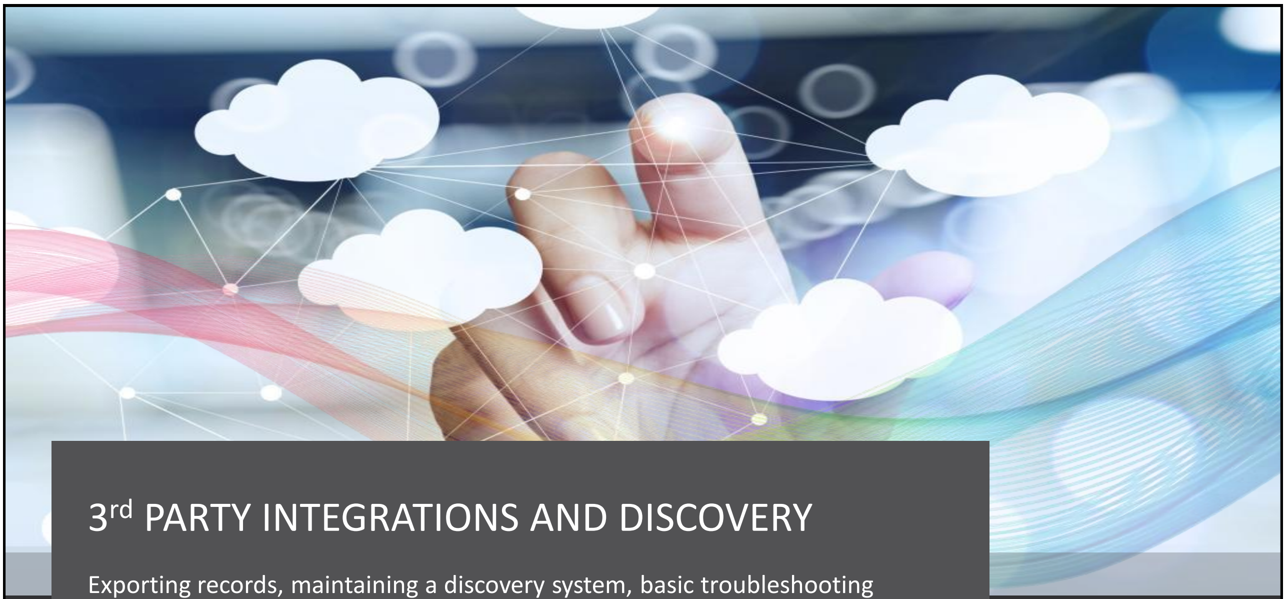

3rd PARTY INTEGRATIONS AND DISCOVERY

Exporting records, maintaining a discovery system, basic troubleshooting

LAURA JACOBS | FUNCTIONAL SUPPORT ANALYST
AMY ROOD | TEAM LEAD

Introductions

- Laura Jacobs
- Amy Rood

About This Session and Target Audience

- This session aims to inform users already using discovery and 3rd party integrations (Primo, Summon, EDS) and to assist with setup for those interested in using discovery systems.

- Session Objectives
  - By the end of this sessions you will know, understand and/or be able to:
    - A) Find resources to set up and troubleshoot Primo
    - B) Export record sets for Summon, EDS, and other discovery systems
    - C) More fully understand RTA

- Session Target Audience:
  - Primo, Summon, EDS customers
  - Systems, cataloging, reference librarians
  - Those interested in purchasing a discovery layer and are researching

