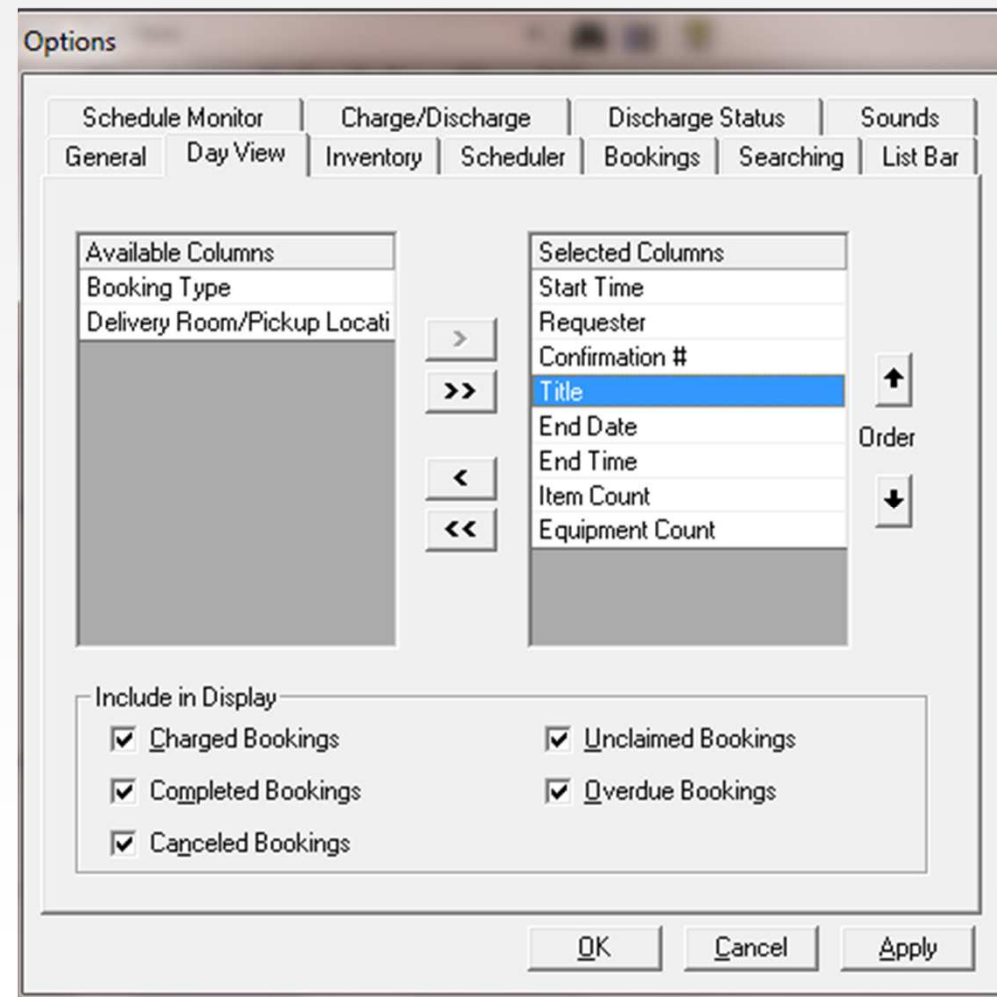
- A single media item will display the title on Day View
- Message displays if there are multiple titles
- Message displays if there are no media items in the booking

