



Voyager® 6.1 WebVoyage® User's Guide

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Endeavor Information Systems, Inc.

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About This Document

Purpose

This document provides instructions for configuring Voyager's Online Public Access Catalog software, WebVoyage.

Intended Audience

This document is intended for Voyager customers using Voyager's Online Public Access Catalog interface (WebVoyage).

Reason for Reissue

This document incorporates and is being reissued for the following reasons:

- Changes requested through Customer First feedback.
- UB Barcode Lookup Table feature documented (See the *Universal Borrowing User's Guide*).

NOTE:

For *Meridian Public Interface Web Service* documentation, see the *Displaying Meridian Information From WebVoyage (Meridian Public Interface Web Service)* section of the *Meridian Technical Guide* (accessible from the **System Administration** tab in Meridian).

How to Use This Document

This document consists of the following:

- | | |
|------------|--|
| Chapter 1 | “Getting Started”
Provides an overview of WebVoyáge, as well as server set up. |
| Chapter 2 | “WebVoyáge Connections”
Details configuring database connections in WebVoyáge. |
| Chapter 3 | “Connecting Remote Databases”
Details configuring remote database connections in WebVoyáge. |
| Chapter 4 | “Display Configuration”
Details general WebVoyáge display configuration. |
| Chapter 5 | “Searching in WebVoyáge”
Details how to search in WebVoyáge. |
| Chapter 6 | “Search Configuration”
Details configuring searches and search options in WebVoyáge. |
| Chapter 7 | “Record Display Configuration”
Details record display options. |
| Chapter 8 | “Patron Functions”
Details functions related to Patron information. |
| Chapter 9 | “Patron Function Configuration”
Details configuring Patron options. |
| Chapter 10 | “Requests”
Details placing and tracking requests in WebVoyáge. |
| Chapter 11 | “Request Configuration”
Details request configuration. |
| Chapter 12 | “WebVoyáge Linking Features”
Details linking WebVoyáge to other resources. |
| Chapter 13 | “Media Booking in WebVoyáge”
Details WebVoyáge media booking workflow. |
| Chapter 14 | “Media Booking in WebVoyáge Configuration”
Details WebVoyáge media booking configuration. |
| Chapter 15 | “Map (Geospatial) Searching”
Details performing map searches in WebVoyáge. |
| Chapter 16 | “Map (Geospatial) Configuration”
Details configuring Map Searching options. |
| Appendix A | “Displaying additional information in WebVoyáge” , including Syndetics Solutions™-related configuration. |
| Appendix B | “WebVoyáge File Reference” |

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Appendix C	Configuring WebVoyáge Bibliographic Record Linking Display , Details configuring WebVoyáge to display linked information from bibliographic records.
Index	The Index is an alphabetical, detailed cross-reference of topics about which this document contains information.
Technical Index	The Technical Index is an alphabetical, detailed cross-reference of technical terms about which this document contains information.

Conventions Used in This Document

The following conventions are used throughout this document:

- Names of commands, variables, stanzas, files, and paths (such as `/dev/tmp`), as well as selectors and typed user input, are displayed in **constant width** type.
- Commands or other keyboard input that must be typed exactly as presented are displayed in **constant width bold** type.
- Commands or other keyboard input that must be supplied by the user are displayed in **constant width bold italic** type.
- System-generated responses such as error messages are displayed in **constant width** type.
- Variable *portions* of system-generated responses are displayed in **constant width italic** type.
- Keyboard commands (such as **Ctrl** and **Enter**) are displayed in **bold**.
- Required keyboard input such as “Enter **vi**” is displayed in **constant width bold** type.
- Place holders for variable portions of user-defined input such as `ls -l filename` are displayed in **italicized constant width bold** type.
- The names of menus or status display pages and required selections from menus or status display pages such as “From the **Applications** drop-down menu, select **System-wide**,” are displayed in **bold** type.
- Object names on a window’s interface, such as the **Description** field, the **OK** button, and the **Metadata** tab, are displayed in **bold** type.
- The titles of documents such as *ENCompass Web Client User’s Guide* are displayed in **italic** type.
- Caution, and important notices are displayed with a distinctive label such as the following:

NOTE:

Extra information pertinent to the topic.

⚠️ IMPORTANT:

Information you should consider before making a decision or configuration.

⚠️ CAUTION:

Information you must consider before making a decision, due to potential loss of data or system malfunction involved.

**TIP:**

Helpful hints you might want to consider before making a decision.

RECOMMENDED:

Preferred course of action.

OPTIONAL:

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Getting Started

1

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Introduction

This chapter describes the prerequisite installations and basic information for beginning work with the Voyager WebVoyáge online public access catalog.

Purpose of this Chapter

The purpose of this chapter is to provide general directions for:

- Installing WebVoyáge
- Preparing Your Web Server
- Preparing Your WebVoyáge Files
- Allowing Access to WebVoyáge
- Installing on another machine

Prerequisite Skills and Knowledge

To use this document effectively, you need knowledge of the following:

- Basic Microsoft® Interface navigation
- Basic UNIX® commands and navigation
- Basic Voyager System Administration Module

- Intermediate knowledge of MARC record formats (for creating customized WebVoyage display directories, and editing some configuration files)

WebVoyage Directory Structure

[Figure 1-1](#) shows the basic default directory structure of the main WebVoyage directories.

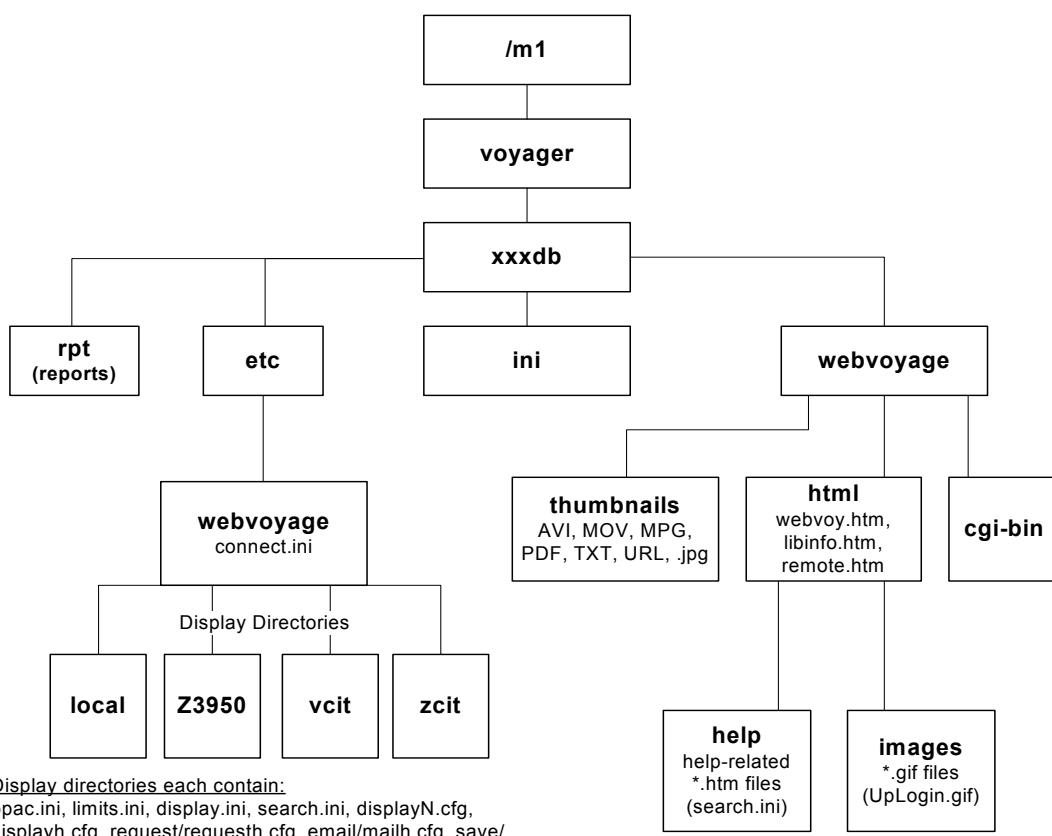


Figure 1-1. WebVoyage Directory Structure

Installing WebVoyáge

Installing WebVoyáge requires some prior web server setup. That set up is detailed in the following sections.

Prepare Your Web Server



IMPORTANT:

Because of the variety of Web Servers available and the differences in how they are configured, specific setup instructions may vary. For purposes of consistency, the following instructions will be for an Apache Web Server installed under the /usr/local/apache directory. WebVoyáge is developed for use with Apache Web Servers.

For the equivalent configuration of your Web Server, please refer to its documentation.

Also, if you use multiple or split servers (separate servers for the web server and the database server, for example) you must keep track of and account for the location of the various programs and files on these servers, when referencing them in configuration files.

Define the Web Server's Port

Web Servers, by default, run on port 80. If you are running multiple Web Servers (to handle multiple Voyager databases on the same server, for example) using port-based virtual hosts, you must run them on different ports. You can specify the port on which you want your Web Server to run by editing the `Port` entry in: `/usr/local/apache/conf/httpd.conf`

Example:

`Port 80`

For more information about setting up virtual hosts see your server's documentation, (for virtual hosts on an Apache server, see <http://www.Apache.org>).

Define the Web Server's Document Root or Script

Alias

To use WebVoyáge you first need to have a Web Server properly set up and running. The two components to configure a web server are:

-
- Setting up a Document Root
 - Setting up a Script Alias

Document Root

Web Servers need to know the location of the root directory for their HTML files. This directory is referred to as the Web Server's Document Root. You can specify the path for the Document Root by editing the `DocumentRoot` entry in:
`/usr/local/apache/conf/httpd.conf`

Example:

```
DocumentRoot "/m1/voyager/xxxdb/webvoyage/html"
```

Script Alias

A Script Alias can be thought of as setting up a virtual directory so that you will not reveal your file system to your patrons. Since you map to this virtual directory, the patron will only see the IP address and the cgi-bin directory.

NOTE:

Your web server should have a path aliased to the cgi-bin directory.

For example, in Apache you would add to the `httpd.conf` file in `/usr/local/apache/conf/`:

```
ScriptAlias /cgi-bin/ "/m1/voyager/xxxdb/webvoyage/cgi-bin"
```

The request will be made for:

```
http://www.sample.edu/cgi-bin/Pwebrecon.cgi
```

The web server will know to look for:

```
/m1/voyager/xxxdb/webvoyage/cgi-bin/Pwebrecon.cgi
```

Define the Web Server's Directory Index

Web Servers use an index file in order to display a default web page. Usually, this is set to either `index.html` or `default.html`. You can specify multiple files that will come up as a default page, ranked by the order, in the `DirectoryIndex` entry. In order for the Web Server to load WebVoyage's default introduction page, you must add `webvoy.htm` to the `DirectoryIndex` entry in:
`/usr/local/apache/conf/httpd.conf`

Example:

```
DirectoryIndex webvoy.htm index.html
```

Copy the WebVoyage Files into the Appropriate Directories

WebVoyage's cgi-bin, html, help, and image files must reside within the directories specified in your Web Server's configuration files in order to function. At installation and upgrades of the Voyager software, these files are placed under /m1/voyager/xxxdb/webvoyage in the following directories respectively:

- /cgi-bin
- /html
- /html/help
- /html/images

You may specify the /html and /cgi-bin directories in the configuration files (as shown in [Define the Web Server's Document Root or Script Alias on page 1-3](#)).

Check the Permissions on Your Files

All WebVoyage files must have appropriate permissions in order to be used by the Web Server. You can set your permissions correctly by using the chmod command. In the cgi-bin directory, issue the following three commands:

```
chmod 755 Pwebrecon.cgi WebVoyage.cgi webrecon.exe  
chmod 644 *.ini  
chmod 644 *.cfg
```

This will give the owning user read/write/execute permissions on the program files and read/write permissions on the ini and cfg files, and give everyone else read/execute permissions on the program files and read permissions on the ini files.

Next, change to the html directory and issue the following command:

```
chmod -R 644 *
```

This will give the owning user read/write permissions and everyone else read permissions on all HTML and image files in the /html, /help, and /image directories.

Prepare Your WebVoyáge Files

The following files are contained within the /m1/voyager/xxxdb/webvoyage/cgi-bin directory:

Table 1-1. WebVoyáge Configuration Files

FILE	DESCRIPTION	USER EDIT?
Pwebrecon.cgi	script that launches webrecon.exe with the necessary parameters.	May have to edit this file.
webvoyage.cgi	WebVoyáge program.	Cannot edit this file.
webrecon.exe	program that provides the connection.	Cannot edit this file.
webrecon.ini	file that is only used by Endeavor for troubleshooting.	Used by EISI for troubleshooting.
webvoyage.ini	initialization file that provides information about the files necessary to run WebVoyáge.	Must edit this file for WebVoyáge to work.

Check the Pwebrecon.cgi File

Pwebrecon.cgi is a script that starts webrecon.exe and has the following parameters:

Table 1-2. The Pwebrecon.cgi parameters

Parameter	Specifies
-s	The absolute path to WebVoyáge.cgi
-c	The absolute path to webrecon.ini
-t	The absolute path to the temp location and temp file that logs info passed back and forth between WebVoyáge and webrecon.cgi. This is where all necessary information is written, while WebVoyáge processes the information sent to it by webrecon.exe. This path and file name should be identical to what is defined as entered after the TempFileLocation and TempFileName variables in the [WebRecon] stanza of the webvoyage.ini file.

Use the **more** command to look at the `Pwebrecon.cgi` file. This file will contain the following script:

```
#!/bin/ksh
exec ./webrecon.exe -s/m1/voyager/xxxdb/webvoyage/cgi-bin/webvoyage.cgi \
                     -c/m1/voyager/xxxdb/webvoyage/cgi-bin/webrecon.ini \
                     -t/tmp/webrecon
```

Figure 1-2. The -s, -c, and -t parameters in the Pwebrecon.cgi

The paths following **-s** and **-c** must match the current directory for **Pwebrecon.cgi**.

Set the Root Directory for WebVoyáge

To get WebVoyáge running with the default settings, you must change the entry after the **OpacIniRoot** variable in the **[AppVar]** stanza of the **webvoyage.ini** file so that it points to the appropriate directory where all of the WebVoyáge configuration files reside. Initially, the entry will be as follows:

OpacIniRoot=/m1/voyager/xxxdb/etc/webvoyage

Change the **xxxdb** to your site's specific database directory under **/m1/voyager**.

For example, if you want WebVoyáge to connect to the training database, set the **OpacIniRoot** as follows:

OpacIniRoot=/m1/voyager/traindb/etc/webvoyage

The **opac.ini** file must be in the **/local** directory under the path defined by **OpacIniRoot** variable in the **webvoyage.ini** file. In the training database example, the **opac.ini** should be in **/m1/voyager/traindb/etc/webvoyage/local**.

Prepare Your **voyager.ini** File

Once you have specified a path after the **OpacIniRoot** variable in the **webvoyage.ini** file, you must edit the **voyager.ini** file located in the **/m1/voyager/xxxdb/etc/webvoyage** directory. To get WebVoyáge running with the default settings, you must change the information after the **Server** and **Port** variables in the **[Communications]** stanza to establish a connection. Initially, these entries will be:

Server=xxxx.xxx.xxx.xxx
Port=NNNN

Specify the IP number and Port number for the WebVoyáge server.

The *FileServer*, *FilePort*, and *FileTimeout* keys specify the default server, port and time-out settings to be used if digital objects are stored on the server for web access but an address to those digital objects is not specified in the Cataloging 856 field. The format of this information includes the server name or IP address, the port number, and the time-out value.



Procedure 1-1. Setting a Default Server

Use the following to connect to a default server, when no server is specified in the 856 field of a record.

In the [File Download] stanza:

1. Type **Server** on the first line, then an equals sign (=), followed by the complete name or IP address of the server.
2. Next, type **Port** on the second line, then an equals sign (=), followed by the port number for the server.
3. Finally, type **time-out** on the third line, then an equals sign (=), followed by the time-out value (in seconds) to use for the connection.

Result:

At this point, you should be able to point a browser to your Web Server and WebVoyáge will run. The default page will display, and you should be able to click the Local Catalog button and perform a search. If you cannot do this, please contact Endeavor Support.

Establishing a Secure Socket Layer (SSL) Webserver

If WebVoyáge is being installed on a web server that uses an SSL (Secure Socket Layer) connection, WebVoyáge must be configured to support SSL.

If...	Enter...
using SSL	TRUE (case sensitive) after the SSL= variable in the [Security Options] stanza of the webvoyage.ini file
not using SSL	FALSE (case sensitive) after the SSL= variable in the [Security Options] stanza of the webvoyage.ini file

NOTE:

If nothing appears after the `SSL=` variable, or if the `SSL=` variable does not appear at all, the `SSL` variable with default to `FALSE`.

Next, you must change the URL for ImageServer from `http:` to `https:`. This is done by changing the address from `http://xxx.xxx.xxx.xxx` (`xxx.xxx.xxx.xxx` being the path for your server) to `https://xxx.xxx.xxx.xxx`. This change must be made to the address following the `Scandoc` variable in the `[Links]` stanza of the `voyager.ini` file. The entry must be made entirely on the same line.

For example, if your `voyager.ini` file read (all on the same line):

```
ScanDoc=http://256.256.256.256/cgi-bin  
/scandoc.cgi
```

you would want to change it (all on the same line) to:

```
ScanDoc=https://256.256.256.256/cgi-bin  
/scandoc.cgi
```

If the `Scandoc` variable is blank, you do not need to enter anything.

Endeavor does not distribute a web server; because of this, you must configure your webserver properly for SSL support. However, a useful source of information is the Apache web site at <http://www.apache.org>.

SSL support is NOT built into Apache by default, due to export restrictions on cryptography, so the apache source must be patched and built by hand. There is useful information about how to do this as well as other helpful information at the above web site under the link to "Related Projects." Note that the information at the Apache web site is specifically about the Apache webserver.

Allowing Access to WebVoyáge

To allow your patrons to access WebVoyáge, you can create a hypertext link from your home page to the WebVoyáge introduction page, which is called `webvoy.htm`. You can also set up the Web Browser's home page to bring up the `webvoy.htm` file.

Installing on Another Machine

To Install WebVoyáge on a different machine than the one your Voyager (Oracle) database is on, follow the same steps as above except that instead of copying the files from one directory to another, you must FTP them from one machine to the other (from the database machine to the webserver machine).



Procedure 1-2. Installing on Another Machine

Use the following steps to install WebVoyáge on another machine.

1. FTP the following subdirectories under the `/m1/voyager/xxxdb` directory to the webserver machine:
 - `/m1/voyager/xxxdb/etc/webvoyage`
 - `/m1/voyager/xxxdb/etc/webvoyage/local`
 - `/m1/voyager/xxxdb/etc/webvoyage/Z3950`
 - `/m1/voyager/xxxdb/etc/webvoyage/vcit`
 - `/m1/voyager/xxxdb/etc/webvoyage/zcit`
2. Edit the `webvoyage.ini` file (see [Set the Root Directory for WebVoyáge](#) on [page 1-7](#)).
3. Change the `[AppVar]` stanza to point to where the `/webvoyage` subdirectory structure is.

Example:

For example, if you FTP the files from machine `TrainBox:/m1/voyager/xxxdb/etc/webvoyage` to machine `DemoBox:/webserver/home/etc/webvoyage` then you would change the `OpacIniRoot` variable in the `webvoyage.ini` file from `/m1/voyager/xxxdb/etc/webvoyage` to `/webserver/home/etc/webvoyage`.

4. Edit the `/m1/voyager/xxxdb/etc/webvoyage/local/opac.ini` file in the new location on the new machine to point to the IP address and ports on the Voyager database machine.

Customizing WebVoyáge

In Voyager, each site has the ability to determine what bibliographic and holdings data should display in WebVoyáge. This includes the determination of labels, what MARC fields/subfields to include under what labels, and the order and spacing of information on the WebVoyáge page.

The WebVoyage configuration files are located in the /m1/voyager/xxxdb/etc/webvoyage directory and related sub-directories on your network. The configuration files have the extensions .ini and .cfg and can be edited by editing directly on the server using an editor like vi or emacs or by downloading the files and editing them with a text editor such as Microsoft Notepad.

Configuration File Overview

The WebVoyage configuration files are located on your server in the /m1/voyager/xxxdb/etc/webvoyage directory and sub-directories, and the /m1/voyager/xxxdb/webvoyage directory and sub-directories. The configuration files have the extensions *.ini and *.cfg and can be edited using a text editor on your server. There are also many *.htm files that can be customized by your institution.



IMPORTANT:

*You cannot remove any HTML text that invokes the Pwebrecon.cgi program, otherwise, WebVoyage will fail. You cannot rename or change the lengths of any variables within the *.ini files, but any plain text entered after the variables in the files can be modified. In addition, you can substitute your own image files for the files Endeavor provides (however, you must use the exact same name for your image files).*

To open the configuration files, use a text editor on your server.

Required Elements

Most of the configuration files (the *.ini files in particular) in the /m1/voyager/xxxdb/etc/webvoyage directory and sub-directories, and the /m1/voyager/xxxdb/webvoyage directory and sub-directories on your server mandate that certain elements be present in the file. These elements include: stanza names, variable names, and data elements. A portion of the opac.ini configuration file is shown below:

```
[Patron_Info_Page]
Personal=Personal Information
Charged=Charged Items
```

Figure 1-3. Sample Stanza

Stanza names separate sections of the configuration file and are displayed in square brackets. In the above example, the stanza is named [Patron_Info_Page]. Stanza names must *never* be changed or deleted. Some configuration files do not have stanzas.

Stanzas contain variables and data elements. Variable names are located to the left of the equals sign (=). Variable names are usually one word or several words run together (without spaces). In the above sample, the variable names are *Personal* and *Charged*. Like stanza names, variable names must *never* be changed. However, certain variable names may be deleted. You also can use a pound sign (#) as the first character of a line to indicate that the rest of the line is to be ignored. In this way, you aren't required to delete the information, but it is no longer used by the program.

Data elements are located to the right of the equals sign (=). Data elements can usually be modified by your institution. For example, in the sample stanza shown above, any text entered after the *Personal* variable would display as the caption header at the top of the Personal Information section on the Patron Information page, and any text entered after the *Charged* variable would display as the caption header at the top of the Charged Items section on the Patron Information page.

Displaying Unicode characters

Beginning with The Voyager With Unicode release, WebVoyáge displays Unicode encoded characters in the web browser, instead of using the Glyph Server. Voyager represents Unicode characters using UTF-8 character encoding.

NOTE:

Unicode characters in bibliographic, holdings, and item records display in this version of Voyager. There is also a UTF-8 encoding for purposes of saving and printing records. Configuration files (including help files), and all other files are still in Latin-1 encoding.

To view UTF-8 encoded characters in WebVoyáge you must:

- Set your web browser to display the characters
- Install at least one Unicode font on each PC viewing UTF-8 encoded records.

See the following for Unicode-related configuration

- [Displaying Alternate Graphic Representations on the View Record Pages](#) on [page 1-14](#).

- UTF-8 download format for printing and saving in [Download Formats](#) on [page 4-33](#).

Web Browser configuration

In order to display Unicode characters in WebVoyáge, you will need to use a web browser capable of supporting the UTF8 encoding scheme. Both Microsoft Internet Explorer and Netscape Navigator introduced Unicode capabilities with versions 4.0. However, it may be necessary for you to enable support for the UTF8 encoding scheme in your web browser.

Most browsers contain an option to auto-select the language based on the encoding of the page. Typically, the setting for this is on the **View** menu tab.

- For internet explorer:
Go to **View>>Encoding** and make sure the **Auto-Select** is checked.
- For Netscape:
Go to **View>>Character Coding** and make sure **Auto-detect** is selected.



IMPORTANT:

These configuration directions are subject to change or differ depending on web browser changes. Check the help for your browser if you need help configuring the automatic character encoding selection option.

Some older web browsers do not support UTF-8 encoding. You may need to update your web browser to view UTF-8 encoded text.

Font installation

Different Unicode fonts display certain characters and languages better than others. Some fonts are specific to certain languages, while others are more generic and cover a broader range of characters. Some testing may be necessary to refine display of some languages.

If you are having difficulty displaying a certain language or languages, download a font specific to that language, or a general Unicode font that includes the characters' range. There are resources on the Web which list Unicode fonts and the character ranges they cover. Resources also exist to test your Unicode font character range coverage and display.

Search for “unicode character range” on the Web, for example, to view resources specific to determining font character range coverage. You can also search for language-specific resources as there are many out there.

Browsers also vary in their ability to display Unicode so you may want to test on multiple browsers, if using Unicode characters heavily.

You must install unicode fonts on all WebVoyage workstations. See your operating system's help for more on installing fonts.

Displaying Alternate Graphic Representations on the View Record Pages

Alternate graphic representations can be displayed on the View Record Pages. More specifically, original language information added to properly configured 880 MARC record fields displays after the MARC fields to which they are attached. So, for example, the 245a displays on the View Record Page, with an 880 containing original language text, displaying beneath it. For more information about alternate graphic representation, see the *MARC 21 Concise Formats* specifications.

For an example of alternate graphic representation display in WebVoyage, see [Figure 1-4 on page 1-15](#).

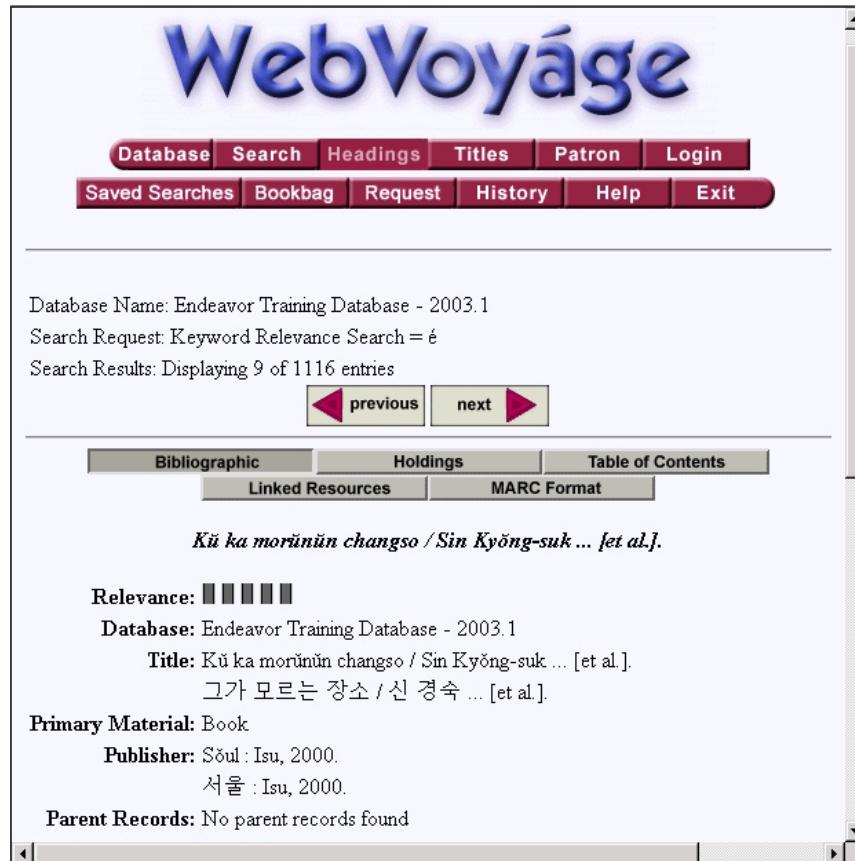


Figure 1-4. Alternate Graphic Representation Display Example

Configure the alternate graphic representation display by:

- Including 880 fields in the MARC records, containing linking instructions.
- Setting a variable in the [View_Record_Page] stanza in the opac.ini file which allows the 880 fields to link to their counterparts.

NOTE:

Authority and Holdings records do not support alternate graphic representation display in WebVoyage.

Enabling the 880 field linking

To enable alternate graphic representation display 880 fields to display directly beneath their primary fields, set the `Link880s` variable in the `[View_Record_Page]` stanza of the `opac.ini` file.

- `Link880s=Y` displays the linked 880 fields directly after their primary field counterparts.

NOTE:

When `Link880s` is set to `Y`, only 880 fields linked to primary fields display. Of course, if there is no primary field to display, the linked 880 field information will not display either. Any 880 fields not linked to a primary field, or linked with an occurrence number of `00` will only display if the `displayn.cfg` file contains an 880 display directive. In that case, they will display under the 880 field section.

- `Link880s=N` displays linked and non-linked 880 field information according to the normal display specification in the `displayn.cfg` files. For more information, see [The `displayn.cfg` files](#) on page 7-6.

Adding 880 Alternate Graphic Representation information

Each alternate graphic representation 880 field must be linked to its counterpart MARC field (*primary field*) such as the 245a. Do this by including a linking specification in the `#6` subfield of the 880 field as well as the corresponding primary field.

This information can be added or edited using the Voyager Cataloging module if it is not already in the record.

Format of Linked MARC fields

This section details the format of the information in the MARC record used to link 880s to their primary fields.

NOTE:

For purposes of detailing alternate graphic representation display, references to *linked fields* indicate fields (880 and primary) that have link specifications in them. The term *linked fields* therefore, is not restricted to fields which display on the view record pages as linked (that is, a primary field with 880 information displaying directly beneath it).

The link specification consists of the field specification (primary or 880), followed by a -, followed by the occurrence number.

Format of the 880 fields

The general format of the linked 880 fields is as follows

880 *indicator fields #6 primary field-occurrence number
original language information*

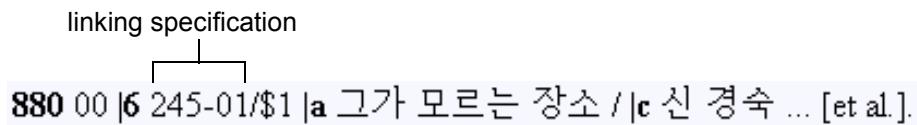


Figure 1-5. Sample linked 880 field in a MARC record

The components detailing the format are listed in [Table 1-3](#). [Figure 1-5](#) contains an example in a MARC record.

Table 1-3. 880 field format component description

Component		Description
Indicator fields		normal MARC record indicator fields
Linking specification	primary field	field to which this 880 links
	occurrence number	unique identifier also existing in the primary field, indicating to which primary field this links. This number must match the occurrence number in the 880 field linked from.
Original language information		Unicode encoded text describing the record. This can be in multiple scripts.

Format of the primary fields

The general format of the linked primary fields is as follows

MARC Field *indicator fields #6 880-occurrence number
MARC field information*

linking specification



```

245 00 |6 880-01 |a Kǔ ka morǔnǔn changso / |c Sin Kyǒng-suk ... [et al.].

```

Figure 1-6. Sample 245 field in a MARC record

The components detailing the format are listed in [Table 1-4](#). [Figure 1-6](#) contains an example in a MARC record

Table 1-4. Primary field format component description

Component	Description	
Indicator fields		normal MARC record indicator fields
Linking specification	880	880 to which this primary field links
	occurrence number	unique identifier also existing in the 880 field, indicating to which 880 field this links. This number must match the occurrence number in the 880 field linked to.
Original language information		Standard primary field and subfield information.

An 880 field with an occurrence number of 00 will display under the 880 specification on the `displayn.cfg` as normal (that is, not linked to any other field). This assumes you have included an 880 display specification in a `displayn.cfg` file.

Examples

This section includes examples to demonstrate some possible uses of the alternate graphic representation display feature.

When the alternate graphic representation feature is enabled in the `opac.ini` (see [Figure 1-7](#)), the 880s linked in the MARC record shown in [Figure 1-10](#) on [page 1-21](#) display as in [Figure 1-8](#) on [page 1-19](#). The `display1.cfg` used for this example is shown in [Figure 1-9](#) on [page 1-20](#) (parts omitted for clarity).