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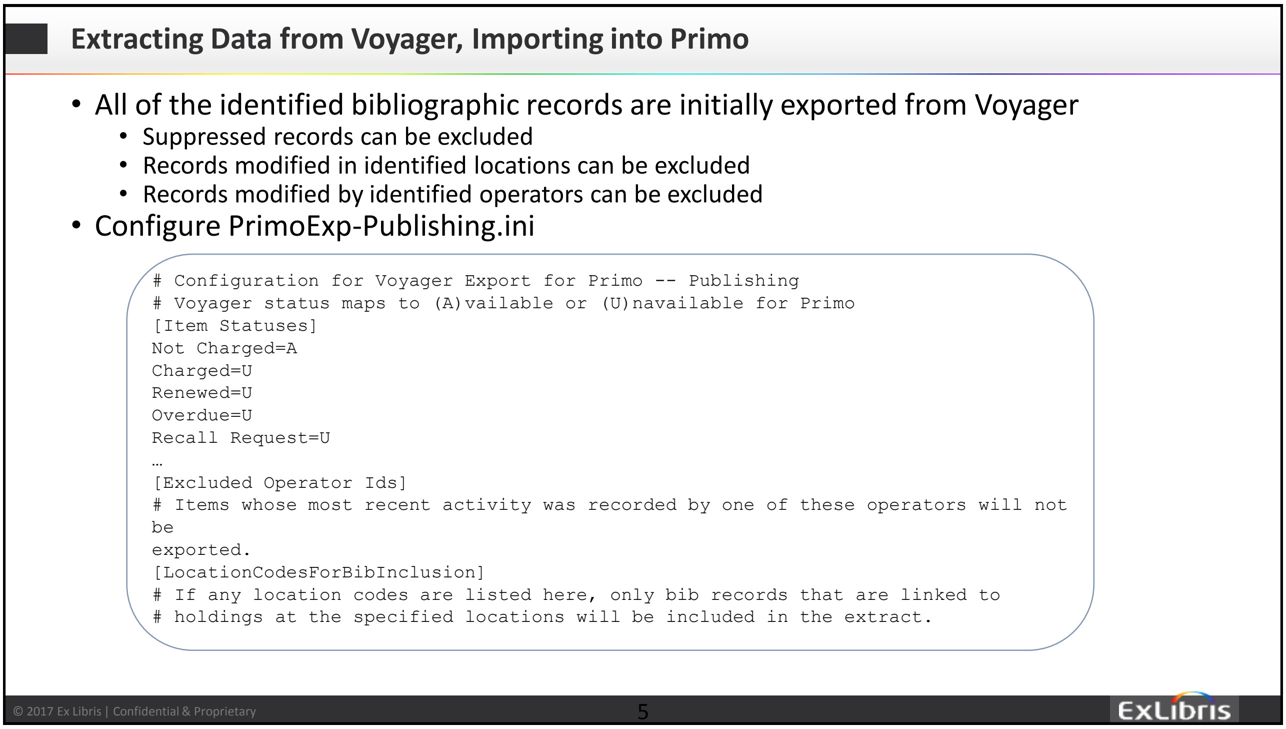
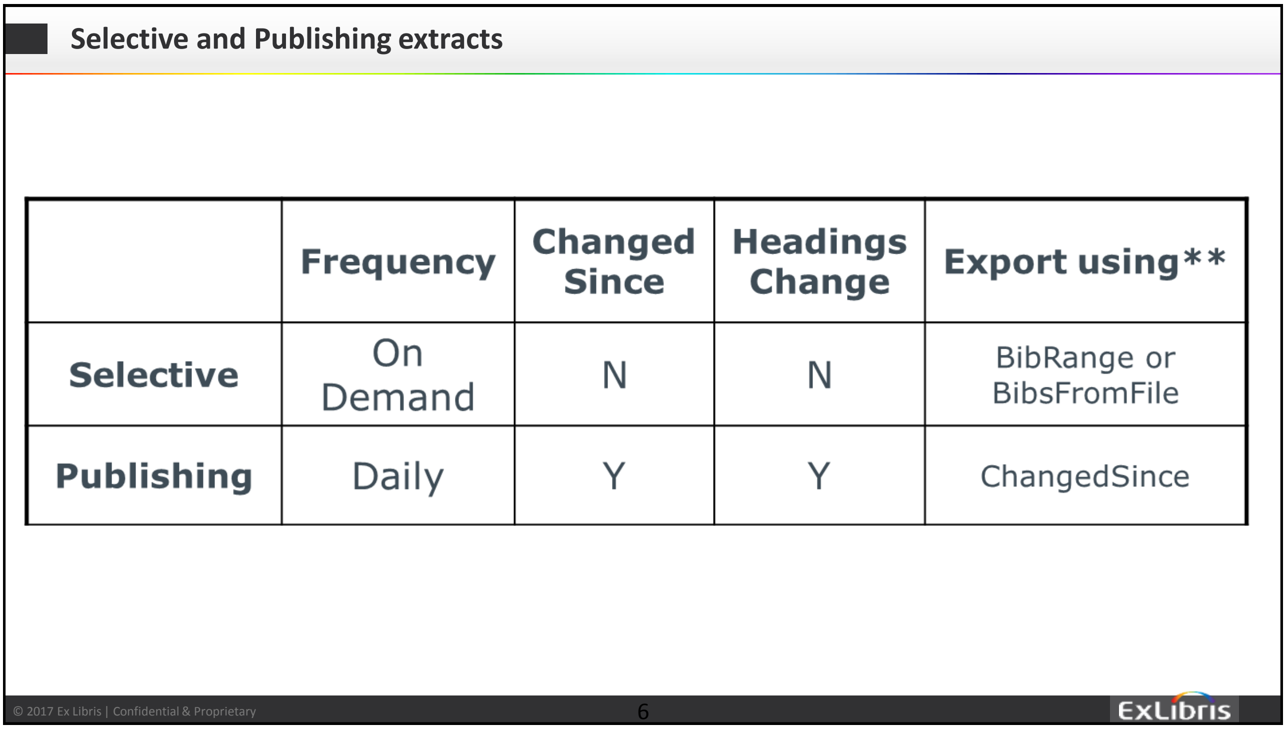
Voy-Primo: Setup



Extracting Data from Voyager, Importing into Primo

- All of the identified bibliographic records are initially exported from Voyager
  - Suppressed records can be excluded
  - Records modified in identified locations can be excluded
  - Records modified by identified operators can be excluded
- Configure PrimoExp-Publishing.ini

```
# Configuration for Voyager Export for Primo -- Publishing
# Voyager status maps to (A)vailable or (U)navailable for Primo
[Item Statuses]
Not Charged=A
Charged=U
Renewed=U
Overdue=U
Recall Request=U
…
[Excluded Operator Ids]
# Items whose most recent activity was recorded by one of these operators will not
be
exported.
[LocationCodesForBibInclusion]
# If any location codes are listed here, only bib records that are linked to
# holdings at the specified locations will be included in the extract.
```



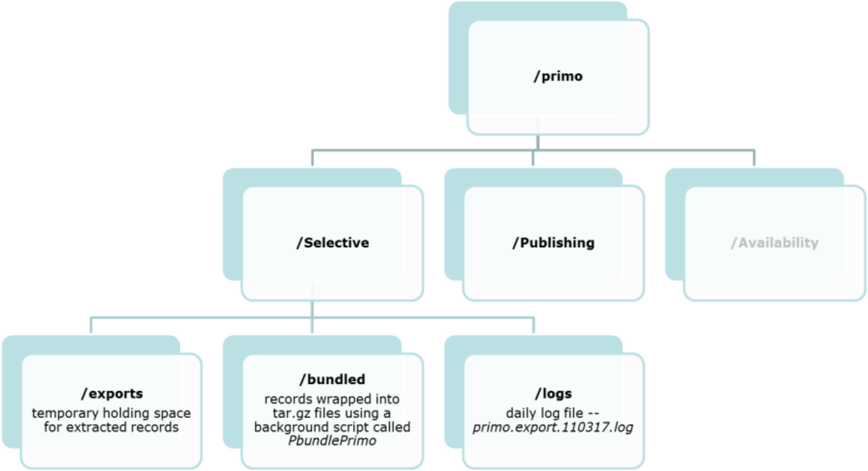
Selective and Publishing extracts

	Frequency	Changed Since	Headings Change	Export using**
Selective	On Demand	N	N	BibRange or BibsFromFile
Publishing	Daily	Y	Y	ChangedSince

