

Voyager® 6.1 Release Notes

Release Overview

Voyager 6.1 offers significant changes to search capabilities in both WebVoyage and staff-side searching. New features include the ability to modify the default operator in WebVoyage keyword searches, as well as the creation of a new combined keyword search of bibliographic and holdings records.

In addition, this release incorporates one of the most universal of all enhancements, support for ISBN-13. Because this is a critical issue for all Voyager libraries, more information than usual is being included in the release notes.

Several enhancements specific to Universal Borrowing are also included, as is the ability for public users to access appropriate information held in Meridian from within the OPAC.

New Search Options

Enhanced Options for Boolean Keyword Searches

Currently in WebVoyage, Boolean keyword searches are performed as phrases. New functionality will allow your choice of a default Boolean operator to be used instead; this will be indicated in the search.ini configuration file with the addition of two new symbol combinations.

- An circumflex (^) symbol placed after the appropriate index code will mean that an AND operator (all of these) will be inserted between the terms in the search string.
- A pipe (|) symbol placed after the appropriate index code will mean that an OR operator (any of these) will be inserted between the terms in the search string.

In addition, relevance can be added to either symbol by placing an asterisk (*) after the above symbols.

The current search functionality will remain and can be indicated in the configuration file by the presence of the index code without a symbol present. The presence of quotation marks around groups of words indicates that the words are to be searched as a phrase (Figure 1).

The screenshot shows the WebVoyage search interface. At the top, there are three tabs: "Simple Search", "Builder Search" (which is selected), and "Course Reserve". Below the tabs, there are two input fields. The first field, labeled "Find This:", contains the search term "'shakespeare william' hamlet". The second field, labeled "Find Results in:", contains a dropdown menu with three options: "Keyword Anywhere AND with Relevance" (which is selected), "Keyword Anywhere OR with Relevance", and "Title Keyword AND".

Figure 1: Keyword Anywhere search defined with default AND operator in WebVoyage

100 1_ |a Branagh, Kenneth.

245 10 |a *Hamlet* / |c by *William Shakespeare*; screenplay and introduction by Kenneth Branagh ; Konow and Peter Mountain.

250 __ |a 1st ed.

260 __ |a New York : |b W.W. Norton & Co., |c c1996.

300 __ |a xv, 208 p. : |b col. ill. ; |c 24 cm.

500 __ |a Includes screenplay based on the play by *William Shakespeare*.

630 00 |a *Hamlet* (Motion picture : 1996)

650 _0 |a *Hamlet* (Legendary character) |v Drama.

700 1_ |a *Shakespeare, William*, |d 1564-1616. |t *Hamlet*.

Figure 2: Resulting record view for Keyword Anywhere AND operator search

Combined MFHD-Bib Record Keyword Search

Expanding the MFHD keyword searching feature added in Voyager 5, this update will allow users to combine keyword searches of the bibliographic and holdings records in both Voyager public and staff searches.

In Acquisitions, Cataloging, Circulation, these same types of searches can be executed using the Boolean search option on the Keyword tab (Figure 3), or by combining indexes on the Builder tab (Figure 4).

Figure 3: Combined holdings/bibliographic index search from Keyword tab in Cataloging client

Figure 4: Combined holdings/bibliographic index search from Builder tab in Cataloging client

Any results list from this type of search is returned according to the search order defined in System Administration for the first index defined in the string.

Titles Index		
Font:	Arial Unicode MS	Sort By:
Full Title	Author	Dates
Alley dances [videorecording] / ABC Video Enterprises, Inc. in association with James Lipton Productions, Inc.		1982
Anatomy as a master image in training dancers [videorecording] / 3S Productions ; directed by Gus Solomons Jr. ; created & produced by Ruth Solomon.		1988
Anna Sokolow: choreographer [videorecording].		1991-1980
Ballroom [videorecording]		1985
Cha cha. [videorecording] / Arthur Murray Franchised Dance Studios.		1992-1990
Charles Weidman, on his own [videorecording] / Dance Horizons Video, Princeton Book Company ; producers, Virginia Brooks, Janet		1990
...		
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>	<input type="button" value="Search"/>
<input type="button" value="Select All"/>	<input type="button" value="Clear All"/>	
34 Records Found	Search: Command=hkey media and skey dance	

Figure 5: Search results from combined holdings/bibliographic search in Cataloging client

In WebVoyage, combined searches can be executed using the Command search from the Simple Search screen (Figure 6), or by combining MHFD indexes with other keyword indexes on the Builder screen (Figure 7). In Figure 6 and Figure 7, below, “media” is a location code and indexed with the HKEY (MFHD Global Keyword) index.