Make Media's Day View Customizable



You can control

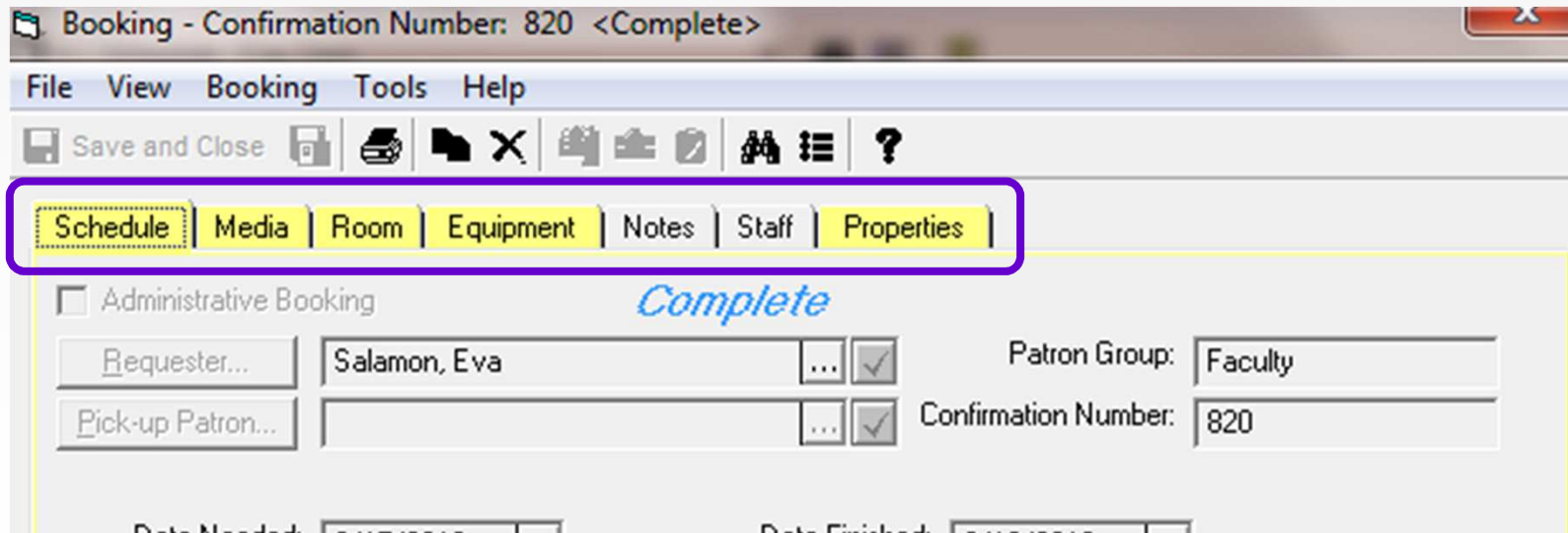
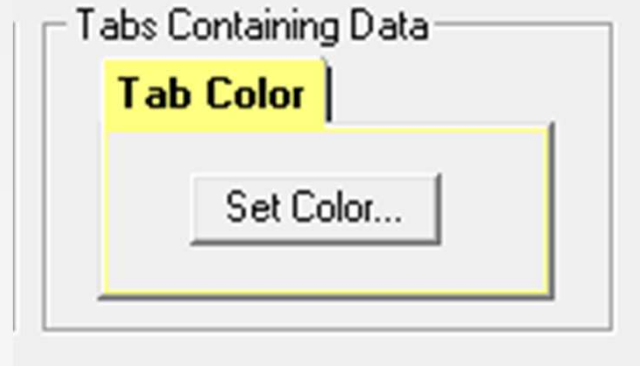
- Which fields display
- Order of fields in display
- Which statuses display



Color-code MS Tabs When Data Is Present



Set your preference, just like the **tab coloring** in Acquisitions



Patron Counters and Bookings



- Summary display of patron counters and booking activity

Patron Counters and Bookings

Patron Name:

Current Bookings:

Late Returns: Canceled Bookings:

Historical Bookings: Unclaimed Bookings:

Reset Date: Reset Operator ID:

Include Historical Bookings

Status	Start Date	Start Time	End Date	End Time	Confirmation Number	Booking Type	Delivery Room/Pickup
Complete	8/5/2013	02:09 PM	8/5/2013	02:30 PM	406	Library Scheduled	Audio/Visual - SC5 - S
Cancelled	5/3/2011	10:00 AM	5/3/2011	12:00 PM	397	Pickup	Media Center
Cancelled	4/16/2010	08:00 AM	4/16/2010	09:00 AM	396	Library Scheduled	Audio/Visual - 349 - A'
Unclaimed	4/14/2010	06:30 PM	4/14/2010	07:00 PM	395	Pickup	Media Center
Complete	4/14/2010	08:00 AM	4/14/2010	12:00 PM	394	Pickup	Media Center
Complete	4/14/2010	08:00 AM	4/14/2010	12:00 PM	392	Pickup	Media Center
Cancelled	9/14/2006	01:00 PM	9/14/2006	04:00 PM	365	Pickup	Media Center
Cancelled	2/20/2006	05:00 PM	2/21/2006	01:00 PM	361	Pickup	Media Center
Cancelled	2/17/2006	02:00 PM	2/17/2006	05:00 PM	362	Delivery	College - BUS210 - Bu
Unclaimed	2/3/2005	10:00 AM	2/3/2005	12:00 PM	329	Delivery	College - B116 - Bowe
Complete	2/1/2005	03:35 PM	2/1/2005	05:00 PM	331	Pickup	Media Center