Pipes and Harvesting (probably not the kinds you're thinking)

- Pipes bring information from Voyager to Primo
  - Publishing pipe
    - Brings bibliographic information from Voyager bibs to Primo for display
  - Availability pipe
    - Brings availability information and changes from holdings from Voyager to Primo
  - Selective pipe
    - Brings back select bib information to Primo after the initial harvest
- /m1/voyager/yyydb/ini
  - PrimoExp-Publishing.ini
  - PrimoExp-Availability.ini
  - PrimoExp-Selective.ini
- Schedule pipes to run at convenient times
  - You know your system: how often will they run? How often do you update bibliographic records? Add new records? How many? How many transactions are occurring daily?

Primo directories on the Voyager server



/primo

/Selective

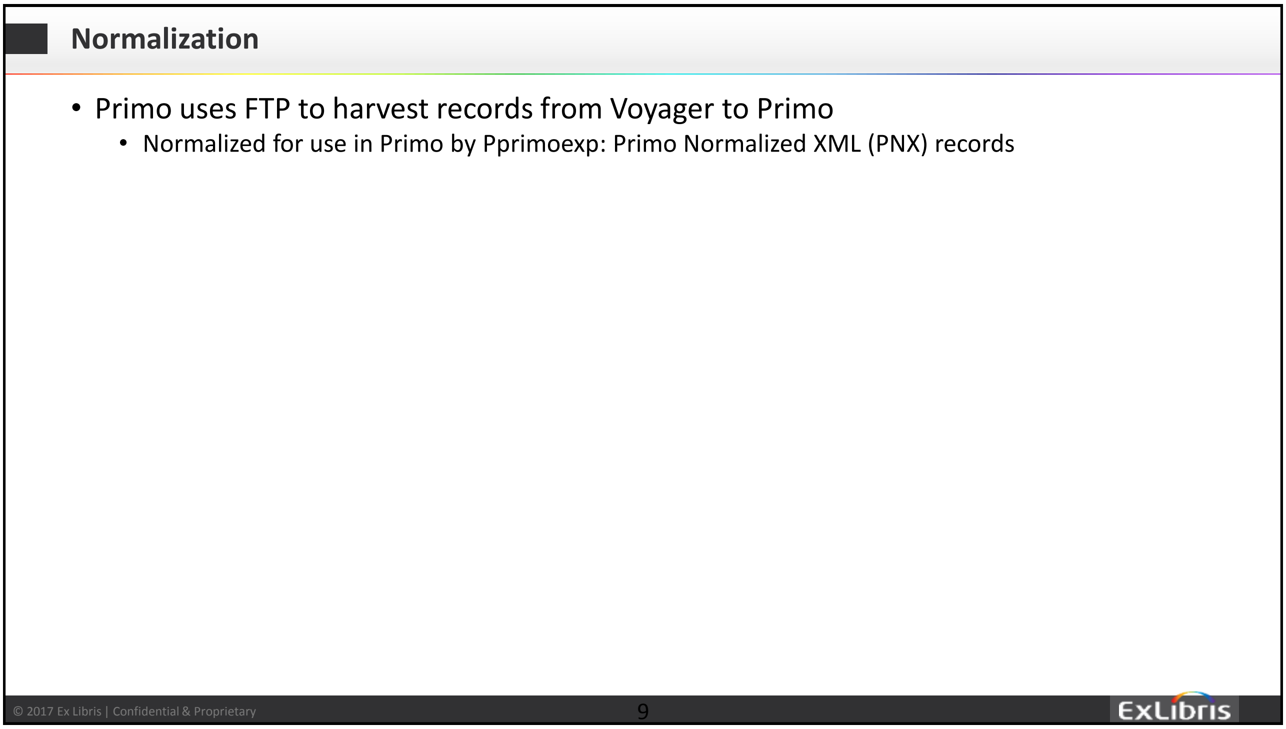
/Publishing

/Availability

/exports
temporary holding space for extracted records

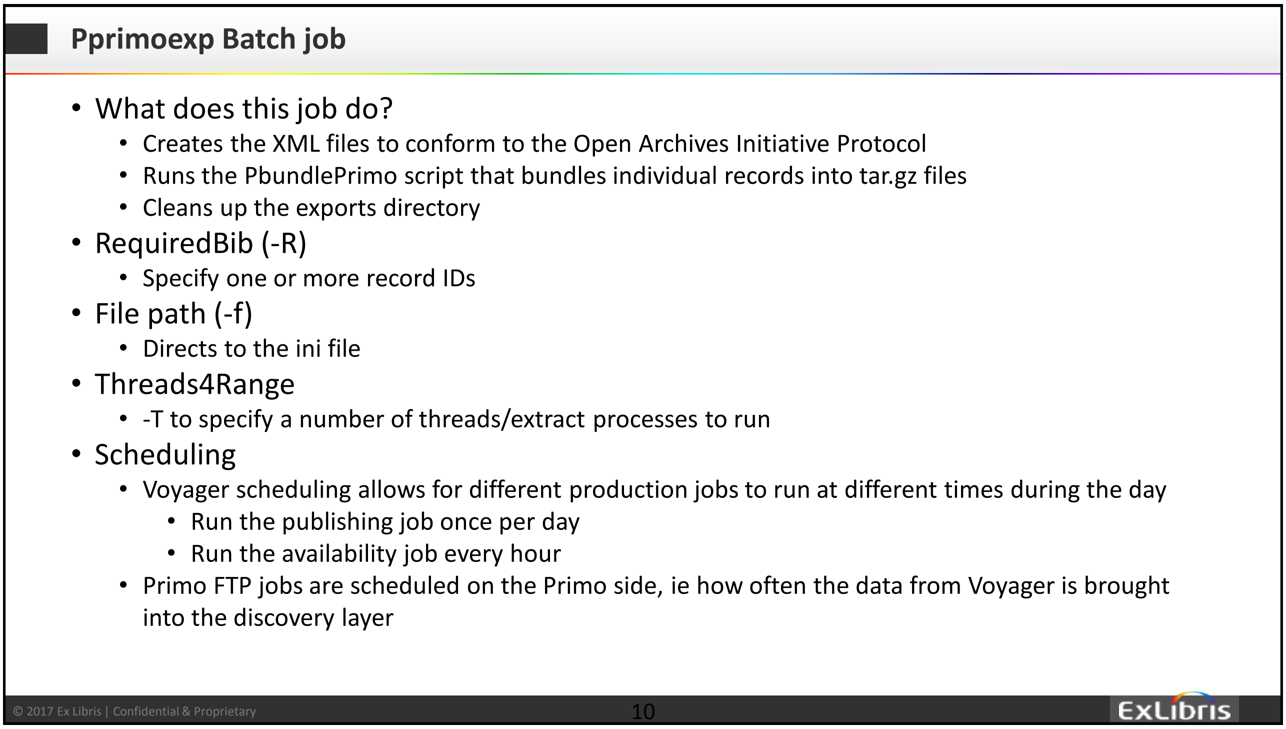
/bundled
records wrapped into tar.gz files using a background script called *PbundlePrimo*

/logs
daily log file -- *primo.export.110317.log*



Normalization

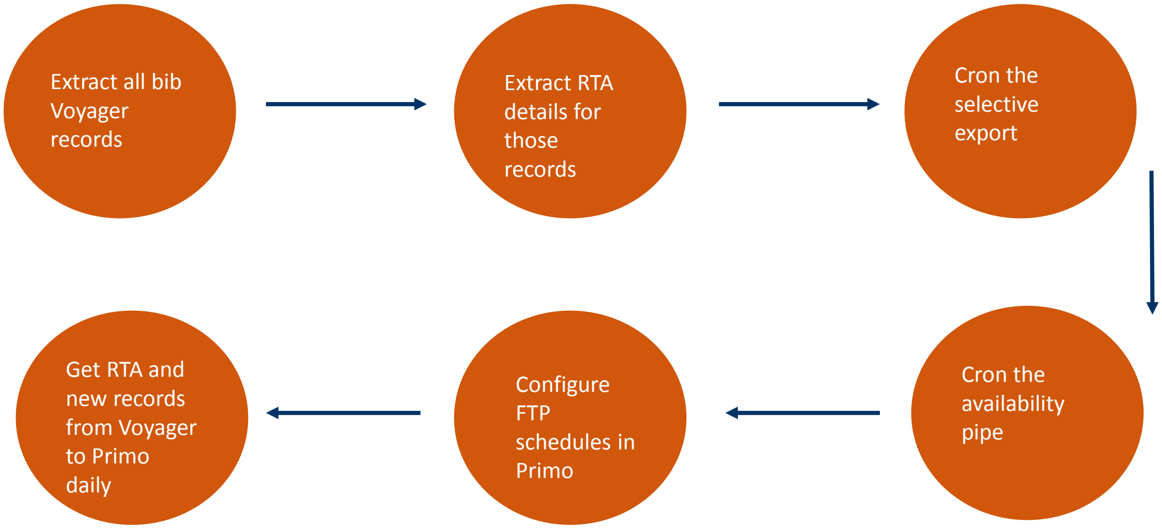
- Primo uses FTP to harvest records from Voyager to Primo
  - Normalized for use in Primo by Pprimoexp: Primo Normalized XML (PNX) records



Pprimoexp Batch job

- What does this job do?
  - Creates the XML files to conform to the Open Archives Initiative Protocol
  - Runs the PbundlePrimo script that bundles individual records into tar.gz files
  - Cleans up the exports directory
- RequiredBib (-R)
  - Specify one or more record IDs
- File path (-f)
  - Directs to the ini file
- Threads4Range
