VOYAGER PRODUCT UPDATE

IGeLU 2016

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Agenda

- What's new in Voyager
- Highlights of New Features in Voyager 9.2
- A Look Ahead to Future Releases
- Highlights of New Features in Voyager 10
- Questions

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What's New in Voyager?

Voyager 8.x

- 155 customer-requested enhancements
- GDC module
- Client Auto-Update
- Enhanced operator security
- Indexes for RDA
- Shelf-ready workflows
- XML patron loader
- UTIL menu

Voyager 9.x

- 159 customer-requested enhancements
- Pick & Scan 2.0
- "Delete All" in GDC
- New authority loader workflows
- Duplicate detection using RDA
- Display RDA info in search results
- Sorting MARC tags

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Voyager 9.2

- Voyager 9.2 was released in November 2015
- Voyager customers helped prioritize enhancements for the release
- 9.2 delivers a major enhancement to Authority Loader workflows
  - Added an Authority Load Reviewer to the Cataloging module
  - Simplified the process to manage authorities and update headings in bib records
- Additional enhancements to sort MARC tags, display RDA info in search results, enrich bulk import options, and many more…

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Highlights of New Features in Voyager 9.2

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A Brief Overview of Authority Loader

Overview of changes

- GDC-based
- Pre-load filtering
- Match point uses existing Duplicate Detection
- Automatically load new (unmatched) authorities
- Options for merging exact matches
- When multiple records found that match incoming record, options for choosing ‘best’ of those records
- Delete records in database automatically
- Some files will require manual review and handling

First Introduced in Voyager 9.1

New Authority Loader Workflows

- Builds on development started in 9.1
- Workflow to review authority load files in the Cataloging module
- Introduces the Authority Load Reviewer
- Actions based on the type of file
  - No Match
  - Multi-match
  - Split
  - Delete
  - Reject
- Records managed/processed in Cataloging

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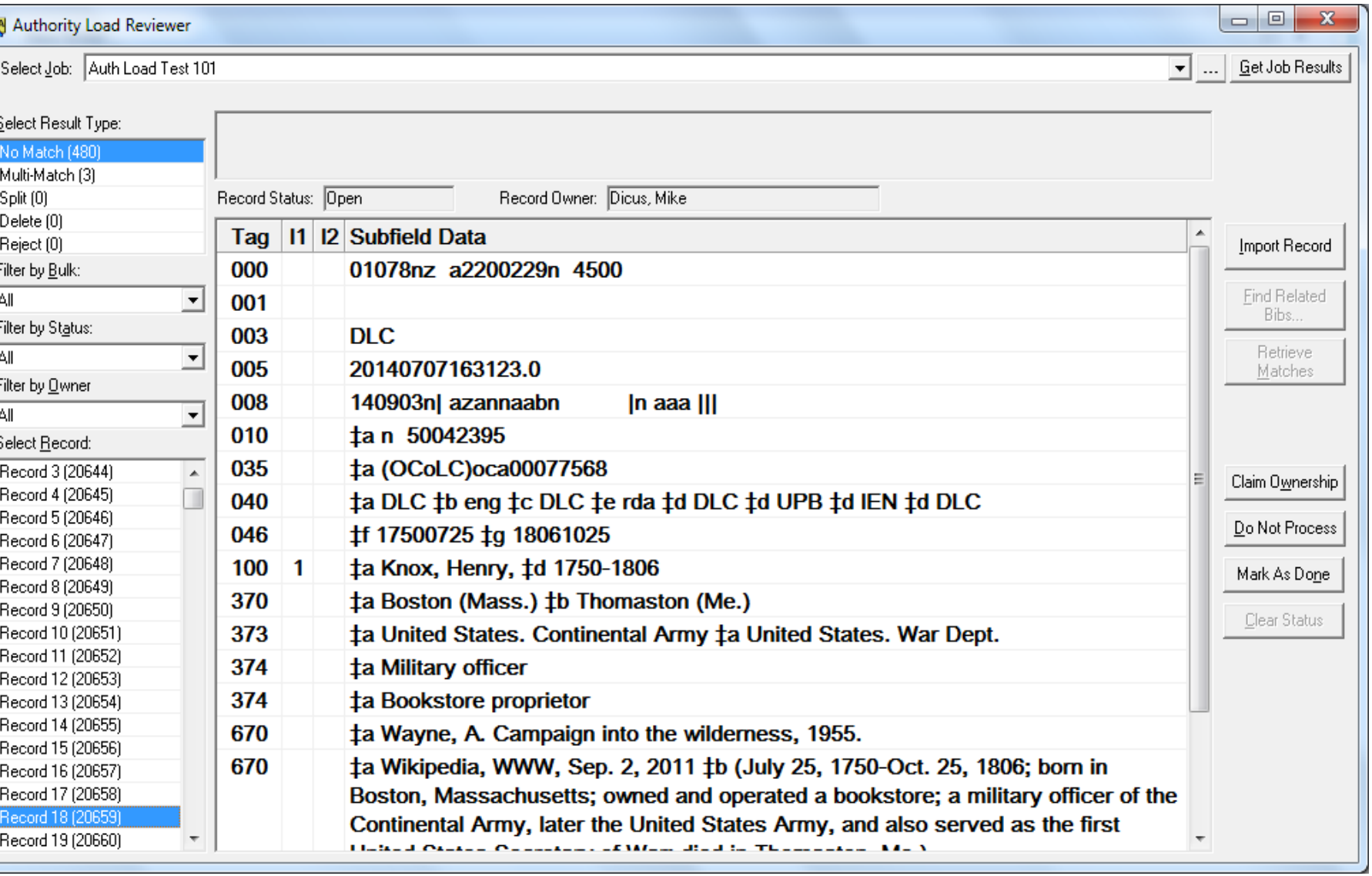
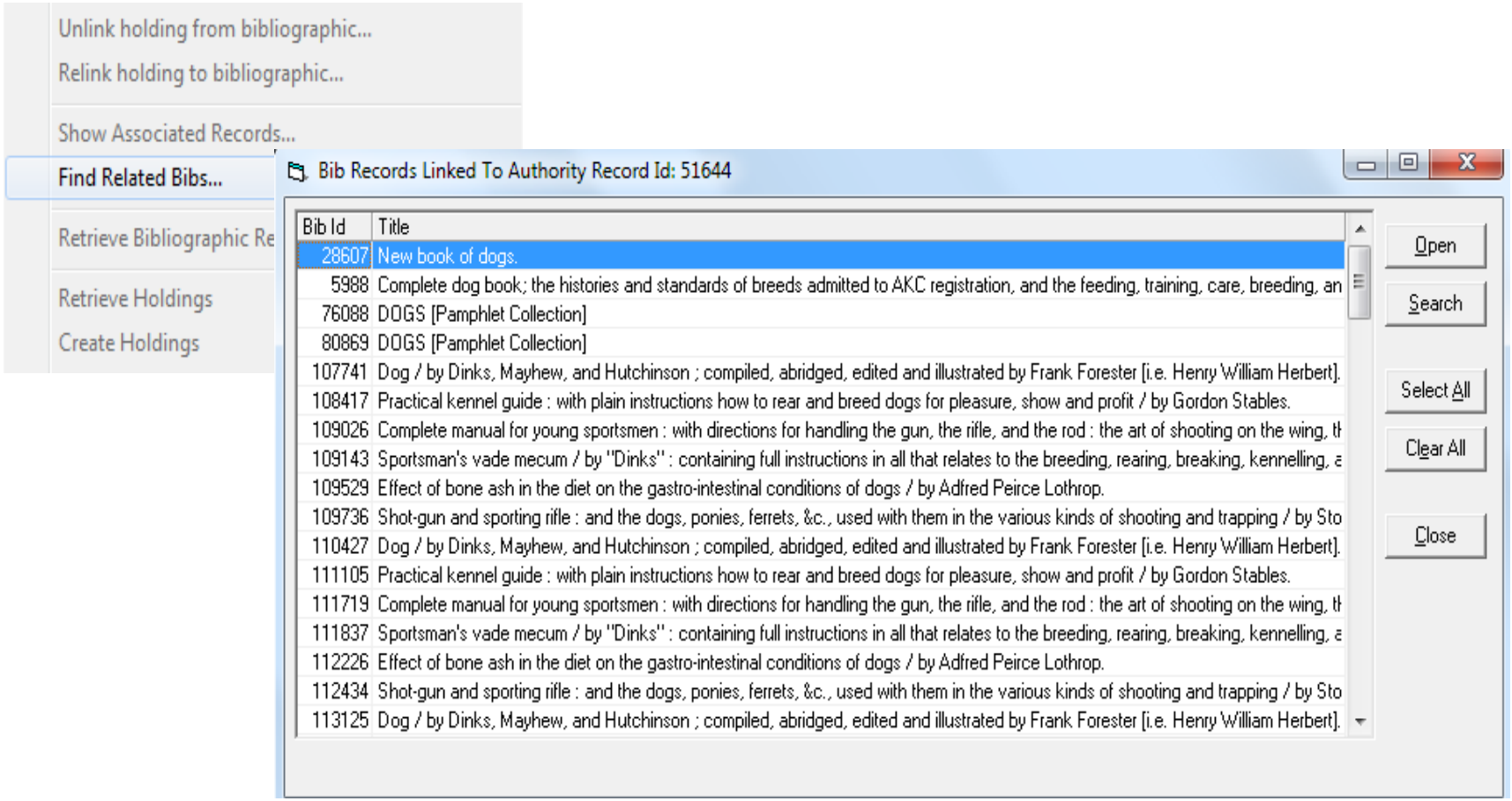
Authority Load Reviewer



Find Bibs Related to an Authority Record

- New option to Find Related Bibs when viewing an authority



New Match Rule for Authority Records

- Matching Authorities based on 1xx tags
  - 13 new authority left-anchored indexes added to Voyager
  - Makes it possible to match records with standard numbers to records without standard numbers