[View_Record_Page]

...

Link880s=Y

Figure 1-7. Sample View_Record_Page stanza

The screenshot shows a library catalog interface. At the top, it says "Search Results: Displaying 2 of 2 entries". Below this are navigation buttons for "previous" and "next". A horizontal menu bar includes "Bibliographic" (which is highlighted), "Holdings", "Table of Contents", "Linked Resources", and "MARC Format". The main content area displays a single record for the book "Kü ka morünün changso / Sin Kyöng-suk ... [et al.]". The record details are as follows:

- Relevance:** ■
- Database:** Endeavor Library
- Title:** Kü ka morünün **changso** /
그가 모르는 장소 /
- Primary Material:** Book
- Publisher:** Söul : Isu, 2000.
서울 : Isu, 2000.
- Original Language Non-Linked:** 서울 : Isu, 2000. Non-linked.

A note in purple text states: "No holdings available -- check at the Circulation Desk." At the bottom of the screen, there are "previous" and "next" navigation buttons, and a "Record Options" button.

Figure 1-8. Sample record display with 880s=Y

The display1.cfg also includes an 880 display specification to display the non-linked 880 fields (see [Figure 1-9](#)).

Main Author:	
100 XX aq	
110 XX ab	
...	
Title:	
130 XX aplskf	
240 XX {a[%}plskf"]"	
245 XX ab	
Primary Material:	
000 06 2	
...	
Publisher:	
260 XX abc	
Original Language Non-Linked:	- Displays the non-linked 880's.
880 XX abc	
...	

Figure 1-9. Sample display1.cfg

Notice in the MARC record ([Figure 1-10](#)) there are two 880 fields for the 100 field. One is linked (880 10 |6 100-01...) and the other is not (880 10 |6 100-00...). In the MARC record display, the linked 880 displays directly below the 100 field and the non-linked 880 displays under the 880 display configuration as configured in the display1.cfg ([Figure 1-9](#)).

NOTE:

This configuration is used for illustrative purposes, and some fields have been omitted for clarity.

[Figure 1-10](#) shows the sample MARC record used in the examples.

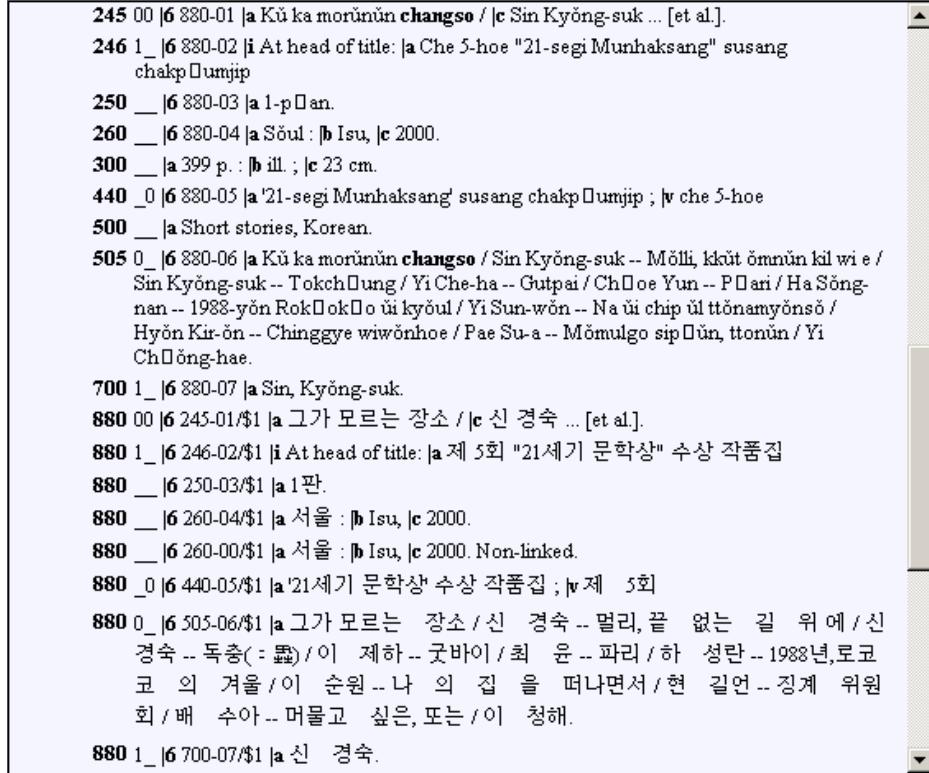


Figure 1-10. Sample MARC record

[Figure 1-12](#) on [page 1-22](#) shows the display of the same record and configuration, with the 880 links disabled (Link880s=N – see [Figure 1-11](#)). Notice that the 880 fields with 880 link directives display below the 880 display directive toward the bottom of the page and are no longer displayed along with their primary fields. Without an 880 display directive on the display1.cfg file, none of the 880 fields will display at all.

```
[View_Record_Page]
...
Link880s=N
```

Figure 1-11. Sample View_Record_Page stanza

Database Name: Endeavor Library
 Search Request: Keyword = changso
 Search Results: Displaying 1 of 2 entries

◀ previous next ▶

Bibliographic	Holdings	Table of Contents	Linked Resources	MARC Format
<i>Kü ka morünün changso / Sin Kyöng-suk ... [et al.]</i>				
Database: Endeavor Library Title: Kü ka morünün changso / Primary Material: Book Publisher: Söul : Isu, 2000. Original Language Non-Linked: 그가 모르는 장소 / 신 경숙 ... [et al.]. 제 5회 "21세기 문학상" 수상 작품집 1판. 서울 : Isu, 2000. '21세기 문학상' 수상 작품집 ; 그가 모르는 장소 / 신 경숙 -- 멀리, 끝 없는 길 위에 / 신 경숙 -- 독충(·蟲) / 이 제하 -- 굿바이 / 죄 윤 -- 파리 / 하 성란 -- 1988년,로코코 의 겨울 / 이 순원 -- 나 의 집 을 떠나면서 / 현 길언 - 경계 위원회 / 배 수아 -- 머물고 싶은, 또는 / 이 청해. 신 경숙.				

Figure 1-12. Sample record display with Link880s=N

Making WebVoyáge Multilingual

There are a number of steps you must take in order to make the WebVoyáge interface multilingual. These steps include:

- creating new directories at the appropriate locations in your directory structure
- preparing the configuration files and image files
- creating links to the different language versions of WebVoyáge from your institution's home page or WebVoyáge start-up page.
- specifying default directories

NOTE:

These sections are devoted to making the WebVoyáge *interface* multi-lingual. For more information on using Unicode characters to display multiple languages in MARC records, see [Displaying Unicode characters](#) on [page 1-12](#) and the related sections.

Create Language Directories

In order to have more than one language-version of WebVoyáge, you must create new directories at specific locations within your directory structure.

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1. Create a custom WebVoyage display directory for each language under /m1/voyager/xxxdb/etc/webvoyage. For example, if you want to offer WebVoyage in English and French, you would create an /m1/voyagerxxxdb/etc/webvoyage/English directory and an /m1/voyagerxxxdb/etc/webvoyage/French directory.

The same directory structure and all of the files which are normally contained under the /m1/voyager/xxxdb/etc/webvoyage directory (for example, the /local, /zcit, /vcit and /z3950 directories, as well as the configuration files within these directories) must be copied to each new language directory.

2. Create an image file directory for each language under /m1/voyager/xxxdb/webvoyage/html/images, and /m1/voyager/xxxdb/webvoyage/html/help. These directories should have the exact same name as the corresponding directory under /m1/voyager/xxxdb/etc/webvoyage. For example, if you have created an /English and /French directory above, you must create an /English and /French directory here.

All of the image files which are normally located in the /images directory must be copied to each new language directory under /m1/voyager/xxxdb/webvoyage/html/images.

3. Create a help file directory for each language under /m1/voyager/xxxdb/webvoyage/html/help. For example, /m1/voyager/xxxdb/webvoyage/html/help/french.

All of the help files which are normally located in the /help directory must be copied to each new language directory under /m1/voyager/xxxdb/webvoyage/html/help.

Prepare Configuration Files and Images

Once you have created your directories and ensured that they contain the appropriate subdirectories and files, you can edit the configuration files (opac.ini, display.ini, etc.) and image files which control how WebVoyage functions and appears.

The configuration files should be located within the subdirectories of the language directories under /m1/voyager/xxxdb/etc/webvoyage. The configuration files control much of the text that displays throughout WebVoyage, allowing you to extensively define the language of WebVoyage. For example, the *NotCharged* variable in the [Item Statuses] stanza of the opac.ini file controls how the "Not Charged" item status will appear in WebVoyage. If you wanted this status to display in a language other than English, you would enter the text after the *NotCharged* variable.

The image files should be located within each language directory under /m1/voyager/xxxdb/webvoyage/html/images. The image files control many of the buttons and images that display throughout WebVoyáge. Many of these buttons and images have text on them; therefore, if you want the text on a button or image to display in a language other than English, you can either edit the image or create a new image and save it with the exact same file name as the original image.

Create Links to WebVoyáge

In order for the patrons of your institution to access the different language versions of WebVoyáge, you must provide links to these different versions on your institution's home page or WebVoyáge start-up page.

Normally, if you were not making WebVoyáge multilingual, the following URL would be used as a link to WebVoyáge:

```
http://institution's ip address/cgi-bin/  
Pwebrecon.cgi?DB=local&PAGE=First
```

In order to provide successful links to different language versions of WebVoyáge, you must slightly alter the above URL for each link. In each link, you must insert the following between? and DB:

```
LANGUAGE=directoryname&
```

LANGUAGE must be in upper case. In place of *directoryname*, you must insert the exact name of the language directory to be used. For example, if you created a /French directory under /m1/voyager/xxxdb/etc/webvoyage and /m1/voyager/xxxdb/webvoyage/html/images you would insert

LANGUAGE=French& in the URL of the link. The full URL for this example would be:

```
http://ip/cgi-bin/  
Pwebrecon.cgi?LANGUAGE=French&DB=local&PAGE=First
```

where *ip* would be replaced with your institution's ip address.

Specify Default Directories

Once you have created your language directories, edited the configuration and image files, and created the appropriate links, you must set the *DefaultLang* and *DefaultImageDir* variables in the [AppVar] stanza of the webvoyage.ini file. These variables specify which language directories (and therefore which language version) will be used as defaults by WebVoyáge.

The *DefaultLang* variable specifies which language directory under /m1/voyager/xxxdb/etc/webvoyage will be used as the default directory containing the necessary configuration files. The name of the directory entered after this variable must be exactly the same as the directory name in the directory structure.

The *DefaultImageDir* variable specifies which language directory under /m1/voyager/xxxdb/webvoyage/html/images will be used as the default directory containing the necessary image files. The name of the directory entered after this variable must be exactly the same as the directory name in the directory structure.

The directories entered after these variables will be used when a language directory is not specified. Most likely this would occur when the URL of a link to a version of WebVoyáge does not specify a language directory (the activity described above in “Create Links to WebVoyáge”).

Version Management Messages

This section contains messages that pertain to WebVoyáge version management. They are:

- A newer version of WebVoyáge is available (see [Newer Version of WebVoyáge Available](#))
- The current WebVoyáge version is incompatible with the Voyager client modules (see [WebVoyáge Incompatible with Voyager Clients](#))

Newer Version of WebVoyáge Available

The information entered after the *WebErrNewOpac* variable will display as a message when WebVoyáge is launched if a more current version of the WebVoyáge client is available but not being used. In order for the correct value to display, you must not change or re-order the “%s” entry. This symbol is used literally by WebVoyáge to gather the appropriate version information.

WebVoyáge Incompatible with Voyager Clients

The information entered after the *WebErrCompatibility* variable will display as a message when WebVoyáge is launched if the server is not compatible with the current version of the WebVoyáge client. In order for the correct values to display, you must not change or re-order any of the “%s” entries. These symbols are used literally by WebVoyáge to gather specific information.

Miscellaneous Initial Server Set up

This section contains optional server configuration which may be performed at the time of initial set up.

Time-out Value

The entry after the `Timeout` variable of the `[WebRecon]` stanza in the `opac.ini` file specifies the number of seconds that WebVoyage waits for user input before timing out of the connection and displaying the `ErrorFile` message.

Time-out Error File

The entry after the `ErrorFile` variable in the `[WebRecon]` stanza of the `opac.ini` file specifies the absolute path and file name of the HTML file that displays when the connection time-out value has elapsed. Initially, this entry after the `ErrorFile` variable will be as follows:

```
/m1/voyager/xxxdb/webvoyage/html/webconerr.htm
```

Temporary File directory

The entry after the `TempFileLocation` variable of the `[WebRecon]` stanza in the `webvoyage.ini` file specifies the absolute path to the temporary files created by WebVoyage to support connection-based functionality. This should be the same as the path specified in the `-t` parameter of the `Pwebrecon.cgi` script (see [Check the Pwebrecon.cgi File on page 1-6](#)). Initially, this variable will be set to `/tmp`. Initially, `Pwebrecon.cgi` resides at the following location:

```
/m1/voyager/xxxdb/webvoyage/cgi-bin
```

Temporary File Name Prefix

The entry after the `TempFileName` variable of the `[WebRecon]` stanza in the `webvoyage.ini` file specifies the prefix of all temporary files that will be used by WebVoyage. This should be the same as the name specified at the end of the `-t` parameter of the `Pwebrecon.cgi` script (see [Check the Pwebrecon.cgi File on page 1-6](#)). Initially, this variable will be set to `webrecon`. `Pwebrecon.cgi` resides at the following location:

```
/m1/voyager/xxxdb/webvoyage/cgi-bin
```

WebVoyage Exit Page

The entry after the `ExitPage` variable of the `[WebRecon]` stanza in the `opac.ini` file specifies the absolute path and file name of the HTML file that displays when the Exit button (`s-exit.gif`) is clicked. This gives the user a graceful method of closing the WebVoyage connection to the server. Initially, the entry after the `ExitPage` variable will be as follows:

```
ExitPage=/m1/voyager/xxxdb/webvoyage/html/webvoy.htm
```

Troubleshooting

Because WebVoyage allows a high level of customization, your institution needs to be aware of certain areas which might cause WebVoyage to fail.

1. You must not remove any information that invokes the `Pwebrecon.cgi` program. This will cause WebVoyage to fail.
2. You cannot rename or modify the length of any of the variables within the `*.ini` files. A variable is information in an `*.ini` file that comes before the equals sign (=). For example, `ResetTime` is the variable of `ResetTime=120`.

However, you can modify the data that follows the variables within the `*.ini` files.

3. You can substitute your own `*.gif` files for the ones that we distribute. However, you MUST use the exact same name and location for those new `*.gif` files.
4. You can include almost any HTML information in the error, assistance and block `*.htm` files. You may include Java/JavaScript and VBSCRIPT with 20 lines of text maximum. You must **not** include `<BODY>`, `<FORM>`, `</FORM>`, or `</BODY>` tags because WebVoyage provides these when the pages are dynamically built. These `*.htm` files are generated and included as messages in various built WebVoyage pages.
5. However, you cannot alter where these messages appear on the built WebVoyage pages. For example, your institution cannot include information that displays between the search text box and the Search button.
6. When editing WebVoyage pages on the server, and testing them using a browser, be sure to refresh the browser frequently. This ensures that the browser reflects the changes you have made recently.

[REDACTED]

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Database Display

This section details configuring WebVoyáge to display database information.

Database Name (Search Page Top)

The `Database_Name` variable in the `[Misc_Strings]` stanza of the `opac.ini` file controls one of the labels that display toward the top of all search pages, search results pages and record display pages. This variable controls the label that displays before the name of the database that is associated with a search, search result, or record. Enter the information that you want to display before the database name after the `Database_Name` variable. For example, if `Database Name:` was entered after the `Database_Name` variable, and you were searching a database called “Endeavor Library of Knowledge,” the label and database name would display as “Database Name: Endeavor Library of Knowledge.” If nothing is entered after the `Database_Name` variable, `Database Name:` will be used as the default.

Database Selection Display Configuration

The `connect.ini` file is located in the `/m1/voyager/xxxdb/etc/webvoyage` directory.

The `connect.ini` file specifies which Voyager and Z39.50 connections display on the Select Database page in WebVoyage. These are the databases available for WebVoyage to connect to. You can access the Select Database page by clicking the **Database** button.

The database settings for the databases are defined in **Voyager System Administration>>Search>>Database Definitions**. Once defined in Voyager System Administration, the databases must also be listed in the `connect.ini` in order for them to be available in WebVoyage.

This is true even of databases that have had the **Public Use** check box turned off. In order for a database to appear on the Select Database page in WebVoyage, it must be:

- listed in the `connect.ini` file
- either have the Public Use check box turned on, or accessible to the currently logged in patron (i.e., the patron must be a member of an Access Group given access to that database on the Database Definitions dialog).

There is no limit to the number of databases that may be listed in the Connect.ini file.

Overview

The first type of stanza in the `connect.ini` file is the `[Folders]` stanza, which contains the name of each set of connections that display on the Select Database page. There is no limit to the number of set names that can be within the `[Folders]` stanza. Each name displays next to a list box on the Select Database page in WebVoyage.

The contents of each set (and list box) is defined by the next type of stanza, the Set Name stanza, which bears that set's name (i.e., `[Voyager Databases]`, *not* `[Set Name]`). A maximum of twenty items can be contained within each set name stanza. Each item listed in the set name stanza is either a database code or the stanza name of a definition of a group of databases. This stanza must be repeated for each set before defining specific locations.

After defining all the set names, you can add an optional third type of stanza; the Location stanza. These stanzas are referred to as Location stanzas because they can do one of two things:

- Specify a custom WebVoyage display directory location for that database
- Set up a group name to attach a group of databases (locations) to (for simultaneous search, for instance)

This option requires creation of another stanza (a List Location stanza).

NOTE:

The database code for a database may be specified more than once within the lists in the connect.ini (e.g., you may add the database code to more than one list). If a database code is used as the name of a stanza, however, you may only have one stanza named after that database code.

The connect.ini file As Distributed

- [Figure 2-1](#) shows the default connect.ini file as distributed
 - [Figure 2-2](#) shows the display of the default connect.ini in WebVoyáge.
-

[Folders]	[FOLDERS] Stanza
1=Local Libraries	Set Name
2=Other Databases	
[Local Libraries]	Set Name STANZA
1=LOCAL	database code
2=DBCODE1	
3=DBCODE2	
[Other Databases]	
1=DBCODE3	
2=DBCODE4	
[DBCODE3]	Location Stanza
Config=Vcit	
[DBCODE4]	
Config=vcit	

Figure 2-1. Sample distributed connect.ini file

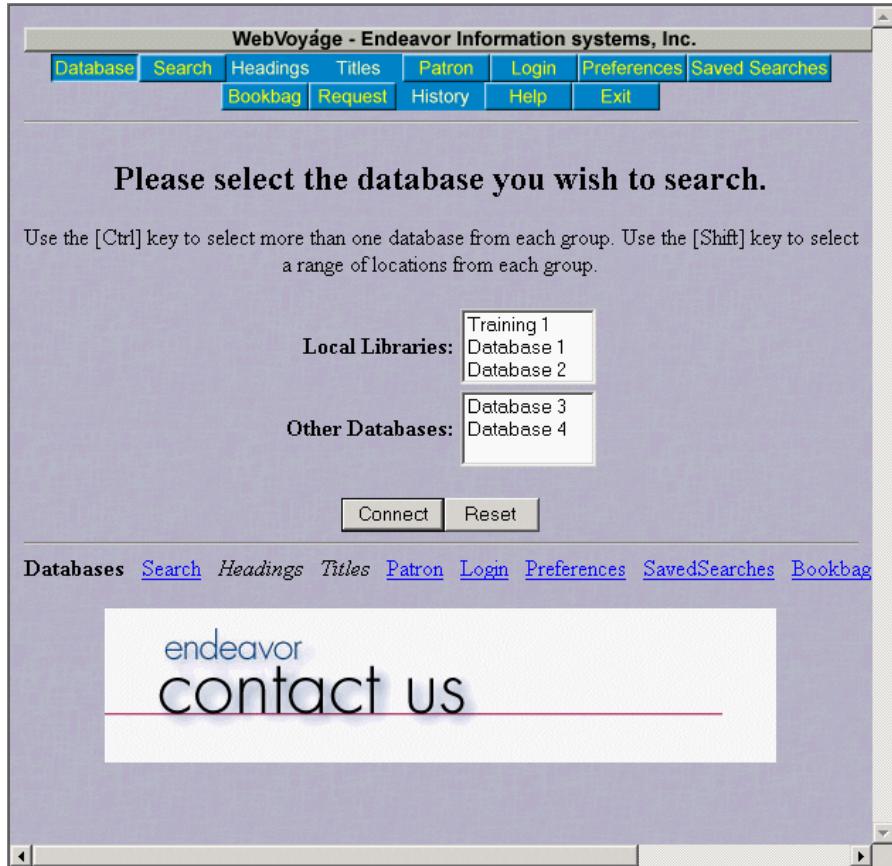


Figure 2-2. Display of default connect.ini in WebVoyage

The [Folders] Stanza

The [Folders] stanza is where you define the groups of search connections available to patrons, and the sequence in which they display, on the Select Databases Page. Each entry in this stanza will display a corresponding list box in WebVoyage.

On each line of this stanza, enter a number for the set (consecutively, starting with 1), an equals sign (=), followed by the name of the set (which will display as the label for the corresponding list box).

For example, if you want to create a set for Voyager databases and a set for Z39.50 databases, enter something like the [Folders] stanza in [Figure 2-3](#).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites
```

Figure 2-3. Sample [Folders] stanza

Repeat the above instructions for each set that you want to display. The order (from the top of the file) in which the sets are typed is the order (from the top) that the sets will display on the Select Database page in WebVoyáge.

This is the first step in making the sets of databases available for selection on the Database Selection page. [Figure 2-3](#) will eventually create two list boxes on the Database Selection page, one labeled **Voyager Libraries**, the other labeled **Some Z3950 Sites**. Next you must create Set Name stanzas for each of the two sets.

Set Name Stanzas

Once you have defined the set names in the [Folders] stanza, you must create a corresponding stanza specifying the databases comprising that set. These stanzas are referred to as Set Name stanzas because they are named after the sets configured in the [Folders] stanza.

Each entry in the [Folders] stanza must have a corresponding Set Name stanza, with the same name as the entry in the [Folders] stanza. For example, for the entries in the [Folders] stanza in [Figure 2-3](#), you would create two Set Name stanzas: **[Voyager Libraries]** and **[Some Z3950 Sites]** (see [Figure 2-4](#)).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]

[Some Z3950 Sites]
```

Figure 2-4. Set Name stanzas added to connect.ini

While the entries in the [Folders] stanza determine the names of the list boxes on the Database Selection page in WebVoyage, the Set Name stanzas determine which databases are contained in those list boxes.

On each line of the Set Name stanza, enter a number for the database (consecutively, starting with 1), an equals sign (=), followed by the database code (as entered in Voyager System Administration>>Search>>Database Definitions. See [Figure 2-5](#)).

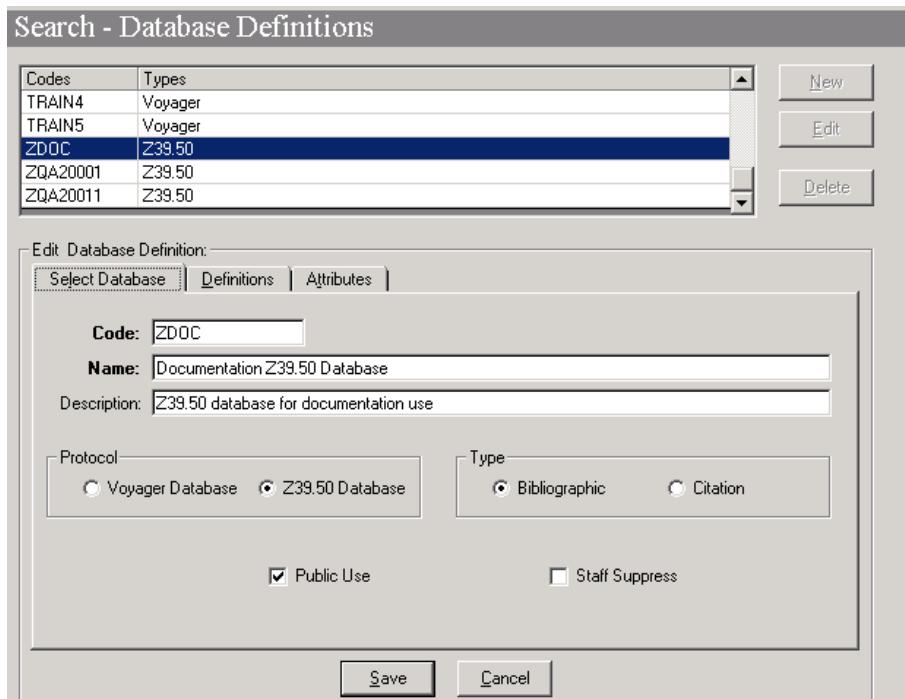


Figure 2-5. Database information in Database Definitions

So, to include the Documentation Z39.50 database in [Figure 2-5](#) in the **Some Z3950 Sites** list box on the Database Selection page, create an entry in the [Some Z3950 Sites] Set Name stanza as in [Figure 2-6](#).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]

[Some Z3950 Sites]
1=ZDOC
```

Figure 2-6. Sample entry in a Set Name stanza

The entry in [Figure 2-6](#) would display in WebVoyage as in [Figure 2-7](#).

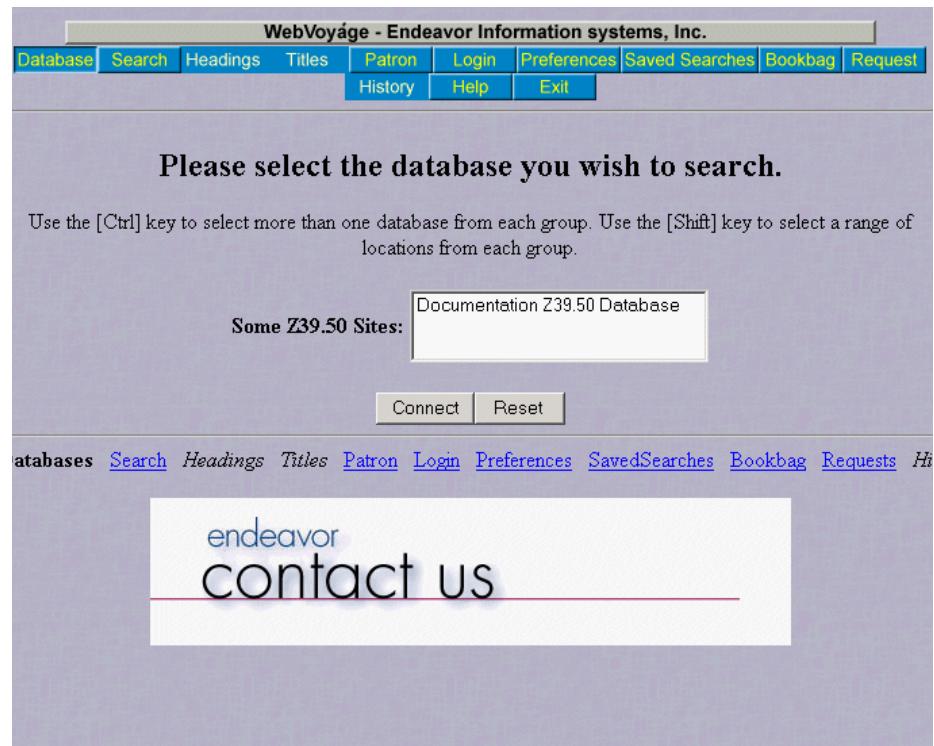


Figure 2-7. Result of database entry in the Set Name stanza

Also notice that the **Voyager Libraries** list box does not appear. This is because we have not included any databases in the [Voyager Libraries] Set Name stanza yet.

! IMPORTANT:

If the database code specified in a Set Name stanza is not created yet, or is incorrect, the database will not appear for selection on the database selection page. Also, if none of the database codes in a Set Name stanza are present in Database Definitions, the set's list box itself will not display. Lastly, if there are no database codes entered into a Set Name stanza, the Set Name list box will not display.

If we include a database code (such as *LOCAL*), in the [Voyager Libraries] Set Name stanza (see [Figure 2-8](#)), the set's list box will display (along with the LOCAL database's Database Name). In this case, the LOCAL database's name is *Training 1*. [Figure 2-9](#) shows the resulting display in WebVoyáge.

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC
```

Figure 2-8. Sample database added

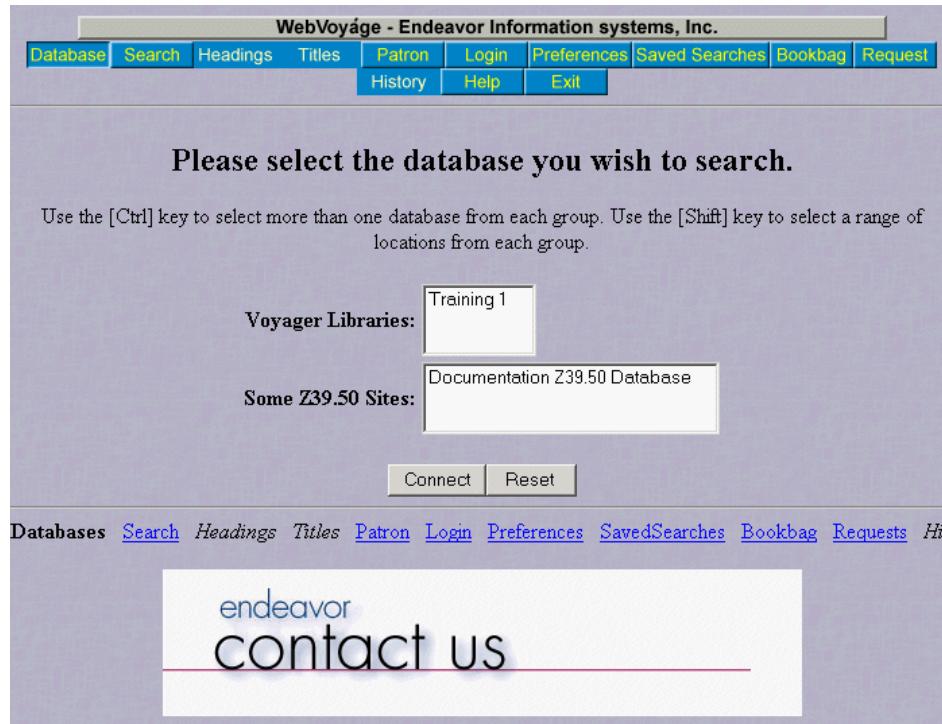


Figure 2-9. Result of adding a database to the stanza

Location Stanza

Location stanzas are used for two things:

- To specify a custom WebVoyage display for that database

Once you have created a custom WebVoyage display directory in /m1/voyager/xxxdb/etc/webvoyage, you can use the custom display for a database by specifying it here. This is also useful for multi-lingual WebVoyage configuration.

For more information about creating custom WebVoyage display directories, see [Customizing Display with WebVoyage Directories](#) on [page 4-23](#).

For more information about using location stanzas to specify custom display directory locations, see [Specifying a custom display directory for a database](#) on [page 2-10](#).

- To set up a *group name* to attach a group of databases to (for simultaneous search, for instance).

You can include a list of databases for patrons to search simultaneously by selecting the group name, rather than having to select each database one at a time, on the Database Selection page.

List Location stanza

Once you have established a group name in a location stanza (if using the location stanza to set up a group name), you must specify the databases to include in the group. This is done in the *list location* stanza. For more information about List Location stanzas, see [Using a Location Stanza to Group Search Locations](#) on [page 2-12](#).