  - -T to specify a number of threads/extract processes to run
- Scheduling
  - Voyager scheduling allows for different production jobs to run at different times during the day
    - Run the publishing job once per day
    - Run the availability job every hour
  - Primo FTP jobs are scheduled on the Primo side, ie how often the data from Voyager is brought into the discovery layer

Basic Workflow:



Extract all bib Voyager records

Extract RTA details for those records

Cron the selective export

Cron the availability pipe

Configure FTP schedules in Primo

Get RTA and new records from Voyager to Primo daily

Course Reserves

Course Reserves Overview

- Facets and search scopes in Primo can allow course reserves searching in discovery
- Extracted Voyager records are enriched with course reserve information
  - Course number, course name, instructor name/title, effective date, department name, etc.
- In the relevant PrimoExp<xxx>.ini:
  - CourseReserves=Y
    - 952 tag in the [Enrichment Tags] stanza
- ITEM.on_reserve
  - If flag is set to Y in the item record, every attached course reserve list will be linked
    - When a ChangeSince= value is specified, RESERVE_ITEM_HISTORY is consulted to determine if reserve data should be extracted

InsertCRTag=952 Enrichment Tag

- Assumes you're not currently using the 952 locally
  - 952a: Reserve list name
  - 952b: list effective date
  - 952c: list expiration date
  - 952d: List location display name
  - Etc
- PprimoExp looks first at the ini: Course Reserves=Y?
  - Does one of the bib's items include an entry in RESERVE_ITEM_HISTORY for timeframe?
  - ITEM.on_reserve=Y
  - Generate the bib with 952 fields