- New indexes described in *Voyager 9.2 Index Changes* document

- Index conflicts reviewed in process similar to Voyager 8.2 index changes

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New Merge Rule for Authority Records

- Move old heading to 688 tag upon Merge

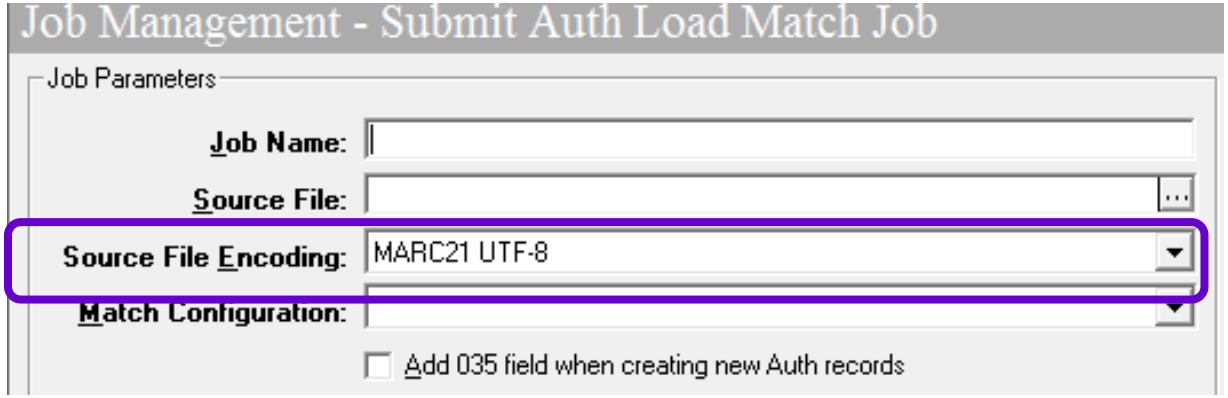
Merge Rules:

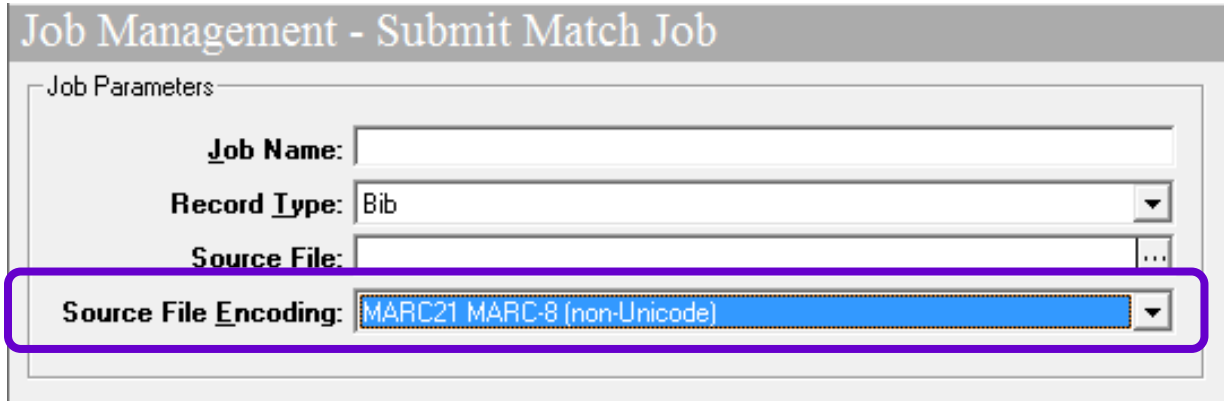
Rule	Retention	Add $5	Apply Only To Fields
☐ Retain Local 008/06			
☐ Retain Local 008/12			
☐ Retain Local 008/13			
043 Retention	Use incoming field		
09X Retention	Use incoming field	☐	
0XX Retention	Use incoming field	☐	
1XX Retention	Move old heading to 688	☑	
2XX Retention	Use incoming field	☐	

- 6XX merge rule must be configured to retain the existing field and the incoming field

Load Files in Different Encodings

- Source File Encoding option when loading files in GDC
  - Applies to Match Job and Authority Load Match Job only
  - Can be set as a session preference

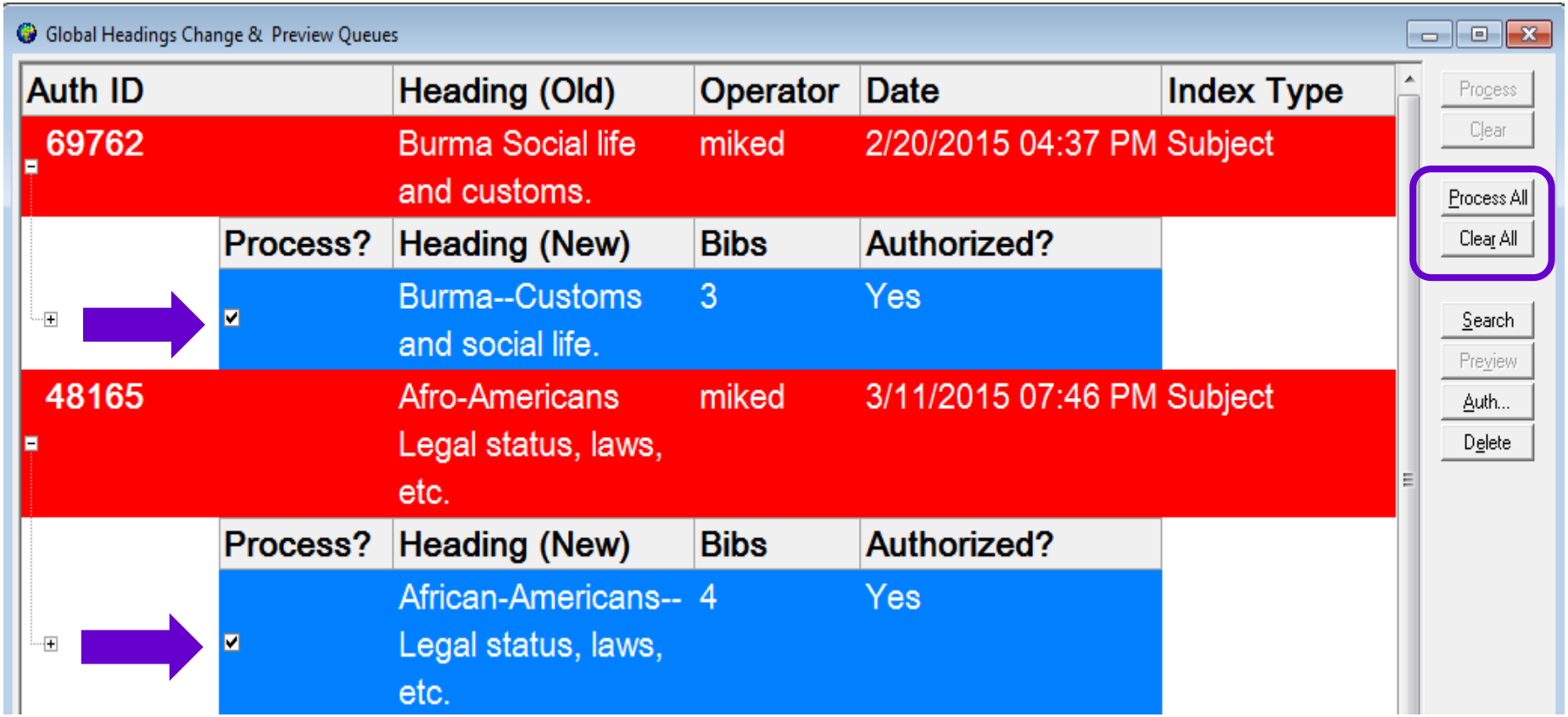




  - Same potential values as in Acq and Cat

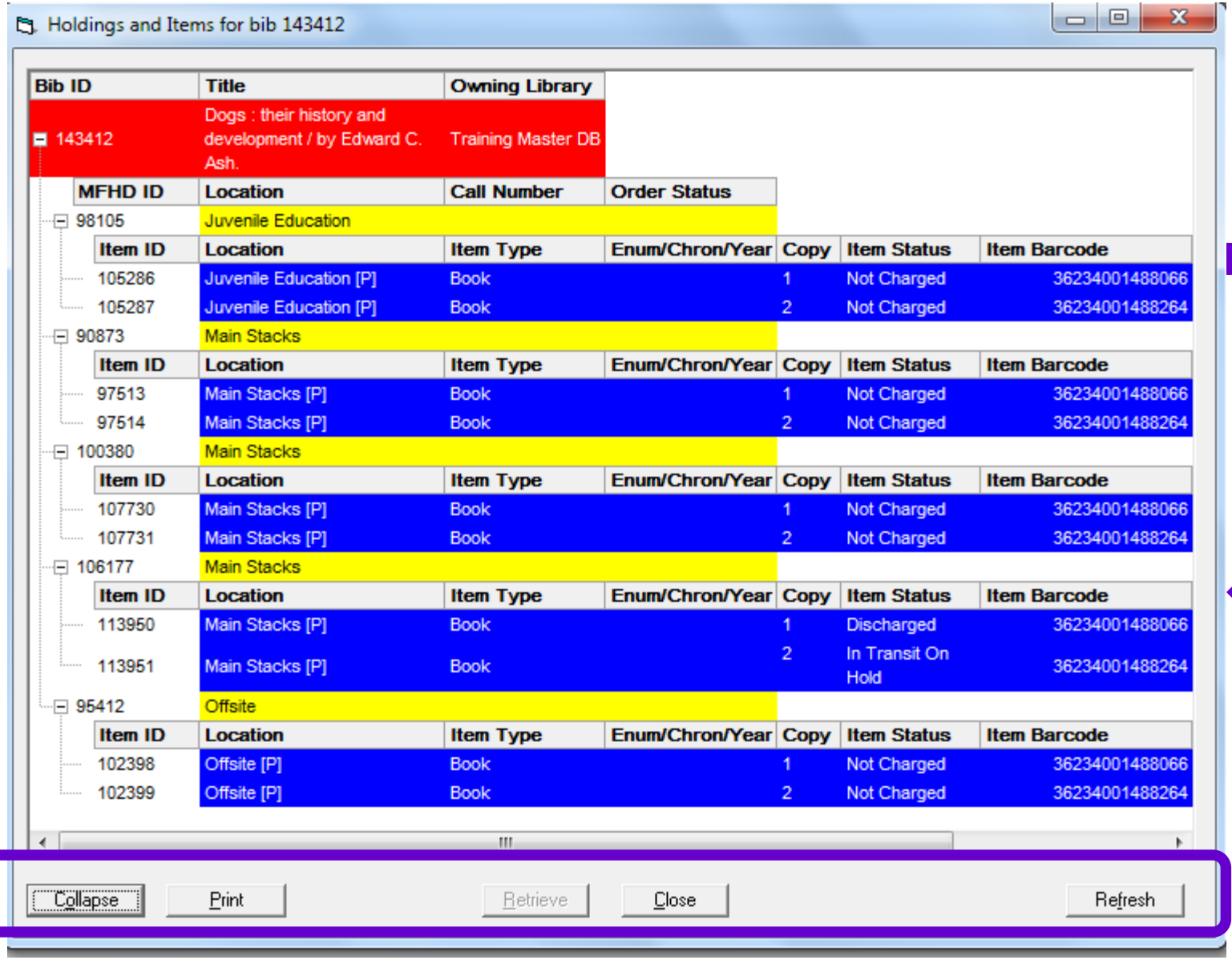
Select All Headings for Processing in GHC