Simple Search	Builder Search	Course Reserve
Find This: hkey media and skey dance	Find Results in:	Subject Browse Command Search Date Search (Left Anchored)

Figure 6: Combined holdings/bibliographic index search from the Simple Search tab in WebVoyage

Simple Search	Builder Search	Course Reserve
Search for: media	any of these	Search in: MFHD Global Keyword
<input checked="" type="radio"/> AND <input type="radio"/> OR <input type="radio"/> NOT		
Search for: dance	any of these	Search in: Subject

Figure 7: Combined holdings/bibliographic index search from the Simple Search tab in WebVoyage

#	Full Title	Author	Dates
<input type="checkbox"/> [1]	Ailey dances [videorecording] / ABC Video Enterprises, Inc. in association with James Lipton Productions, Inc.		1982
	Library Location: Media Department Call Number: A293 Status: Not Charged		
<input type="checkbox"/> [2]	Anatomy as a master image in training dancers [videorecording] / 3S Productions ; directed by Gus Solomons Jr. , created & produced by Ruth Solomon.		1988
	Library Location: Media Department Call Number: A5355 Status: Not Charged		
<input type="checkbox"/> [3]	Anna Sokolow: choreographer [videorecording].		1991-1980
	Library Location: Media Department Call Number: A5355 Status: Not Charged		
<input type="checkbox"/> [4]	Ballroom [videorecording]		1985
	Library Location: Media Department Call Number: C3573b Status: Not Charged		

Figure 8: Search results from combined holdings/bibliographic search in WebVoyage

Additional Features for Staff Clients

Two additional features for the staff clients provide staff with better display capabilities and the ability to re-sort results lists, similar to existing functionality in WebVoyage.

Headings Subdivision Separators

As you are aware, headings list displays in WebVoyage and staff clients do not currently provide any visual markers between a subject heading and its subdivisions. As a result, the display may be somewhat confusing.

Agriculture United States Periodicals

The MARC Standard suggests that two dashes (--) may be generated for a heading with subdivisions, even though the dashes are not visible in the MARC record. (This is also, of course, how subject headings have ‘always’ displayed on catalog cards...)

For example, a MARC record with the following 650:

‡a Agriculture ‡z United States ‡v Periodicals

May display as:

Agriculture--United States—Periodicals

Version 6.1 provides the ability to display these dashes between your existing headings and subdivisions as a part of your upgrade; any new headings added following the upgrade will also reflect the dashes.