Course Reserves E-Items

- Voyager item type specifically created for course reserves
  - Eitems exist only in the context of course reserves
  - Optionally are attached to bibs
- What Pprimoexp is looking for:
  - Status of e-items
  - Attachment to effective courses
  - ChangedSince=
    - Deleted eitems
    - Changed/edited eitems
    - Reserve list changes

InsertEIMTag=954 Enrichment Tag

- Included in the [Enrichment Tags} stanza of the .ini
  - 945a: Code supplied as a parameter to the job
  - 945b: Display name of the Voyager owning library of the bibliographic record
  - 945c: Display name of the Voyager location from the MFHD
  - Etc.
- ExportEitemsWithCourseReserves=
  - Y or N
  - ChangedSince governs exported eitems
  - Only eitems between effective and expiration dates
  - Qualifying linked bib records will also be imported
- IncludeEItemSuppressedBibs=
- IncludeReserveListEitemsSuppressedBibs=

Real-Time Availability

RTA

- Dynamically generated from Voyager availability information
  - Primo sends a request to Voyager ILS
    - Contains and operation parameter from publish_avail
    - A doc_num parameter with bib record numbers
  - Voyager availability service (VXWS) processes the request
    - Uses PrimoExp.ini config
  - Returned bib record information from the Voyager database in XML with enrichment tags showing availability, course reserves status, etc

Common RTA errors

- Missing bibliographic record ID number (doc_num) in the URL request
  - <error>doc_num must be included in parameters</error>
- URL request contains an operation parameter other than publish_avail
  - <error>Unrecognized op</error>
- Requested bibliographic record ID number does not exist in the Voyager database
  - <error_message>Error reading document</error_message>

OPAC via Primo (OvP)

Patron Directory Services (PDS)

- Doesn't have a patron database, but configures access on the fly
  - Passes credentials to designated target server or to an external authentication page
- PDS can send credentials to the Voyager server for verification
  - SSO (Single sign on) for Voyager, Primo, etc.
- LDAP, Shibboleth, etc can also be used
  - Primo must have:
    - Voyager patron ID (Institution_id or patron_barcode)
    - Voyager patron group ID
    - UBID, patron home database

My Account in Primo

- What can it show?
  - Patron information
  - Option to renew charged items
  - Option to cancel requests
  - Option to update the patron PIN
  - Option to update the patron SMS
  - Display ILL requests

Configuring OPAC Request Forms

- Default request forms:
  - Hold (default.HoldRequest)
  - Recall (default.Recall)
  - Call Slip (default.CallSlip)
  - UB (default.UBRequest)
- Additional request forms
  - Defined in the Primo Code Tables
  - <request code> needs to match the code name in the Voyager System Administration OPAC Configurations

Configuration in Voyager for OPAC via Primo

- Primarily in the vxws.properties
  - /m1/voyager/xxxdb/tomcat/vxws/context/vxws/ui/eng
- You can configure:
  - Status text for display
  - Serial information
  - Order information
  - Skins
  - UB databases
  - Request group parameter
- Similar to configuring texts and options in the webvoyage.properties

Serials in OvP

- Handled in vxws.properties
  - Uses 1020-1044 codes
  - serial.issue.1020.recent.basic=Y
  - serial.issue.1022.recent.supplement=Y
  - serial.issue.1024.recent.index=Y
  - serial.issue.1040.older.basic=Y
  - serial.issue.1042.older.supplement=Y
  - serial.issue.1044.older.index=Y
- 1030 handles the order status as shown in the PO

Skins

- Some request types might not be allowed in OvP
  - Link embeds WebVoyage In the Primo interface
  - Specify the skin to be used

EDS, Summon and beyond

Voyager and non-ExLibris discovery

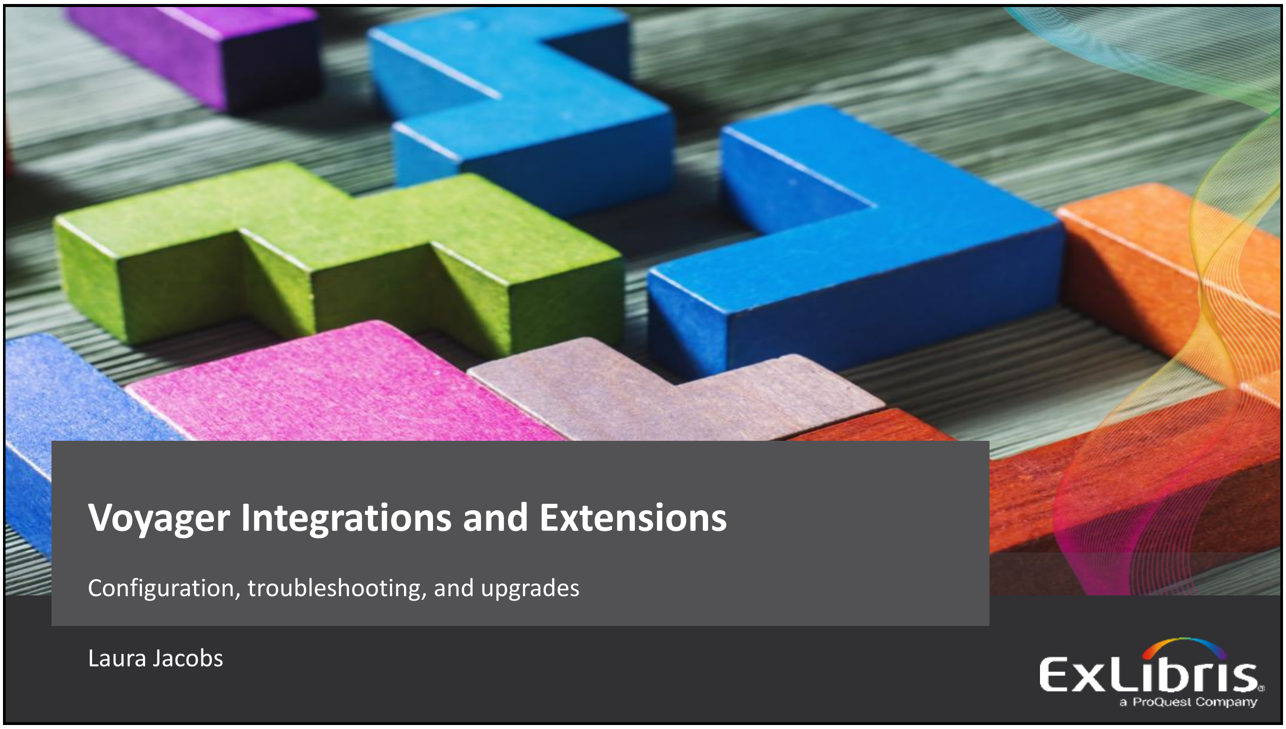
- Summon, EDS, and other proprietary discovery layers can be mostly configured with Voyager
- Exports and Z39.50 send information from Voyager to discovery, rather than the extract scripts that feed Primo
- Basic workflow for getting started remains the same: use Voyager utilities to export your database to discovery; use edited script parameters to parse out recent bibs and holdings