- “Process All” option in GHC queue – marks all headings in the queue



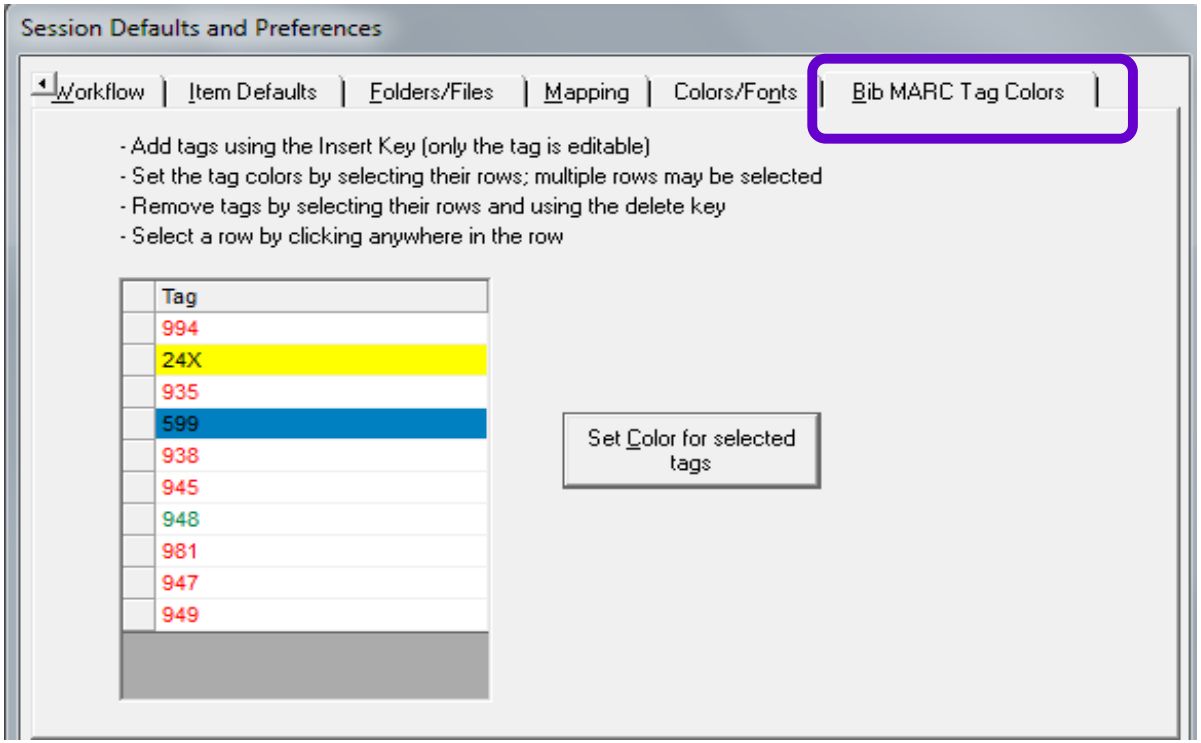
- Must run Catjob 11 before marking records to Process

Cataloging Record Navigation



Add Color Preference for MARC Tags

- Display MARC tag numbers in bib records based on user-defined color preferences



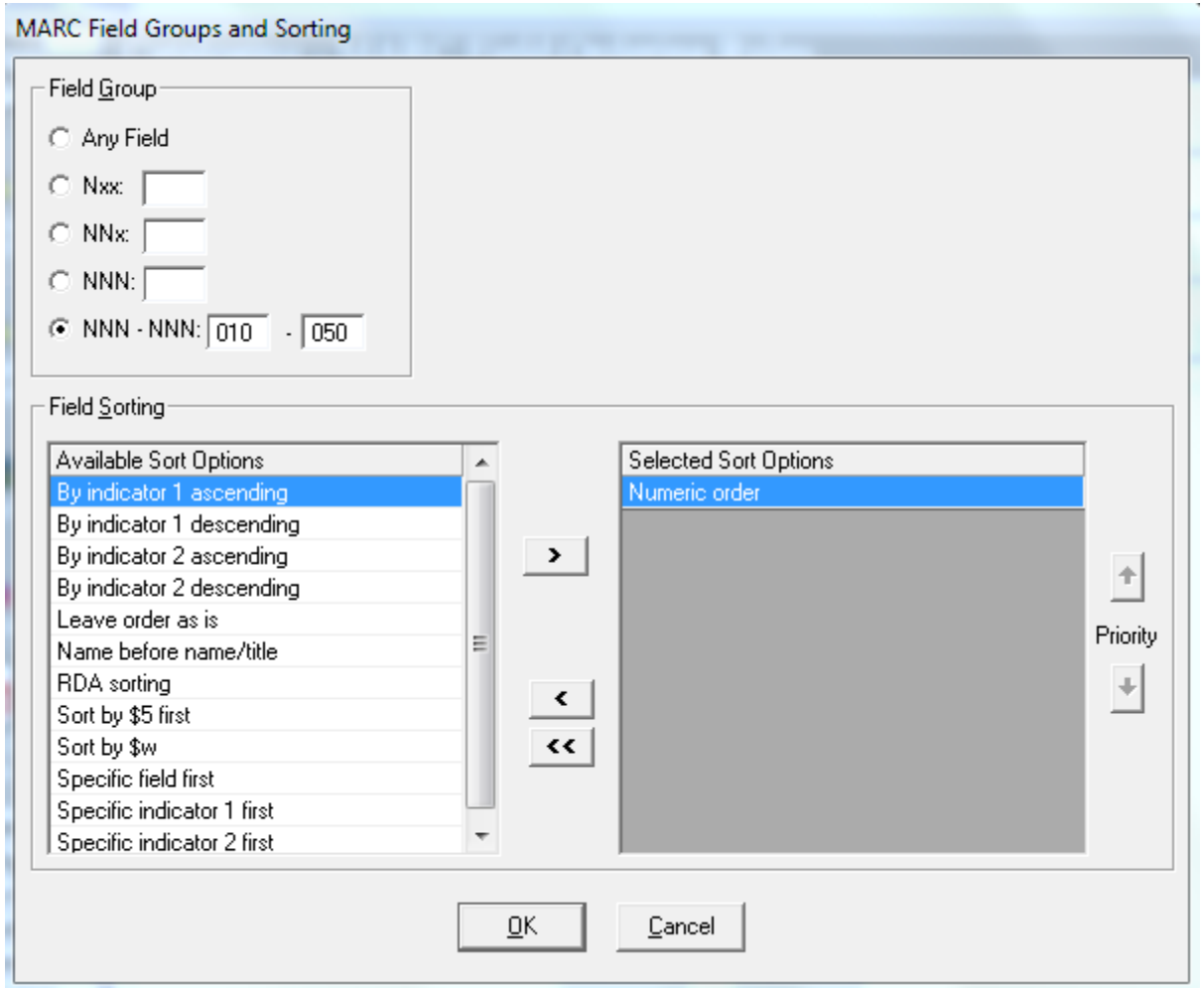
- Tags may be wildcarded: 2XX, 34X, but not X45, X4X, or XX5

A World of Color

	Tag	I1	I2	Subfield Data
	100	1		‡a Rowling, J. K.
	245	1	0	‡a Harry Potter and the Chamber of Secrets / ‡c by J.K. Rowling ; illustrations by Mary GrandPré.
	260			‡a New York : ‡b Arthur A. Levine Books, ‡c 1999.
	300			‡a viii, 341 p. : ‡b ill. ; ‡c 24 cm.
	500			‡a "Year 2"--Spine.
	500			‡a Sequel to: Harry Potter and the sorcerer's stone.
	520			‡a When the Chamber of Secrets is opened again at the Hogwarts School for Witchcraft and Wizardry, second-year student Harry Potter finds himself in danger from a dark power that has once more been released on the school.
	700	1		‡a GrandPré, Mary, ‡e ill.
	856	4	#	‡i Input this URL in a browser to get HTML More Info data. ‡q HTML ‡u http://firstsearch.oclc.org/WebZ/DECRead?standardNoType=1&standardNo=0439064864&sessionid=0&srcdbname=worldcat&key=87cdfc79fe93f3a96dc3bcf3d1ac26f58eb23463600f4a2e0f635834e2af8543&ectype=MOREINFO ‡x OCLC EC ‡3 More Info
	938			‡a Baker & Taylor ‡b BKTY ‡c 22.99 ‡d 17.24 ‡i 0439064864 ‡n 0003218791 ‡s active
➔	945			‡f bks
	945			‡p ejh ‡q Pre-adolescent
	945			‡p fic ‡q Fiction
	947			‡n 19980928 ‡p 20070703 ‡m 3744 ‡g 98-46370 ‡s Y
	948			‡a US ‡b IA ‡c UIB ‡d AMES PUB LIBR ‡c IO9 ‡d ASHFORD UNIV ‡c bcy ‡d ATLANTIC PUB LIBR ‡c fzb ‡d BEDFORD COMMUN SCH DIST ‡c IOB ‡d BRIAR CLIFF UNIV ‡c IOE ‡d BUENA VISTA UNIV ‡c kay ‡d

Order Tags in MARC Records

- User-defined sort order for MARC tags
- Defined in System Admin
- Applied in Cataloging and GDC
- Can have multiple configurations
- Field group order is important
- Put specifics first



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Order Tags in MARC Records

How can we order?