Procedure 2-1. Specifying a custom display directory for a database

Use the following to specify a custom WebVoyáge display for a database.

1. Add a stanza, with the same name as the database code, below the Set Name stanza that the database code appears in (see [Figure 2-10](#)).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC

[ZDOC]
```

Figure 2-10. Sample location stanza

2. Add an entry in the new stanza including the *Config* Variable (`Config=`) followed by the name of the custom WebVoyáge display directory.

You must include the variable `Config=` to the stanza to designate this location as a display directory location (as opposed to a group location).

Example:

If the name of your custom WebVoyáge display directory is `zspecial`, as illustrated in [Figure 2-11](#), enter a line as in [Figure 2-12](#).

<code>z3950</code>	<code>dbselmsg.htm</code>	<code>formats.ini</code>	<code>local</code>
<code>search.ini</code>	<code>voyager.ini</code>	<code>connect.ini</code>	<code>footer.htm</code>
<code>header.htm</code>	<code>marcinfo.htm</code>	<code>vcit</code>	<code>zcit</code>
<code>zspecial</code>			

Figure 2-11. Sample directory in `/m1/voyager/xxxdb/etc/webvoyage`

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC

[ZDOC]
Config=zspecial
```

Figure 2-12. Sample config variable in the location stanza

Result:

WebVoyáge will use the `zspecial` directory for WebVoyáge display when connected to the Documentation Z39.50 database, instead of the `z3950` directory (which is the default display directory for Z39.50 bibliographic databases).



Procedure 2-2. Using a Location Stanza to Group Search Locations

Use the following to group databases in a Location stanza.

1. Add a stanza, with a code for the group, in the desired Set Name stanza. This code can be any uppercase text, but keep it concise.

Example:

The example in [Figure 2-13](#) shows a group code of **SIMULZ** added to the **[Some Z3950 Sites]** stanza. This indicates that we want the group name to appear in the **Some Z3950 Sites** list box.

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC
2=SIMULZ
```

Figure 2-13. Sample group code in a Set Name stanza

2. Add a *group* location stanza, with the same name as the group code, below the Set Name stanza that the group code appears in (see [Figure 2-10](#)). This is referred to as a group location stanza because it specifies a group of databases to be defined, rather than a single database code (though it is not designated to Voyager as a group location stanza yet).

NOTE:

If you create an entry in a Set Name stanza consisting of a group code, and you do not create a group location stanza, the group will not appear in that set in WebVoyage.

Example:

In [Figure 2-13](#), we added a group code of SIMULZ, so we will create a group location stanza named [SIMULZ] (see [Figure 2-14](#)).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC
2=SIMULZ

[SIMULZ]
```

Figure 2-14. Sample group location stanza

3. Add an entry in the group location stanza to indicate to Voyager that it is a database group (see [Figure 2-15](#)).

You must include the variable **Type=G** to the stanza to designate this location as a group location (as opposed to a display directory location).

4. Add an entry in the group location stanza to specify the display name of the group in WebVoyage. This entry takes the form of **Name=** followed by the name of the group. This name can be any descriptive name you want (within screen size constraints).

For an example, see [Figure 2-15](#).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC
2=SIMULZ

[SIMULZ]
Type=G
Name=Group of Z39.50 Databases
```

Figure 2-15. Sample group location variables

5. Create a *List Location* stanza, detailing the databases included in the group. This gives Voyager the list of databases to connect to when the group is selected from WebVoyage

Do this by creating a stanza named **[List group code]**. The *group code* in this case is the same group code as entered into the Set Name stanza and the group location stanza name.

Example:

For the example in [Figure 2-15](#), create a stanza named **[List SIMULZ]**.

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC
2=SIMULZ

[SIMULZ]
Type=G
Name=Group of Z39.50 Databases

[List SIMULZ]
```

Figure 2-16. Sample list location stanza

6. Add the database codes of the databases you want to include in the group in the list location stanza. Number the list entries followed by an equals sign (=), followed by the database code, just as in the Set Name stanzas.

NOTE:

The contents of the list location stanza will *not* appear in WebVoyage. Only the group name will appear in WebVoyage - not the individual search locations.

Example: To add the Documentation Z39.50 database and a Z39.50 training database, we will add the database codes for these two databases (*ZDOC* and *ZTRAIN*, respectively) to the stanza (see [Figure 2-17](#)).

```
[Folders]
1=Voyager Libraries
2=Some Z3950 Sites

[Voyager Libraries]
1=LOCAL

[Some Z3950 Sites]
1=ZDOC
2=SIMULZ

[SIMULZ]
Type=G
Name=Group of Z39.50 Databases

[List SIMULZ]
1=ZDOC
2=ZTRAIN
```

Figure 2-17. Sample list location stanza

[Figure 2-18](#) shows the corresponding display on the Database Selection page in WebVoyage.

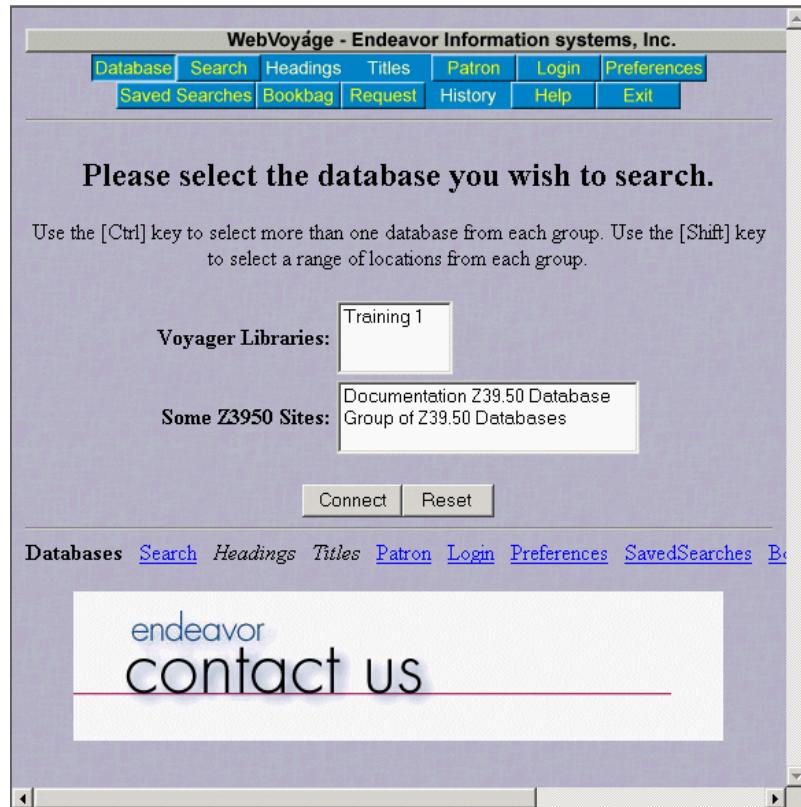


Figure 2-18. Group name included on Database Selection page

Result:

Now the **Group of Z39.50 Databases** entry displays in the **Some Z3950 Sites** list box on the Database Selection Page in WebVoyage. Selecting the **Group of Z39.50 Databases** entry from the **Some Z3950 Sites** List box on the Database Selection page, will connect to the Z39.50 documentation and training databases (along with any other databases selected).

See the *Voyager System Administration User's Guide* for information about defining databases in the System Administration module.

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Connecting Remote Databases

3

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Overview

In this section you will learn how to connect to remote resources and how they display in WebVoyage. Following are the topics included in this section.

- Define a database in System Administration
- Add database codes to the connect.ini file
- Set up duplication check in Simultaneous Search profile
- Set up citation database to display local holdings

One of the more powerful features of Voyager is its ability to connect to a wide variety of databases and electronic resources. This section includes instructions for connecting Voyager to:

- your local database
- remote Voyager databases
- Z39.50 compliant databases
- citation databases via Voyager or Z39.50

Also included are instructions for using WebVoyage to access resources on the Web, TN3270, or telnet connections.

On the WebVoyage search screen is the **Database** button. The Database page allows you to select which databases you want to connect to when performing searches. The list of databases that are available to select from are specified in the connect.ini file.

The Database button uses the [Toolbar_Top] stanza of the opac.ini file. Each WebVoyage display directory (for example, local, vcit, zcit) has a corresponding opac.ini file.

The connect.ini file (/m1/voyager/xxxdb/etc/webvoyage) defines the connections that can be accessed on the Database screen. Note that the connect.ini file contains references to database definitions. You will use the System Administration module to create these references.

The WebVoyage client, as a whole, interfaces with the voyager.ini file or the webvoyage.ini file, which tells WebVoyage where to connect with the WebVoyage server. The opac.ini file contains the client preferences.

Local Folder

The **Local folder** contains initialization (.ini) files and configuration (.cfg) files you can use to define your connectivity preferences, such as:

- search types
- limits
- help text for searches
- display preferences
- request messages
- fields to print, E-mail, and save to text files

This information in the local folder also resides in three distinct folders: Vcit, Zcit, and Z39.50. The type of connection and database type, as defined in System Administration, determines which folder a database will use. You can define additional folders. You can specify additional folders in the connect.ini file.

Table 3-1. WebVoyage Display Directories

Connection type	Database type	Default folder
Voyager	Bibliographic	Local
Voyager	Citation	Vcit
Z39.50	Bibliographic	Z3950
Z39.50	Citation	Zcit

Voyager System Administration

In addition to files on the client or server, settings in the System Administration module play a large role in setting up Voyager connections. The Search Configuration screen contains the major options you will use to connect Voyager:

- Database Definition
- Simultaneous Search
- Hook to Holdings

Database Definition

The Database Definition button defines the database connections accessed from the Database button in WebVoyage. Here you define whether you are accessing a bibliographic or citation database, and whether it is a Voyager or Z39.50-compliant database.

Simultaneous Search

The Simultaneous Search button defines the fields used to eliminate duplicates from result sets. Bibliographic records are de-duped against bibliographic records and citation records are de-duped against other citation records. Bibliographic records are not de-duped against citation records and vice versa.

Hook to Holdings

If you have Endeavor's Citation Server® software, the Hook to Holdings button allows you to define profiles that determine which indices are used in matching records from a citation search with existing records in the local database. This will let you view the local holdings available for a particular citation record. Once the profiles are defined, they are selected within the Database Definition screen for citation databases.

Connection Types

Below are the types of Voyager connection and database types.

Table 3-2. Database and Connection Types

Connection type	Database type
-----------------	---------------

Table 3-2. Database and Connection Types

Local Voyager to Voyager (Same compatible version of software)	Bibliographic
Local Voyager to Voyager	Local Citation database (bibliographic records without holdings records) NOTE: Citation Server required
Local Voyager to Z39.50	Bibliographic
Local Voyager to Z39.50	Citation NOTE: Citation Server required

Information You Will Need

Before you can start setting up connections you will need to collect some information from your library and some information about the target sites to which you are connecting. Following is the information you will need before you begin.

- Know the type of connection(s) of your target resource(s)
 - Your local database (LOCAL)
 - Remote Voyager systems
 - Z39.50 database systems
 - Citation databases
- Server (IP) addresses of the target systems
- Ports of target systems
- Voyager version number for Voyager to Voyager connections (Voyager versions 97.2 or later are compatible.)
- Whether or not a Logon ID and password are required for each target system when using Z39.50
- Attribute types and attribute codes for Z39.50 searches (The server requires a numeric equivalent of the search codes.) Types of searches the Z39.50 target system will allow. See the citation or Z39.50 database vendor's documentation or target site's support staff to get this information.
- Access control, if any (patron groups who will be able to use each database—faculty, graduate students, etc.)

Quick Start

The Quick Start section takes you through the steps required in connecting Voyager to target databases.

1. For Z39.50 connections, get the IP address, port, and attributes from target site.
2. Open System Administration > Search > Database Definitions and add the target site.
3. Set up stanzas in connect.ini.
4. Check the connection in WebVoyage.
5. For Citation Server (optional Endeavor software), define a hook to holdings profile. Open System Administration > Search Configuration > Hook to Holdings.
6. Attach the profile to database in Database Definitions.

Z39.50 Server settings

This section contains additional information relating to configuring WebVoyage for Z39.50 connections.

Strict Attribute Enforcement

In an incoming Z39.50 search, if Strict Attribute Enforcement is disabled, queries which include attributes that are not supported may still be treated by WebVoyage as the supported attribute. This means that WebVoyage is more lenient with respect to the attributes requested in an incoming Z39.50 search.

If Strict Attribute Enforcement is enabled, a query containing an unsupported attribute fails.

Strict Attribute Enforcement is set in the StrictAttributeEnforcement variable of the z3950srv.ini file (/m1/voyager/**xxx**db/ini).

- To enable Strict Attribute Enforcement, set
 StrictAttributeEnforcement=**Y**
- To disable Strict Attribute Enforcement, set
 StrictAttributeEnforcement=**N**

Connecting to Resources within Voyager

To connect to resources within Voyager you will first define a target database in System Administration. For the target system you will define the connection type (Voyager or Z39.50) and the database type (bibliographic or citation). For all Z39.50 connection types, you will have to define attributes supported by the target system's search engine. You will then add the database to the connect.ini file. In Simultaneous Search you will define the fields used to eliminate duplicates when performing a search on multiple databases. For Voyager connections to citation databases, you have the option to display local holdings, if present, associated with the cited reference. You will use the Hook to Holdings to define the profile for your local holdings. Step-by-step instructions with sample data will guide you through the requirements for connecting to resources within Voyager.

Define a Database in System Administration

Settings in the System Administration module play a large role in setting up Voyager connections. The Search Configuration screen contains the major options you will use to connect Voyager:

- Database Definition
- Simultaneous Search
- Hook to Holdings

See the *Voyager System Administration User's Guide* for more information about these configuration components.

Sample Search Scenarios

The sample search recommendations that follow are general suggestions that may help in defining your search attributes.

Keyword Search Attributes

When setting up a Keyword search you may use the following attributes.

Table 3-3. Keyword Search Attribute Example

Attribute	Selection
Relationship	<unspecified>
Position	any position in field
Structure	word
Completeness	<unspecified>

Left-Anchored Search Attributes

When setting up a left-anchored search you may use the following attributes.

Table 3-4. Left-Anchored Search Attributes

Attribute	Selection
Relationship	<unspecified>
Position	first in field
Structure	phrase
Completeness	<unspecified>

In general, for keyword searches, you will want to

- check Boolean enabled box
- check Right-hand truncation boxes.

For left-anchored searches, you will want to

- check right-hand truncation box.

View Connection in WebVoyáge

To check the connection, follow the steps below.

1. Open WebVoyáge.
2. Click the **Database** button in the tool bar.
3. Scroll down in the Remote Databases list to see if your institution's name appears.

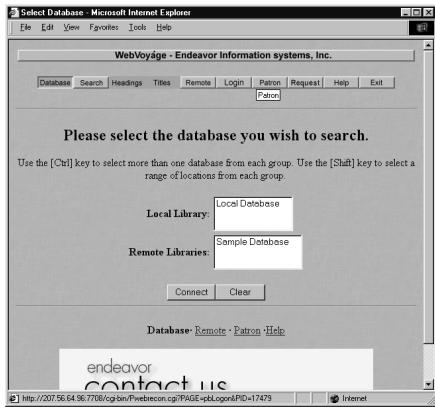


Figure 3-1. Connection Options in the Database Screen of WebVoyage

If the connect.ini has been edited properly, you should see the name of the institution that represents the database you set up.

Troubleshooting

Connection Options Display Problems. If you experience problems on the above display, you need to resolve them within the connect.ini file. (1) Remember that the database code that you set up in Database Definitions is case sensitive and must match the code you enter in the connect.ini file. (2) The information you enter within the folders must match the data you enter in the stanzas.

Connection Problems. If you experience connection problems, you need to check the Database Definitions that you set up.

Simultaneous Search

The Simultaneous Search feature lets you define criteria that will eliminate duplication of bibliographic titles when searching more than one database. If this de-dupe specification determines that duplicate records exist, the database with the highest weight will display the record. For more information, see the *Voyager System Administration User's Guide*.

The following search configurations must be in place in order for simultaneous search to work:

- Database Definitions (for access to databases through the WebVoyage client).

- Search configurations (codes and attributes given to search terms so that databases have a common search language). See the “Search Definition Tables” appendix to the *Voyager System Administration User’s Guide*.
- search index display priorities (defines which database has priority for displaying records).
- fields to use for merging result set.

Search results are divided into two different result sets, Bibliographic records and Citation records. This is the window where you specify the hierarchies to check in the event of duplicate records.

All bibliographic records will be de-duped using the criteria in the first set of fields (Bib. fields) while the second set of fields will be used for citation records. Bibliographic records are not de-duped against citation records. In the event of duplication, the record that displays is the one from the highest weighted database.

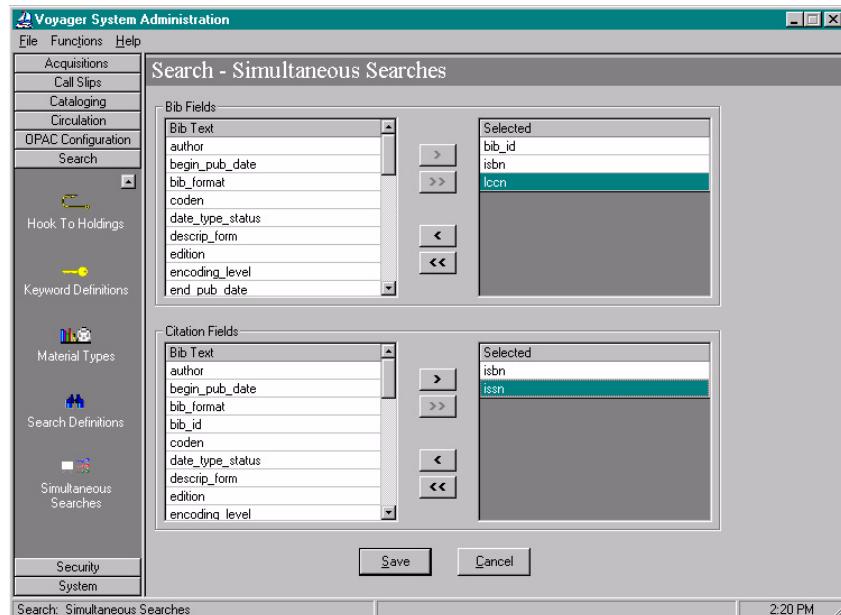


Figure 3-2. Simultaneous Search De-Duplication Profile

Simultaneous search accommodates both fast and slow search engines. Slow search engines will not hold up search results from quicker engines that return results more promptly. The “Show” link in WebVoyage (used to retrieve records) allows you to view the records currently received as soon as any of the search results are available. This will abort the search.

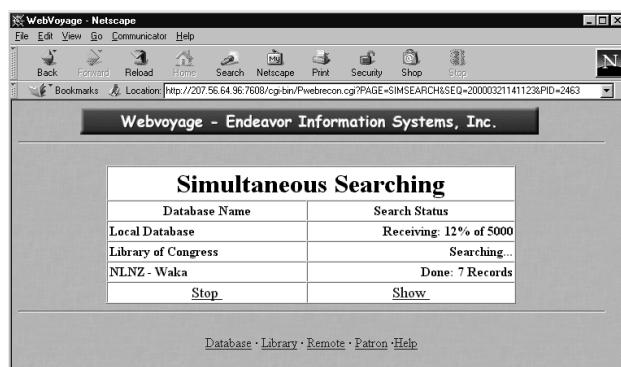


Figure 3-3. WebVoyage Search Status

If you are searching a Voyager bibliographic database that is version 97.1 or older, you must connect via Z39.50. Simultaneous search can only function with versions 97.2 or later.

Simultaneous search relies on WebVoyage display configurations. In the opac.ini file, make sure that the reset time is set to 120 or greater so that the simultaneous search function has time to search the databases.

For a single remote Voyager connection, all standard WebVoyage search features are available including headings, limits, call number, and relevance ranking. If you are connecting to Z39.50 sites or citation databases, you will only be able to perform standard WebVoyage searches, such as, author, subject, and title.

Hook To Local Holdings

The Hook to Holdings feature is used only in conjunction with Citation Server (optional software from Endeavor).

You must first set up a Hook to Holdings profile, which lists the match points for “hooking” holdings data from the local catalog to a citation, e.g. a citation from a journal article. The hook usually matches a standard number in the citation record against a standard number in the local catalog. You specify which fields to use for

the hook fields when you create the configuration in the Hook to Holdings profile window. If there is a match to the bibliographic record for the journal title, all of the local holdings display along with the citation including the following.

- location
 - call#
 - serials receipts
 - circulation status
 - MFHD holdings
-

Short View	Long View	MARC View
<p style="text-align: center;"><i>Who are the real wealth creators?.</i></p> <p>Relevance: ■</p> <p>Database: HW Wilson Databases</p> <p>Title: Who are the real wealth creators?.</p> <p>Author(s): Lieber, Ronald B.</p> <p>Source: Fortune v.134 (Dec. 9 96) p.107-8 +</p> <p>Page(s): p.107-8 + :</p> <p>Digital Resources: FULL TEXT, HTML VERSION. FULL TEXT, PDF VERSION.</p> <p>Local Library Holdings</p> <hr/> <p>Location: Stacks (floors 2-4)</p> <p>Call Number: HF5001 .F7</p> <p>Status: Not Charged</p> <hr/> <p>Location: Periodicals</p> <p>Call Number: HF5001 .F7</p> <p>Status: No information available</p> <p>Summary Holdings: v.119-126 (1989-1992) LACKS: v. 125; no. 13 (1992) v. 130: no. 10-13 (1994: Nov 14-Dec 26) v. 131: no. 1-12 (1995: Jan 16-Jun 26) v. 132: no. 1-4 (1995: Jul 10-Aug 21)</p> <p>Notes: Current issues in periodicals. Some volumes available electronically; ask at REFERENCE.</p> <p style="text-align: center;">LinkFinder click here for full text</p>		

Figure 3-4. WebVoyage Display-Hook to Holdings

For more information about Hook to Holdings, see the *Voyager System Administration User's Guide*, and the *Citation Server User's Guide*.

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Display Configuration

4

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See notice on first page

Display Configuration

4

Overview

This chapter details the configuration options and settings for displaying and customizing display of information in WebVoyáge.

Since most page configurations are done in multiple files or places, many of the page descriptions contain diagrams detailing the corresponding configuration components (for example, a stanza in a configuration file, or graphic file in a particular directory).

Customizing WebVoyáge Structure

One of the things that you should consider when customizing WebVoyáge is that you can customize more than just the existing pages. You can also change the structure of WebVoyáge itself by adding pages and deleting others and linking them together in new and different ways. This can be done by adding additional html pages in the form of .htm files. Since the .htm pages have all of their information contained within the file, you can replace existing images with new ones; change backgrounds and other formats; and add, remove and redirect links between pages.

For example, you decide that instead of having the search button on the introductory page lead directly to the search dialog, you want it to link to a new page with a list of search types which will then open the appropriate search page. You can edit the link on the existing introductory page so that it connects to a new

.htm page, and then edit the new page so that it contains links for all of the different types of searches that connect to the appropriate tab of the search dialog. This requires an understanding of html programming, but anyone who knows html will be able to easily customize the overall structure of the WebVoyáge program.

Customizing Individual WebVoyáge Pages

There are two different types of pages that WebVoyáge uses. The first kind of page is an html page that is generated by WebVoyáge using all of the text and options set in the initialization files and incorporating the image files. There is no single file that WebVoyáge reads in order to create the page; instead, WebVoyáge reads all of the appropriate options and assembles a page accordingly.

For example, the Search page is generated in this way by WebVoyáge. This page does not have an .htm file associated with it; editing this page requires setting a number of different options (outlined in [Search Page Overview](#) on [page 6-6](#)). For this type of page, information relating to each page can be customized, but it is not contained within an .htm file. It is contained in a number of configuration (*.cfg) and initialization (*.ini) files.



CAUTION:

Do not add HTML code to these files as doing so may cause WebVoyáge to malfunction.

However, some of the pages in WebVoyáge are not created by WebVoyáge but are actually free-standing html (.htm) files. These pages are configured for the most part by simply editing a single file (in the form of an html file) where all of the appropriate information is stored.

For example, the initial page consists of a single file called webvoy.htm. This file contains most of the information required to generate this page, including the layout and the names of the images (see [Initial WebVoyáge Page \(Webvoy.htm\)](#) on [page 4-5](#)). The pages that are HTML files generally have most of their options set in the file itself instead of in the configuration and initialization files. These pages are much more open in their structure. They can be kept as they are presented in their default form, or they can be modified partially or completely by anyone who knows html.

NOTE:

Editing .htm files allows customization of pages, but care must be taken that any changes are thoroughly thought out and allow access to all of the parts of WebVoyage.

General Notes on the WebVoyage Pages

When replacing images, unless it is specifically stated, you must *not* change the names of the images. Changing the names of images will prevent WebVoyage from being able to find the proper image, and the image will *not* appear on-screen. The correct way to change an image is to delete the old one, copy the new one to the directory and give it the name of the old file. The old filename *must* be kept in order for WebVoyage to be able to find it.

Setting the Initial Page

The initial page is set in your web server's initialization files. The default setting is typically the webvoy.htm page. This can be changed, but it must be set to an html page (a page with the extension .htm - i.e., webvoy.htm, libinfo.htm, remote.htm, and so on).

For an Apache Web Server, the default page is set in the `httpd.conf` file in the `/usr/local/apache/conf` directory by entering the name of the page after the `DirectoryIndex` variable (note that no equals sign is used between the variable and the filename, unlike in Windows files). Multiple files can be listed on the same line. If the first is not found, the next file in the line will be used, and so on. A sample entry might look like this:

```
DirectoryIndex webvoy.htm index.html
```

If you were to change the default page to `initial.htm` instead of `webvoy.htm`, you would enter the following (all on the same line of the `httpd.conf` file):

```
DirectoryIndex initial.htm webvoy.htm index.html
```

This will tell the server to first look for the `initial.htm` file, and if `initial.htm` cannot be found, to look for the `webvoy.htm` file; and if `webvoy.htm` cannot be found, to look for the `index.html`.

Using the Search Page as the Initial Page

You can give your users the appearance of connecting directly to the search page. Follow [Procedure 4-1, Using the Search Page as the initial page](#) to make WebVoyage appear to connect directly to the search page.



Procedure 4-1. Using the Search Page as the initial page

Use the following steps to configure WebVoyáge to connect directly to the search page.

1. Create a new HTML file and give it a new name, such as `initial.htm`.
2. Enter the following HTML code into your file:

```
<script language="javascript">  
  window.location.href="http://xxx.xxx.xxx.xxx/cgi-bin/  
  Pwebrecon.cgi?DB=local&PAGE=First"  
</Script>
```

where `xxx.xxx.xxx.xxx` is the IP and port of your web server.

3. Set your new file (i.e., `initial.htm`) to be the default page.

For an Apache Web Server, the default page is set in the `httpd.conf` file in the `/usr/local/apache/conf` directory by entering the name of the page after the `DirectoryIndex` variable (note that no equals sign is used between the variable and the filename, unlike in Windows files). Multiple files can be listed on the same line. If the first is not found, the next file in the line will be used, and so on. A sample entry might look like this:

```
DirectoryIndex webvoy.htm index.html
```

If you were to change the default page to `initial.htm` instead of `webvoy.htm`, you would enter the following (all on the same line of the `httpd.conf` file):

```
DirectoryIndex initial.htm webvoy.htm index.html
```

This will tell the server to first look for the `initial.htm` file, and if `initial.htm` cannot be found, to look for the `webvoy.htm` file; and if `webvoy.htm` cannot be found, to look for the `index.html`.

Now, when you point your browser to the IP of your WebVoyáge server, the search page should appear.



IMPORTANT:

For the changes in the httpd.conf to take effect, Apache must be stopped and restarted.

If you do not plan to use the existing `webvoy.htm`, you could do the following on the server:

```
cd /m1/voyager/xxxdb/webvoyage/html  
cp webvoy.htm webvoy.orig.htm  
cp initial.htm webvoy.htm.
```

Initial WebVoyáge Page (Webvoy.htm)

The Initial WebVoyáge page (the `webvoy.htm` file) is the standard introductory page for WebVoyáge. This is the page that will typically appear first in WebVoyáge.

This page, as distributed by Endeavor, allows you to access the functions of WebVoyáge. From this page you can begin a search; get information on the library or a patron; connect to other web sites; or get help with WebVoyáge. Your institution may partially or completely customize this page (or discard it entirely).



Figure 4-1. WebVoyáge Initial Page

Editing the Webvoy.htm File

This page is an html page that can be edited by someone conversant in html. If you want to customize the appearance of the page you can edit any of its parts. Make sure, however, that you do not mistakenly delete any links that you will want on this page. Note that when editing the links attached to each button that you must enter the entire path, starting with the IP or server address (for example, <http://www.yourserver.org/help/contents.htm>).

The image files that are used by this page in its default configuration are listed below. Note that if you do not know html, you can also customize the pages by deleting the old file and copying a new image that has the same name as the old file into the image directory.

These images are located in the `/m1/voyager/xxxdb/webvoyage/html/images` directory on the server.

Table 4-1. The webvoy.htm image files

Image	File	Target
Background	bg4.gif	None
WebVoyáge logo	logo.gif	None
Endeavor Logo	eisi.gif	Endeavor website
local catalog	search.gif	Connects to the main search page
Databases	database.gif	Remote library page (remote.htm)
Library Information	libinfo.gif	Library information page (libinfo.htm)
Patron Information	patinfo.gif	Patron information page
Help	help.gif	Help contents page (contents.htm)

Customizing the Initial WebVoyáge Page

Customizing the initial page in WebVoyáge is done differently from most of the other pages in WebVoyáge. The initial page is its own specific HTML file that is loaded when you link to the page. The initial page can be customized by editing the contents of the **webvoy.htm** file in the `/m1/xxxdb/webvoyage/html` directory.

This page can be customized as you would any other HTML file. You can add any type of information to this file, or use it for a different purpose entirely. However, in order to customize it, you must be conversant in HTML.

Library Information Page (Libinfo.htm)

The Library Information page (the `Libinfo.htm` file) is an html page. Like the `webvoy.htm` page, the `Libinfo.htm` file can be edited to present information about your library or anything else. This file can be extensively edited - the contents of the page can be edited and customized using html.

As it is distributed, this page has no specific information in it - you must add information to this file that is appropriate for your institution.

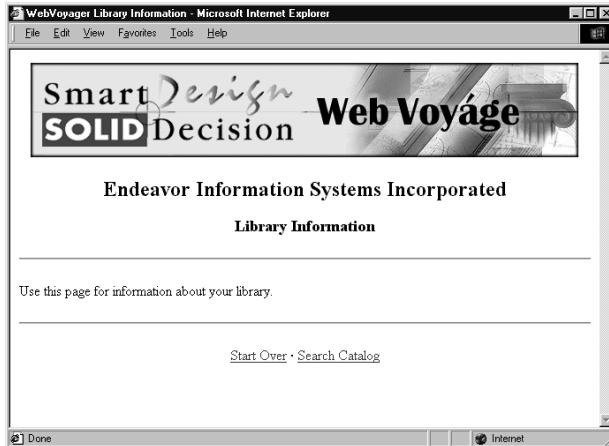


Figure 4-2. Libinfo.htm Page

Customizing the Library Information Page

The Library Information page can be customized by editing the contents of the **libinfo.htm** file in the **/m1/xxxdb/webvoyage/html** directory. This page can be customized as you would any other HTML file. You can add any type of information to this file, or use it for a different purpose entirely. However, in order to customize it, you must be conversant with HTML.