Summon and Voyager

- Starts with a full export of your Voyager catalog:
  - https://knowledge.exlibrisgroup.com/Voyager/Knowledge_Articles/How_to_export_all_bib_and_mfhd_records_in_database
- Daily cron-ed job to export records created within that day
  - Pmarcexport, using create data range
- Quarterly export of your full catalog if participating in the Summon index
  - 4-6 weeks of QA to become live on the Summon index

Z39.50

- Some discovery layers might use Z39.50 to bring back availability information
  - https://knowledge.exlibrisgroup.com/Voyager/Knowledge_Articles/How_do_other_sites_connect_via_Z39.50_to_our_database%3F

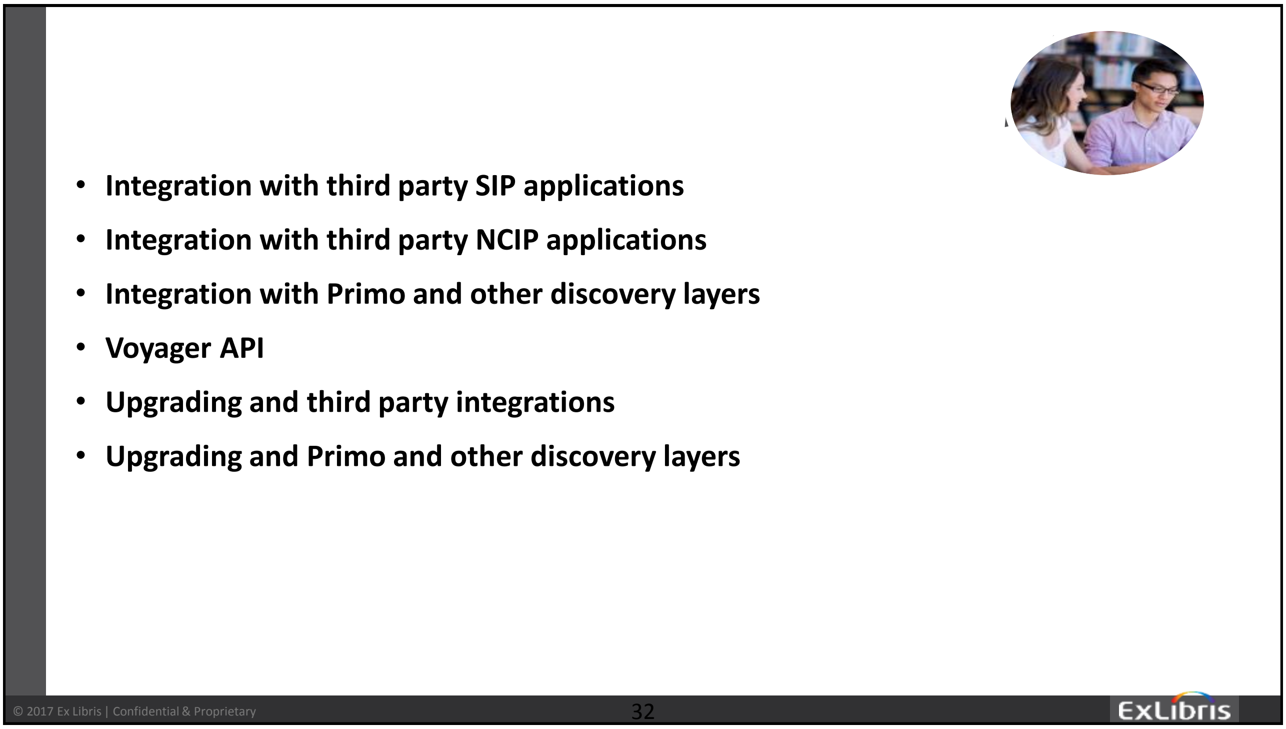


Voyager Integrations and Extensions

Configuration, troubleshooting, and upgrades

Laura Jacobs

ExLibris
a ProQuest Company

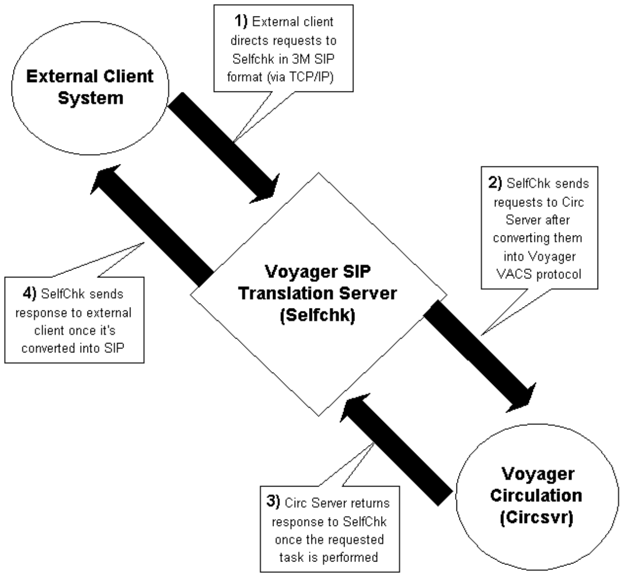


- Integration with third party SIP applications
- Integration with third party NCIP applications
- Integration with Primo and other discovery layers
- Voyager API
- Upgrading and third party integrations
- Upgrading and Primo and other discovery layers