- Leave as is
- Numeric order
- By indicator (ordered, or specific one first)
- Specific tags first/ordered
- Sort by $w
- Sort by $5 first
- RDA sorting (by contents of 336/337/338 $2)
- Name before Name/Title (700, 710, 711)
- 880 paired

See "**MARC Field Ordering Rules**" in the *Voyager 9.2 System Administration User's Guide* for more information

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Order Tags in MARC Records

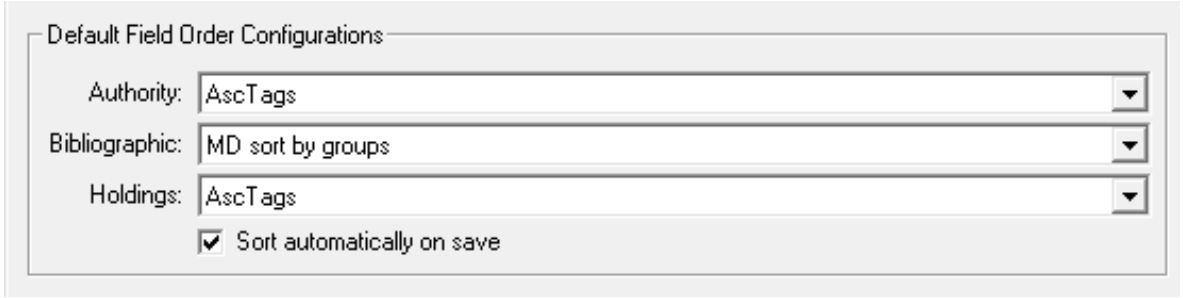
- Puts MARC fields in user-defined order automatically

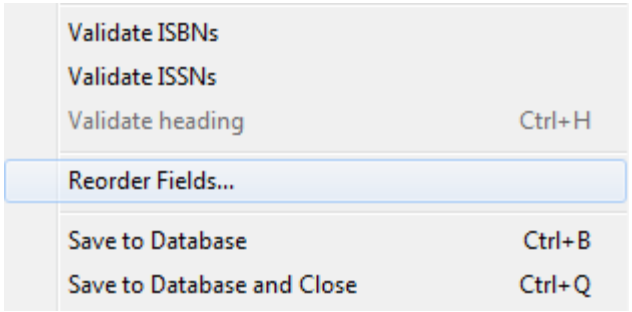
	Tag	I1	I2	Subfield Data
	015			‡a GBA469083 ‡2 bnb
	020			‡a 0812694554 (pbk.)
	016	7		‡a 012997674 ‡2 Uk
	020			‡a 9780812694550 (pbk.)
	035			‡a (OCoLC)ocm56654878
	040			‡a UKM ‡c UKM
➔	245	0	0	‡a Harry Potter and philosophy / ‡c edited by David Baggett, Shawn Klein, William
	082	0	4	‡a 823.914 ‡2 22
	260			‡a Chicago, Ill. : ‡b Open Court, ‡c 2004

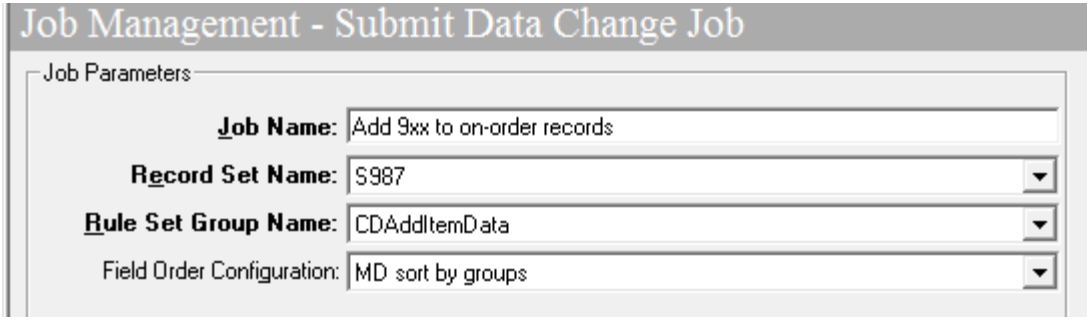
	Tag	I1	I2	Subfield Data
➔	015			‡a GBA469083 ‡2 bnb
	016	7		‡a 012997674 ‡2 Uk
	020			‡a 0812694554 (pbk.)
	020			‡a 9780812694550 (pbk.)
	035			‡a (OCoLC)ocm56654878
	040			‡a UKM ‡c UKM
	082	0	4	‡a 823.914 ‡2 22
	245	0	0	‡a Harry Potter and philosophy / ‡c edited by David Baggett, Shawn Klein, William Irwin

Order Tags in MARC Records

- Preference option in Cataloging
- Menu option in Cataloging
- Job parameter in GDC







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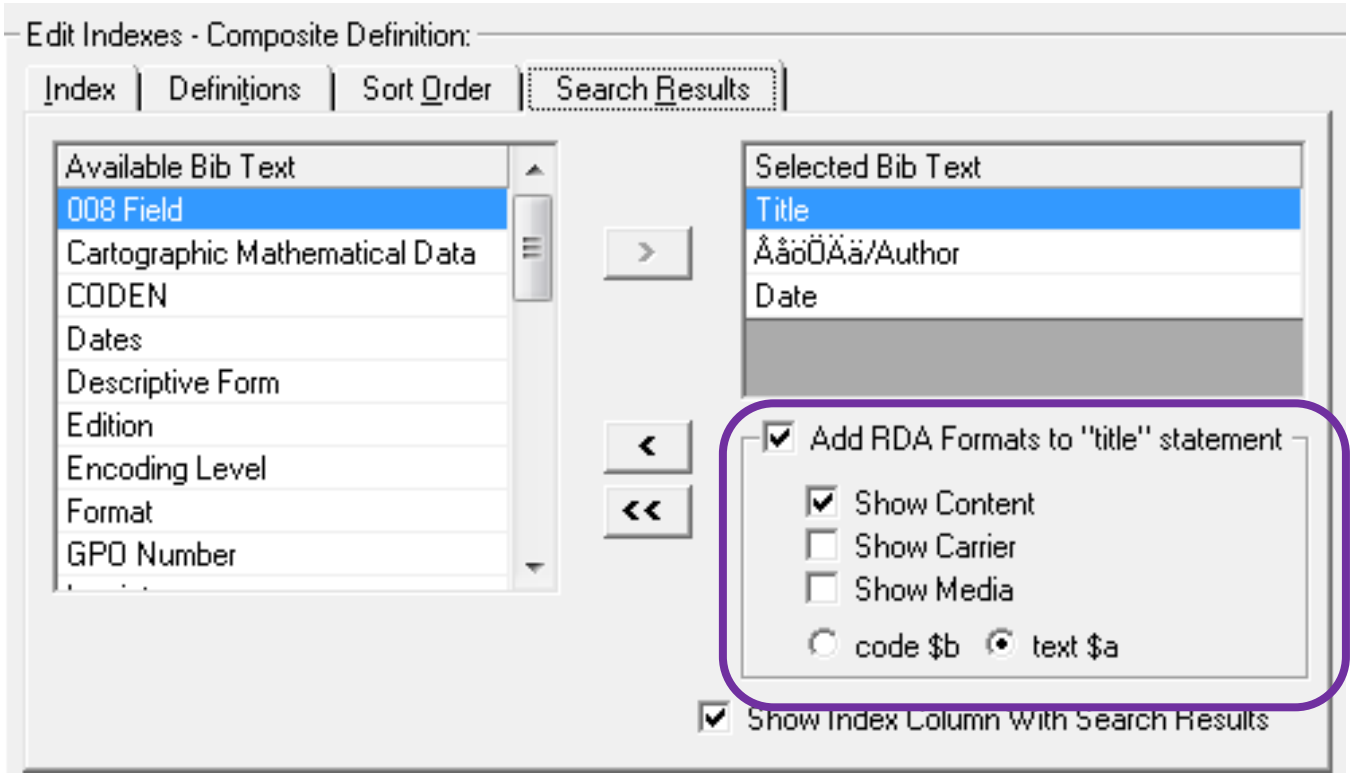
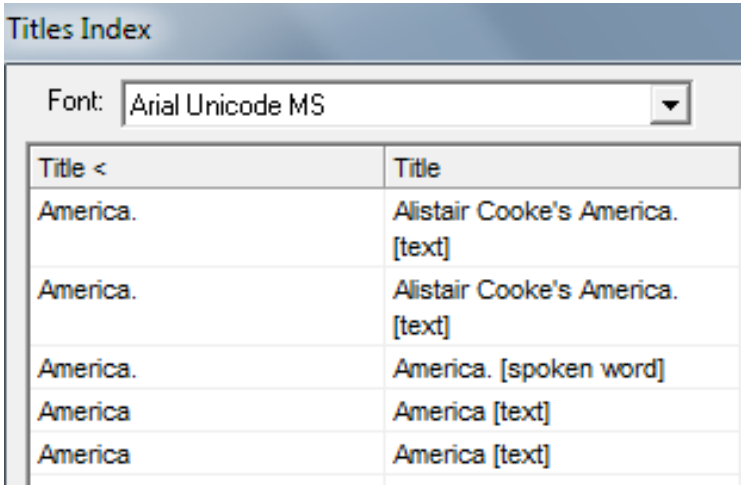
Add RDA Fields to Title Summary Display