Remote Libraries Page (Remote.htm)

The Remote Libraries page (the `remote.htm` file) is a static html page. As it is distributed, this page has no information in it but you may add information on links to other web sites, or it may serve an entirely different purpose. Like the `webvoy.htm` file, this file can be extensively edited - the contents of the page can be edited and customized using html.

As distributed, the Remote Libraries page has no specific information in it, and must be edited by your site to provide information appropriate for your institution.



Figure 4-3. Remote.htm Page

Editing the Remote.htm File

The Remote Libraries page can be customized by editing the contents of the `remote.htm` file in the `/m1/xxxdb/webvoyage/html` directory.

This page is an html page that can be edited by someone conversant in html. If you want to customize the appearance of the page you can edit any of its parts. Make sure, however, that you do not mistakenly delete any links that you will want on this page. Note that when editing the links attached to each button that you must enter the entire path, starting with the IP or server address (for example, `http://www.yourserver.org/help/contents.htm`).

The image files that are used by this page in its default configuration are listed below. Note that if you do not know html, you can also customize the pages by deleting the old file and copying a new image that has the same name as the old file into the image directory.

These images are located in the `/m1/voyager/xxxdb/webvoyage/html/images` directory on the server.

Table 4-2. Remote.htm Buttons List

Image	File
WebVoyáge logo	logo.gif

General Page Display Configuration

This section details display configurations which affect all WebVoyáge pages (such as those in the `[Html_Body]` stanza), or are common to all WebVoyáge pages (such as the top and bottom toolbars).

The general page display configuration components are:

- General Configuration rules
- Horizontal Rules (see [Horizontal Rules on page 4-10](#))
- Line Breaks (see [Allow Line Breaks on page 4-10](#))
- Global page appearance in the `[Html_Body]` stanza (see [Global Page Color Options \(the \[Html_Body\] Stanza\) on page 4-10](#))
- Top and bottom toolbars (see [Top and Bottom Toolbar Configuration on page 4-12](#))
- Header and footer display (see [Header and Footer Configuration on page 4-17](#))

General configuration rules

This section contains general configuration rules.

Specifying colors in configuration files

Unless otherwise noted, you must use a hexadecimal rgb color code to specify a color.

Example:

To make the background of the tab white, enter `ffffff` (the hexadecimal color code for white) after the `ActiveTabColor=` variable (`ActiveTabColor=ffffff`).

Horizontal Rules

The `UseHorizontalRule=` variable in the `[Options]` stanza of the `opac.ini` file toggles horizontal rules on and off. With this variable on, thin horizontal lines are displayed between different sections of the pages. This requires patron to scroll more but it breaks up the sections more neatly. To display horizontal rules, set `UseHorizontalRule=Y`; to prevent horizontal rules from displaying, set `UseHorizontalRule=N`.

Allow Line Breaks

The `AllowLineBreaks` variable in the `[Options]` stanza of the `opac.ini` file toggles line breaks on and off. With `AllowLineBreaks=Y`, there is more horizontal background space between search boxes, buttons, etc., This requires patrons to scroll more but it makes the pages look less cramped. With `AllowLineBreaks=N`, there is less horizontal background space between sections of the display pages, which requires less scrolling to view search result information.

Global Page Color Options (the `[Html_Body]` Stanza)

The variables within the `[Html_Body]` stanza allow you to configure the background of a page as an image or a color, the color of the text on a page, the color of an unvisited link on a page, the color of a visited link on a page, and the color of a link as it is being clicked on a page.

You can set the general appearance of the WebVoyage Pages in the `[HTML_Body]` stanza of the `opac.ini` file. Most configuration stanzas for the individual WebVoyage pages also contain the variables found in this stanza. The variables perform the same function for each individual page.

Configuration changes made in the individual page stanzas override the global configuration (in the `[HTML_Body]` stanza).

- Configure the `[Html_Body]` stanza to set global page appearance options.
- Configure the individual page configuration stanzas to set the appearance of that particular page.

For example, to display a background color of White for all pages *except* the Map Search (Geospatial) Page, set the `BGCOLOR` variable in the `[Html_Body]` stanza to `#FFFFFF` and the `BGCOLOR` variable in the `[Map_Search_Page]` to a different color (say `#FFFFFCC` for a light yellow).

The `[Html_Body]` stanza contains the variables detailed in [Table 4-3](#).

Table 4-3. The `[Html_Body]` Stanza Variables

Variable	Description	Notes	Example
Background	Sets the back-ground of page to a graphic. Overrides the <code>bcolor</code> variable.	Include the path to the file from HTML directory.	<code>Background=/images/bgnd.gif</code>
Text	Controls the color of the text on a page.	You must use a hexadecimal rgb color code to specify a color. Empty variable results in text color defaulting to the settings of the web browser	<code>Text=ffffff</code>
<code>bcolor</code>	Controls the color of the background of a page.	You must use a hexadecimal rgb color code to specify a color. Empty variable results in color defaulting to the settings of the web browser	<code>bcolor=ffffff</code>
LINK	Controls the color of unclicked (unvisited) links	You must use a hexadecimal rgb color code to specify a color. Empty variable results in color defaulting to the settings of the web browser	<code>LINK=ffffff</code>
VLINK	Controls the color of clicked (visited) links	You must use a hexadecimal rgb color code to specify a color. Empty variable results in color defaulting to the settings of the web browser	<code>VLINK=ffffff</code>
ALINK	Controls the color of links as they are being clicked on a page	You must use a hexadecimal rgb color code to specify a color. Empty variable results in color defaulting to the settings of the web browser	<code>ALINK=ffffff</code>

Top and Bottom Toolbar Configuration

The top and bottom toolbars are also configured globally. These are the toolbars that appear on the top and bottom of each WebVoyage page. [Figure 4-4](#) shows the default top toolbar.



Figure 4-4. Toolbar Excerpt (buttons)

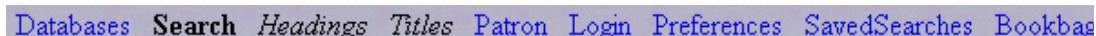


Figure 4-5. Toolbar Excerpt (text)

The buttons and linked text on the Top and bottom Toolbars are configured in the [Toolbar_Top] and [Toolbar_Bottom] stanzas of the opac.ini file. The graphics files for these buttons are in the /m1/voyager/xxxdb/webvoyage/html/images directory.

The Top and Bottom Toolbars are configured and act independently of each other. For each set (top and bottom), you can specify whether the links display as text or buttons, what images to use, the point size of the text if using text links and what function each button performs.

Button Group Variables

Each button in each toolbar is configured in the [Toolbar_Top] or [Toolbar_Bottom] stanza using a group of variables. Each button variable group begins with Btnxx, where the xx corresponds to the button number as it displays on the WebVoyage page from left (01) to right.

So for The left-most button or text link on the WebVoyage page, edit the Btn01... variables (Btn01Text, Btn01GraphicUp, and so on).

Setting the Button or Text Link Count

The number that follows the Count variable specifies how many links or buttons are to appear in that toolbar. All of the buttons up to the specified number will be displayed: for example, if you entered Count=12 in a toolbar stanza, buttons 1 through 12 will appear at the bottom (or top) of the page. This number should

correspond to the number of button variable groups in the toolbar stanza. For example, if your button groups are numbered Btn01... to Btn13..., you would enter Count=13.

Hyperlinked Text Display Variables

The **TextFont**, **TextFontSize**, and **TextSeparator** variables determine text display options on the toolbars when text is to be used instead of buttons in the toolbar. The text in the toolbar uses the font specified in the **TextFont** variable and the font size specified in the **TextFontSize** variable. (The font size specified must be between 1 and 7.)

In addition, if two adjacent links are represented using text instead of buttons, you can enter a character in the **TextSeparator** variable that will be placed to the right of the text for each link. Use a pipe ("|") after the TextSeparator variable to cause a space to appear onscreen. (Entering spaces after the variable will not cause spaces to appear onscreen.)

[Figure 4-6](#) shows an example of the [Toolbar_Top] stanza. The [Toolbar_Bottom] stanza contains the same variables.

Login-Specific Variables

Because the Login button works slightly differently than the other buttons, there are two additional variables that are only used by the Login feature:

BtnXXToggleText and **BtnXXToggleGraphicUp**. Other buttons, when pressed, are represented on the next page in their “pressed” state. For example, clicking the Database button causes the Database page to display with the Database button in its pressed state. However, when a patron is logged into WebVoyage, the Login button is replaced with a Logout button. This allows the patron to log out of WebVoyage. The additional variables allow you to specify the text or the button and popup text that will appear onscreen when the patron is logged in.

BtnxxToggleGraphicUp

The **BtnXXToggleGraphicUp** variable is used only in conjunction with the Login function (for example, **BtnXXFunction=LOGIN**). It specifies the image that will be used to trigger the “Logout” feature after the patron has already logged in. The button will appear in place of the Login button and depicts the button in the “up” (i.e., unpressed) state.

BtnxxToggleText

The **BtnXXToggleText** variable is used in conjunction only with the Login function (for example, **BtnXXFunction=LOGIN**). This text is used in place of the text entered after the **BtnXXText** variable when the patron has logged in.

Note that if no sets of the **BtnXX** variables appear in the stanza, no buttons will appear in the toolbar.

Line#

1	[Toolbar_Top]
1	Count=14
2	TextFont=WingDings
3	TextFontSize=
4	TextSeparator=
5	Btn01Text=DATABASES
6	Btn01GraphicUp=UpDatabase.gif
7	Btn01GraphicDown=DownDatabase.gif
8	Btn01GraphicDisabled=DisabledDatabase.gif
9	Btn01Function=DATABASE
10	Btn01Link=
-----Display Truncated-----	
11	Btn07Text=Preferences
12	Btn07GraphicUp=UpPref.gif
13	Btn07GraphicDown=DownPref.gif
14	Btn07GraphicDisabled=DisabledPref.gif
15	Btn07Function=PREFERENCES
16	Btn07Text=Preferences
17	Btn07GraphicUp=UpPref.gif
18	Btn07GraphicDown=DownPref.gif
19	Btn08Text=Bookbag
20	Btn08GraphicUp=UpBookbag.gif
21	Btn08GraphicDown=DownBookbag.gif
22	Btn08GraphicDisabled=DisabledBookbag.gif
23	Btn08Function=BOOKBAG

Figure 4-6. Details of the [Toolbar_Top] stanza

NOTE:

While you can configure as few links as you want, you should at least include links to the critical pages.

[Table 4-4](#) details the components of the top and bottom toolbars. The xx's indicate the button or linked text variable group number.

Table 4-4. Top and Bottom Toolbar Component Descriptions

Component	Configured in	Possible Values
Rollover text of button, or text of link if not using an image	BtnxxText=	Free text
button image in the “up” position Only specify a file if displaying links as graphics	BtnxxGraphicUp=	Valid .gif graphic file-name
button image in the “down” position Only specify a file if displaying links as graphics	BtnxxGraphicDown=	Valid .gif graphic file-name
button image when page link disabled Only specify a file if displaying links as graphics	BtnxxGraphicDisabled=	Valid .gif graphic file-name
Logged in button text Used only in conjunction with the Login function (for example, BtnXXFunction=LOGIN). This text is used in place of the text entered after the BtnXXText variable when the patron has logged in.	BtnXXToggleText	Free text
Logged in button graphic Used only in conjunction with the Login function (for example, BtnXXFunction=LOGIN). Specifies the image that will be used to trigger the “Logout” feature after the patron has already logged in. The button will appear in place of the Login button and depicts the button in the “up” (i.e., unpressed) state.	BtnXXToggleGraphicUp	
Determines which page the link links to.	BtnxxFunction=	see Table 4-5

Table 4-4. Top and Bottom Toolbar Component Descriptions (Continued)

Component	Configured in	Possible Values
URL button link Connects to the IP address specified after the variable. Only active if BtnxxFunction=URL. This string is used to access the Remote, Library Information and Home buttons.	BtnXXLink	Valid URL
Number of buttons in toolbar configuration	Count=	1-14
Text font	TextFont=	Free text
Text font size	TextFontSize=	Text font size (in points)
Text Separator (between hyperlinked text)	TextSeparator=	Free text

[Table 4-5](#) details the button and hyperlink functions.

Table 4-5. Button Functions

Button Function (BtnxxFunction)	Target	For more, see
DATABASE	Database selection	Database Selection Display Configuration on page 2-1
SEARCH	Search page	Search Page Overview on page 6-6
HEADINGS	Headings	Headings Page on page 6-75
TITLES	Titles list	The Titles List Page on page 6-92
PATRON	Patron Information	Patron Information Page on page 9-61
LOCALDB	Connects back to the local database (from a UC database, for example)	WebVoyage Connections on page 2-1
LOGINOUT	Login or Logout	Editing the Patron Login Page on page 9-59
PREFERENCES	Preferences page	MyOPAC Preferences on page 9-19
CHANGE PIN	Change PIN	PIN Configuration on page 9-3

Table 4-5. Button Functions (Continued)

Button Function (BtnxxFunction)	Target	For more, see
SAVEDSEARCHES	Saved Searches	Configuring Saved Searches on page 6-30
BOOKBAG	Bookbag	Bookbag Configuration on page 6-40
REQUESTS	Request	Request Selection Page on page 11-1
HELP	Help	
EXIT	Exit	
HISTORY	Search History	Editing the Search History Page on page 6-71
URL	<p>connects to the IP address specified after the BtnXX-Link variable (this string is used to access the Remote, Library Information and Home buttons)</p> <p>The “URL” string is used to trigger a function other than the functions in this list. You can specify the function by using the BtnXXLink variable.</p>	<p>! IMPORTANT: <i>If you enter “URL” in the BtnXXFunction variable and leave the BtnXXLink variable empty, the link will be available without a real link; this will cause an error message to display when users click the link. Be sure to enter a valid IP address in the BtnXXLink variable.</i></p>

Header and Footer Configuration

You can display institution logos or other identifying information on each generated WebVoyáge page (all pages except for `webvoy.htm`, `remote.htm` and `libinfo.htm`) by configuring the header and footer. Edit these HTML files to your institution’s preference.

The header.htm File

The `header.htm` file contains the information that will be displayed at the top of each generated WebVoyáge page. This file can contain any text or images that your institution may want to display. If nothing is entered in this file, nothing will display in the header area.

The footer.htm File

The `footer.htm` file contains the information that will be displayed at the bottom of each generated WebVoyage page. This file can contain any text or images that your institution may want to display. If nothing is entered in this file, nothing will display onscreen.

Title Bar Options (Title_Bar Stanza)

The `[Title_Bar]` stanza (`/m1/voyager/xxxdb/etc/webvoyage/local`) contains the variables that control the text in the title bars of various WebVoyage pages. The last two variables, `AddBibForm` and `ModHoldingsForm`, control the text in the title bars of WebCataloging pages. The title bar is the bar at the very top of the Web Browser which usually contains the title of the page currently displayed. An example of a title bar for the WebVoyage Titles Page is shown below.



Figure 4-7. Example of a Title Bar

[Table 4-6](#) details the title bar variables in the `[Title_Bar]` stanza.

Table 4-6. Title Bar Variables

Title Bar Page	Variable
Builder Search	Builder
Course Reserve Search	Course
Database Selection	Database
Headings Search Results	Headings
Search History	History
Hold/Recall Request	Holds_Recals
Keyword Search	Keyword
Search Limits	Limits
Email successfully sent page (displays after an email sent from the Save Options box)	Mail
Patron Information	Patron_Info
Patron Login	Patron_Logon

Table 4-6. Title Bar Variables (Continued)

Title Bar Page	Variable
Purchase Request	Purchase_Request
Record View	Record Views (Record View_1, Record View_2, and so on)
References	References
All library-defined request (excludes all system-defined request pages such as Hold, Recall, Short Loan, Remote Storage and Purchase Request)	Request_Form
Simple (Combined) Search	Simple
Titles search results	Titles
WebVoyáge pages without specific title bar configurations in the [Title_Bar] Stanza.	Default

Records Per Page Display Options

Patrons can select the number of records to display from many of the search and records view pages. The display configuration for the “records per page” options is determined by the [Records_Requested] stanza of the opac.ini file (/m1/voyager/xxxdb/etc/webvoyage/local).

Drop-Down Value Variables 1, 2, 3, and 4

The values entered after the 1, 2, 3, and 4 variables will display in the records per page drop-down box. Enter the value you would like to display first in the drop-down menu after the 1= variable, second after the 2= variable, third after the 3= variable, and last after the 4= variable. The value may not exceed 100. If a value larger than 100 is entered after any of the variables, 100 will be used instead.

[Table 4-7](#) details the variables of the [Records_Requested] stanza.

Table 4-7. Variables of the [Records_Requested] Stanza

Variable	Description	Example
1	The number of records to display as the top-most selection in the Records Per Page box	10
2	The number of records to display as the second selection from the top in the Records Per Page box	20

Table 4-7. Variables of the [Records_Requested] Stanza

Variable	Description	Example
3	The number of records to display as the third selection from the top in the Records Per Page box	50
4	The number of records to display as the fourth selection from the top in the Records Per Page box	100
Default	Indicate which number of records option the drop-down box should display by default. Enter 1, 2, 3, or 4, corresponding to the number of records variable, you wish to use.	1
Description	The description added after each number of records increment to qualify what the number indicates	records per page

Example:

The variable values in [Table 4-7](#) yield the Records Per Page box shown in [Figure 4-8](#).

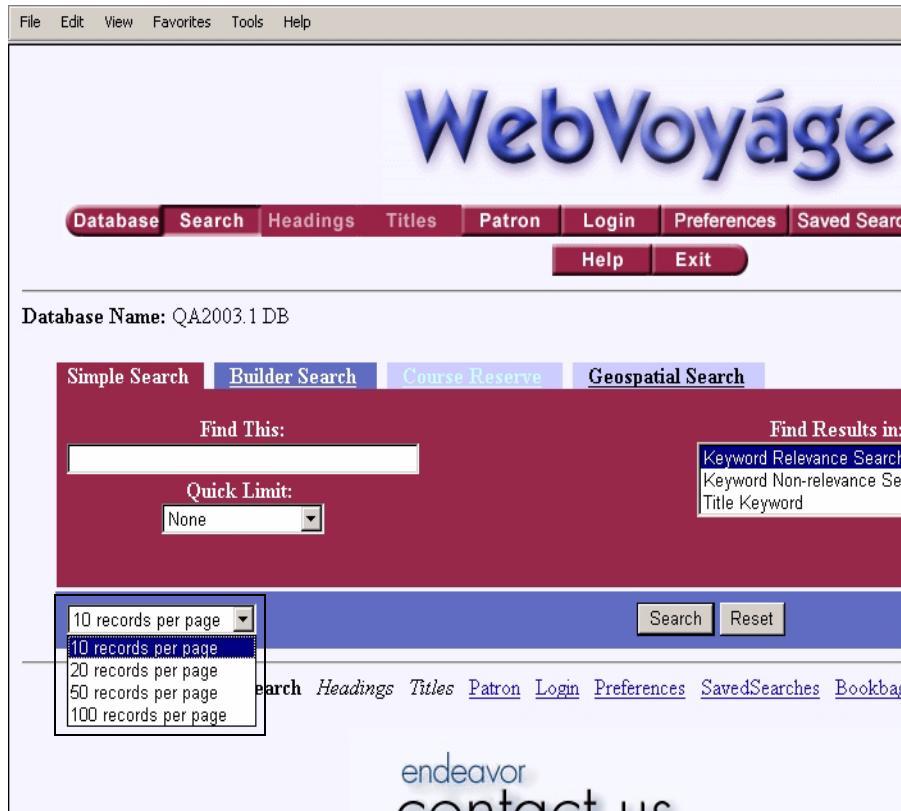


Figure 4-8. Sample Records Per Page Box

General WebVoyage Display Settings

This section details general display options that do not necessarily appear in the same place on all WebVoyage pages. This includes such things as Date and Time format.

Date Format and Appearance

The keys within the [Date] stanza are used to configure how dates will appear on an item's Record Display in WebVoyage.

Date Order

To display the month before the day and year (MM/DD/YY), enter the number 0 after the `Order=` variable (`Order=0`). To display the day before the month and year (DD/MM/YY), enter the number 1 after the `Order=` variable (`Order=1`). If nothing is entered after the `Order=` variable, the number 0 will be used as the default.

Century Format

To display all four digits of the year (MM/DD/YYYY), enter the number 1 after the `Century=` variable (`Century=1`). For example, if the number 1 were entered after the `Century=` variable, a date would display as "10/20/1976". To display only the last two digits of the year (MM/DD/YY), enter the number 0 after the `Century=` variable (`Century=1`). For example, if the number 0 were entered after the `Century=` variable, a date would display as "10/20/76". If nothing is entered after the `Century=` variable, the number 0 will be used as the default.

Date Display Separator

To use a dash between the month, day, and year of a date (MM-DD-YY), enter the number 0 after the `Separator=` variable. For example, if the number 0 were entered after the `Separator=` variable, a date would display as "10-20-76". To use a forward slash between the month, day, and year of a date (MM/DD/YY), enter the number 1 after the `Separator=` variable. For example, if the number 1 were entered after the `Separator=` variable, a date would display as "10/20/76". If nothing is entered after the `Separator=` variable, the number 0 will be used as the default.

Indefinite Option

It is standard procedure to use the date "December 31, 2382" as a way of indicating an indefinite date. If this date is associated with a record (for instance, as the due date for an item), the information entered after the `Indefinite` variable will display in place of the date. Enter the information that you want to display in place of "December 31, 2382" after the `Indefinite` variable. For example, if you wanted "No due date" to display whenever "December 31, 2382" is associated with a record, you would enter `No due date` after the `Indefinite=` variable. If nothing is entered after this variable, `Indefinite` will be used as the default.

Customizing Display with WebVoyáge Directories

The contents of the folders in the **/m1/voyager/xxxdb/etc /webvoyage** directory and its subdirectories configure the WebVoyáge displays. The areas that can be configured are:

- search tabs display
- help text on the search tabs
- radio button text on the headings tab
- record display tabs
- tab labels
- MARC contents of each record display tab
- MARC tags for E-mail, print, save or request forms.

In Voyager, each site has the ability to define the bibliographic and holdings displays in WebVoyáge. This includes

- define labels
- determine which MARC fields/subfields to include under the labels
- the sequence and spacing of information on the WebVoyáge page.

The configuration files are located in the **/voyager/xxxdb/etc/ WebVoyáge** directory.

The folders that appear in the WebVoyáge directory can be configured for each Voyager or Z39.50 database that appear in the System Administration module under Database Definition. The names of the folders linked to the database code are located on your server in:

- m1/voyager/xxxdb/etc/webvoyage/connect.ini

If Hook to Holdings are used (Citation databases only), the contents of the folder will be affected accordingly.

The Local Folder

The local folder is used to configure results from your local catalog. The **local folder** contains initialization (.ini) files and configuration (.cfg) files you can use to define your connectivity preferences, such as:

- search types
- limits

- help text for searches
- display preferences
- request messages
- fields to print, E-mail, and save to text files

This information in the local folder also resides in three distinct folders: Vcit, Zcit, and Z39.50. The type of connection and database type, as defined in System Administration, determines which folder a database will use. You can define additional folders. You can specify additional folders in the connect.ini file.

Table 4-8. Default WebVoyage Display Directories

Connection type	Database type	Default directory
Voyager	Bibliographic	Local
Voyager	Citation	Vcit
Z39.50	Bibliographic	Z3950
Z39.50	Citation	Zcit

NOTE:

In this document, whenever a file is mentioned in the `/m1/voyager/xxxdb/etc/webvoyage/local` directory, that same file can reside in one of these alternate directories. If the database you are configuring uses a different display directory, replace the `local` portion of the directory string with the relevant directory. For example, if configuring a citation database that uses a custom display directory named `citspecial`, the relevant file for that database, referred to in the documentation, is in the `/m1/voyager/xxxdb/etc/webvoyage/citspecial` directory (*not /m1/voyager/xxxdb/etc/webvoyage/local*).

VCIT, ZCIT, and Z39.50 Folders

Voyager Citation databases are those citation databases like a Wilson abstracts database (i.e. Wilson Arts Abstracts Index), which Endeavor has loaded onto your server into a Voyager file. To identify these databases, determine how the databases are updated. If the answer is the cataloging module or bulk import, the database is a Voyager Citation database. If the answer is “A new tape is loaded from the vendor,” or “We connect directly to the vendor,” the database is a Z39.50 citation database.

Searches available are key differences between Voyager and Z39.50 citation databases. In a Voyager database, left-anchored heading searches and keyword searches are available. In a Z39.50 database, only keyword searches are available.

- **Vcit** is the default folder used with Voyager Citation databases.
- **Zcit** is the default folder used with Z39.50 Citation server databases.
- **Z39.50** is the default folder used with Z39.50 library connections.
- **Simultaneous Searches:** If you are searching two or more databases of a different type (for example, a Voyager citation database and a Z39.50 citation database) at a time, the Default Simultaneous Search search.ini (/m1/voyager/xxxdb/etc/webvoyage) is used for the search options.

Any changes to the configurations in these folders will affect the displays of all the corresponding searches. If you want to customize one or more displays, without changing the default settings, you can make a copy of a folder, rename it, and specify its use in the connect.ini file.

To change contents among databases:

1. Copy the display folder.
2. Change the name of the copy to match the name of the database code in Database Definitions.
3. Add config=*new folder name* after the appropriate stanza of the connect.ini file.

VCIT and ZCIT Folders

You may need to change files below when connecting to a Voyager citation database.

1. **Search.ini Course reserves** - Course Reserves can be turned off because they are not used in conjunction with a citation database.
2. **Displayn.cfg** - Examine the MARC tags listed in your displayn.cfg files to see whether the tags being used reflect the tags used in citation records and not bibliographic records. While citation databases use MARC tags, just like bibliographic databases, the meaning of tags will differ.
3. **Print files** - While E-mail and save files may remain the same, look at the print.cfg, printh.cfg and printf.cfg files to see if the information being printed at your institution is appropriate for a Voyager citation database. Author, title, location and call number are needed if hook-to-holdings is available at your institution. Check to see if you need OCLC number, ISSN or ISBN. Check to see if there are tags that can be deleted. Determine whether you want full text or abstracts to print.
4. **Helptext.ini** - Modify with appropriate examples for a citation search.

-
- 5. **Limits.ini**-The limits.ini file determines what limiting criteria are available to your patrons and in what order you want those limiting criteria to display in the Limits dialog.

Search Codes in the Z3950 and ZCIT Folders

You can define different types of searches that can be made available depending on whether a Z30.50 or a local connection is being made. This means that you can change the types of searches available to the users to types that will be more appropriate and effective for Z39.50 searches. For example, ISSN and ISBN are extremely useful staff searches for Z39.50 databases, so you might want to add a search for ISSN or ISBN to your Simple Search list.

This can be done by editing the Simple_Search_Codes stanza in the search.ini file in your **Z3950** or **ZCIT** directory and adding the appropriate search types. WebVoyage will use the search.ini in the Z3950 directory for Z39.50 bibliographic connections and the search.ini in the ZCIT directory for Z39.50 citation connections.

- 1. Review the list of attributes for the indexes in Voyager System Administration (**Search>indexes Index Type**) and decide what the most useful index searches for the searcher will be. (Remember that your staff will be using this as well.) ISSN and ISBN are extremely useful staff searches for Z39.50 databases. For instance:

Table 4-9. Useful Z39.50 Search Codes

Attribute	Code
Author	auth
Title	tkey
Subject	skey
ISSN	ISSN
ISBN	ISBN

- 2. In the search.ini, go to the [Simple_Search_Codes] stanza. Each variable is a unique number. The first string of two to four characters after the equals sign is the Attribute Code as listed in the System Administration module. The attribute code is followed by a space and then the descriptions of each search type. The labels can contain any text, but the search attributes must be as listed in the System Administration module in order to function properly. Appending a plus sign ("+") to the search code indicates a browse search. For example:

```
[Simple_Search_Codes]
Counter=5
1=AUTH Author Search
2=TKEY Title Search
3=SKEY Subject Search
4=ISSN ISSN Search
5=ISBN ISBN Search
```

Figure 4-9. A Sample [Simple_Search_Codes] Stanza

NOTE:

Be sure that the number after the Count variable reflects the number of search types listed in the stanza (i.e., that the Count variable should match the line number of the last line).

The search.ini used for simultaneous searches is in the /m1/voyager/xxxdb/etc/webvoyage directory and uses the local folder for WebVoyage display. For more information on this search.ini file, see [Simultaneous Search search.ini file on page 6-69](#).

1. **Displayx.cfg** - In Z39.50 databases, no heading indexes are available. Searching is keyword only. It is less confusing for the searcher if redirected searches (hypertext on author, title, subject or call number) do not appear. In display2.cfg and displayh.cfg, remove the appropriate codes. For example:

Display2.cfg Example

Table 4-10. Display2.cfg Example

Before	After
Main Author: 100 XX aqd A aq	Main Author: 100 XX aqd
Title 130 XX aplskfmnor T apl	Title 130 XX aplskfmnor
Subject 600 XX adfklmnopqrstuvwxyz S adfklmnopqrstuvwxyz	Subject 600 XX adfklmnopqrstuvwxyz

Displayh.cfg Example

Table 4-11. Displayh.cfg Example

Before	After
Call number 852 XX khij c hi	Call number 852 XX khij

If the following are available tags from the vendor, add the information to either display1.cfg or display2.cfg.

Source:

773 XX t
773 XX g
300 XX a

Abstract:

520 XX a

Full Text:

3000

1. **Request files** - Review the request.cfg and requesth.cfg to see if additional tags are warranted. Suggested to add:

Record Number:

035 XX a
020 XX a

022 XX a

Output Display Configuration

This section details configuration related to output of information from WebVoyage, including saving, e-mailing, and printing records.

Record Options Box Configuration

The Record Options box contains the output options which display on record and search results pages. From this box, you can email, print, or save records on view or selected from the search results page.

The Record Options box configuration consists of the following:

- Record Options Box Color (see [Record Option Box \(Table\) Color on page 4-29](#))
- Modifying the [Mail_And_Requests] stanza (see [The \[Mail_And_Requests\] stanza on page 4-29](#))

Record Option Box (Table) Color

The SaveRecords variable in the [Table_Colors] stanza of the opac.ini file controls the color of the Save Options box with which a user can save or email information. You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the SaveRecords= variable to configure the color of the Save Options box. For example, if you wanted to make the Save Options box appear white, you would enter *ffffff* (the hexadecimal color code for white) after the SaveRecords= variable (SaveRecords=*ffffff*). If nothing is entered after the SaveRecords variable, the color of the Save Options box will default to the settings of the web browser. For more information about configuring the Save Options box, see [Record Options Box Configuration on page 4-29](#).

The [Mail_And_Requests] stanza

The [Mail_And_Requests] stanza of the opac.ini file controls the text for the various portions of the save/print/e-mail options box that appears on all titles lists and record displays.

- The Format for Print/Save button allows users to reformat the records and save or print them.
- The e-mail box allows patrons to send the displayed information to a particular e-mail address.

- The Save To Bookbag button allows patrons to save the selected records to their Bookbag (if the Bookbag feature is enabled- see [Bookbag \(Shopping Cart\) on page 5-38](#)).

[Figure 4-10](#) shows the Record Options box on the records results page. [Figure 4-11](#) shows the Record Options box on a single record display page.