Summary... Print Select All Unselect All Close

Voyager

Display Item Status on Media Tab



Booking - Confirmation Number: 847 <Charged>

File View Booking Tools Help

Save and Close [Icons]

Schedule **Media** Room Equipment Notes Staff Properties

Status	Title
Charged	Baseball [videorecording] / a film by Ken Burns ; the Baseball Film Project, Inc. ; a pr

Search...
Remove
MARC...

Media Barcode or Item ID:

Add by Barcode
Add by Item ID



Display Patron Notes In Media Scheduling



Alert Staff When Lost Media Item Discharged



Item and Equipment Status Alerts

Item Information:

Status	Item
--------	------

Select Statuses to Remove:

Status	Item or Equipment
<input checked="" type="checkbox"/>	Lost-Library 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 All Deselect All

OK Cancel

Discharge Alerts Based on Item/Equip. Status



Options

General | Day View | Inventory | Scheduler | Bookings | Searching | List Bar
Schedule Monitor | Charge/Discharge | **Discharge Status** | Sounds

Display discharge alert for the following Equipment statuses:

Available Equipment Statuses		Selected Equipment Statuses
Missing	>	Stolen
	<	Lost
		In Maintenance
		Misplaced

Display discharge alert for the following Item statuses:

Available Item Statuses		Selected Item Statuses
Recall Request	>	Missing
Hold Request	<	Lost--Library Applied
On Hold		Lost--System Applied
Claims Returned		Withdrawn
Damaged		
At Bindery		
Cataloging Review		

Limit To Available Equipment When Booking



DVD Player List

Barcode	Location	Room	Status
12345	College-Media Sche	B01 - Baker Hall Room 01	Not Charged
123DVDbber	Cataloging Desk	33333	Not Charged
5001	Media Department	AMC 01 - Audio Media Carrel 01	Not Charged
5002	Cataloging Desk	1 - 1	Not Charged
50022	Media Department	44 - Eva	Not Charged
5006	Media Department	Storage 01 - Media Department S	Not Charged
5007	Circulation Desk	AMC 10 - Audio Media Carrel 10	Not Charged
5009	Cataloging Desk	15charactersmax - Testing Piv iss	Charged
5010	Cataloging Desk	Test99 - RoomName99	Not Charged
5011	Media Department	AMC 01 - Audio Media Carrel 01	Not Charged
5012	Cataloging Desk	33333	Not Charged
R1	Cataloging Desk	33333	Not Charged

The screenshot shows the 'Equipment' dialog box in the Ex Libris Voyager system. On the left, a tree view shows the hierarchy: Equipment > DVD Player. The 'DVD Player' item is selected. On the right, a table lists the equipment items. A red box highlights the 'Show available equipment only' checkbox, which is checked. Below the table are 'OK' and 'Cancel' buttons.

Barcode	Location	Room
5006	Media Department	Storage 01 - Media Department Stc
5012	Cataloging Desk	33333
R1	Cataloging Desk	33333
123DVDbber	Cataloging Desk	33333
50022	Media Department	44 - Eva



Remove SSN from MS Patron Display



- SSN search option removed
- SSN display removed from search results

Patron Name	Institution ID
Smith, Donna	100106
Smith, John	1200
Smith, John	8876
Smith, Johnny3	eagtaeg
Smith, Sandy	6209

Increasing Support for Standards

- Enrich content of OpenURLs created by Voyager
- Provide granular control over block options in SIP2
- Add patron birthdate to SIP2 messages
- Add option to customize on-screen messages in SIP2
- Update ISO currencies supported in Voyager
- MARC 21 tag table updates

Apply Item Blocks in Self Check



- Pre-9.0, all self-check blocks were hardcoded
- Added functionality to the SIP2 self-check module to use the appropriate circulation profile to determine which item blocks may be automatically overridden by the self-check module, rather than the hardcoded set in use prior to 9.0.