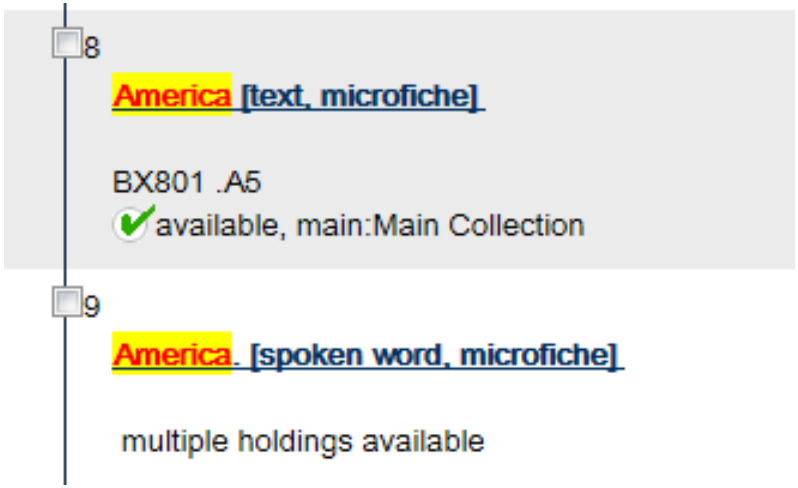
- Configured by search type in Sys Admin
- Title field must be included in search results
- 33x [term] or [code] is added to search results



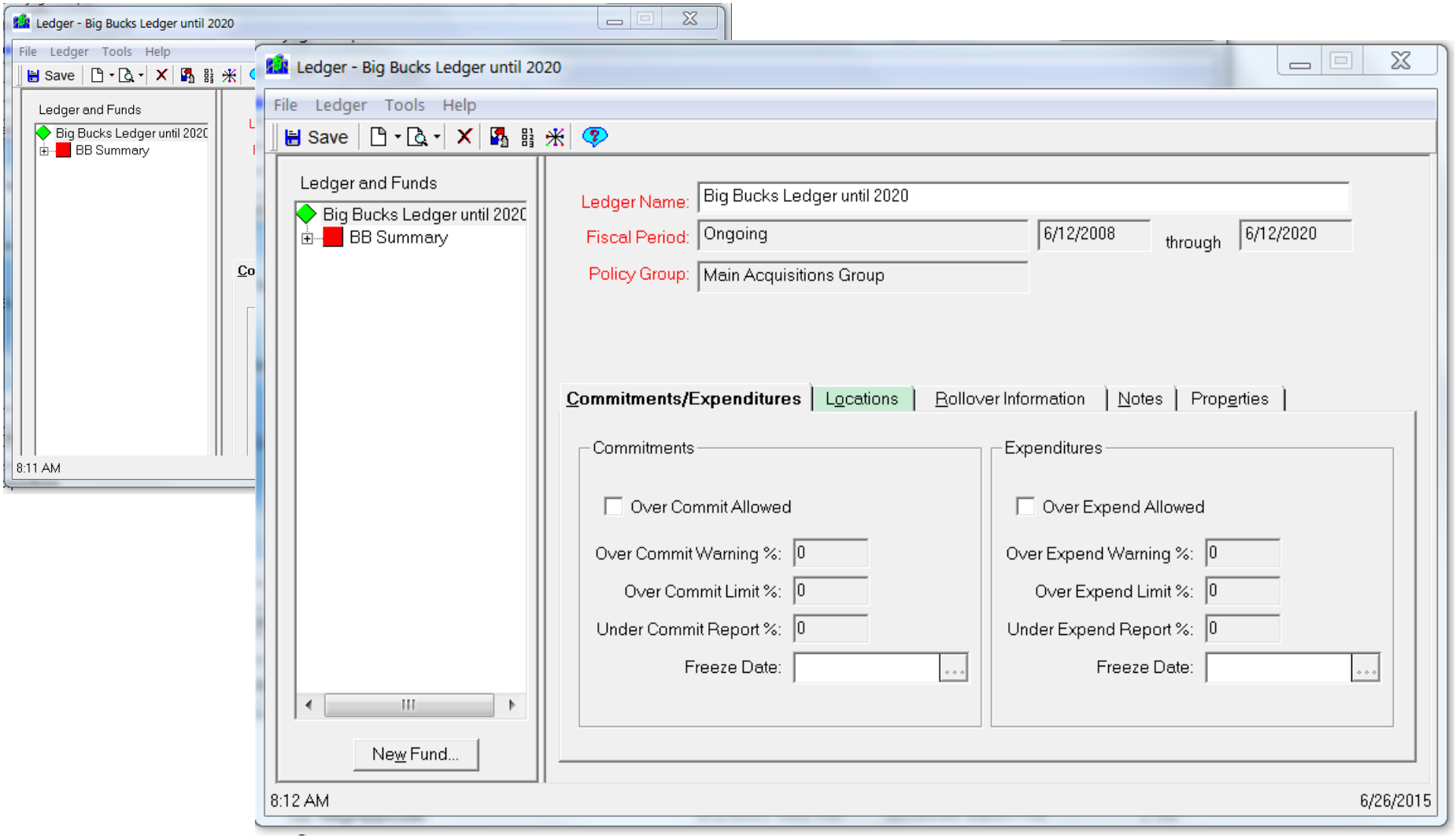
Add RDA Fields to Title Summary Display

- Record must contain 040 $e rda
- 33x [term] or [code] is added to search results