Record Options	
Records	Select Download Format: Full Record <input type="button" value="Format for Print/Save"/> <input type="button" value="Save Search Query"/>
<input type="radio"/> All on page <input checked="" type="radio"/> Selected on page <input type="radio"/> Selected all pages	Enter your email address <input type="text"/> <input type="button" value="Email"/>
	Save results for later: <input type="button" value="Save To Bookbag"/>

Figure 4-10. Record Options box (on records results page)

Record Options	
Select a type: Full Record <input type="button" value="Format for Print/Save"/> <input type="button" value="Save Search Query"/>	
Enter your email address: <input type="text"/>	<input type="button" value="Email"/>
Save results for later: <input type="button" value="Save To Bookbag"/>	

Figure 4-11. Record Options box (on single record display page)

Line#

```
1 [Mail_And_Requests]
2 MarcAllowed=T
3 Mail=Record Options
4 Format=Select Download Format:
5 Type=Select Download Format
6 Records=Records
7 All=All on Page
8 Selected=Selected On Page

9 SelectedRecsAllPages=Selected all Pages
10 Save=Format for Print/Save
11 EmailAddress=Enter your email address:
12 SaveToBookbag1=Save results for later:
13 SaveToBookbag2=Save To Bookbag
14 Email=Email
15 EmailSubject1=Opac %s Search for %s
16 EmailSubject2=Contents of Bookbag
17 EmailMessage1=No email address has been
   entered. Please enter an email
   address.
18 EmailMessage2=No records have been selected for
   e-mailing.
19 AuthorityRecEmailSubject=Authority Record
20 SaveSearchQuery=Save Search Query
21 SaveMessage=You have not selected any titles to
   save or print.
```

Figure 4-12. Default [Mail_And_Requests] stanza

[Table 4-12](#) details the [Mail_And_Requests] stanza variables.

Table 4-12. [Mail_And_Requests] Stanza Variables (Page 1 of 3)

Variable Name	Description
Mail=	Heading of the Record Options box heading.

Table 4-12. [Mail_And_Requests] Stanza Variables (Page 2 of 3)

Variable Name	Description
Format=	Text next to the drop-down list used to select the format to convert the record to (for more information on formats, see Download Formats on page 4-33)
Records=	Heading of the section containing the record selection options (radio buttons). This section only appears on the Record Options box on Title List pages.
All=	Text next to the radio button used to select all of the records on the current Title List page for download.
Selected=	Text next to the radio button used to select only the records checked on the current Title List page for download.
SelectedRecsAll-Pages=	Text next to the radio button used to select only the records checked on all Title List pages for download.
Save=	Text of the button which reformats the relevant records according to the format selected in the Download Format drop-down list.
EmailAddress=	Text next to the text box where patrons enter their e-mail address for e-mailing selected records.
SaveToBookbag1=	Text of the heading next to the button used to save Bookbag
SaveToBookbag2=	Text of the button used to save records to the bookbag
Email=	Text of the button used to email the selected records to patron.
EmailSubject1=	Text of the subject line of e-mails of selected records sent to patrons.
EmailSubject2=	Text of the subject line of e-mails sent to patrons with the contents of Bookbag (from the record options of the Bookbag page). See Figure 6-30 on page 6-52
AuthorityRecEmail-Subject=	Text of the subject line of e-mails sent to patrons with Authority records attached.
SaveSearchQuery=	Text for the button used to save the selected records to your bookbag (for more information on Bookbag, see Bookbag (Shopping Cart) on page 5-38)
MarcAllowed	The option to save, print and email records in MARC format can be allowed or prevented by entering T (Y) or F (N) after the MarcAllowed variable. Defaults to F.

Table 4-12. [Mail_And_Requests] Stanza Variables (Page 3 of 3)

Variable Name	Description
SaveRecords	Color of the save/email table. If no color is specified, the table defaults to white.

Download Formats

WebVoyage's Multiple Download Formats feature allows you to enable and select five different text formats and two MARC formats for downloading. All of the text formats may be altered to suit your library's needs.

NOTE:

The two MARC formats are not configurable, nor are they available for email from WebVoyage.

For example, you can have different pre-configured text formats for a brief record view, a full record view, and a citation record view. Additionally, you can have formats for upload into specific software packages, such as EndNote®.

formats.ini file

Configure the names of the available format for all WebVoyage display directories in the [Download_Formats] stanza of the formats.ini file (/m1/voyager/xxxdb/etc/webvoyage). [Figure 4-13](#) shows the default formats.ini file.

```
Line#
1 [Download_Formats]
2 Save1.cfg=Full Record
3 Save2.cfg=Brief Record
4 Save3.cfg=EndNote Citation
5 Save4.cfg=
6 Save5.cfg=
7 Latin1=Latin1 MARC
8 Marc8=MARC 8
9 UTF-8=UTF-8
```

Figure 4-13. Sample formats.ini file

Lines 7 and 8 show the two MARC download routines available, and only the text of the corresponding line in the download format drop-down list of the Record Options box is configurable for these. Marc8 (Raw MARC) is now included so you can retain more special characters in your records.

Line 9 shows the UTF-8 download routine.

Lines 2 through 6 of [Figure 4-13](#) determine the text of the selections in the download format drop-down list corresponding to the `saven.cfg` files (see [Figure 4-14](#)). For example, selecting “Brief Record” from the drop-down list will reformat the selected records according to the `save2.cfg` file (once the Format for Print/Save button is clicked). See [Figure 4-15](#) for the default `save2.cfg`.

`Save4.cfg` and `Save5.cfg` have been left empty so you can use them to create custom formats.

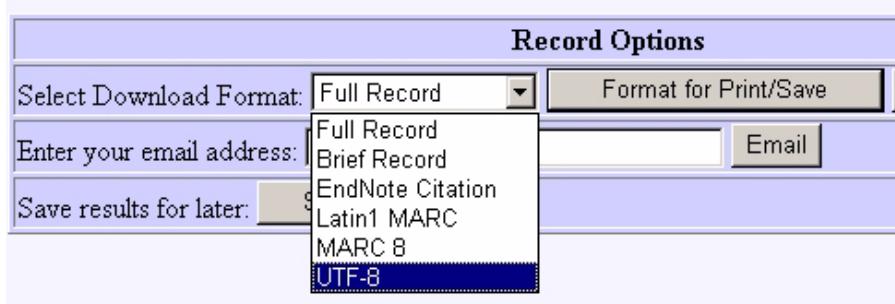


Figure 4-14. Download format drop-down list in the Record Options box

There is only one `formats.ini`, which connects the Record Options box to the appropriate `saven.cfg`, but each of these `saven.cfg`'s must be in each WebVoyage display directory for which they will be enabled (`/m1/voyager/xxxdb/etc/webvoyage/local`, `zcit`, `vcit`, and so on). For example, if the `Save2.cfg` of your `formats.ini` file corresponds to the Brief Record format, to have the Brief Record format available to patrons while connected to the Local database, you must have the Brief Record `Save2.cfg` in the `/m1/voyager/xxxdb/etc/webvoyage/local` directory.

Also, if you are using the same `saven.cfg` for different formats for different databases, make sure the description in the download format box is generic enough to fit all of them. If, for instance, your `Save4.cfg` for the `vcit` directory is a custom citation format, while the `Save4.cfg` for the `local` directory is a custom brief record format, configure the `Save4.cfg` variable of the `formats.ini` to read something like Other or Custom.

To make a format unavailable from a database view, rename or remove the `saven.cfg` corresponding to that format from the WebVoyage display directory for that database. That format will no longer appear in the download format drop-down box when connected to databases using that WebVoyage display directory.

For example, to make the EndNote Citation format unavailable to patrons searching the Local Database, rename or remove the `Search3.cfg` from the `/m1/voyager/xxxdb/etc/webvoyage/local` directory. The EndNote Citation option will then no longer appear in the download format drop-down box when connected to the Local database.

Customizing `saven.cfg` files

The default `saven.cfg`'s are straightforward, and can be modified in a text editor such as vi. These files are configured in much the same way as the `displayn.cfg` files.



Procedure 4-2. Modifying a `saven.cfg` file

Use the following steps to modify a `saven.cfg` file.

1. Determine what MARC fields must be in the text format, and how they should be organized.
2. Open the appropriate `saven.cfg` file in a text editor.
3. Set up the `saven.cfg` as a template to organize and display the MARC field information of the records as determined in step 1.



IMPORTANT:

Any field labels, such as "Title:" should be left-justified. Each MARC field following the label must be indented three spaces. Include all indicators you want to appear under that label.

4. Configure the line corresponding to that `saven.cfg` in the `formats.ini` file, so your new format can be selected from the download format drop-down list in the Record Options box (see [formats.ini file](#) on page 4-33).
5. Modify any other configuration files per your preferences, such as the footer information (`saveXf.cfg`) for the appropriate `saven.cfg` file.

Database: +No information available
5000

Main Author:
100 XX aq
110 XX ab

Conference:
111 XX acnd

Title:
130 XX aplskf
240 XX {a[%}plskf"}
245 XX ab

Primary Material:
000 06 2

Physical Description:
007 00 1

Includes:
006 00 1

Publisher:
260 XX abc

Holdings Information: +No Data Available--Ask at Reference
9000

Figure 4-15. Default save2.cfg (brief record) file

Database: College Library of Endeavor
Main Author: Pearce, Joseph Chilton.
Title: The crack in the cosmic egg; challenging constructs of mind
and reality.
Primary Material: Book
Publisher: [New York] Julian Press, 1971.

Call Number: BD331 .P39
Location: Main Collection

+
Institution Name
Institution Address
Institution Phone Number
Institution E-mail Address

Figure 4-16. Record formatted based on save2.cfg (brief record) file

The SAVEH.CFG File

The `saveh.cfg` file is located in each of the `/m1/voyager/xxxdb/etc/webvoyage` database sub-directories (`/local`, `/Z3950`, `/vcit`, `/zcit`, etc.).

The saveh.cfg dictates the holdings information that your patrons can save. You indicate that holdings information should be saved by typing the Holdings code, 9000, in the saven.cfg file.

You can specify the information as can be included in the `displayh.cfg` files. You can also delete all the information in this configuration file. However, note that since this configuration file dictates the holdings information that your patrons can save, deleting all information from this file would prohibit them from saving any holdings information.

The SAVEF.CFG File

The `savef.cfg` file is located in each of the `/m1/voyager/xxxxdb/etc/` webvoyage database sub-directories (`/local`, `/z3950`, `/vcit`, `/zcit`, etc.).

The savef.cfg file contains the text that you want to appear at the bottom of the page when saving or printing record information in WebVoyáge. Any time the **Format for Print/Save** button is clicked on the Title List or Record Display pages in WebVoyáge, the resulting text that displays will have the contents of the savef.cfg appended after all of the record information. The savef.cfg may contain any text.

The EMAIL.CFG File

The email.cfg file is located in each of the /m1/voyager/xxxdb/etc/webvoyage database sub-directories (/local, /z3950, /vcit, /zcit, etc.).

The email.cfg dictates the information that your patrons can email. You can include all the information that can be included in the displayn.cfg files. You can also delete all information in this configuration file. However, note that since this configuration file dictates the information that your patrons can email, deleting all information from this file would prohibit them from e-mailing any information.

The EMAILH.CFG File

The emailh.cfg file is located in each of the /m1/voyager/xxxdb/etc/webvoyage database sub-directories (/local, /z3950, /vcit, /zcit, etc.).

The emailh.cfg dictates the holdings information that your patrons can email. You indicate that holdings information should be emailed by typing the Holdings code, 9000, in the email.cfg file.

You can specify the information as can be included in the displayh.cfg files. You can also delete all the information in this configuration file. However, note that since this configuration file dictates the holdings information that your patrons can email, deleting all information from this file would prohibit them from e-mailing any holdings information.

The EMAILF.CFG FILE

The emailf.cfg file is located in each of the /m1/voyager/xxxdb/etc/webvoyage database sub-directories (/local, /z3950, /vcit, /zcit, etc.).

The emailf.cfg file contains the text that you want to appear at the bottom of the page when e-mailing record information in WebVoyáge. Any time the **Email** button is clicked on the Title List or Record Display pages in WebVoyáge, the resulting text that displays will have the contents of the savef.cfg appended after all of the record information.

Searching in WebVoyáge

5

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Overview

Searching in WebVoyáge can be as general as performing a keyword search on all records in your local database, or as specific as searching for a specific call number in specialty database, or anywhere in between. After you perform a search, you can view the results in different displays, save, print, or email record information, and search other resources for similar information.

Main Search Page

When you first open the Search page, WebVoyáge automatically connects to your local Voyager database. If you want to change your a Search Location, you must open the Database Page and select which locations you want to search. Otherwise, you can simply begin searching. You can click one of the search type buttons (see [Figure 5-1](#)) to specify whether you want to perform a Simple Search, an advanced search (Builder Search), or a search of Course Reserve materials (Course Reserve).

[Simple Search](#) | [Builder Search](#) | [Course Reserve](#)

Figure 5-1. WebVoyáge Search Type Buttons

NOTE:

If your institution has purchased Geospatial Search, you can also perform Geospatial (Map) Searches from this page (for information about Map Searches, see [Map \(Geospatial\) Searching](#) on [page 15-1](#)).

Simple Search

The Simple Search page (see [Figure 5-2](#)) allows you to perform a normal search. You can specify the search terms, the type of search (Keyword, Author, Title, etc.), and a single limit on the search. You can also select from the main list of limits before performing your search.

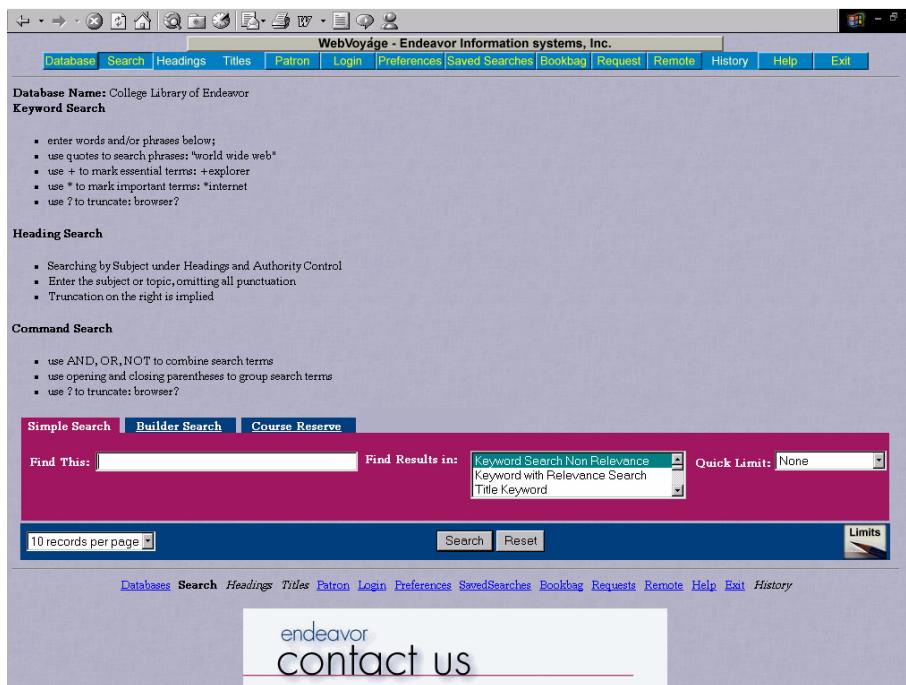


Figure 5-2. Simple Search Page



Procedure 5-1. Performing a Simple Search

Use the following steps to perform a simple search.

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1. Enter the words you want to search for in the **Find this:** field.

NOTE:

Select the type of search that you want to perform by choosing a search type from the **Find Results in:** list. Depending on how your library has this configured, it may be a drop-down arrow or a list.

In order to perform a command search, you should enter your command-line style term in the Find This: field, and then select Command-Line Search from the Find Results In: list.

When entering a command search, AND, OR and NOT may be in upper or lower case.

OPTIONAL:

2. Choose what type of limit you want applied to the search by either:
 - Selecting a limit from the **Simple Limit** menu, or
 - Clicking the **Limits** button and choosing from the entire list of limits.
3. Specify how many entries of the search results you want to have display on each page by clicking the drop-down arrow and selecting the number of records in the ...records per page field.
4. Click the **Submit** button to execute the search. You can also click the **Reset** button to clear the information entered into the page.

Your library defines which of the following searches are available. The searches available may include the following:

- Keyword - Looks for the desired words anywhere in a record. For example, a keyword search on the word "shakespeare" would return all the titles which contain the word shakespeare anywhere in the record. You can also allow items to be weighted for importance. If no boolean operator is specified, the default boolean operator between search terms is **AND**.
 - Enclose terms in parentheses ("") to search for those terms as a phrase
 - Use a space between multiple words
 - Use a question mark (?) in a search term to indicate a wildcard, matching on zero or more characters in place of the ?. For example: Enter **behav?r** to retrieve results containing behavior and behaviour, and so on. A ? at the end of a term acts as a truncation symbol

-
- Use percent signs to indicate wild cards of a specified character length. For example, enter `g%%se` to search for geese, goose, and so on. Enter `g%1f` to search for golf, gulf, and so on

NOTE:

The ? and % wild cards do not work with Z39.50 searches

- Use quotation marks ("") to search for specific phrases
- Use a plus sign (+) before a term to indicate an essential term. This indicates that a record will be listed with more relevance if that term is found somewhere in the record
- Use an asterisk (*) before a term to indicate an important term. This indicates that a record will be listed with more relevance if that term is found somewhere in the record (but it will be listed with less relevance than a term marked by a plus sign)
- Use an exclamation point (!) before a term to indicate that records containing the term are not to be displayed

Example:

For example, a Keyword search on *space physics* would return at the top of the list (most relevant) all records with space and physics as a subject, followed by records with only *space* or only *physics* as a subject (less relevant). The more words you include in your search text, the more specific your search results will be.

The search results are displayed in a Title List. For more information, see [Title List on page 5-29](#).

- Left-Anchored - Left-Anchored (or Headings) search looks for the desired words only at the beginning of the appropriate field.

A left-anchored search scans an index and returns every subject, author, title, call number, or publication date that begins with what you typed. For example, a heading search on the subject "medi" would return the topics: *medicaid*, *medical*, *medicare*, *medici*, *medicine*, *medieval* and *mediterranean*.

The search results are displayed in a browseable Heading List for Subject and Author searches. Journal Title and Call Number searches display in a Title List. For more information, see [Heading List on page 5-25](#) and [Title List on page 5-29](#).

For information on customizing Simple Searches, see [Editing the Simple Search Page on page 6-14](#).

Headings Searches

You can retrieve Headings lists in WebVoyáge by performing one of the following Headings search types:

- Find- Performs a left-anchored search and returns only the hits for that string (see [Figure 5-3](#)).
- Browse- Places you in the list of headings, where the search string fits (see [Figure 5-4](#)).
- Keyword- Retrieves headings containing the string searched for.

To combine search strings, use boolean operators (and, or, not). Search terms in quotations are searched for as a phrase.

Limits placed against search terms in Headings Keyword Searches are ignored.

NOTE:

All of the headings search types in WebVoyáge only return a heading if there are records attached to the heading.



Figure 5-3. Headings Find

The screenshot shows the WebVoyage software interface. At the top, there is a menu bar with the following items: Database, Search, Headings, Titles, Patron, Login, Preferences, Saved Searches, Bookbag, Request, History, Help, and Exit. Below the menu bar, the database name is listed as "Endeavor Library". A search request is shown: "Search Request: Subject Browse = philanthropy". The search results are displayed as follows:

Search Results: Displaying 1 through 25 of 25 entries.

| # | Titles | Headings | Headings Type |
|-----|--------|--|---------------------|
| 1 | 0 | Philanthropy | LC subject headings |
| 2 | 0 | Philately | LC subject headings |
| 3 | 0 | Philharmonic Society of New York | LC subject headings |
| 4 | 0 | Philharmonic-Symphony Orchestra (New York, N.Y.) | LC subject headings |
| 5 | 0 | Philharmonic-Symphony Orchestra of New York | LC subject headings |
| 6 | 0 | Philharmonic-Symphony Society of New York | LC subject headings |
| ... | | | LC subject |

Navigation buttons for the results are present: "previous" and "next".

Figure 5-4. Headings Browse

Builder Search

A Builder search finds records using keywords located anywhere in a record, or only in specific fields. Builder Searches allow you to further narrow searches or combine information to search for.

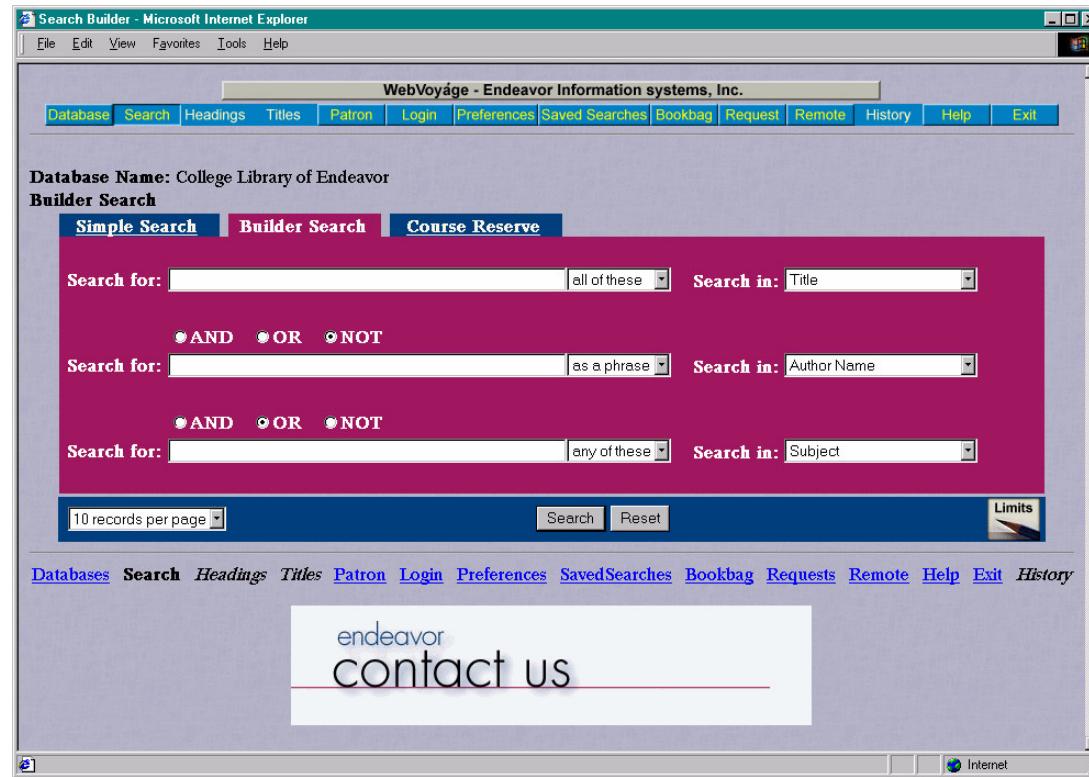


Figure 5-5. Builder Search page



Procedure 5-2. Performing a Builder Search

Use the following steps to perform a Builder search:

1. On the Simple Search page, click the **Builder** tab. The Search Builder page appears.
2. Type in the search term(s) you want to find in the first **Search for** field. (Punctuation, case, and word order are ignored.)
3. Default search criteria can be modified for your search:
 - Select from the drop-down list whether you want to search for **all of these** search terms, **any of these** search terms, or the search terms **as a phrase**. For standard or call numbers, you must select to search 'as a phrase'.

-
- Select the data fields in which you want to search for your search term(s) from the **Search In** drop-down list. Note that all of the search terms in the Search In drop-down list are keyword searches. Your library defines which fields are available in the System Administration module. For more information, see “Keyword Searches” in the *Voyager System Administration User’s Guide*.
 - Select which Boolean operator you want applied to the next search statement(s), if applicable, from the drop-down list: **AND**, **OR**, or **NOT**. If you are adding additional search statements, you must click a Boolean operator.
4. Repeat steps 2 and 3 for any additional terms that you want to search for and all of the relevant criteria.
 5. Click the **Limits** button to limit your search by specific criteria (optional). For more information, see [Limiting Searches](#) on [page 5-22](#).
 6. Click **Search** to begin the search. Click **Reset** to clear all items from the **Search in** text boxes.

The search results are displayed in a Title List (see [Title List](#) on [page 5-29](#)).

NOTE:

If Combined Searches is enabled, you can combine Builder Searches to further focus or expand your search. For Combined Search configuration and use, see [Combining Builder Searches \(Optional\)](#) on [page 5-8](#).

For information on configuring the Builder Search, see [Editing the Builder Search \(Boolean Search\) Page](#) on [page 6-21](#).

Combining Builder Searches (Optional)

If Combine Builder Searches is enabled, you can combine Builder Searches to further focus or expand your search. After performing two or more Builder Searches, you can combine them from the History page and perform them together as one search. Combined Builder Searches adds the selected builder search strings together using the AND operator. The combined builder search retains the operators of the builder searches used in the original searches.

For an example of a combined builder search string, see the Search Request line of [Figure 5-7](#) on [page 5-10](#).

After performing combined builder searches, the searches appear on the History page, and can be edited just like normal searches, by clicking the hyperlinked text in the Edit column of that search (see [Figure 5-8](#) on [page 5-11](#)). When editing a combined builder search (from the Builder Search page), you can enter a maximum of 98 search terms. One new search term box is added each time you run the cumulative search from the Builder Search page (to a maximum of 98 search term boxes). For an example, see [Figure 5-9](#) on [page 5-12](#).

! **IMPORTANT:**

You can only combine Builder Searches.

For information about configuring Combined Builder Search options, see [Combined Builder Search Configuration](#) on [page 6-27](#).



Procedure 5-3. Performing a Combined Builder Search

To perform a Combined Builder Search (After performing two or more Builder searches):

1. Go to the **History** page.
2. In the **Combine** column, select the check box to the left of each search to use in the combined builder search.
3. Click the **Search** button.

[Figure 5-6](#) illustrates two Builder searches selected for a combined builder search. [Figure 5-7](#) shows the results of this search.



Figure 5-6. Two Builder Searches on the History page, Selected for a Combined Builder Search

| WebVoyage - Endeavor Information systems, Inc. | | | | | | | | | |
|--|--|--|--|--|--|--|---------------|--|--|
| Database Search Headings Titles Patron Login Bookbag Request History Help Exit | | | | | | | | | |
| Database Name: Local Library | | | | | | | | | |
| Search Request: Builder = (ethics) [in Keyword Anywhere] OR ("moral 3F") [in Keyword Anywhere]
AND (science) [in Title/Subject] AND ("philosophy") [in Title/Subject] | | | | | | | | | |
| Search Results: Displaying 1 through 10 of 372 entries. | | | | | | | | | |
| ◀ previous next ▶ | | | | | | | | | |
| Sort by: <input type="button" value="▼"/> Post Limit | | | | | | | | | |
| # | Full Title | | | | Author | | Format | | |
| <input type="checkbox"/> [1] | Adventures on the borderlands of ethics / by Richard C. Cabot. | | | | Cabot, Richard C. (Richard Clarke), 1868-1939. | | Book | | |
| | <i>Library Location: Main Collection Call Number: BJ1725 .C3 Status: Not Charged</i> | | | | | | | | |
| <input type="checkbox"/> [2] | After virtue : a study in moral theory / Alasdair MacIntyre. | | | | MacIntyre, Alasdair C. | | Book | | |

Figure 5-7. Results of the Combined Builder Search

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The screenshot shows the WebVoyáge History Page. At the top, there is a menu bar with links: Database, Search, Headings, Patron, Login, Saved Searches, Bookbag, Request, Remote, History, and Exit. Below the menu is a table titled "Search Type" which lists three separate search results:

| Combine | Edit | Hits | Search Type | Searched For |
|--------------------------|-------------------|------|-------------------------|--|
| <input type="checkbox"/> | 1 | 1 | Builder | (science)[in Title/Subject]
AND ("philosophy")in
Title/Subject] AND (ethics)[in
Keyword Anywhere] OR
("moral 3F")in Keyword
Anywhere] |
| <input type="checkbox"/> | 2 | 59 | Builder | (science)[in Title/Subject]
AND ("philosophy")in
Title/Subject] |
| <input type="checkbox"/> | 3 | 563 | Builder | (ethics)[in Keyword Anywhere]
OR ("moral?")in Keyword
Anywhere] |

Below the table is a "Search" button. At the bottom of the page, there is a navigation bar with links: Databases, Search, Headings, Patron, Login, Saved Searches, Bookbag, Requests, and a link to Endeavor.

Figure 5-8. Combined builder search as a separate search on History Page

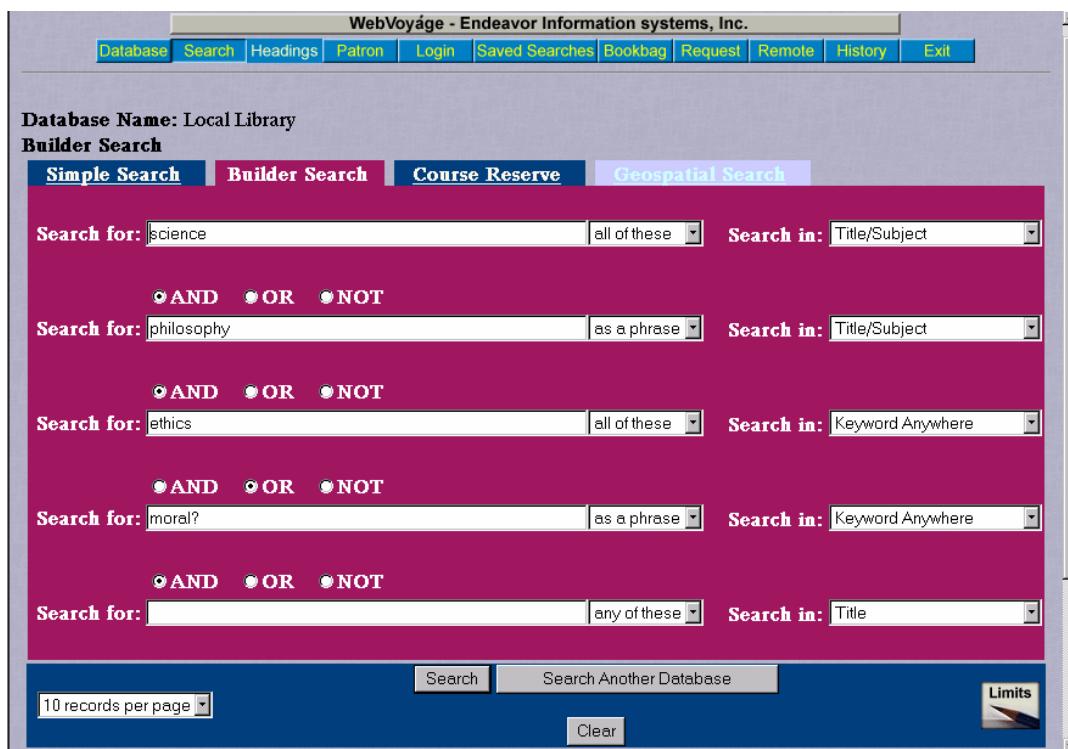


Figure 5-9. Search term box added to a combined builder search when editing

MFHD-Bibliographic Combined Keyword Search

The MFHD-Bibliographic Combined Search feature allows you to search MFHD record information such as virtual collections stored in holdings 901 \$a and \$b fields, while narrowing the search by including bibliographic record search terms. You may perform command and builder/boolean MFHD-bibliographic combined keyword searches.

The following search components are supported:

- Relevance ranking
- Boolean operators
- Parentheses to group terms
- Search limits
- Search result de-duplication by bibliographic record ID

Course Reserve Search

A Course Reserve search allows you to search for active items on reserve for various classes.

NOTE:

You cannot set Limits on a course reserve search.