New blocks available in SelfCheck:

Block Code	Meaning
43	Item scheduled for a short loan request.
44	TERM renewal precedes permitted renewal period.
48	Item has been scheduled and cannot be charged or renewed.
49	Item has call slip request for another patron.
128	Item is misrouted. Please consult library personnel for assistance.

Certain blocks that require operator input will continue to be blocked regardless of the value for the block in the Circ profile for the self-check user.

Block Code	Meaning
26	Item does not have an assigned loan period.
27	Item is non-circulating.
104	Item has a term loan period, but a term due date has not been set.
107	The renewal due date calculated precedes the item's current due date.
108	The renewal due date calculated is in the past.



Add New ISO Currencies



Currency Maintenance

File Help

Save Save and Close

Current Currency: Afghani Australian Dol... Azerbaijania... Balboa Belize Dollar Deutsche M... Dollar East Caribbe... Euro Franc Lira Pound Pound Sterli... Shekel Swiss Franc Turkish Lira

Currency Name: Afghani

Country Name: Afghanistan

Decimal Places: 4

Properties

Rate

2500.36254

9/7/2004

demo

12:27 PM

U.S. Dollar

USD

United States

Conversion Rate History

Rate	Create Date	Create Time	Operato
2500.36254	9/7/2004	12:27 PM	demo

New

Enhancing Stability and Performance

- Developing new tools and processes to:
 - Automate the process of detecting when you need to run a regen
 - Monitor Oracle table space and data file size
 - Rotate log files
- Improve Oracle memory tuning tools in the VIK
- Update WebAdmin with new features
- See the **Voyager 9.0 Release Notes** for details.



A Testimonial about Voyager 9.0

- “Our staff members are enthusiastic about the improvements in *Pick and Scan 2.0*, and we welcome the many enhancements that will further streamline our work processes.”

Laura Guy
-- Systems Librarian &
Frequent FT Partner --
Colorado School of Mines



What Are Your Plans?

Have you planned your upgrade to Voyager 9.0?



Agenda

- Voyager today
 - Highlights of 9.0
- A sneak peek
 - New features in 9.1
- Voyager's roadmap
 - Future releases



Highlights of Voyager 9.1



- The ELUNA and IGeLU Voyager PWGs helped to prioritize enhancements for the next release
- Customer voting for Voyager 9.1 enhancements occurred in September 2013
- Development is currently underway on top-ranked projects
- Release planned Q4 2014

“Big Bang” Project for Voyager 9.1



- Enhance authority control loader functionality
 - Develop new match & merge routines
 - Automate load of new/updated records
 - Reconcile changes
 - Update headings in bibs
- All changes done via the client = no server access required
- Additional authority control enhancements planned for future releases

Voyager PWG Enhancement Priorities



9.1

- Improve logging of deleted records
- Control fields in emailed notices
- Use specific amounts in Extended Fund Allocation
- Highlight suppressed MFHDs in Call Number search results
- Search by patron ID in the Circulation client
- Change multiple Circulation calendars at one time
- Option to increase font sizes in Cataloging beyond 12 points
- Print Item Due Date on Fine/Fee Notices & Statements
- Print Copy Numbers on Overdue Notices
- Sort display of incoming EDI files
- Purge patrons by Patron ID
- Copy rules in GDC

Voyager 9.1 Field Test

- Looking for customers who want to be FT partners



August 2014							September 2014							October 2014						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2	1	2	3	4	5	6				1	2	3	4	
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				