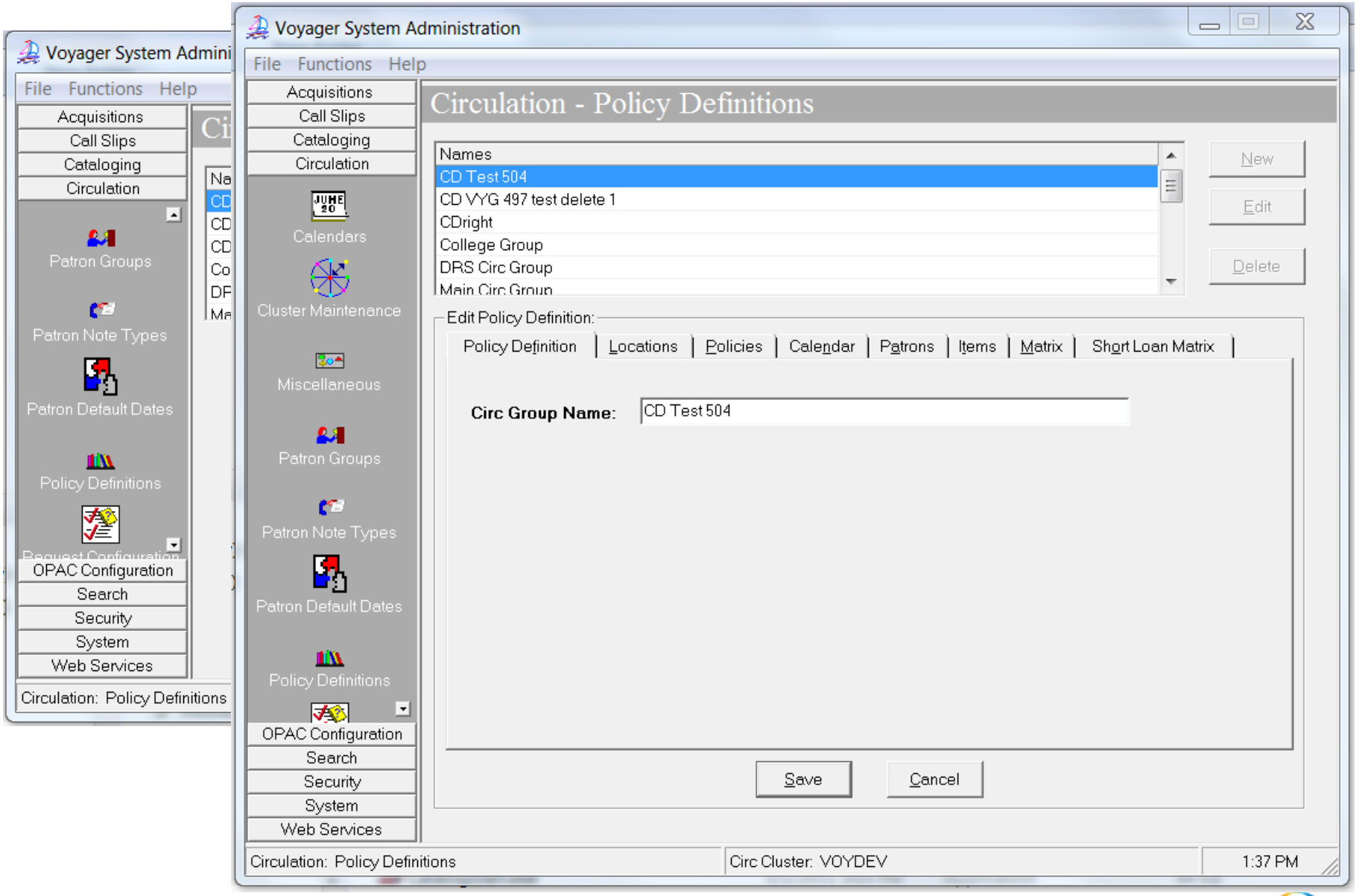




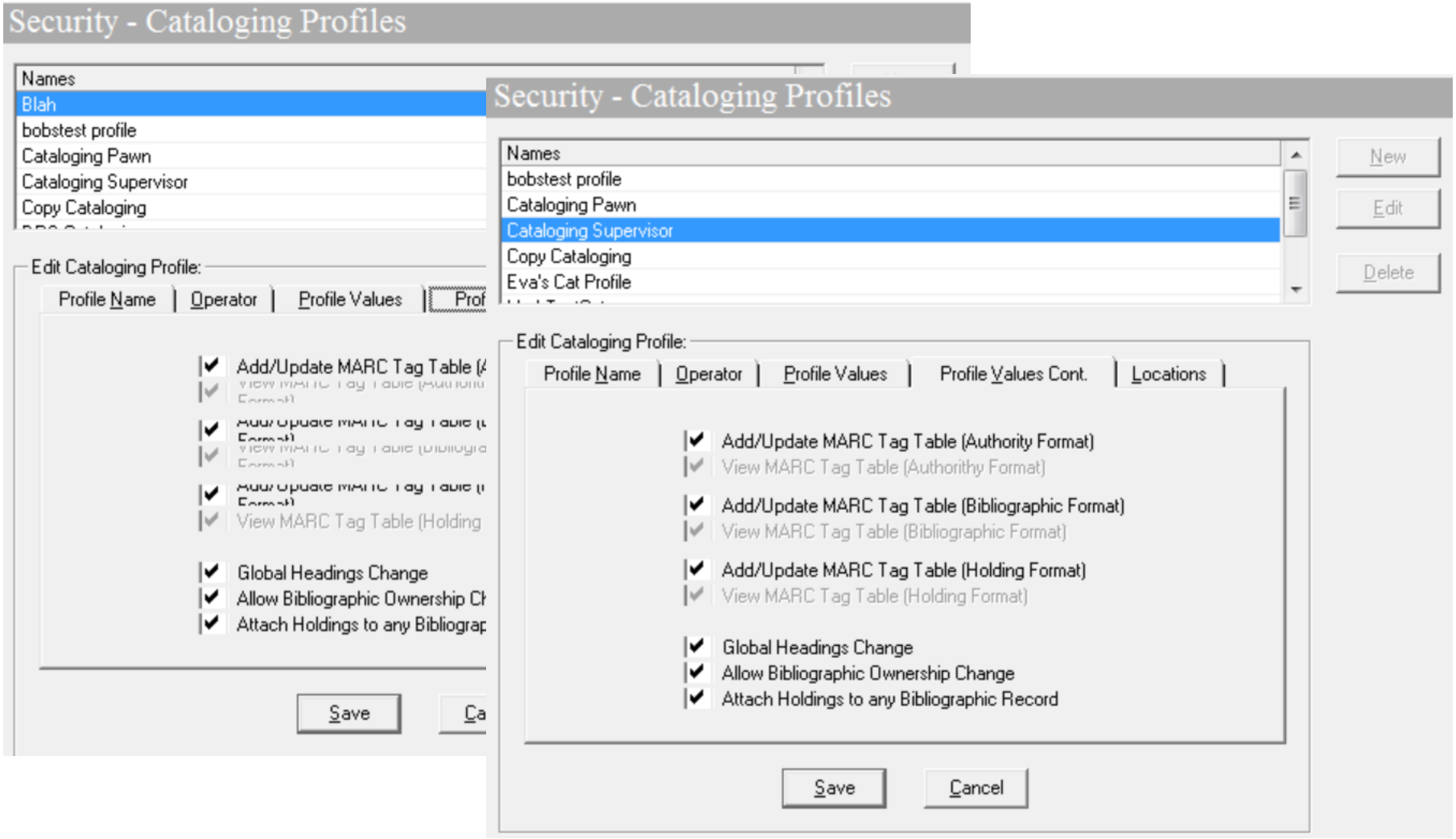
Ledger Window Sized for Every Font



System Admin Sized for Every Font



Font Adjustments in All Modules



Want to Know More About Voyager 9.2?

- Details of these and other new features in 9.2 are available in the Voyager documentation

- Review the Release Notes and other documentation on the new **Ex Libris Knowledge Center** --

http://knowledge.exlibrisgroup.com

Voyager > Release Notes > 9.2.0

Voyager > Implementation Guides > 9.2.0

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A Look Ahead to Future Releases

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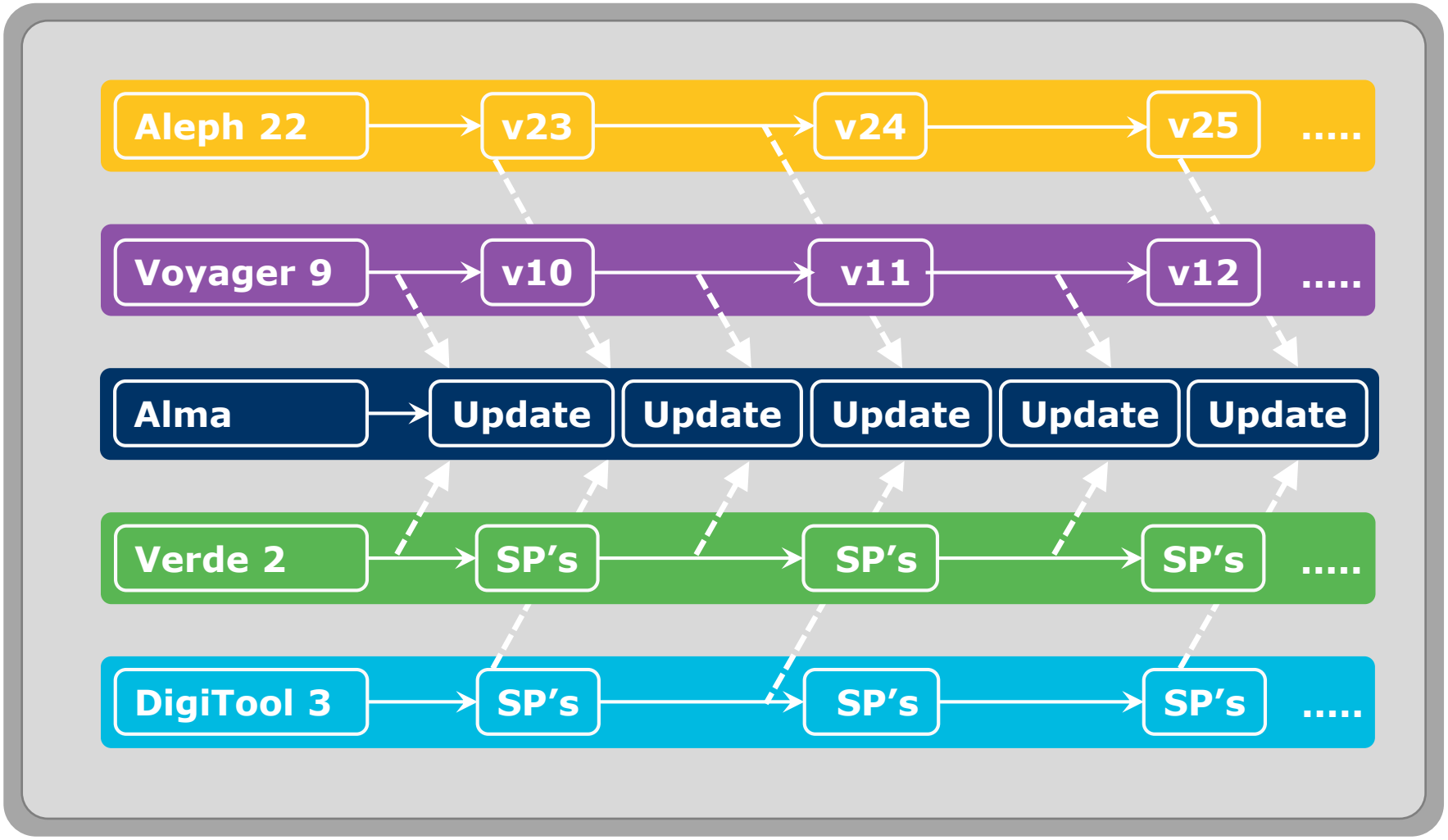
A Future Path for Every Customer



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Voyager 10

- Development on Voyager 10 has already begun
- Enhancements are focused on simplifying staff workflows, improving service to users, and reducing TCO
- Ten customer-requested enhancements from latest voting cycle will be included in versions 10.0-10.2

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Enhancement Voting Results for Voyager 10

1. Show count of unchanged records in data change job file
2. Modify CAT client behavior when changing record types
3. Warn user when an item record has been modified since it was opened
4. Show serials pop-up notes once for each title
5. Show which operator applied an item status
6. Include “Last Use Date” in patron record
7. Add new rule conditions in GDC
8. Provide warning message when closing Voyager clients
9. Provide message in SA when deselecting locations used in ledger
10. Warn when default patron expiration/purge dates are in the past

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Highlights of New Features in Voyager 10.0