SIP and NCIP integrations

- **SIP2**
- **ESIP**
- **Self Check**
- **3M SelfCheck**

Communication using Self Check



External Client System

1) External client directs requests to Selfchk in 3M SIP format (via TCP/IP)

Voyager SIP Translation Server (Selfchk)

2) SelfChk sends requests to Circ Server after converting them into Voyager VACS protocol

Voyager Circulation (Circsvr)

3) Circ Server returns response to SelfChk once the requested task is performed

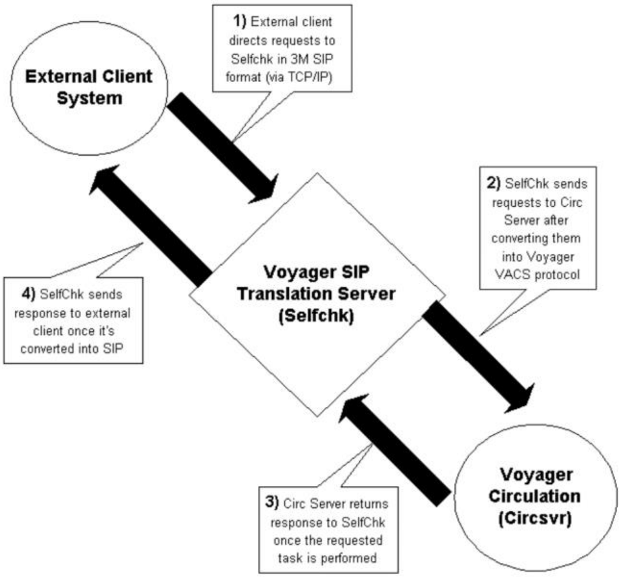
4) SelfChk sends response to external client once it's converted into SIP

Voyager Configuration for Self Check

Voyager System Administration module setup

- Create a circulation desk location for SIP Self Check
- Create an operator profile for SIP Self Check
- Create a circulation security profile for SIP Self Check
- Associate the SIP Self Check operator profile with the circulation security profile
- Associate the SIP Self Check circulation location with the circulation security profile
- Associate the SIP Self Check circulation desk location with a circulation policy group, and define values for the location

Troubleshooting Self Check



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Troubleshooting Self Check

- Login to Circulation using the Self Check Operator, Password, and Circulation Happening Location
- Are you able to perform the same tasks there?
- What connection information is used in the Self Check machine? Voyager server IP and port xx31?
- Can you telnet from the Self Check Machine to the Voyager server over port xx31?
- Is checksum/error checking turned off on the self check machine?
- Do logs in the self check machine show responses to messages?
- Is there a 93 message that matches your login information?
- A 94 message received in response?

Voyager InterCirc – NCIP
NCIP
URSA
Relais
OCLC Navigator

NCIP Configuration considerations

- Operator ID to be used to record URSA, Relais ILL, or OCLC Navigator transactions in Voyager
- Type of patron validation required by your site (barcode or institution ID)
- Item type to be used for remote items borrowed by local (Voyager system) patrons
- Location where remote items are held locally (Voyager site)
- Location where remote items may be picked up by local patrons

NCIP Configuration considerations

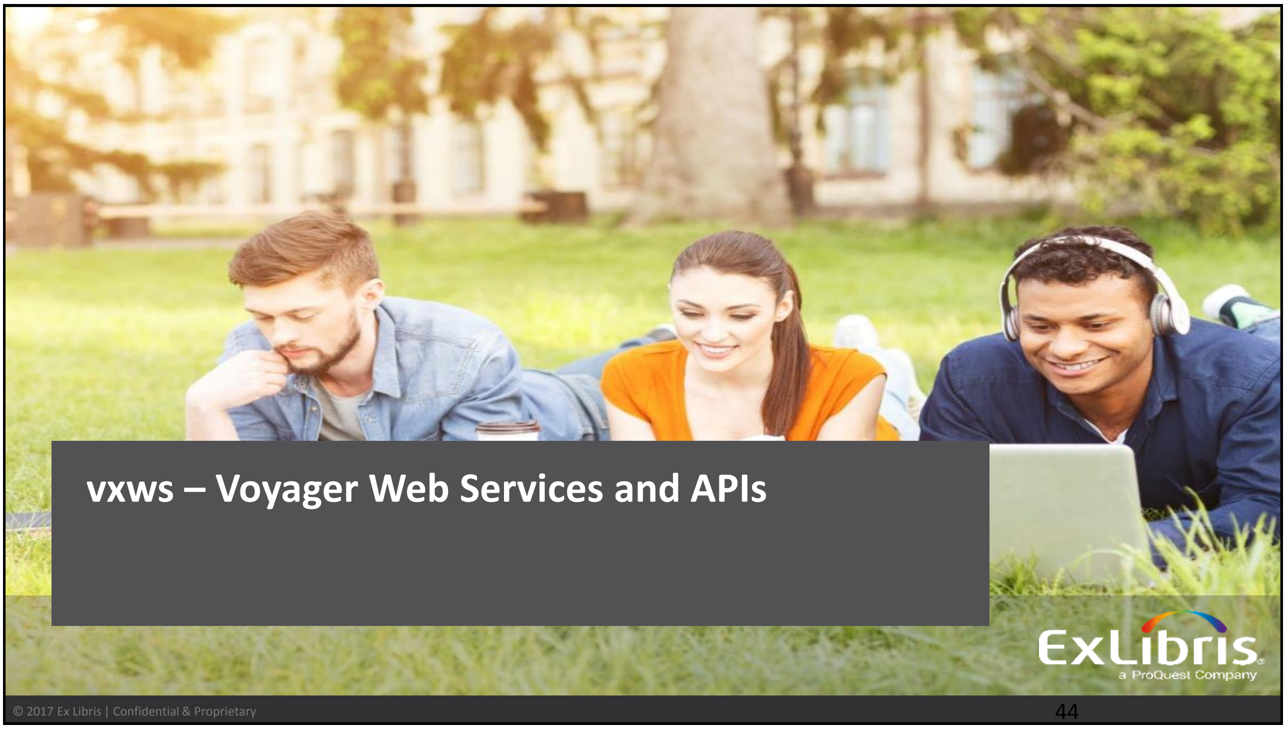
- Special system patron to be charged by Voyager Circulation with all local items lent to remote patrons
- Patron group and circulation policy with unlimited privileges for the special system patron
- Location where local items are charged to special system patron on behalf of the remote patron
- Location from which local items are mailed to remote libraries
- Common circulation policies
- Expected time in days it takes for a local item to be returned from the remote library
- Call Slip configuration that can be used to retrieve items requested by remote libraries