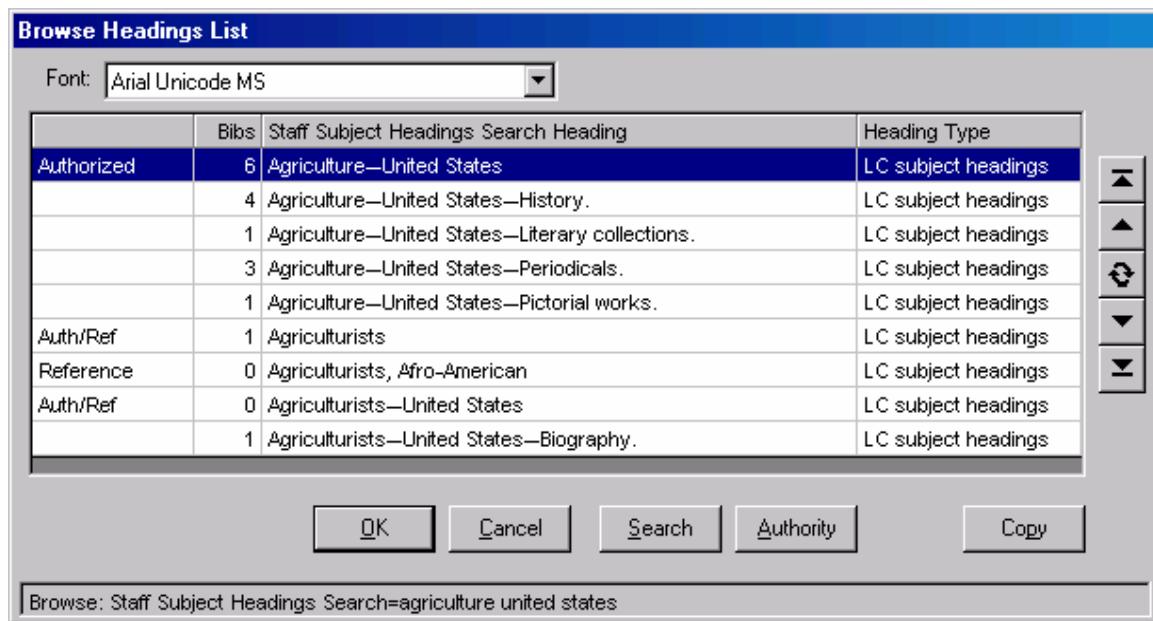


Figure 9: Headings subdivision separators in the Cataloging client

The dashes will display not only in staff clients (Figure 9), but in WebVoyage as well (Figure 10), increasing the visual effectiveness of any headings lists a patron may display.

Titles	Headings
6	Agriculture--United States
4	Agriculture--United States--History.
1	Agriculture--United States--Literary collections.
3	Agriculture--United States--Periodicals.
1	Agriculture--United States--Pictorial works.
1	Agriculturists
1	Agriculturists--United States--Biography.
1	Agriculturists--United States--Correspondence.
0	Agrochemicals
0	Agroclimatology

Figure 10: Headings subdivision separators in WebVoyage

Please note that in order to insert dashes between headings and subdivisions as shown above, an index regen will be required. It is mandatory that you make this known when scheduling your upgrade with Endeavor. The dashes are for display only, and will not change sorting.

Staff Client Resort

Three new options are now available to re-sort data in bibliographic result sets in all Voyager 6.1 Staff Clients.

1. A drop-down list of sort options is displayed above the result set, including options to resort by Title, Author, Publish Date Descending, Publish Date Ascending, and Relevance when a relevance search is executed.
2. The columns that display in the result list also appear in a drop-down list above the result set, identified as a Quick Sort. Selecting one of the options will resort the values in the list in ASCII ascending order. Selecting the same value a second time will resort the values in ASCII descending order.
3. The column headers in the result list will be clickable to perform an ASCII sort in ascending order on the values in the result list. Clicking the same column header a second time will re-sort the values in ASCII descending order.