There are two possible interface styles for Course Reserve searches. Locate the appropriate documentation for your institution's Course Reserve interface based on the following descriptions:

- Drop-down interface- Contains drop-down lists of course reserve information such as instructor and department (see [Course Reserve Drop-Down interface on page 5-13](#)).
- Browse interface- Contains abbreviated alphabetical browse lists of reserve items (see [Course Reserve Browse interface on page 5-15](#))

Course Reserve Drop-Down interface

The Course Reserve drop-down interface contains drop-down boxes, organized by instructor, course, department, section, or any combination thereof. The course reserve information entered into the Voyager Circulation module appears here. [Figure 5-10](#) shows an example of the Course Reserve drop-down interface.

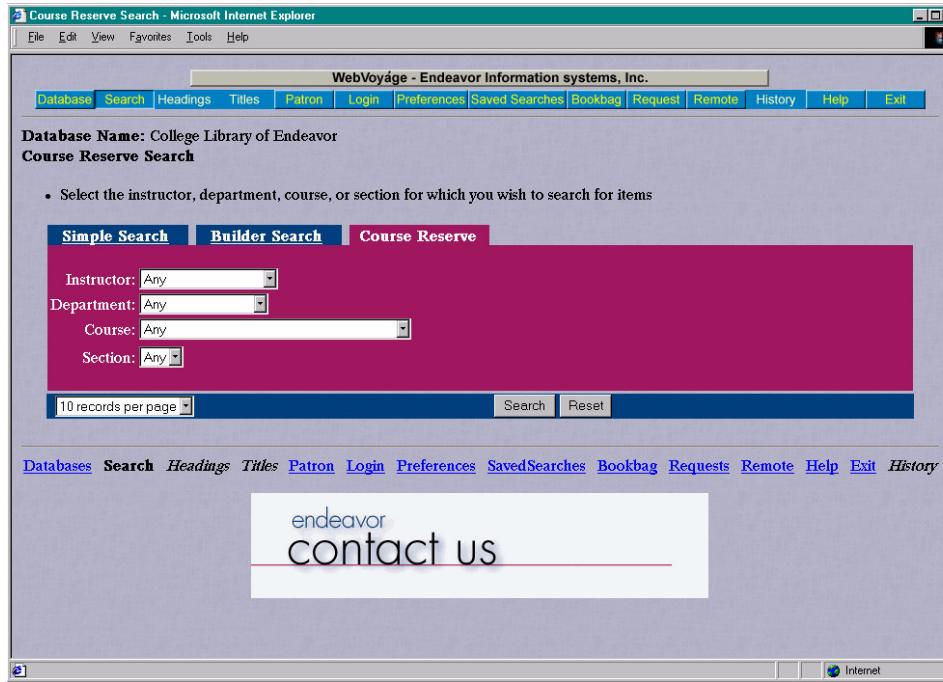


Figure 5-10. Course Reserve Search page (Drop-Down style)



Procedure 5-4. Performing a Course Reserve Search

To perform a Course Reserve search:

1. On the Simple Search page, click the **Course Reserve** tab.
2. Select one item from one (or more) of the following drop-down lists: **Instructor**, **Department**, **Course**, or **Section**. Performing a search without selecting at least one of the items will cause the search to fail. Depending on your library's policies, one or more of the above drop-downs may not be available. For information about configuring available drop-down boxes, see [Editing the Course Reserve Search Page on page 6-56](#).
3. Click **Search** to begin the search. Click **Reset** to clear all selected items from the lists.

Result:

The search results are displayed in a Title List (see [Title List](#) on page 5-29).

Course Reserve Browse interface

WebVoyáge can display Course Reserve information in a browse-interface format. Patrons can search for their Course Reserve information by:

- instructor
- department
- course

NOTE:

Course Reserve Information display in WebVoyáge in either the drop-down list form or the browse-interface display, but not both.

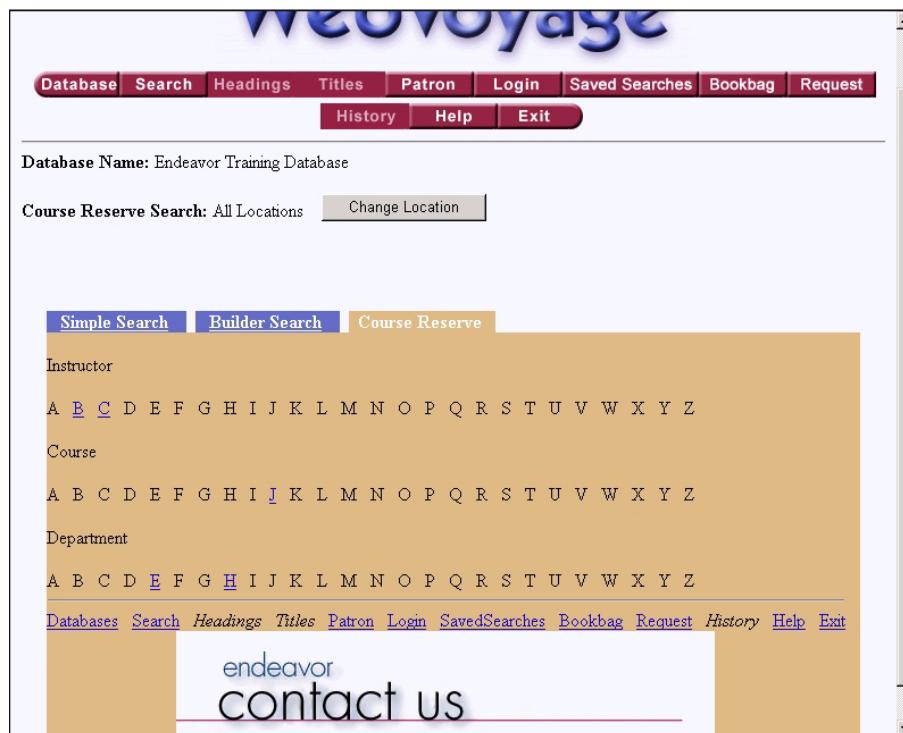


Figure 5-11. Course Reserve Alphabetical List page (Browse style)



Procedure 5-5. Performing a Course Reserve Browse

To perform a Course Reserve browse:

1. On the Simple Search page, click the **Course Reserve** tab.

Result: The Course Reserve Browse Location page displays.

The screenshot shows the WebVoyage interface. At the top is a navigation bar with links: Database, Search, Headings, Titles, Patron, Login, Saved Searches, Bookbag, Request, History, Help, and Exit. Below the navigation bar is a header with the text "Course Reserve Location:" followed by two links: "All Locations" and "UB Development Test Library". Underneath the header is another set of navigation links: Databases, Search, Headings, Titles, Patron, Login, SavedSearches, Bookbag, Request, History, Help, and Exit. At the bottom of the page is a light blue footer bar containing the text "endeavor" and "contact us".

Figure 5-12. Course Reserve Browse Locations page

2. Select a location.

Result: The Course Reserve Alphabetical List page displays (see [Figure 5-11](#) on [page 5-15](#)).

3. Select a letter or number from one of the following alphabetical lists: **Instructor, Department, or Course**.

Result: A detailed list of Course Reserve material for that letter or number displays. The information displayed varies, according to the alphabetical list type from which the letter or number was selected (see [Figure 5-13](#)).

NOTE:

All letters of the alphabet appear in each list of the page, and letters with corresponding Course Reserve items appear as links. Numbers and accented letters will only appear on the list page if there is Course Reserve material associated with them.



Figure 5-13. Course Reserve Browse detail list page (Course)

4. Select the desired section, instructor, or department.

Result: The material on reserve is displayed in a Title List (see [Title List](#) on [page 5-29](#)).

Searching Other Databases

When you initially open the Search page, WebVoyage automatically connects to your local Voyager database (the database where your institution catalogs its holdings). If this is the database that you want to search, then you can simply proceed with your search. However, if there are other databases that you want to search, you must specify which ones they are (for example, a medical journal database, or the holdings of an affiliated institution).

To get to the Database page, click the **Database** button in the banner on the search page (or from any of the pages with buttons in the banner).

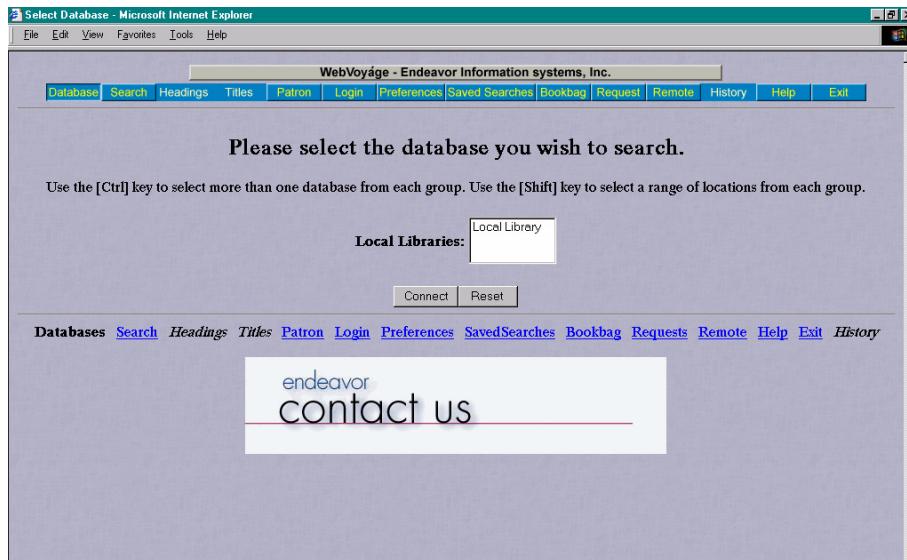


Figure 5-14. Database Page

The Database page contains lists of databases that can be searched. Depending on your institution's policies, you may have to log in to WebVoyage before certain databases will be displayed in the database lists. If you do not log on, only the databases that currently appear on the Database page will be available to you.

If a user has not previously logged in, that user will be presented only with the database(s) that have been designated for "Public Use" in the Database Definitions section of the System Administration module. In order for the system to present a user with the specific database(s) that the institution allows that user to search, that user must login. See "Access Control tab" in the Database Definition section of the *Voyager System Administration User's Guide* for more information.



Procedure 5-6. Selecting a Database

Use the following steps To select a database to search.

OPTIONAL:

1. *If you are not currently logged in, click the **Login** button to display the WebVoyáge Patron Login page (see [Figure 5-15](#)).*
-

The screenshot shows a Microsoft Internet Explorer window with the title bar 'Page Patron Logon - Microsoft Internet Explorer'. The menu bar includes 'File', 'View', 'Favorites', 'Tools', and 'Help'. The main content area has a header 'WebVoyáge - Endeavor Information systems, Inc.' and a sub-header 'Please enter your Patron Barcode and Last Name, then click the OK button.' Below this is a form with fields: 'Home Library: Local Library', 'Barcode' (with a dropdown menu), 'PIN' (text input field), and 'Last Name' (text input field). At the bottom of the form are 'Login' and 'Reset' buttons. The status bar at the bottom of the browser window shows 'Internet'.

Figure 5-15. Patron Login page

2. Enter your Patron Barcode (your institution may use Social Security Number or Institution ID rather than Patron Barcode) and Last Name in the appropriate fields and click the **Login** button. Click the **Reset** button to clear the contents of the fields on screen.

NOTE:

If your institution is using the PIN feature, you must also enter your PIN in the PIN field. The PIN you enter the first time you log in after enabling the PIN feature depends on how the default PIN is set by your institution. If you do not know your PIN, contact your Circulation Desk.

For more information about PINs and setting the default PIN, see [PIN Configuration on page 9-3](#).

Result: When you have successfully logged in, you are returned to the **Databases** page.

3. Click the databases in the list that you want to connect to.
To select more than one database in a list, press the **Ctrl** key while clicking additional databases.
To select multiple databases adjacent to one another in a list, press the **Shift** key while clicking additional databases.
If you have clicked on too many databases and want to de-select all of the databases, click the **Clear** button.
4. To connect to the databases and return to the main Search page, click the **Connect** button. This will allow you to search all of the selected databases simultaneously from the main Search page.

If no database is selected and the Connect button is pressed, the Local Database will be used.

NOTE:

Your library may require you to log in before allowing you to access certain databases. Only after logging in can the system provide you with the specific database options that your library allows you. If you are not forced to log in, and you have not previously logged in, only the default databases that your library makes available (for example, the Local Database) will display for you to access.

For information on configuring the Database page, see [Database Selection Display Configuration on page 2-1](#).

Search History Page

The Search History page allows you to re-execute or edit any of your previous searches. To access the Search History page, you must first complete at least one search. This makes the Search History page available through the **History** button in the toolbar.

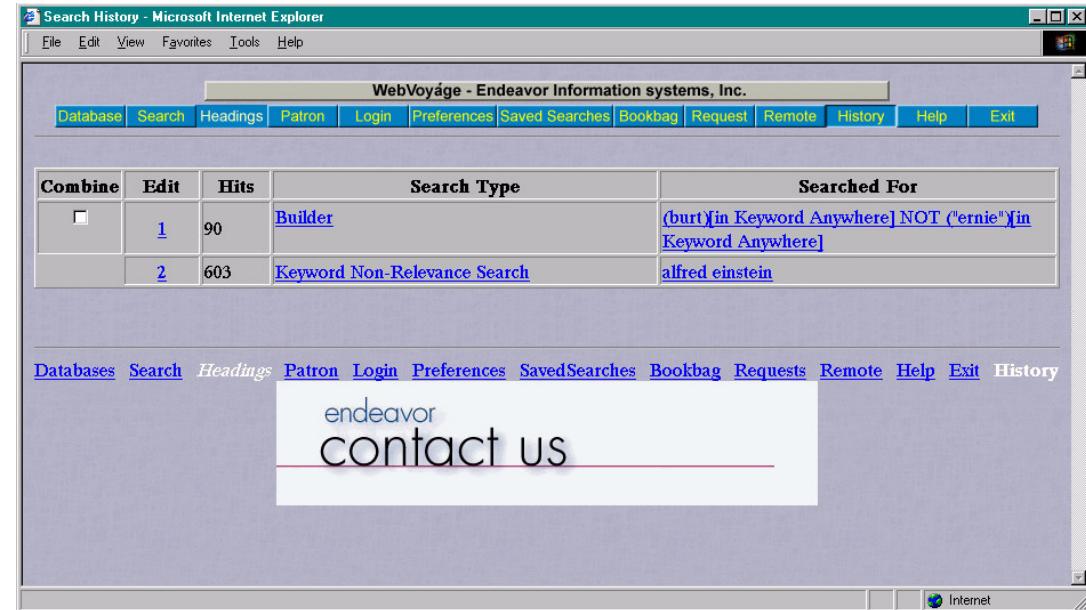


Figure 5-16. Search History Page

The Search History page lists a link to edit the search (Edit), number of items found for each search (Hits), the type of search performed (Search Type), and what was searched (Searched For).



Procedure 5-7. Executing a Previous Search

To re-execute a previous search:

1. Click the **History** button in the banner. This will open the Search History page.
2. Click the entry in either the **Search Type** or the **Searched For** field for the search that you want to repeat. This will re-execute the search. Depending on the type of search being executed, either the Title List or the Headings List will appear next.

NOTE:

The **History** tab does not retain information about search limits. If you re-execute or edit a search, any current limits in effect will be used instead of limits you specified previously.



Procedure 5-8. Editing and Executing a Previous Search

To edit a previous search and execute the edited search:

1. Click the **History** button in the banner. This will open the Search History page.
 2. Click the number in the **Edit** field for the search that you want to edit. This will open up the search page from which the search was originally performed, with the search text and any search settings as they were previously set.
 3. Edit the terms of the search.
 4. Click **Search** to begin the search. Click **Reset** to clear all search text and all selected items from the lists.
-

For information on configuring the Search History, see [Editing the Search History Page on page 6-71](#).

Limiting Searches

You can limit your searches according to any of the limits appearing on page. The Limit page displays each limit type and, next to the limit type, the set of limit values of that specific type. You can select as many values from any number of limit types as you want. Using the limit values that you select, WebVoyage performs limiting according to the following rules:

- The relationship between multiple limit values of the same limit types is considered to be “OR.” This means that selecting “English” and “French” will return only records that are in either English or French.
- The relationship between limit values of different limit types is considered to be “AND.” This means that selecting “English” (of limit type Language) and “Book” (of limit type Item Type) will return only records that are books in English.
- When there are multiple item types each with multiple limit values involved, each limit value is combined with every other limit value of the other limit types when determining the result set.

Example:

For example, the result set that would be returned if English, French, Book and Serial were selected would be books in English and French as well as serials in English or French.

As a boolean expression this relationship would be written out as:

(English OR French) AND (Book OR Serial)

Additional limit types would have an AND relation to the rest of the limit types as well. For example:

(English OR French) AND (Book OR Serial) AND (Denmark
OR Hong Kong)

The list of locations can be customized in the System Administration module (See the section on “Location Limit Groups” in the *Voyager System Administration User’s Guide*).

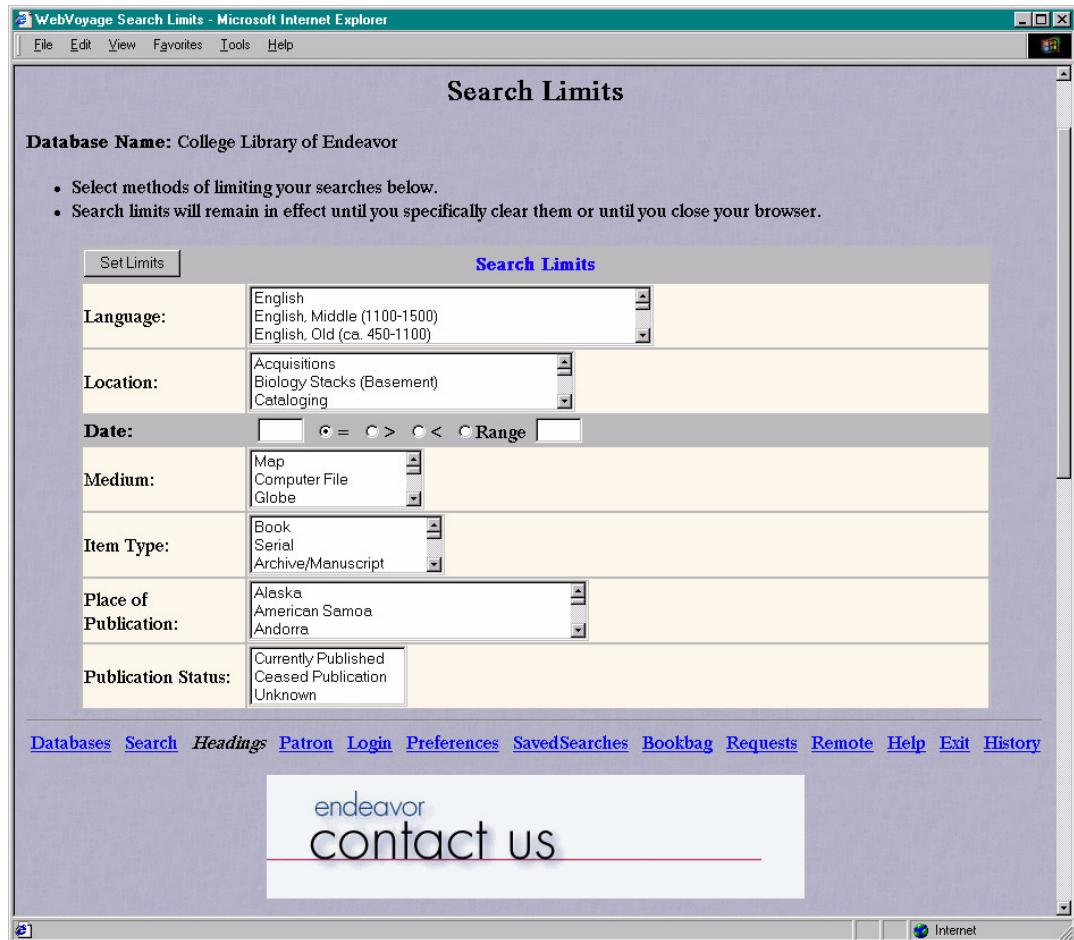


Figure 5-17. Limits Page



Procedure 5-9. Setting Search Limits From the Search Limits Page

Use the following to set search limits from the Search Limits Page.

1. Click the **Limits** button. The Limits page displays.
2. Highlight the limits that you want to add to your search.
To set multiple limits of the same type, hold down the **Ctrl** button while you click the limits in the list that you want to apply.

3. To remove the highlight from a particular limit in the Limit List, hold down the **Ctrl** button while you click the limit. To clear all limits from the Limit List, click the **Erase Limits** button.
 4. Click **Submit** to accept the limiting criteria.
-

For more information on configuring the Search History, see [Search Limits Page](#) on [page 6-100](#).

Viewing Search Results

After you perform a search, results can be displayed in three ways, depending on the search performed:

Table 5-1. Viewing Results

| Display Method | Result |
|-----------------------|---|
| Heading List | displays headings as a result of a Heading Search. |
| Heading Browse List | displays headings as a result of a browse-type Heading Search. |
| Title List | displays titles selected from the Heading List or as a result of a Journal Title or Call Number search. A Keyword Title List displays titles from a Keyword Search. |
| Record Display | displays the bibliographic records selected from the Title List. |

Heading List

Each entry in the Heading List is a standardized name of the Subject or Author. The Heading List will automatically display after a headings search is performed. You can display the Heading List yourself by clicking the **Headings** button in the toolbar. The Heading List displays the headings found in your most recent Headings search.

| Item No. | Titles | Heading | Heading Type |
|--------------------------------|--------|---|---------------------|
| [51] | 1 | United States. Air Force Procurement Periodicals. | LC subject headings |
| [52] | 1 | United States. Air Mobility Command Pictorial works. | LC subject headings |
| See also
53 | | United States. Alcohol, Drug Abuse, and Mental Health Administration. National Institute of Mental Health | LC subject headings |
| See also
54 | | United States. Alcohol, Drug Abuse, and Mental Health Administration. National Institute on Drug Abuse | LC subject headings |
| See also
55 | | United States Aliens | LC subject headings |
| [56] | 1 | United States. Altitudes. | LC subject headings |
| [57] | 2 | United States. Americans with Disabilities Act of 1990. | LC subject headings |
| [58] | 1 | United States. Americans with Disabilities Act of 1990 Government policy. | LC subject headings |
| See also
59 | | United States Annexations | LC subject headings |

Figure 5-18. Heading List Page

You can navigate through the list by clicking the **previous** and **next** buttons above and below the Heading list; this will cause the preceding or the following set of headings to display. You can also jump to a particular part of the list by clicking the number in the **Jump Bar** (between the previous and next buttons) that is closest to the point in the list that you want to view.

You can select a heading to view by clicking the name of the heading or the line number. This will cause the Titles List to display with the titles under that heading. You can then view more information about the headings you selected in the Title List. You can also display the Title List for selected headings by double-clicking a Heading entry.

Authority information also displays in the Heading List. This information is indicated by an oval-shaped **Note** or **See Also** button in the **Item No.** column. To view the authority information, click the button. The Reference Information page displays.

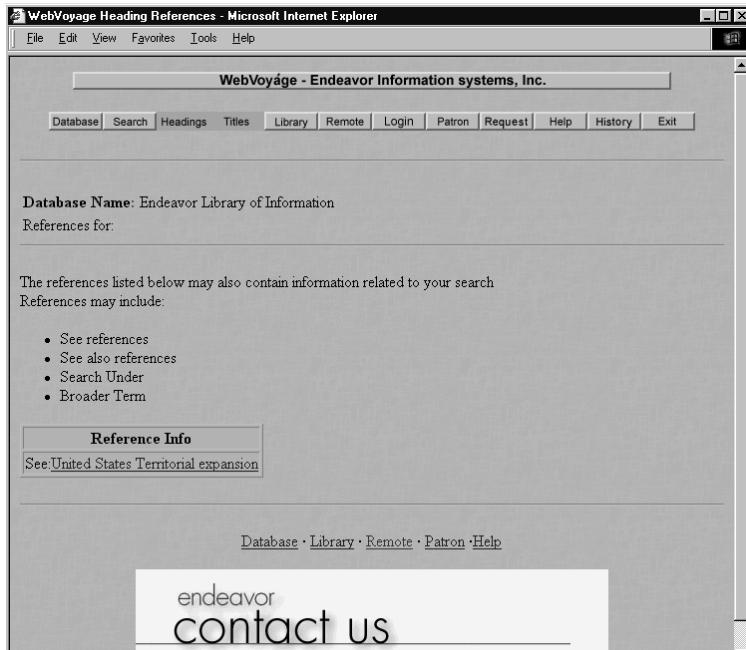


Figure 5-19. Reference Information page

This page lists the reference(s) for a specific heading. To perform a search on a listed reference, click the reference. Use the Back command in your browser to return to the Headings List page (in IE, this is **Alt + Left Arrow**).

For information on configuring the Headings List, see [Headings Page on page 6-75](#).

Heading Browse List

Each entry in the Heading Browse List is a standardized name of the Subject or Author. The Heading Browse List will automatically display after a browse-type headings search is performed. You can display the Heading Browse List yourself by clicking the **Headings** button in the toolbar. In a Heading Browse List, the entire list of headings in your system is displayed in alphabetical order, beginning with the point in the list that best matches the terms of your search. This allows the list to be scrolled through. (A regular headings list displays only the headings that match your search.)

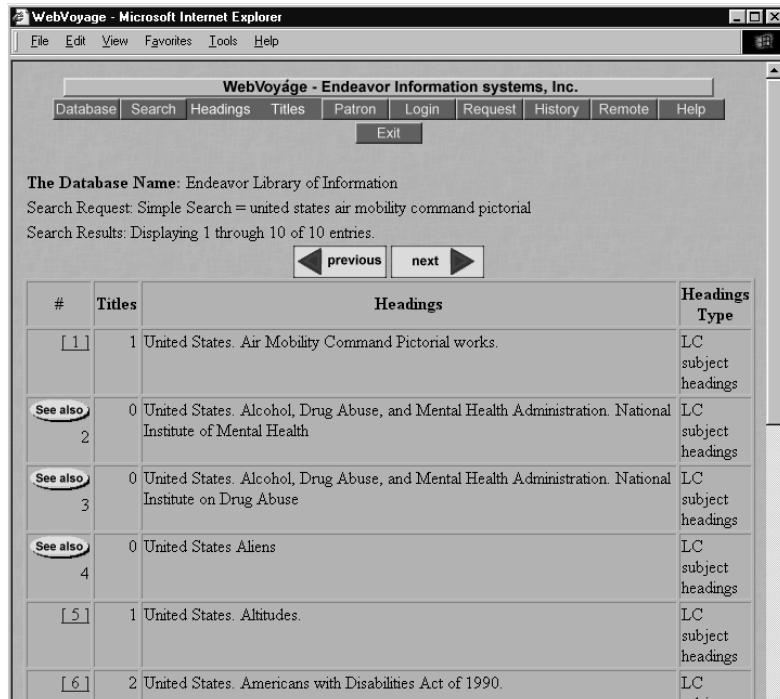


Figure 5-20. Heading Browse List Page

You can navigate through the list by clicking the **previous** and **next** buttons above and below the Heading list; this will cause the preceding or the following set of headings to display.

You can select a heading to view by clicking the line number. This will cause the Titles List to display with the titles under that heading. You can then view more information about the heading you selected in the Title List.

Authority information also displays in the Heading Browse List. This information is indicated by an oval-shaped **Note** or **See Also** button in the **Item No.** column. To view the authority information, click the button. The Reference Information page displays.

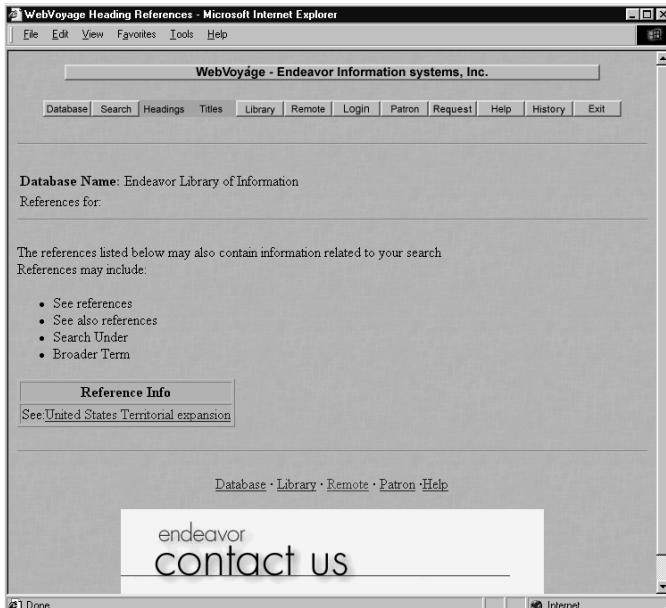


Figure 5-21. Reference Information page

This page lists the reference(s) for a specific heading. To perform a search on a listed reference, click the reference. Use the Back command in your browser to return to the Headings Browse List page (in IE, this is **Alt + Left Arrow**).

For information on configuring the Heading Browse List, see [Browse Page on page 6-80](#).

Title List

The Title List will display automatically after a title search has been performed. You can display the Title List yourself by double-clicking the **Titles** button in the toolbar. The Title List displays the titles found in the most recent search. The Title List display includes Author, Title, and Publication Information.

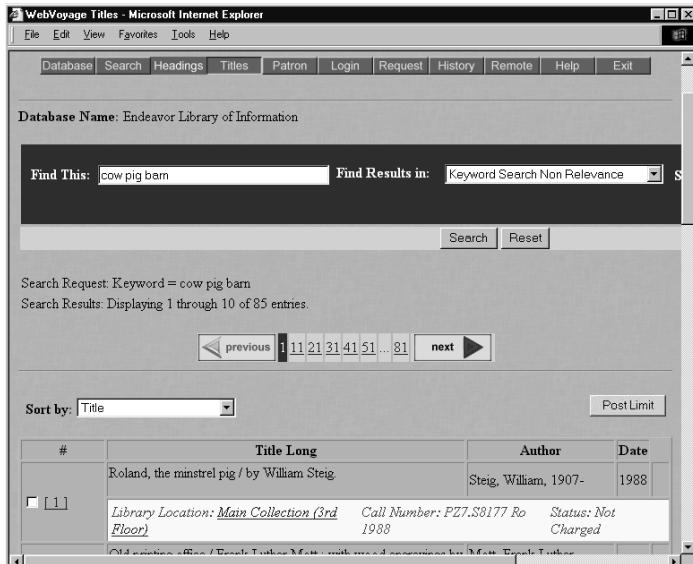


Figure 5-22. Title List page

You can view the records of specific titles by clicking the line number in the **#** column or by clicking the hyperlinked portion of the record in the **Title Long** column. This will display bibliographic information about the titles in the Record Display (see [Record Display](#) on page 5-34).

If you want to narrow down the currently displayed result set, you can click the **Post Limits** button that appears above the title list to add limits to the current search result set. The limits that you set on the Limits page will be applied to all of the records in the search result set. Any records that do not fall within the boundaries of the newly applied limits will be hidden from view. After having applied limits in this fashion, you can restore the result set or add or remove additional limits by clicking the **Post Limits** button again.

Depending on your institution's policies, holdings records may also be automatically sorted depending on the location of your computer or the patron group that you are associated with. This can be configured in the System Administration module. For more information, see "OPAC Holdings Sort Group Definitions" in the *Voyager System Administration User's Guide*.

You can navigate through the list by clicking the **previous** and **next** buttons above and below the Heading list; this will cause the preceding or the following set of records to display. You can also jump to a particular part of the list by clicking the number in the **Jump Bar** (between the previous and next buttons) that is closest to the point in the list that you want to view.

For multiple-branch libraries, note that holdings records for items in your local holdings may appear before items at other branches. Your institution can specify whether local holdings will appear first or not.