NCIP Configuration considerations

- List of Circulation patron group codes for mapping in Relais ILL only
- OCLC composite index definition in SysAdmin > Search > Indexes > Composite definitions for OCLC Navigator only
- Configure intercirc-ursa.ini file for use with Relais or URSA
- Configure oclc-navigator.ini for use with OCLC Navigator.

Troubleshooting NCIP configuration

- Test the login in Circulation to make sure you can make requests and charge items as the NCIP process does
- ReflectRequestDiagnostic=N
- Compare ini files with tml files to examine changes.
- /m1/voyager/xxxdb/tomcat/ncip/logs/ncip-traffic
- Must use TCP/IP



vxws – Voyager Web Services and APIs

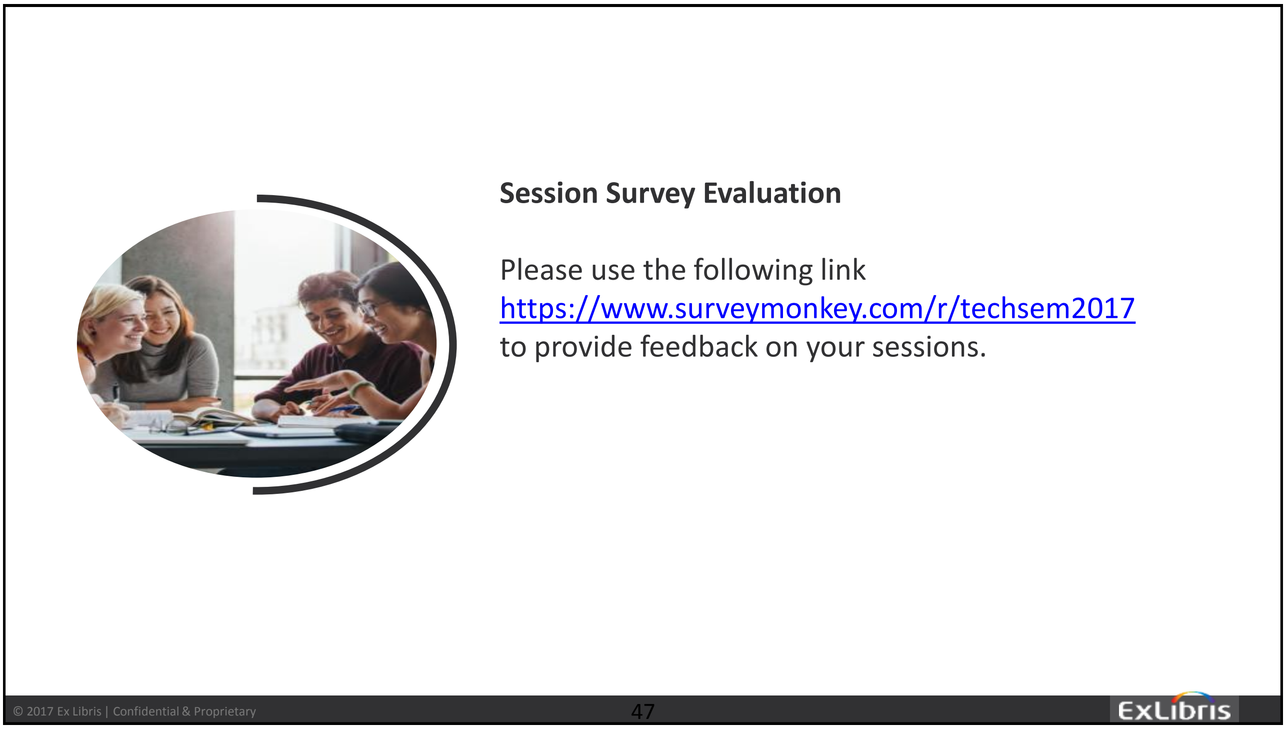
VXWS

- APIs can be used to retrieve information from Voyager and update the databse.
- Developer Network https://developers.exlibrisgroup.com/
- Access Valve
- Firewall should be open to xx14
- OvP – OPAC via Primo
- Xservice

Q & A

Any Questions?

ExLibris



Session Survey Evaluation

Please use the following link
https://www.surveymonkey.com/r/techsem2017
to provide feedback on your sessions.

THANK YOU