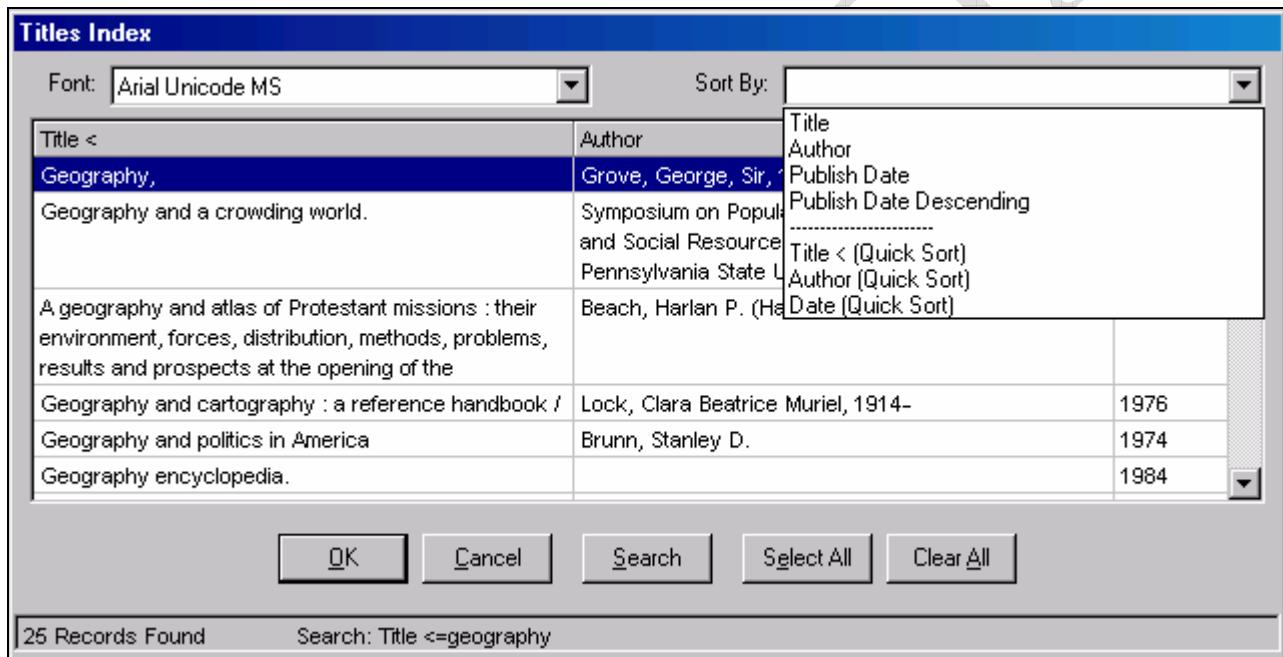


Figure 11: Resorting options in the Cataloging client

ISBN-13 Support in Voyager

Effective January 1, 2007, the ISBN will be expanded from a 10-digit to a 13-digit number. The new ISBN is one and the same with the EAN currently represented as a barcode printed on most trade and paperback book. The Voyager 6.1 release provides ISBN-13 support, including new indexes and modifications to EDI messages necessary for 13-digit ISBN numbers.

Following are details on each aspect of ISBN-13 support in Voyager.

The new 13-digit ISBN, as mentioned above, is one and the same with the EAN, which is currently stored in the MARC 024 \$a field with a first indicator 3. The book industry uses 978 or 979 as prefixes for the EAN, so new 13-digit ISBNs will also begin with 978 or 979.

To ensure appropriate indexing, Voyager has been modified to contain a composite index containing both the 020 ‡a (home of the 10-digit ISBN) and the 024 ‡a (with first indicator 3), if the EAN begins with 978 or 979. This index updates the existing “ISBL” index.

In addition, to support the composite index, two single-field indexes have been created: an “ISBN-13 (024a)” index (index code 024I) and an “ISBN-13: Cancelled (024z)” index (index code 024Y). Both of these indexes use a new normalization rule that only indexes subfields with 13 digits and begin with “978” or “979”. If parenthetical indicators appear after the ISBN-13, they will be ignored.

Note that Voyager does not normalize 10-digit ISBNs to 13-digit ISBNs as part of indexing.

EDItEUR, the group responsible for standardizing EDI messages, published a series of recommendations for libraries and vendors as the library community moves to the 13-digit ISBN. Voyager has been modified in several ways to address this transition.

General

1. The 10-digit ISBN is transmitted in the EDI message’s PIA segment, while the 13-digit ISBN is expected to appear in the LIN segment. Since 13-digit ISBNs are ordinary EAN numbers, they are coded as EANs – not as ISBNs – in EDI messages.
2. During 2006, libraries and vendors anticipate using a combination of 10- and 13-digit ISBNs; even after January 1, 2007, it’s unlikely that only 13-digit ISBNs will be used for every publication represented in an EDI message.

Invoices

Voyager recognizes the ISBN-13 in the LIN element, qualified as an EAN, which looks like:

LIN+5+9781234567890:EN. Invoices may have contained these LIN values in the past, since they are valid EANs at present.

When incoming EDI invoices are loaded, Voyager attempts to match invoice line items against existing PO line items using a variety of criteria. Voyager will continue to match the 10-digit ISBN in the PIA segment against the 020 ‡a index (at least until 2007); in addition, Voyager has been modified to attempt a match between the EAN found in the LIN segment of the EDI invoice and the 024 ‡a index.

Purchase Orders

Through 2007, when Voyager generates purchase orders, the ISBN from the first 020 ‡a of the MARC record will be placed in the EDI PIA segment with an “IB” suffix. This is how previous versions of Voyager populated the PIA segment. After the library community fully shifts to ISBN-13, Endeavor may consider eliminating this procedure in favor of storing the 13-digit ISBN in the LIN segment as described below.