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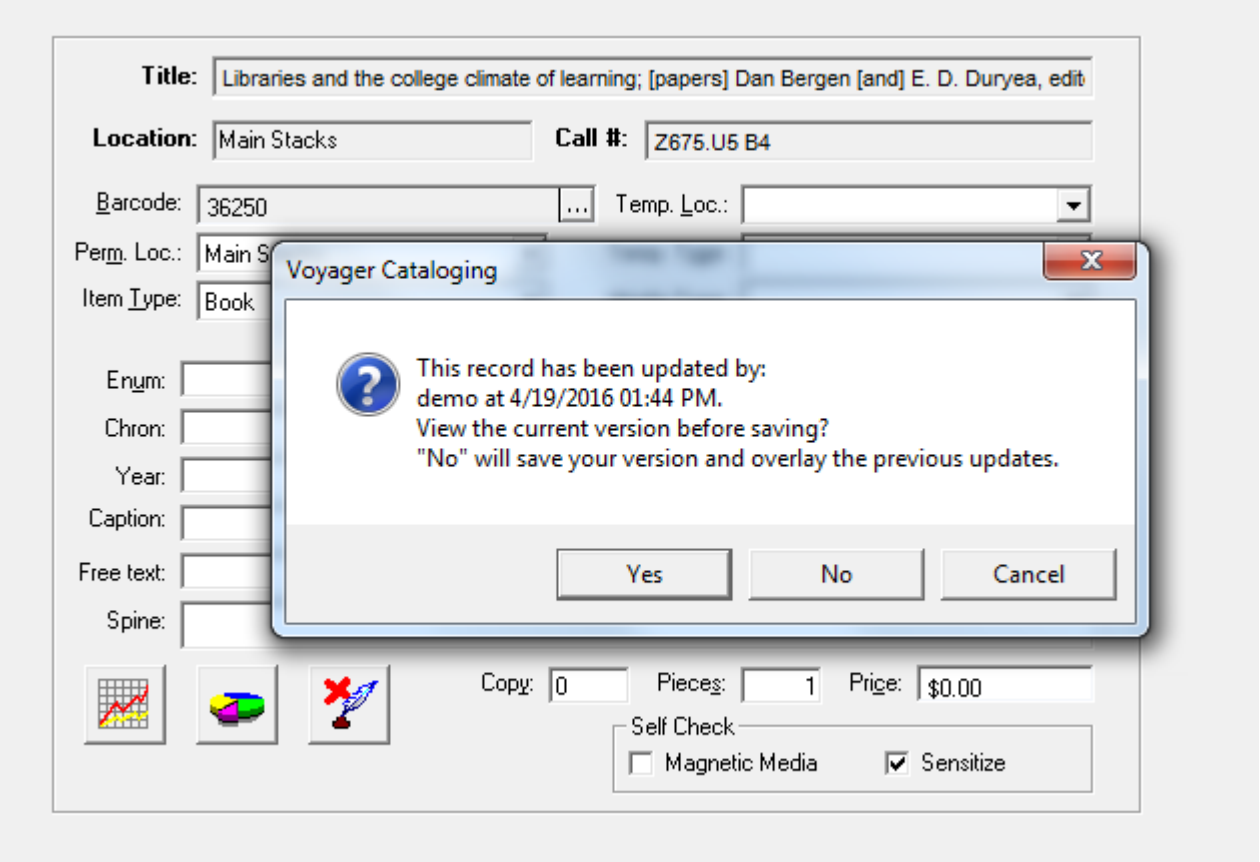
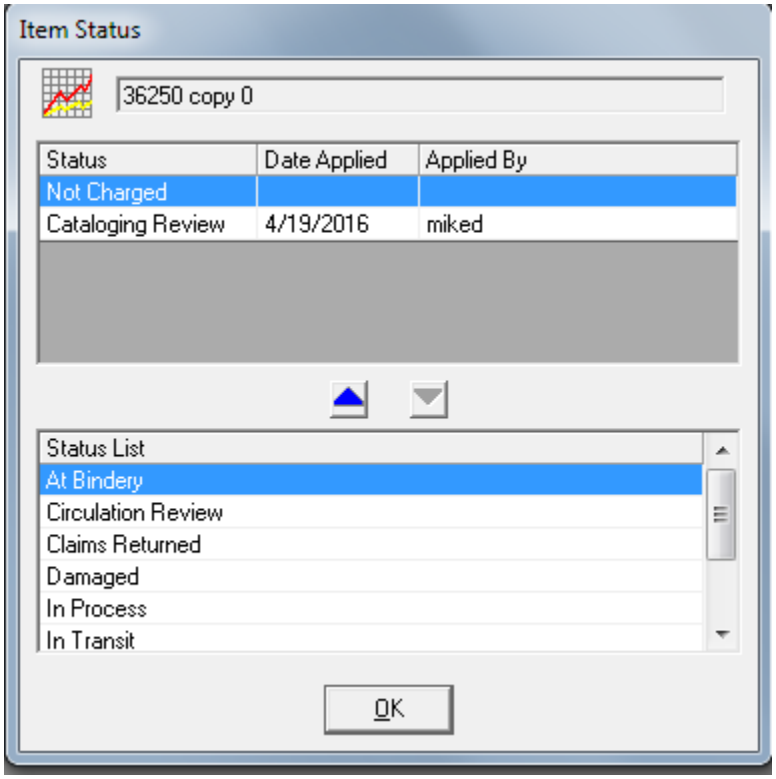
Warn User When Item Record Modified After Opening

- Displays a warning message when trying to save an item record that has been modified by another user since the record was opened



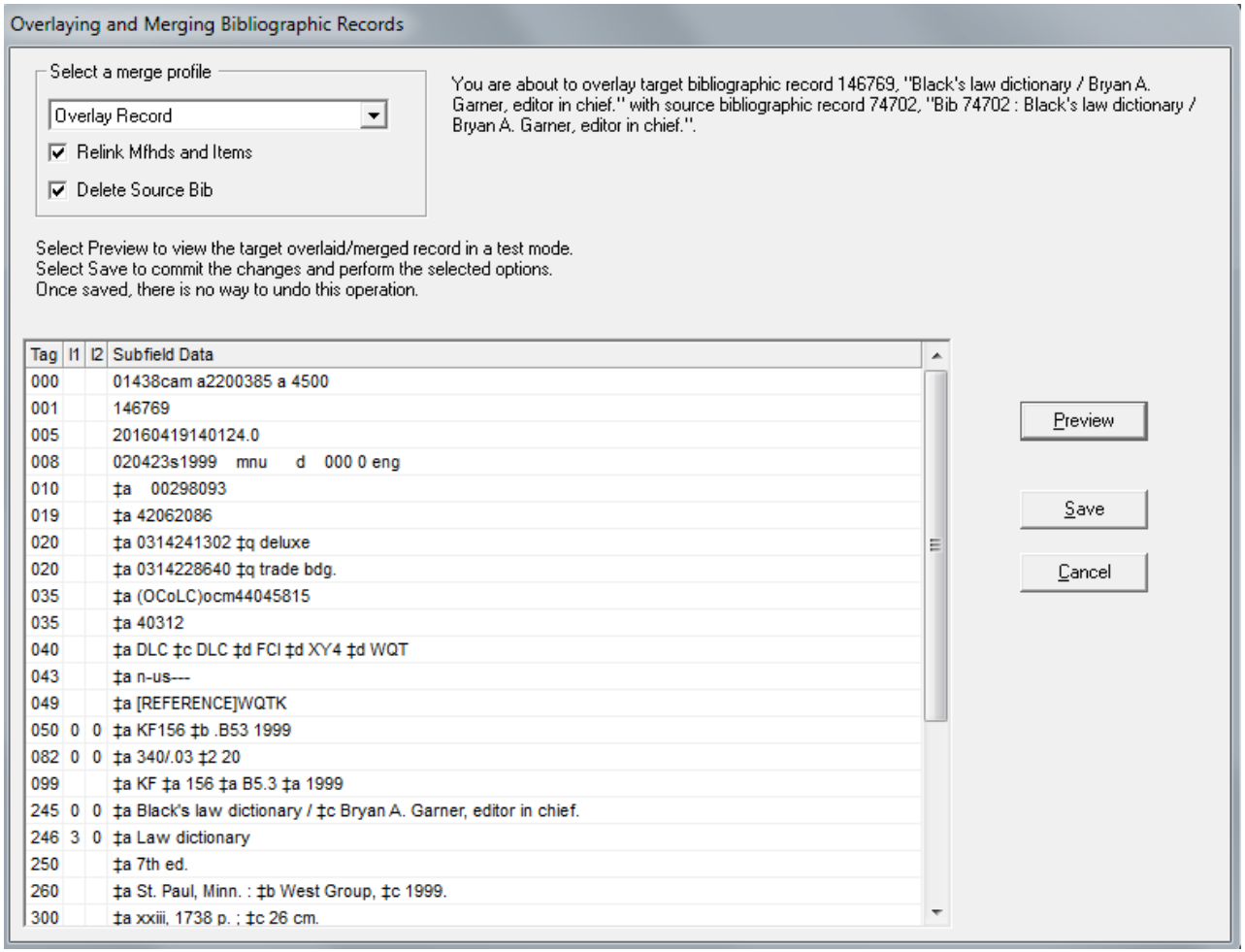
Show Which Operator Applied an Item Status