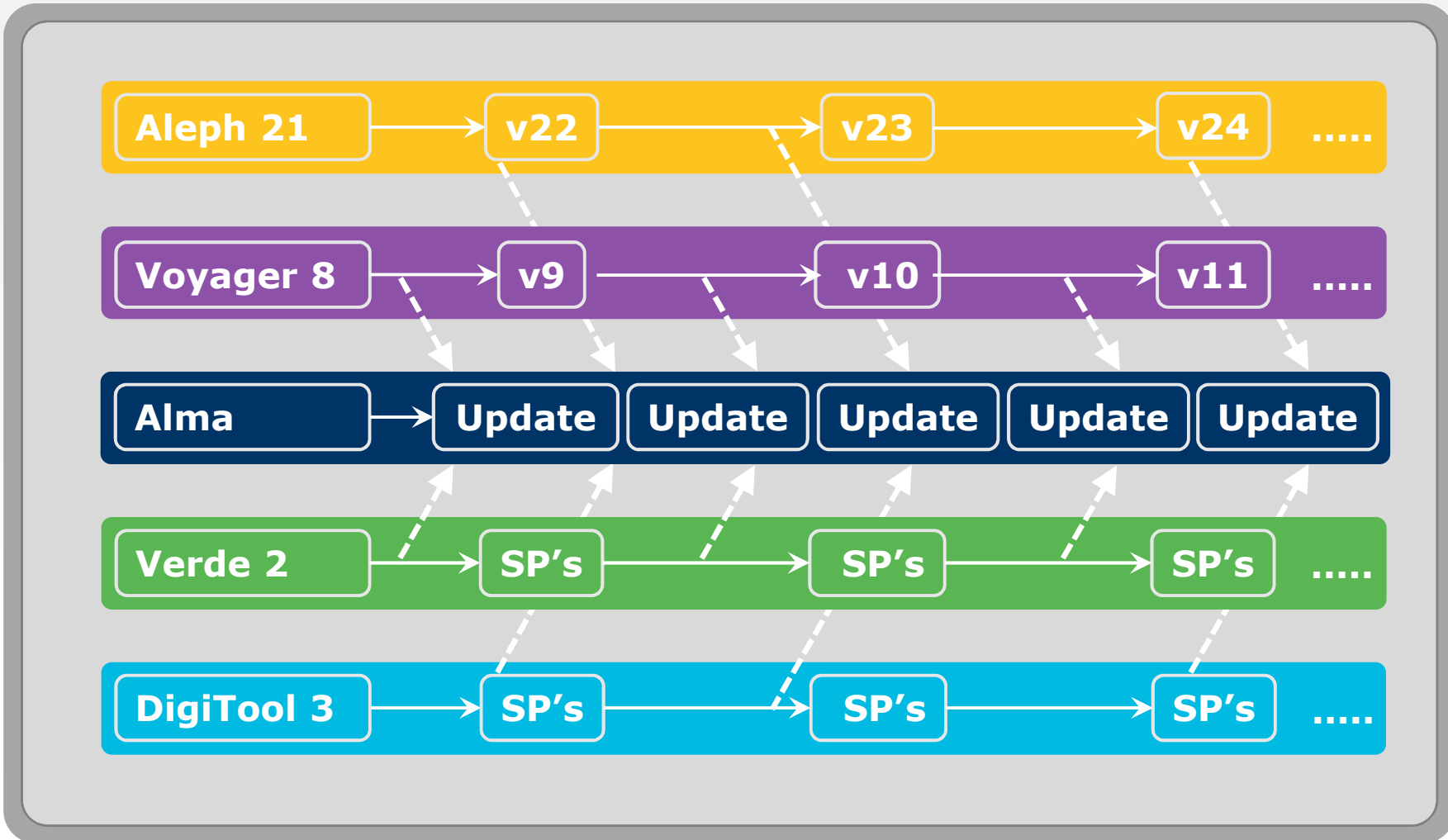
- Contact me if you are interested:
mike.dicus@exlibrisgroup.com

Agenda

- Voyager today
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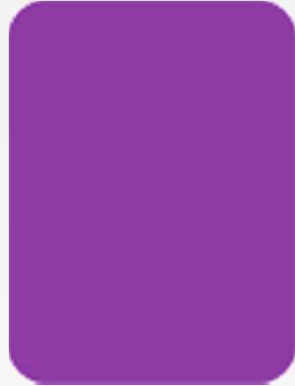
A Future Path for Every Customer



Voyager 10 and Beyond

- The ELUNA and IGeLU Voyager PWGs are starting to prioritize enhancements for the next release
- Enhancement balloting will take place later in 2014
- Planning for the next release ramps up when the prior release moves into development

Voyager Product Update



Any questions?



Thank You

mike.dicus@exlibrisgroup.com