You can sort your result set by any of the columns on screen by clicking in the **Sort by:** drop-down to specify what type of sort will be performed. The search results will be resorted according to your selection.

NOTE:

This option is not available for Course Reserve searches.

You can mark specific titles on any of the pages of the result set by clicking in the check box in the # column. Marking records allows you to save, print or E-mail information about those titles. You can unmark titles by clicking in the check box a second time (so that the check mark disappears). You can select records from multiple pages for saving, printing or emailing. After you have selected records on a page, in order to preserve those selections you must click the **Retain Selected** button before moving to the next page; otherwise, these selections will not be preserved. You must press **Retain Selected** on each page whenever you select records that you want to preserve. If you want to change the selections that you have preserved for a particular page, you must make the changes and again click the **Retain Selected** button. You can also click the **Clear Selected** button to clear all of the selections from the page and from the list of saved selections. Once the set of records has been selected, it can be saved, printed or emailed. See [Saving, Printing and Emailing Information](#) on [page 5-45](#).

You can modify and execute the previous search directly from the results list. This new feature allows you to change the terms and limits of the search if your search results in too many or too few hits. If you want to perform a new search, you can enter the search terms into the **Find This:** field in the **Simple Search** block and click the **Search** button. The Simple Search block can appear at the top or bottom of the page (or both). The Simple Search block is similar to the search block on the regular Simple Search page.

There are two types of Title Lists: Basic and Relevancy (Keyword). Your institution defines which Title Lists are available.

Basic Title List

The Basic Title List displays the titles associated with headings selected from the Headings List or the direct results of other searches (for instance, journal title or call number searches).

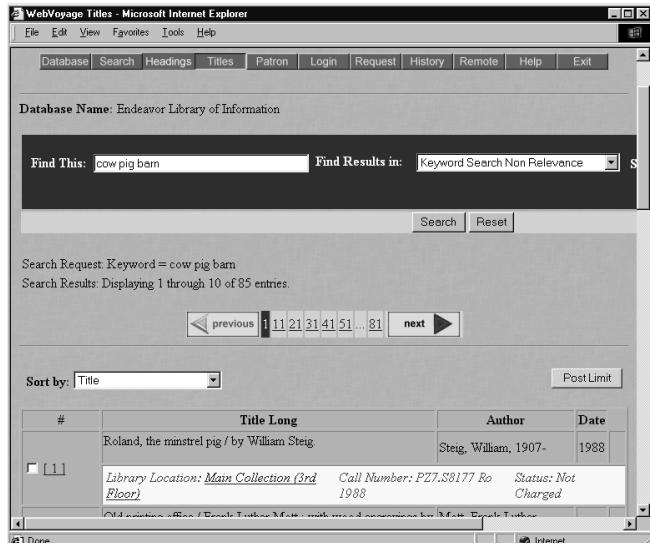


Figure 5-23. Basic Title List

Each record found appears in its own row containing the row number (the **#** column); the **Title Long** field; the **Author** field; the **Date** field; and the **Location** field. If the institution possesses an item that appears in the title list, the location of the item will appear in the Location field. If the institution owns more than one of a particular item, a message will display reading "Title has multiple holdings."

You can view bibliographic information about a title by clicking the hyperlinked portion of the record (such as the row number or on the location of the item).

You can sort the title list that appears on screen by clicking the **Sort By** drop-down arrow and selecting the type of sort from the menu. This will resort the search list on screen.

After the search is complete, you can place further limits on the set of search results by clicking the **Post Limit** button. This will open the Search Limits page. Submitting the limits from that page will apply the new limits to the search results and a new titles list will be displayed. You can also use the Post Limit button to remove limits in the same way.

Keyword (Relevancy) Title List

The Keyword Title List displays the same information as a Basic Title List along with one addition: a relevancy rating. The relevancy rating is a bar made up of a series of circles and half-circles in the **Relevance** column of the Title List display. This bar indicates the probable degree of relevance the title has to the search items you entered.

An example of a relevancy display is shown in [Figure 5-24](#). This figure displays the results from a Keyword search statement of: *cow pig barn*. The results of a search are displayed in order of relevance, determined by the search engine and based on the search terms entered. The record with more search terms occurring in it will be listed as more relevant than other records.

The titles are ranked from the longest bar (most relevant) to the shortest bar (least relevant). The bars are also colored, according to the relevancy ranking. The colors (from most to least relevant) are: red, green, blue, brown, and black.

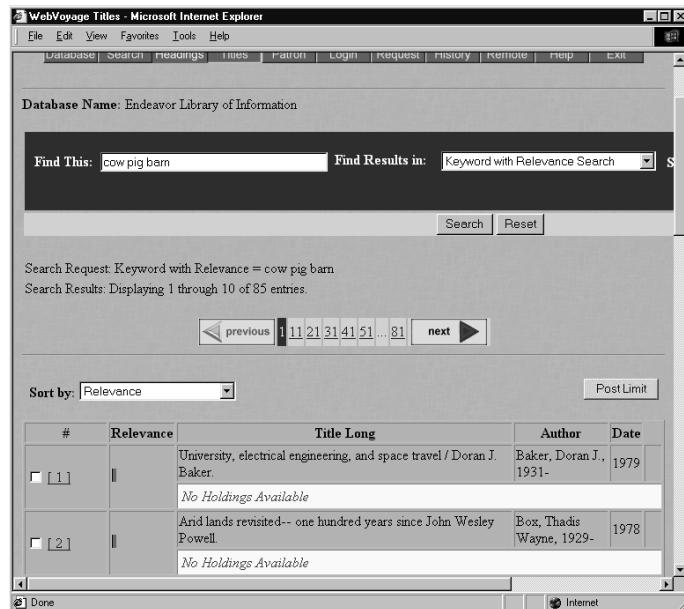


Figure 5-24. Keyword Title List

For information on configuring the Title List, see [The Titles List Page on page 6-92](#).

Record Display

You can display the details of records you selected in the Title List by double-clicking the row number or location of a title entry.

Simultaneous Searching

If you are performing a simultaneous search, before the records display you will see a page that informs you about the progress of the search. Instead of having to wait for the entire search to be completed, you can view the titles or headings that have already been found, and when your server has downloaded the rest of the records, you can view the rest of them.

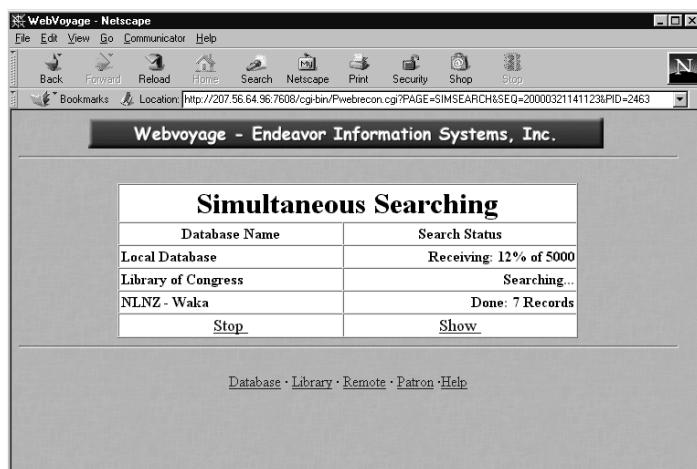


Figure 5-25. Simultaneous Search Page

The Simultaneous Searching block lists the databases being searched and the status of each search. **Searching** means that the search is being performed on the database. **Receiving** means that the result set is being downloaded from the database; a percentage of the total number of records downloaded is given. **Done** means that the results have been downloaded; the total number of records is given.

To view the search results, you should wait until all of the records have been downloaded. Once all searches are complete, click the **Show** link. However, if you do not want to wait for all of the search results to be downloaded, you can click the **Show** link; this will display all of the records that have been currently received. However, this also ends the search - the search will not continue if you click **Show** before the search is completed.

If you want to simply end the search, click the **Stop** link. You can then choose to view the records that have been downloaded by clicking **Show**, or redo your search by clicking the **Search** button.

For information on configuring the Simultaneous Search, see [Editing the Simultaneous Search Page on page 6-67](#).

Saved Searches

The Saved Searches feature allows you to save searches previously performed, and run them again on command, as well as on a regular basis automatically (using the Selective Dissemination of Information, or SDI, feature).

- [Figure 5-26](#) shows two saved searches on the Search Queries page without SDI enabled.
- [Figure 5-27](#) shows two saved searches on the Search Queries page with all SDI options enabled.

| Delete? | Search Type | Searched For |
|--------------------------|---------------------------------------|--|
| <input type="checkbox"/> | Journal Title Keyword | Philosophy |
| <input type="checkbox"/> | Builder | (Science){in Title} OR ("Physics"){in Subject} |

Figure 5-26. Sample Search Queries page (without SDI enabled)

| Delete? | Search Type | Searched For | Run Search Every: | New Hits |
|--------------------------|---------------------------------------|--|-------------------|----------|
| <input type="checkbox"/> | Journal Title Keyword | Philosophy | None | N |
| <input type="checkbox"/> | Builder | (Science){in Title} OR ("Physics"){in Subject} | None | N |

Figure 5-27. Sample Search Queries page (with SDI enabled)

Using Saved Searches/SDI

There are two ways to use saved search queries:

- Edit/Run previously saved search queries on command (only saved search query option available when SDI not enabled).
- Save new search queries to use later, including automatically run queries (requires SDI be enabled and configured).

NOTE:

The following searches will not work with SDI:

- Browse searches
- Course Reserve searches
- Map searches

NOTE:

Limits placed in the original search are not retained in the saved search.

Saving new search queries

New search queries are saved after running the search (on the local database) as usual. After running the search, go to the Record Options section of the Titles Index page and click the **Save Search Query** button (see [Figure 5-28](#)).

| Record Options | | |
|--|---|--|
| Records | Select Download Format: <input type="button" value="Full Record"/> <input type="button" value="Format for Print/Save"/> | <input type="button" value="Save Search Query"/> |
| <input type="radio"/> All on page
<input checked="" type="radio"/> Selected on page
<input type="radio"/> Selected all pages | Enter your email address <input type="text"/> <input type="button" value="Email"/> | |
| | Save results for later: <input type="button" value="Save To Bookbag"/> | |

Figure 5-28. Sample Save Search Query button in the Record Options section of the Titles Index page

Clicking the **Save Search Query** button calls up the Saved Search Queries page. This is where you edit, run, and delete saved search queries.

Editing, running and deleting saved search queries

If SDI is not enabled, after saving search queries, the queries can be deleted or run on command from the Saved Search Queries page.

To run a search query on command, click the hyperlinked text in either the Search Type or the Search For columns (see [Figure 5-29](#) and [Figure 5-30](#)).



Figure 5-29. Clicking the Hyperlinked Text in the Searched For (or the Search Type)

| Database Name: Local Library | | | |
|--|---|-------------------------------------|---|
| Search Request: Builder = (Science)[in Title] OR ("Physics")[in Subject] | | | |
| Search Results: Displaying 1 through 10 of 862 entries. | | | |
| <input type="button" value="previous"/> 1 11 21 31 41 51 ... 861 <input type="button" value="next"/> | | | |
| Sort by: | | | <input type="button" value="Post Limit"/> |
| # | Full Title | Author | Dates |
| <input type="checkbox"/> [1] | ABC pol sci. Advance bibliography of contents: political science & government. | | 1969-999 |
| | <i>Library Location: Main Collection</i> | <i>Call Number: Z7161 .A214</i> | <i>Status: Not Charged</i> |
| <input type="checkbox"/> [2] | Abstracts and indexes in science and technology: a descriptive guide, by Dolores B. Owen and Marguerite M. Hanchey. | Owen, Dolores B. | 1974 |
| | <i>Library Location: Reference Department (non-circulating)</i> | <i>Call Number: Z7403 .O95</i> | <i>Status: Not Charged</i> |
| <input type="checkbox"/> [3] | Abusing science : the case against creationism / Philip Kitcher. | Kitcher, Philip, 1947- | 1982 |
| | <i>Library Location: Main Collection</i> | <i>Call Number: QH371 .K57 1982</i> | <i>Status: Not Charged</i> |

Figure 5-30. Results of the Saved Search

To delete a search query, select the check box next to that query and click the **Submit** button.

If SDI is enabled:

If you are saving a query for the first time, and SDI is enabled, you must set up search query options on the Saved Search Queries page. If you are viewing previously saved search queries, and SDI is enabled, you can edit the query options on this page.

To perform a saved search query on command, click the hyperlinked text in either the **Search Type** or the **Search For** columns (For an example, see [Figure 5-29](#) and [Figure 5-30](#)).

To delete a saved search query, select the check box next to that query and click the **Submit** button.

To set saved search queries to run automatically, select one of the two following options:

- **Run Search Every** (only available when SDI is enabled): This determines with what frequency search queries are run automatically. Set this according to your preferences, depending on the different options made available by your library.
- **New Hits** (only available when enabled and when SDI is enabled): Set this to **y** to make SDI send results of the query to the patron only if new search result information exists. Set this to **n** to make SDI send the results to the patron whenever SDI runs the search, whether there are new results or not.

Bookbag (Shopping Cart)

This feature allows you to save bibliographic records from various search results for later viewing, editing and printing in different formats. The maximum number of records which can be saved to the Bookbag is 1000, and these records may be from any database.

Using Bookbag

When the Bookbag feature is enabled, you can select records to save to your bookbag from the Search Results page. After at least one record has been saved to the bookbag, the record(s) can be edited, deleted, or printed in different formats from the Bookbag Records page.

The following sections detail using the Bookbag feature:

- [Saving a record to the Bookbag](#)
- [Managing your Bookbag](#)
 - [Deleting a record from your Bookbag](#)
 - [Clearing the contents of your Bookbag](#)
 - [E-mailing the contents of your Bookbag](#)
 - [Downloading the contents of your Bookbag](#)

Saving a record to the Bookbag

To save records to your bookbag, from any **Results** page, select the check box to the left of the title of any and all desired records on that page and click the **Save to Bookbag** button in the **Record Options** box (see [Figure 5-31](#)).

| | | | |
|--|--|-------------------|------|
| <input checked="" type="checkbox"/> [7] | Invitation to phenomenology; studies in the philosophy of experience. Edited with an introd. by James M. Edie. | Edie, James M. | 1965 |
| | Library Location: Main Collection Call Number: B829.5 .E3 Status: Not Charged | | |
| <input checked="" type="checkbox"/> [8] | Merleau-Ponty's Phenomenology of perception : a guide and commentary / Monika M. Langer. | Langer, Monika M. | 1989 |
| | Library Location: Main Collection Call Number: B2430.M3763 P475 Status: Not Charged | | |
| <input type="checkbox"/> [9] | New essays in phenomenology; studies in the philosophy of experience. Edited with an introd. by James M. Edie. | | 1969 |
| | Library Location: Main Collection Call Number: B105.E9 N43 Status: Not Charged | | |
| <input checked="" type="checkbox"/> [10] | Perception; selected readings in science and phenomenology. Edited with an introd. by Paul Tibbetts. | Tibbetts, Paul. | 1969 |
| | Library Location: Main Collection Call Number: BF311 .T53 Status: Not Charged | | |

Sort by: Post Limit:

Clear Selected Retain Selected

previous 1 11 21 next

Record Options

| | |
|---|---|
| Records | Select Download Format: <input type="button"/> Full Record <input type="button"/> Format for Print/Save |
| <input type="radio"/> All on Page | Enter your email address: <input type="text"/> Email <input type="button"/> |
| <input checked="" type="radio"/> Selected On Page | Save results for later: <input type="button"/> Save To Bookbag |
| <input type="radio"/> Selected all Pages | |

Figure 5-31. Sample Search Results page with records checked to be saved to Bookbag

This invokes a # Records have been added to the Bookbag message (see [Figure 5-32 on page 5-40](#)).

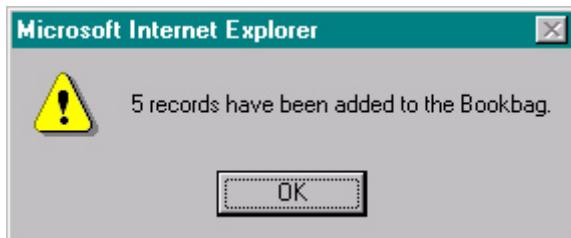


Figure 5-32. # records have been added to the Bookbag message

After clicking OK, you remain on the search results page in order to continue reviewing your search results (and placing more records in the Bookbag if you so choose). To view the contents of your Bookbag when finished viewing your search results, click the **Bookbag** button or linked text on the top or bottom toolbar. This invokes the **Bookbag** page (The **Bookbag** page can also be accessed from the **Patron Information** page).



Figure 5-33. Bookbag button on Top Toolbar

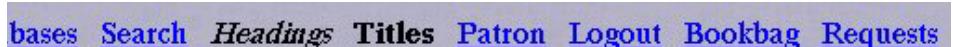


Figure 5-34. Bookbag linked text in Bottom Toolbar

Managing your Bookbag

Once on the Bookbag page, you can view, edit, delete, and print records saved to your Bookbag. For an example of the Bookbag page, see [Figure 5-35](#).

Clicking the linked text under the Author column takes you to that record.

WebVoyáge - Endeavor Information systems, Inc.

Database Search Headings Titles Patron Logout Bookbag Request History Help Exit

| Delete? | author | title | publisher_date | Save Date |
|--------------------------|--|--|----------------|---------------------|
| <input type="checkbox"/> | MacLaurin, Colin, 1698-1746, | Account of Sir Isaac Newton's philosophical discoveries. With a new introd. and index of names by L. L. Laundan. | 1968. | 2001-10-15 15:49:01 |
| <input type="checkbox"/> | Muralt, Andr e de. | Idea of phenomenology : Husserlian exemplarism / Andr e de Muralt ; translated by Garry L. Breckon. | 1974. | 2001-10-18 16:59:17 |
| <input type="checkbox"/> | Edie, James M. | Invitation to phenomenology; studies in the philosophy of experience. Edited with an introd. by James M. Edie. | 1965. | 2001-10-18 16:59:17 |
| <input type="checkbox"/> | Langer, Monika M. | Merleau-Ponty's Phenomenology of perception : a guide and commentary / Monika M. Langer. | c1989. | 2001-10-18 16:59:18 |
| <input type="checkbox"/> | Tibbetts, Paul. | Perception; selected readings in science and phenomenology. Edited with an introd. by Paul Tibbetts. | [1969] | 2001-10-18 16:59:18 |
| <input type="checkbox"/> | Beck, Lewis White. | Commentary on Kant's Critique of Practical Reason, by Lewis White Beck. | [c1960] | 2001-10-18 17:02:36 |

Delete Selected Titles

Clear Bookbag

Record Options

Select Download Format:

Enter your email address:

Figure 5-35. Six records in a patron's Bookbag



Procedure 5-10. Deleting a record from your Bookbag

1. Select the check box (in the **Delete?** column) next to the record.
2. Click the **Delete Selected Titles** button.



Procedure 5-11. Clearing the contents of your Bookbag

1. Click the **Clear Bookbag** button.

This deletes all records from your Bookbag and invokes a page indicating that your Bookbag is empty (see [Figure 5-36](#)).

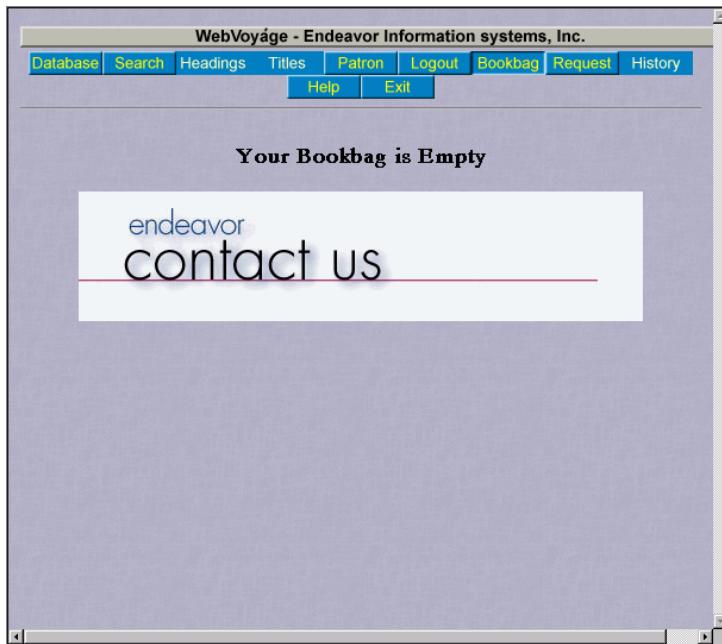


Figure 5-36. Bookbag page invoked when your Bookbag is empty



Procedure 5-12. E-mailing the contents of your Bookbag

In the Record Options box (see [Figure 5-37](#)):

1. Enter the email address to send the contents of the bookbag to in the **Enter your email address:** field.
2. Click the **Email** button.

For a sample email of Bookbag contents, see [Figure 6-30](#) on [page 6-52](#).



Figure 5-37. Record Options box on the Bookbag page



Procedure 5-13. Downloading the contents of your Bookbag

You can select a format from the **Record Options** box, and download the contents of your Bookbag (to a file or a printer):

In the **Record Options** box,

1. Select a format to download from the **Select Download Format** drop-down box.
2. Click the **Format for Print/Save** button.

Result: This will reformat the contents of your Bookbag to plain text (see [Figure 5-38](#)).

Author: MacLaurin, Colin, 1698-1746.

Title: An account of Sir Isaac Newton's philosophical discoveries.
With a new introd. and index of names by L. L. Laundan.

Primary Material: Book

Subject(s): Newton, Isaac, 1642-1727. *Principia*.
Mechanics--Early works to 1800.

Publisher: New York, Johnson Reprint Corp., 1968.

Description: xxv, xx, 393 p. illus. 26 cm.

Series: The Sources of science, no. 74

Notes: The text is a reprint of the 1748 ed.
Bibliographical footnotes.

Call Number: QA803 .M18 1968
Location: Main Collection

=====

Author: Muralt, André de.
Title: [Idée de la phénoménologie. English]
The idea of phenomenology : Husserlian exemplarism / André
de Muralt ; translated by Garry L. Breckon.

Primary Material: Book

Subject(s): Husserl, Edmund, 1859-1938.
Phenomenology.

Publisher: Evanston : Northwestern University Press, 1974.

Figure 5-38. Contents of Bookbag in the Full Record format

3. Use your Internet browser's capabilities to print or save your Bookbag's contents.

Saving, Printing and Emailing Information

From the Record Options box (formerly the Save Options box), you can save, print, or email any or all of the records that are part of the entire result set that were found as a result of your search (see [Figure 5-39](#)). After you have performed a search, and you have selected all the records in the entire result set that you want to preserve, you can choose to save, print or email those records.

The screenshot shows the 'Record Options' dialog box. On the left, there is a vertical list of options under the heading 'Records': 'All on page' (radio button), 'Selected on page' (radio button, selected), and 'Selected all pages' (radio button). To the right of this list are two main sections. The top section is titled 'Select Download Format' and contains a dropdown menu set to 'Full Record' and a 'Format for Print/Save' button. Below this is a 'Save Search Query' button. The bottom section is titled 'Enter your email address' and has a text input field and an 'Email' button. Below that is a section titled 'Save results for later:' with a 'Save To Bookbag' button.

Figure 5-39. Record Options box

Saving a Record

You can save information about records only after specifying on either the Title List or the Record Display which records are to be saved. Your institution determines what specific information is saved from a record.

You can save records in the following ways:

- If you are on the Record Display page, you can save that record to a file.
1. On the Record Display page, in the **Save Options** block at the bottom of the page, in the **Select Download Format** drop-down box, select the desired format.
 2. Click the **Format for Print/Save** button. Depending on what you selected in the Format Type field, the record will appear onscreen in either regular text or MARC format.
 3. In the menu bar of your browser, click **File>Save As**. When the Save dialog appears (in IE, this is the **Save Web Page** dialog) and enter the name of the file that you want to save into the **File Name** field. You can also specify what format the record is to be saved in by selecting from the **Save as type** drop-down menu or the encoding type by selecting from the **Encoding** drop-down menu.

-
4. Click the **Save** button to save the records.
 - If you are on the Title List page, you can save either all of the records onscreen or selected records.
 1. On the Title List page, you must first select all of the records that you want to save by placing a check in the check box in the # column in the row of each record you plan to save.

You may select records from multiple pages for saving, printing or emailing. After you have selected records on a page, in order to preserve those selections you must click the **Retain Selected** button before moving to the next page; otherwise, these selections will not be preserved. You must press **Retain Selected** on each page whenever you select records that you want to preserve. If you want to change the selections that you have preserved for a particular page, you must make the changes and again click the **Retain Selected** button. You can also click the **Clear Selected** button to clear all of the selections from the page and from the list of saved selections.

If you want to save all of the records onscreen, you do **not** have to check any of the check boxes.

2. In the **Save Options** block at the bottom of the page, in the **Records** column, click the **All on page** radio button to save all of the records listed on the page, the **Selected on page** button to print the selected records on the current page or the **Selected all pages** button to print the records selected across all of the pages of the result set.

NOTE:

If you click **Selected on page** and there are no records selected, WebVoyage will save all of the records onscreen.

3. On the Record Display page, in the **Save Options** block at the bottom of the page, in the **Select Download Format** drop-down box, select the desired format.
 4. Click the **Print/Save** button. Depending on what you selected in the Format Type field, the record will appear onscreen in either regular text or MARC format.
 5. In the menu bar of your browser, click **File>Save As**. When the Save dialog appears (in IE, this is the **Save Web Page** dialog) and enter the name of the file that you want to save into the **File Name** field. You can also specify what format the record is to be saved in by selecting from the **Save as type** drop-down menu or the encoding type by selecting from the **Encoding** drop-down menu.
 6. Click the **Save** button to save the records.
-

Printing a Record

You can print information about records only after specifying on either the Title List ([Title List](#) on [page 5-29](#)) or the Record Display ([Title List](#) on [page 5-29](#)) which records are to be saved. Your institution determines what specific information in the record will be printed.

You can print records in the following ways:

- If you are on the Record Display page, you can print the record.
1. On the Record Display page, in the **Save Options** block at the bottom of the page, in the **Select Download Format** drop-down box, select the desired format.
 2. Click the **Print/Save** button. Depending on what you selected in the Format Type field, the record will appear onscreen in either regular text or MARC format.
 3. In the menu bar of your browser, click **File>Print**. When the Print dialog appears (in IE, this is the **Print** dialog) click the **OK** button to print or the **Cancel** button to exit the dialog without printing.
 - If you are on the Title List page, you can print either all of the records onscreen or selected records.

1. On the Title List page, you must first select all of the records that you want to save by placing a check in the check box in the # column in the row of each record you plan to save.

You may select records from multiple pages for saving, printing or emailing. After you have selected records on a page, in order to preserve those selections you must click the **Retain Selected** button before moving to the next page; otherwise, these selections will not be preserved. You must press **Retain Selected** on each page whenever you select records that you want to preserve. If you want to change the selections that you have preserved for a particular page, you must make the changes and again click the **Retain Selected** button. You can also click the **Clear Selected** button to clear all of the selections from the page and from the list of saved selections.

If you want to save all of the records onscreen, you do **not** have to check any of the check boxes.

2. In the **Save Options** block at the bottom of the page, in the **Records** column, click the **All on page** radio button to save all of the records listed on the page, the **Selected on page** button to print the selected records on the current page or the **Selected all pages** button to print the records selected across all of the pages of the result set.

NOTE:

If you click **Selected** on page and there are no records selected, WebVoyáge will save all of the records onscreen.

3. On the Record Display page, in the **Save Options** block at the bottom of the page, in the **Select Download Format** drop-down box, select the desired format.
 4. Click the **Print/Save** button. Depending on what you selected in the Format Type field, the record will appear onscreen in either regular text or MARC format.
 5. In the menu bar of your browser, click **File>Print**. When the Print dialog appears (in IE, this is the **Print** dialog) click the **OK** button to print or the **Cancel** button to exit the dialog without printing.
 6. Click the **Save** button to save the records.
-

Print Setup

You can choose and set up a printer through your browser. Browsers generally allow you to set up your printer through a dialog in the browser. This is generally done by selecting something like **File>Print Setup** (in IE, this is **File>Page Setup**).

Refer to your Windows documentation on how to set up your printer or your browser software documentation on how to activate the printer setup dialog.

Emailing a Record

You can email information about records only after specifying on either the Title List or the Record Display which records are to be emailed. Your institution determines what specific information in the record will be printed.

NOTE:

The two MARC formats are *not* available for email from WebVoyáge.

You can print records in the following ways:

- If you are on the Record Display page, you can email the record.
1. On the Record Display page, in the **Save Options** block at the bottom of the page, in the **Select Download Format** drop-down box, select the desired format.

2. Enter your email address into the **Enter E-Mail address** field. You **must** enter your entire email address (i.e., `username@hostname.ext`) or the email will not be sent.
3. Click the **email** button. Depending on what you selected in the Format Type field, the record will be emailed in either regular text or MARC format to the address that you specified.
 - If you are on the Title List page, you can email either all of the records onscreen or selected records.
1. On the Title List page, you must first select all of the records that you want to save by placing a check in the check box in the **#** column in the row of each record you plan to save.

You may select records from multiple pages for saving, printing or emailing. After you have selected records on a page, in order to preserve those selections you must click the **Retain Selected** button before moving to the next page; otherwise, these selections will not be preserved. You must press **Retain Selected** on each page whenever you select records that you want to preserve. If you want to change the selections that you have preserved for a particular page, you must make the changes and again click the **Retain Selected** button. You can also click the **Clear Selected** button to clear all of the selections from the page and from the list of saved selections.

If you want to save all of the records onscreen, you do **not** have to check any of the check boxes.

2. In the **Save Options** block at the bottom of the page, in the **Records** column, click the **All on page** radio button to save all of the records listed on the page, the **Selected on page** button to print the selected records on the current page or the **Selected all pages** button to print the records selected across all of the pages of the result set.

NOTE:

If you click **Selected on page** and there are no records selected, WebVoyáge will save all of the records onscreen.

3. On the Record Display page, in the **Save Options** block at the bottom of the page, in the **Select Download Format** drop-down box, select the desired format.
 4. Click the **email** button. Depending on what you selected in the Format Type field, the record will be emailed to the address specified in either regular text or MARC format.
-

Exiting WebVoyáge

You can exit WebVoyáge by selecting the appropriate window close command from your browser's menu bar (in IE, this is **File>Close**). You can also click the X button to the right of the title bar to close WebVoyáge.

Search Configuration

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Search Configuration

6

Search Display Configuration

This section contains information about configuring Search-related display options.

Shared Search Page Layout Components

Each search type (Simple, Builder, Course Reserve, and Geospatial) has a search block which includes a tab and input boxes. The search block and search tab layouts are configured in the same variables in each of the search page stanzas ([Combined_Search_Page], [Boolean_Search_Page] and so on) in the opac.ini file.

Tab Components

Each search type has an active search block and an inactive tab (which displays when on one of the *other* search types).

Table 6-1. Shared Search Page Tab Components

| Component | Description |
|-----------|---|
| Tab_Text | Controls the description that appears on the tab on the search page, whether active or not. |

Table 6-1. Shared Search Page Tab Components

| Component | Description |
|-------------------|--|
| ActiveTabColor | Controls the color of the search page tab/block when that search page is active.

For example, when on the Simple Search page, the color of the Simple Search tab/block comes from the ActiveTabColor variable in the [Combined_Search_Page] stanza. |
| InactiveTabColor | Controls the color of the tab of the search page when on the other search pages. This also controls the color of the portion of the block that contains the Records per page field and the Search and Reset buttons.