- The operator who applied an item status is displayed in the item status window

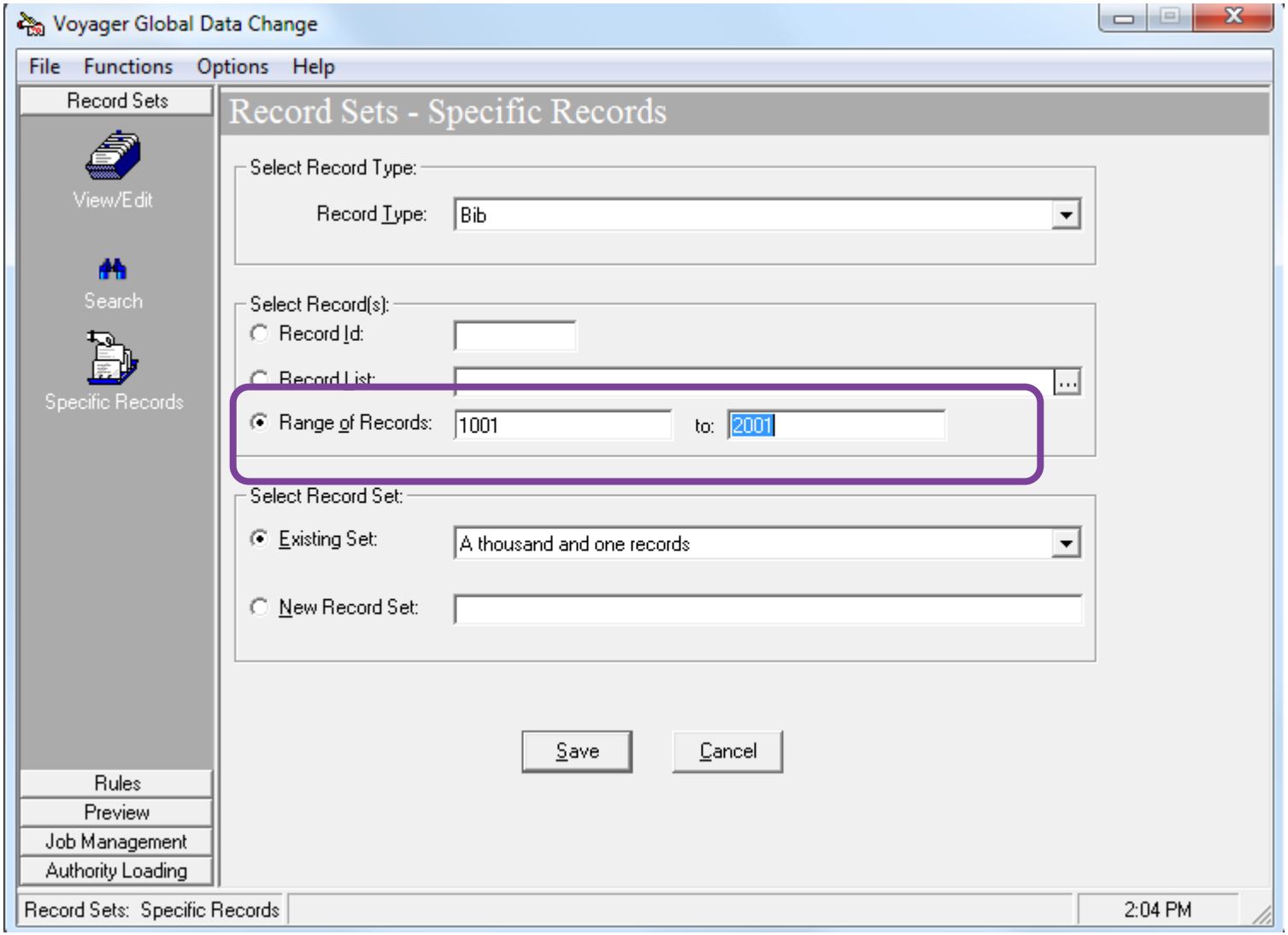


Preview Changes When Using Record Overlay/Merge

- Shows a preview of the record that will be saved to the database when using the Bibliographic Overlay/Merge functionality

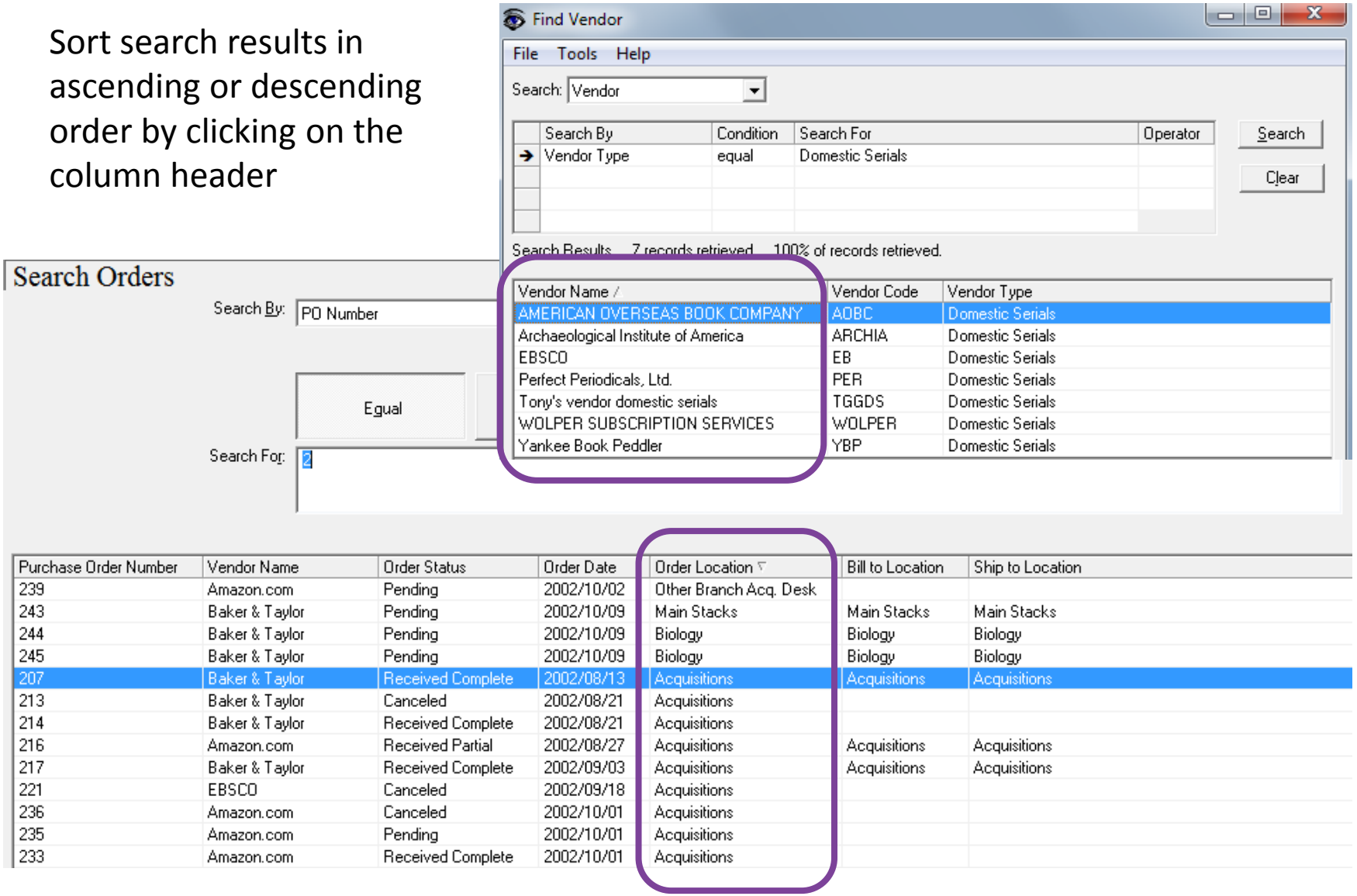


Create GDC Record Set from a Range of Record IDs



Improvements to Searching in Acquisitions

Sort search results in ascending or descending order by clicking on the column header



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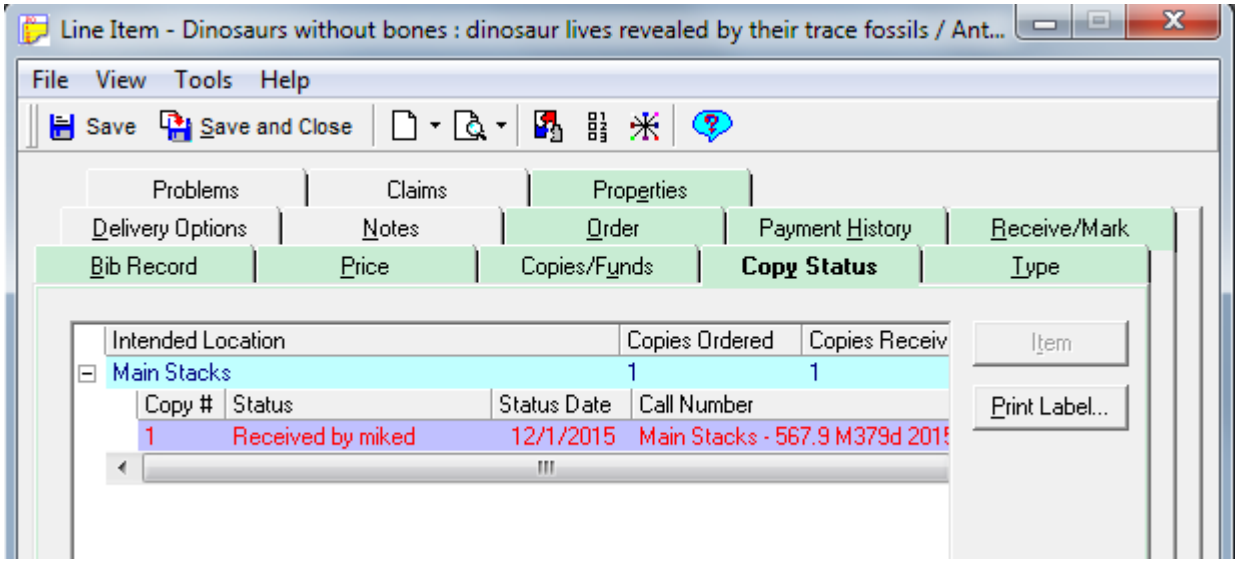
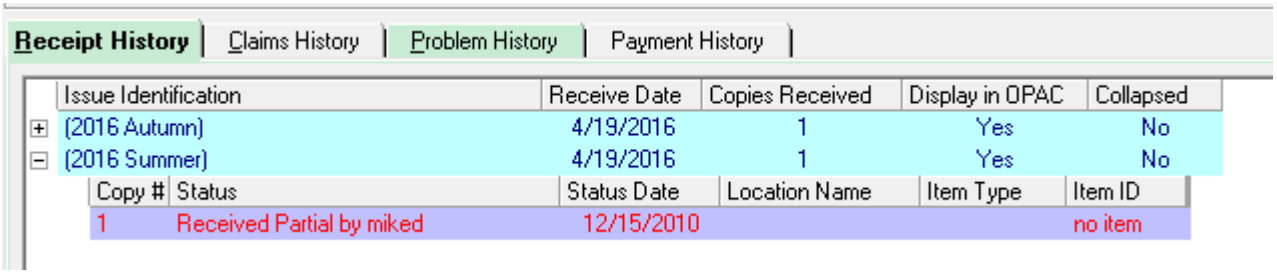
Show Operator Who Received a Line Item

- Displays the operator ID of the staff member who receives an item





Voyager 10 and Beyond

- Voyager 10 will be released in 2017, with additional releases in 2018 and 2019
- Planning for Voyager 11 will begin shortly after Voyager 10 is released

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Questions?

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