Note that only 10-digit ISBNs will be placed in the PIA segment to avoid possible confusion for vendors; if the 020 ‡a does not contain an ISBN with 10 digits, it will not be placed in the PIA segment. Instead, if the 020 ‡a contains a 13-digit ISBN that begins with either “978” or “979”, Voyager will store that information in the LIN element as an EAN.

If no 020 ‡a is found in the MARC record, Voyager looks for and uses data in the 024 ‡a (first indicator 3), provided that the EAN begins with “978” or “979”. This data is placed in the LIN segment, qualified as an EAN. Only the first 024‡a found will be placed in the LIN segment at this time.

Serial Claims and Claim Responses

No changes have been made to the EDI processing for serials claims and claim responses, as these types of messages should not contain ISBN data.

Additional ISBN-13 Support

As the book industry moves from the use of 10-digit ISBNs to the new ISBN-13 standard, implications with regard to matching will arise; applications that use ISBN as a match point, including Voyager, need to be able to match a new record with only an ISBN-13 to an existing record with only a 10-digit ISBN.

In Voyager 6.1, Endeavor updates current indexing functionality to facilitate ISBN matching for both 10 and 13 digit numbers. For each record stored in the Voyager database, if a record contains a single ISBN, Voyager will calculate the corresponding ISBN and then index both values in association with that record. It will not matter which form of the ISBN a searcher enters; Voyager will be able to match on the corresponding 10- or the 13-digit number.

All converted ISBN values will then be indexed in both the left-anchored and keyword indexes. Please note that no changes to the MARC record are included in this process. This additional functionality provides both ISBN-10 and ISBN-13 matching for new records imported into the database.

Acquisitions

Updating Foreign Currencies for Outstanding Commitments

Currently the adjustment of foreign currencies to reflect the most current exchange rates is limited to 1) approved purchase orders and 2) purchase orders for which all of its line items are adjustable. In other words, if any line item on the purchase order cannot be adjusted because it is a prepay or it has been invoiced, the purchase order is not considered for adjustment by the job.

With Voyager 6.1, any line item copy which has not been invoiced and which has not been prepaid is eligible for currency updating.

Universal Borrowing

UB Barcode Lookup Table

Today the Universal Borrowing workflow in circulation is somewhat cumbersome in a clustered environment, i.e. there is no easy way to determine the cluster to which a given patron or item belongs. In the Circulation Client in Version 6.1, Voyager will automatically determine the cluster with which a patron or item barcode is affiliated. This will reduce the amount of work that circulation clerks must perform when charging and discharging items in a UB or multiple cluster environment.

Likewise, UB barcode lookup tables will be accessed in WebVoyage, permitting patrons to log into WebVoyage without having to select an institution.

Block local patrons for UB Aggregate Block Limits

In current Universal Borrowing functionality, a patron performing a circulation transaction (charge, request) at their local cluster is blocked from finishing the transaction only if they have incurred blocks within their local cluster. The system does not check to see if the user has incurred blocks in the rest of the UB universe—either at an aggregate level or at individual holding clusters.

In Version 6.1, functionality has been added that prevents a patron from performing a circulation transaction at their local cluster when they have reached one or more of the UB aggregate blocks as defined in their local cluster.

UB Request Option in Circulation Matrix

This feature creates a new, separate UB request checkbox on the Circulation Matrix form that makes the UB request a standalone option; that is, the ability to place a UB request will not be tied to the ability to place a Call Slip. The ability to **charge** the item, either during a walk-in scenario or when the request is filled and available for pickup, still depends on the Charge/Renew flag being turned on.

WebVoyáge/Meridian

WebServices for Meridian

(Please note that this functionality will be available only when both Voyager 6.1 and Meridian 1.5 upgrades have been completed.)

With this upgrade, a patron using WebVoyáge can retrieve and display license, interface, and general product information about an item. This will save a tremendous amount of time for reference staff in not having to field questions about why a particular database isn't currently available, etc.

Hardware/Software Requirements

Information regarding hardware and software requirements for Voyager 6.1 will be posted on SupportWeb at <http://support.endinfosys.com/cust/voy/upgrade/index.html#releases>.

Contacts

For information on any of Endeavor's extension systems, please contact info@endinfosys.com. Additional information, including the Road to Voyager 6.1, and the Voyager 6.1 Release Handbook, will be posted to the Voyager-L list-serv and to SupportWeb as it becomes available.