For example, when on the <i>Builder</i> Search page (or any search page except the Simple Search page), the color of the <i>Simple</i> Search tab and the lower block comes from the InactiveTabColor variable in the [Combined_Search_Page] stanza. |
| ActiveFontColor | Controls the color of the text on the search page tab when it is active.

For example, when on the Simple Search page, the color of text on the Simple Search tab/block comes from the ActiveFontColor variable in the [Combined_Search_Page] stanza. |
| InactiveFontColor | Controls the color of the text on the search page tab when on the other search pages.

For example, when on the <i>Builder</i> Search page (or any search page except the Simple Search page), the font color of the <i>Simple</i> Search tab comes from the InactiveTabColor variable in the [Combined_Search_Page] stanza. |
| Empty | Displays after the search results label if an error occurs where information cannot be displayed. |
| TitleDisplay | Controls whether or not the titles of records display at the top of the record display page in WebVoyage. For more information, see Title Display on page 6-3 . |

Table 6-1. Shared Search Page Tab Components

| Component | Description |
|-------------------|---|
| AltRelevanceValue | Displays in place of the relevance ranking images when WebVoyage is displayed on a non-graphic Web Browser. The value entered after the <i>AltRelevanceValue</i> variable is equal to a half relevance ranking (so if a title is ranked 3 1/2 out of 5, the value entered after this variable would display 7 times). If nothing is entered after the <i>AltRelevanceValue</i> variable, "*" will be used as the default. |
| Search_References | Controls label at the top of the references page that displays when users click a reference associated to an entry in a title or heading list. Information about what is being referenced will appear after this label. |

Title Display

The *TitleDisplay* variable controls whether or not the titles of records display at the top of the record display page in WebVoyage. Enter *Y* after the *TitleDisplay=Y* variable (*TitleDisplay=Y*) if you want the titles of records to display at the top of the record display page. Enter *N* after the *TitleDisplay=N* variable (*TitleDisplay=N*) if you do not want the titles of records to display at the top of the record display page. If nothing is entered after the *TitleDisplay* variable, *Y* will be used as the default.

The *TitleDisplay* variable displays the information found in field 245, subfields a, b, and c. If the 245 field of a MARC record includes subfield h (medium), the title display will run the subfields together without the punctuation defined in subfield h. For example, if the 245 field of the MARC record looks like this:

Example:

```
245 00 |a Developmentally appropriate practice |h
[videorecording] : |b children birth through age five.
```

The title display at the top of the WebVoyage page will read like this:

Example:

```
Developmentally appropriate practice children birth
through age five.
```

Search Results Page Table Color

The `MainData` variable in the `[Table_Colors]` stanza of the `opac.ini` file controls the color of the search results tables that display after a search is conducted. You must use a hexadecimal rgb color code to specify a color. If nothing is entered after the `MainData` variable, the color of the search results tables will default to the settings of the web browser.

Jumpbar (JumpBar Stanza)

For searches that result in a non-browse title index, a jump bar can be placed on the search results page that allows users to quickly navigate through the hit list. This feature is especially useful for searches that result in hits greater than several hundred.

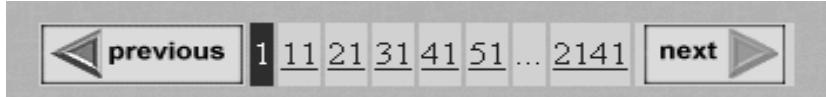


Figure 6-1. Example of a Jump Bar

Top / Bottom

The `Top` and `Bottom` variables control whether or not a jump bar will appear between the Previous and Next buttons at the top and bottom of the Title Index page. If you want a jump bar to display at the top or bottom of the Title Index page, enter `T` after the corresponding variable. If you do not want a jump bar to display at the top or bottom of the Title Index page, enter `F` after the corresponding variable. If nothing is entered after the `Top=` or `Bottom=` variable, `F` will be used as the default.

NOTE:

A jump bar will not display at the top or bottom of the Title Index page if the number of hits for the search is less than twice the “records per page” value (from the drop-down menu on the search page), even if `T` has been entered after the `Top=` or `Bottom=` variable. For example, if “10 records per page” has been selected from the drop-down menu on the search page, 20 or more hits must result from the search in order for a jump bar to display. For more information about the “records per page” value on the search pages, see [Records Per Page Display Options](#) on page 4-19.

Jumps_Before_Current_Record

Hit jumps on a jump bar are incremented according to the “records per page” value that a user selects on a search page. The *Jumps_Before_Current_Record* variable specifies the maximum number of hit jumps that will display before the currently selected hit jump (the currently selected hit jump will have a different background color and will not be enabled as a link; see [Selected_Background_Color](#) on [page 6-6](#) for more information about specifying the background color of the currently selected hit jump). Enter the maximum number of hit jumps you would like displayed before the currently selected hit jump after the *Jumps_Before_Current_Record=* variable. If nothing is entered after the *Jumps_Before_Current_Record=* variable, no hit jumps will display before the currently selected hit jump. Instead, an ellipsis image will display before the currently selected hit jump if there are previous hit pages.

The Previous button, the Next button, and the first and last hit jumps will always be displayed on a jump bar.

Jumps_After_Current_Record

Hit jumps on a jump bar are incremented according to the “records per page” value that a user selects on a search page. The *Jumps_After_Current_Record* variable specifies the maximum number of hit jumps that will display after the currently selected hit jump (the currently selected hit jump will have a different background color and will not be enabled as a link; see [Selected_Background_Color](#) on [page 6-6](#) for more information about specifying the background color of the currently selected hit jump). Enter the maximum number of hit jumps you would like displayed after the currently selected hit jump after the *Jumps_Before_Current_Record=* variable. If nothing is entered after the *Jumps_Before_Current_Record=* variable, no hit jumps will display after the currently selected hit jump. Instead, an ellipsis image will display after the currently selected hit jump if there are subsequent hit pages.

The Previous button, the Next button, and the first and last hit jumps will always be displayed on a jump bar.

Background_Color

Enter a hexadecimal RGB color code after the *Background_Color=* variable to specify the background color of the jump bar (this does not apply to the currently selected hit jump; see [Selected_Background_Color](#) below). For example, if you wanted to make the background grey, you would enter *CCCCCC* (the hexadecimal color code for grey) after the *Background_Color=* variable. If nothing is entered after this variable, *CCCCFF* will be used as the default.

Selected_Background_Color

Enter a hexadecimal RGB color code after the *Selected_Background_Color=* variable to specify the background color of the currently selected hit jump. For example, if you wanted to make the background maroon, you would enter *990000* (the hexadecimal color code for maroon) after the *Selected_Background_Color=* variable. If nothing is entered after this variable, *990000* will be used as the default.

Font_Color

Enter a hexadecimal RGB color code after the *Font_Color=* variable to specify the font color of the currently selected hit jump. For example, if you wanted to make the font color white, you would enter *FFFFFF* (the hexadecimal color code for white) after the *Font_Color=* variable. If nothing is entered after this variable, *FFFFFF* will be used as the default.

The font color of the hit jumps that are not currently selected on the jump bar is determined by the *L/INK* variable in the [Title_Page] stanza.

Search Page Overview

Unlike the .htm pages, the search pages are not made up of stand alone html pages. These pages are generated by the WebVoyage program. Most of the contents of the page can be edited in various ways, but some aspects of the pages cannot be changed. Instead of an html file that contains all of the information about the page, the options for customizing the page are contained in separate configuration (.ini) files. These pages are customized by replacing the image files with new files and altering the options in the .ini files.

The Search pages are made up of a number of entries in .ini files and many separate images. Many of the images are similar from one search page to the next, but a number of the images and links depend on which type of search is currently being performed. All of these are outlined below.

Configuring Available Searches

You can control which types of searches you want to make available to patrons by entering only the types of searches that you want to appear in the [Valid Tabs] stanza of the search.ini file (/m1/voyager/xxxdb/etc/webvoyage). The searches will appear from left to right on-screen in the order that they are listed in the [Valid Tabs] stanza. [Figure 6-2](#) shows a sample [Valid Tabs] stanza in a search.ini file. [Figure 6-3](#) shows the search tabs on the WebVoyage search page produced by the sample [Valid Tabs] stanza.

Each line in the list contains the name of the search. The first tab (search type) listed will appear on the left-hand side and will be the default. You must use the following terms to create the list:

- Simple Search
- Boolean Search
- Course Reserve
- Geospatial Search

If a term is not entered into the list, that tab will not display.

The Search tab *display* names themselves are defined by the `Tab_Text` variable in each of their respective html page stanzas of the `opac.ini` file. [Table 6-2](#) details the configuration stanzas for the types of searches.

Table 6-2. Search Type Configuration Stanzas

| Search Type | Configuration stanza in opac.ini |
|-------------------|----------------------------------|
| Simple | [Combined_Search_Page] |
| Boolean (Builder) | [Boolean_Search_Page] |
| Course Reserve | [Course_Reserve_Search_Page] |
| Geospatial (Map) | [Map_Search_Page] |

NOTE:

When simultaneously searching Voyager and Z39.50 databases, a default Simultaneous Search `search.ini` determines the search options available. Results then display based on the WebVoyage display of the Local folder. For the default Simultaneous Search `search.ini`, see [Simultaneous Search search.ini file on page 6-69](#).

```
[Valid Tabs]
Simple Search
Boolean Search
Course Reserve
Geospatial Searching
```

Figure 6-2. Sample [Valid Tabs] Stanza



Figure 6-3. Search Tabs

Configuring available Simple Searches

The [Simple_Search_Codes] stanza of the search.ini file (/m1/voyager/xxxdb/etc/webvoyage) allows you to specify what search options will appear in the **Find Results in** list on the Simple Search page, and what type of search will be performed by each option.

Each line of the stanza defines a single entry in the Find Results in list. Each line must follow the form:

Line Number=Search_Code Search_Description

There must be at least one space between the Search Code and the Search Description.

```
[Simple_Search_Codes]
Counter=10
1=FT Keyword Search
2=AUTH+ Author Browse
3=TALL Left Anchored Title
4=CALL+ Call Number Browse
5=SUBJ+ Subject Browse
6=KEY Journal Title Keyword
7=CMD Command Line Search
8=008D Date Search (Left Anchored)
9=NAME Name Title
10=XXXX Test for XXXX Index
```

Figure 6-4. Sample [Simple_Search_Codes] Stanza

The Search Description is the text that will appear in the drop-down list on the Simple Search page. You can enter any text that you want to display; however, if you enter more than about 70 characters, the description will not display entirely onscreen.

The Search Code must be one of the codes listed on either the Search Definitions, Composite Definitions or Keyword Searches dialogs (in the Voyager System Administration module). In addition to the search codes on those dialogs, you may use the codes listed in [Table 6-3](#).

Table 6-3. Additional Search Codes

| Code | Corresponding Search |
|-----------|--------------------------|
| FT | Full-Text Keyword Search |
| CMD or BT | Command Search |

To further modify search codes, you may use the following:

- Enter a **plus (+)** sign following the Search Code. This will turn that particular search into a Browse search. For example, entering **AUTH+** would specify an Author Browse search type.
- Enter an **asterisk (*)** sign following the Search Code. This will cause that search to be performed with Relevance. For example, entering **CMD*** will indicate a Command Search with Relevance search type.

-
- Enter a ^ symbol to make the logical operator between the terms in a *boolean keyword* search an and (instead of the keyword search being performed as a phrase). May be used in conjunction with the * operator.
 - Enter a | symbol to make the logical operator between the terms in a *boolean keyword* search an or (instead of the keyword search being performed as a phrase). May be used in conjunction with the * operator.
 - Enter an At (@) sign following a Headings search code to make the Headings search a Headings Keyword search.

NOTE:

You may wish to include a note in the search name in the search.ini, or in the search instructions to include boolean operators to string search terms together for Headings Keyword Searches. This will help avoid patrons getting unexpected results.

Do not combine other search type modifiers (+ or *) with the Headings Keyword modifier (@).

Limits placed against search terms in Headings Keyword Searches are ignored.

Headings Keyword Searches display on the Search History page, and are eligible for saved searches and SDI, but are not available with the Combined Builder Searches feature.

Default Search type

Set the default search type (i.e., which search tab will appear first) by making that page the first in the list of search pages in the [Valid Tabs] stanza of the search.ini file. WebVoyage will then use the search type stanza for that search as the search page layout.

Make the desired search types available in the [Valid_Tabs] stanza of the search.ini file. Configure each search type in the corresponding stanza. When you select a different search by clicking that searches search tab, WebVoyage will use the corresponding search type stanza for the page layout. [Table 6-4](#) shows the individual search tab configuration stanzas.

Each search type also uses additional configuration, not performed in these stanzas. Complete search type page configuration follows in [Customizing Search Pages on page 6-12](#).

Table 6-4. Search Tab Configuration Stanzas

| Search Type | Stanza | See |
|------------------|---|---|
| Simple | [Combined_Search_Page] | Editing the Simple Search Page on page 6-14 |
| Builder | [Boolean_Search_Page] | Editing the Builder Search (Boolean Search) Page on page 6-21 |
| Course Reserve | Drop-Down interface:
[Course_Reserve_Search_Page] | Editing the Course Reserve Search Page on page 6-56 |
| | Browse interface:
[Course_Reserve_Location],
[Course_Reserve_Alpha] and related stanzas | Course Reserve Browse interface on page 5-15 |
| Map (Geospatial) | [Map_Search_Page]

You must purchase the Voyager Geospatial extension product to use map searching. | Overview of the Map Search Page on page 16-1 |

[Table 6-5](#) details the general search page configuration. For configuration of individual search type options, see the sections on configuring those search types.

Table 6-5. Page Appearance Variables (Page 1 of 2)

| Variable | Description | Notes | Example |
|------------|---|---|-----------------------------|
| Background | Sets the background of page to a graphic. Overrides the bgcolor variable. | Include the path to the file from HTML directory. | Background=/images/bgnd.gif |
| Text | Controls the color of the text on a page. | You must use a hexadecimal rgb color code to specify a color.

Empty variable results in text color defaulting to the settings of the web browser | Text=ffffff |

Table 6-5. Page Appearance Variables (Page 2 of 2)

| Variable | Description | Notes | Example |
|-------------------------|---|--|----------------|
| bgcolor | Controls the color of the background of a page. | You must use a hexadecimal rgb color code to specify a color.
Empty variable results in color defaulting to the settings of the web browser | bgcolor=ffffff |
| LINK | Controls the color of unclicked (unvisited) links | You must use a hexadecimal rgb color code to specify a color.
Empty variable results in color defaulting to the settings of the web browser | LINK=ffffff |
| VLINK | Controls the color of clicked (visited) links | You must use a hexadecimal rgb color code to specify a color.
Empty variable results in color defaulting to the settings of the web browser | VLINK=ffffff |
| ALINK | Controls the color of links as they are being clicked on a page | You must use a hexadecimal rgb color code to specify a color.
Empty variable results in color defaulting to the settings of the web browser | ALINK=ffffff |
| Top and Bottom Toolbars | Links to other pages from the top and bottom toolbars | See Top and Bottom Toolbar Configuration on page 4-12 | |
| Header | Graphic at the top of the page, above the top toolbar | See The header.htm File on page 4-17 | header.htm |
| Footer | Graphic at the bottom of the page, below the bottom toolbar | See The footer.htm File on page 4-18 | footer.htm |

Customizing Search Pages

Simple Searches, Builder Searches and Course Reserve Searches can be customized individually.

You can designate whether you want Builder searches to be relevance searches or regular searches. To specify relevance for a search, enter **Y** after the **BooleanRelevance** variable in the Search Dialog stanza of the opac.ini file. To turn off relevance, enter **N**.

For Simple Searches, you can establish specific searches that will be available through the **Find Results In** drop-down menu, including Keyword and Command searches. Simple Searches are configured in the **[Simple_Search_Codes]** stanza of the search.ini file.

You can also define the list of limits that appears on the Simple Search page. Each entry that you add to the list can be completely customized. Simple limits are established in the limits.ini file.

Search Dialog Stanza

The [Search Dialog] stanza allows you to define a number of options pertaining to searching.

```
[Search Dialog]
BooleanRelevance=N
SingleDisplay=True
Limits=True
```

Figure 6-5. Search Dialog Stanza of the opac.ini File

To specify whether a Search type is available to your patrons, you must change information in the [Valid Tabs] stanza of the search.ini file (see page 6).

Relevance

Your institution can choose to not display the relevance bars in the Title List for Boolean searches. To not display the relevance bars in the Index List, specify the following in the [Search Dialog] stanza:

1. Type *BooleanRelevance*, then an equals sign (=), followed by the letter *N* for no. If you want to display relevance, type the letter *Y* for yes. Each of these keys will default to *N* if the keys are absent or if nothing has been entered after them.

For additional information about different search types, see page 37.

Automatic Record Details Display

Your institution can have the Record Details automatically display for titles that have only one related record. To display the Record Details automatically, specify the following in the [Search Dialog] stanza:

1. Type *SingleDisplay*, then an equals sign (=), followed by the letter *Y* for yes or the letter *N* for no. If the *SingleDisplay=* variable is absent from the [Search Dialog] stanza, or if nothing is entered after it, this variable defaults to *N*.

Search Limits

Your institution can specify whether or not limits can be used for searches performed in WebVoyáge. To activate the ability to use limits on searches performed in WebVoyáge, type *True* after the *Limits=* variable (*Limits=True*). To deactivate the ability to use limits on searches performed in WebVoyáge, type *False* after the *Limits=* variable (*Limits=False*).

Automatic Record Details Display

Your institution can have the Record Details automatically display for titles that have only one related record. To display the Record Details automatically, specify the following in the [Search Dialog] stanza:

1. Type *SingleDisplay*, then an equals sign (=), followed by the letter *Y* for yes or the letter *N* for no. If the *SingleDisplay=* variable is absent from the [Search Dialog] stanza, or if nothing is entered after it, this variable defaults to *N*.

Editing the Simple Search Page

You can perform index (non-builder, non-course reserve) searches from the Simple Search Page. [Figure 6-6](#) shows a sample Simple Search Page.

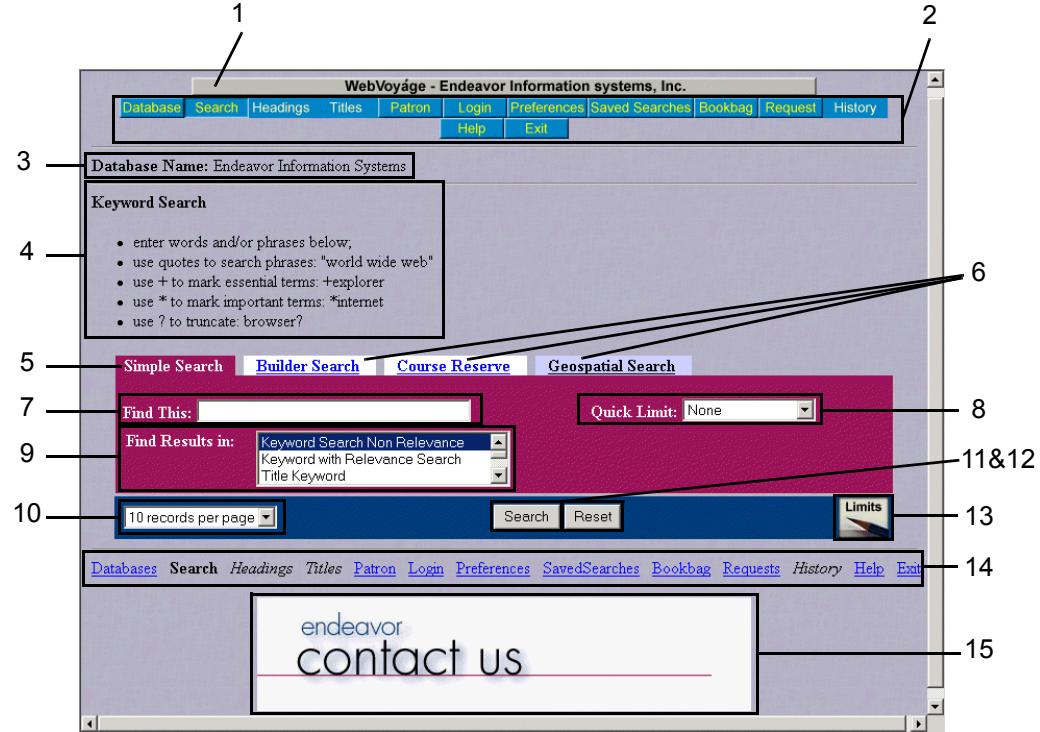


Figure 6-6. Simple Search Page

In addition to the general Page Appearance components of the Simple Search page (see [Table 6-5](#)), you can configure the components detailed in [Table 6-6](#).

[Table 6-6](#) also details the callouts in [Figure 6-6](#).

Table 6-6. Simple Search Page Configuration Reference (Page 1 of 4)

| # | Description | Configured in |
|---|---------------------------|---|
| 1 | WebVoyage Banner (header) | /m1/voyager/xxxdb/etc/webvoyage/header.htm
The header.htm File on page 4-17 |
| 2 | Top toolbar | [Toolbar_Top] stanza of opac.ini
Top and Bottom Toolbar Configuration on page 4-12 |
| 3 | Database Name | Voyager System Administration>System>Default Address>Library Name field |
| 4 | Search page instructions | /m1/voyager/xxxdb/etc/webvoyage/webvoyageDisplayDirectory/ht_combinedsearch.htm |

Table 6-6. Simple Search Page Configuration Reference (Page 2 of 4)

| # | Description | Configured in |
|----|--|--|
| 5a | Active tab color | ActiveTabColor= variable of the [Combined_Search_Page] stanza in the opac.ini file.
For more (on this callout group), see Shared Search Page Layout Components on page 6-1 |
| 5b | Tab text | Tab_Text= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 5c | Active font color | ActiveFontColor= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 6a | Inactive tab color | InActiveTabColor= variable of the corresponding stanza in the opac.ini file.
For more (on this callout group), see Shared Search Page Layout Components on page 6-1 |
| 6b | Tab text | Tab_Text= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 6c | Inactive font color | InActiveFontColor= variable of the corresponding stanza in the opac.ini file. |
| 7a | Search term field label | SearchBoxText= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 7b | Search term box size on page | InputBoxSize= variable of the [Combined_Search_Page] stanza in the opac.ini file.
Does not limit the total number of characters that can be entered into each field. If number of characters typed into the field is greater than the size of the input box, the characters in the box will scroll to the left.
If nothing is entered after the InputBoxSize variable, the default length will be 37 characters. |
| 7c | Search term field maximum number of characters | InputBoxMaxLength= variable of the [Combined_Search_Page] stanza in the opac.ini file.
This length does not place any limitations on how many characters display onscreen in the search term field
If nothing is entered after the InputBoxMaxLength variable, the default length will be 37 characters. |

Table 6-6. Simple Search Page Configuration Reference (Page 3 of 4)

| # | Description | Configured in |
|-----|---|--|
| 8a | Enable Quick Limits? | DisplayQuickLimitsDropDown= variable of the [Combined_Search_Page] stanza in the opac.ini file.
For more, see Quick Limits for Simple Searches on page 6-111

NOTE:
Only available for Simple Searches |
| 8b | Quick Limits available | The [Simple_Limits] stanza of limits.ini file |
| 8c | Quick Limits field label | The QuickLimitsText= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 8d | Quick Limits field size | The QuickLimitDropDownSize= variable of the [Combined_Search_Page] stanza in the opac.ini file.
For more, see Quick Limits for Simple Searches on page 6-111 |
| 9a | Indexes searched | The [Simple_Search_Codes] stanza of the search.ini file.
The search codes themselves are configured in Voyager System Administration>>Search |
| 9b | Indexes searched label | The FindResultsText= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 9c | Indexes searched box size (number of rows) | The SearchTypeDropDownSize= variable of the [Combined_Search_Page] stanza in the opac.ini file. <ul style="list-style-type: none"> • 0 displays list as a set of radio buttons. • 1 displays the list to display as a drop-down list with single entry displayed at a time • 2 or above displays a box with that number of rows. If number of search type options exceeds the number in the SearchTypeDropDownSize variable, the search box includes scroll bars so patrons can access the remaining options. |
| 9d | Search style (layout of Simple Search Tab fields) | The SearchTypeStyle= variable of the [Combined_Search_Page] stanza in the opac.ini file.
Enter a number between 1 and 3.
See Figures 6-8 through 6-10 starting on Page 6-20
Default= 1 |
| 10a | Records Per Page drop-down items | The 1, 2, 3, and 4 variables in the [Records_Requested] stanza in opac.ini file. |

Table 6-6. Simple Search Page Configuration Reference (Page 4 of 4)

| # | Description | Configured in |
|-----|---------------------------|---|
| 10b | Records Per Page label | The Description= variable of the [Records_Requested] stanza in the opac.ini file. |
| 11 | Submit search button text | The SubmitButton= variable of the [Combined_Search_Page] stanza in the opac.ini file. |
| 12a | Reset search button text | The ResetButton= variable of the [Combined_Search_Page] stanza in the opac.ini file.
Clears all free-text fields and resets drop-down boxes |
| 12b | Clear search button text | The ClearButton= variable of the [Combined_Search_Page] stanza in the opac.ini file.

NOTE:
This button is not pictured in Figure 6-6 on page 6-15 . Button only appears after a search with no results is performed. |
| 13a | Set limits button | /m1/voyager/xxxdb/webvoyage/html/images/limit.gif

Only appears if the Limits= variable in the Search_Dialog stanza of the opac.ini file is set to True. |
| 13b | Clear limits button | /m1/voyager/xxxdb/webvoyage/html/images/clear.gif

NOTE:
This button is not pictured in Figure 6-6 on page 6-15 . Button only appears if limits are set on the Search Limits page (and the Limits= variable in the Search_Dialog stanza of the opac.ini file is set to True). |
| 14 | Bottom toolbar | The [Toolbar_Bottom] stanza of opac.ini file
Top and Bottom Toolbar Configuration on page 4-12 |
| 15 | Footer | /m1/voyager/xxxdb/webvoyage/html/images/footer.htm
The footer.htm File on page 4-18 |

The **Simple Search Page** is configured in the [Combined_Search_Page] stanza (see [Figure 6-7](#)).

```
Line#
1 [Combined_Search_Page]
2 Background=
3 Text=
4 BGCOLOR=
5 LINK=
6 VLINK=
7 ALINK=
8 Tab_Text=
9 ActiveTabColor=9F175E
10 InactiveTabColor=003F7C
11 ActiveFontColor=FFFFFF
12 InactiveFontColor=FCF7EA
13 SubmitButton=Search
14 ClearButton=Clear
15 ResetButton=Reset
16 SearchBoxText=Find This:
17 QuickLimitsText=Quick Limit:
18 FindResultsText=
19 QuickLimitDropDownSize=
20 DisplayQuickLimitsDropDown=T
21 SearchTypeDropDownSize=
22 SearchTypeStyle=1
23 InputBoxSize=40
24 InputBoxMaxLength=100
```

Figure 6-7. Sample [Combined_Search_Page] stanza

Figures [6-8](#) through [6-10](#) illustrate the three Search Style types.

WebVoyage - Endeavor Information systems, Inc.

Database Search Headings Titles Patron Login Preferences Saved Searches Bookbag Request History Help Exit

Database Name: Endeavor Information Systems

Simple Search Builder Search Course Reserve Geospatial Search

Find This: Find Results in: Keyword Search Non Relevance Quick Limit: None
 Keyword with Relevance Search Title Keyword

10 records per page

[Databases](#) [Search](#) [Headings](#) [Titles](#) [Patron](#) [Login](#) [Preferences](#) [SavedSearches](#) [Bookbag](#) [Requests](#) [History](#) [Help](#) [Exit](#)

Figure 6-8. Search Type Style 1 (default)

WebVoyage - Endeavor Information systems, Inc.

Database Search Headings Titles Patron Login Preferences Saved Searches Bookbag Request History Help Exit

Database Name: Endeavor Information Systems

Simple Search Builder Search Course Reserve Geospatial Search

Find This: Find Results in: Keyword Search Non Relevance Quick Limit: None
 Keyword with Relevance Search Title Keyword

10 records per page

[Databases](#) [Search](#) [Headings](#) [Titles](#) [Patron](#) [Login](#) [Preferences](#) [SavedSearches](#) [Bookbag](#) [Requests](#) [History](#) [Help](#) [Exit](#)

Figure 6-9. Search Type Style 2 (SearchTypeStyle=2)

WebVoyage - Endeavor Information systems, Inc.

Database Search Headings Titles Patron Login Preferences Saved Searches Bookbag Request History Help Exit

Database Name: Endeavor Information Systems

Simple Search Builder Search Course Reserve Geospatial Search

Find This: Quick Limit: None
 Find Results in: Keyword Search Non Relevance Keyword with Relevance Search Title Keyword

10 records per page

[Databases](#) [Search](#) [Headings](#) [Titles](#) [Patron](#) [Login](#) [Preferences](#) [SavedSearches](#) [Bookbag](#) [Requests](#) [History](#) [Help](#) [Exit](#)

Figure 6-10. Search Type Style 3 (SearchTypeStyle=3)

Endeavor Information Systems, Inc.
See notice on first page

Editing the Builder Search (Boolean Search) Page

You can perform builder (boolean) searches, combining search terms using boolean operators (and, or, not) from the Builder Search page. [Figure 6-11](#) shows a sample Builder Search page.

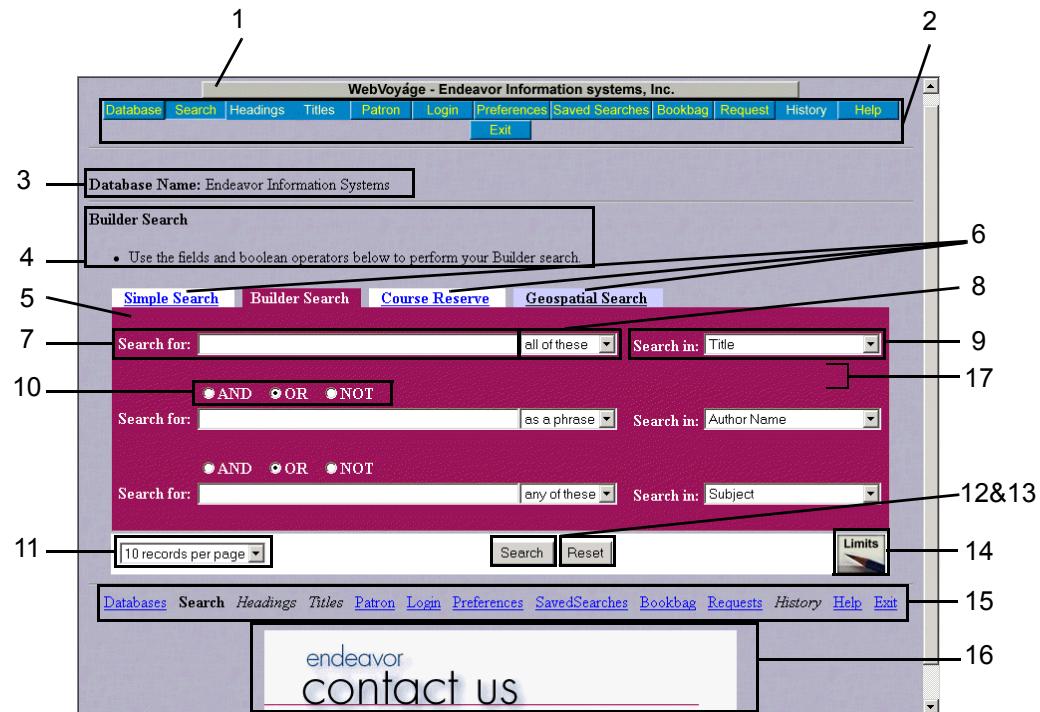


Figure 6-11. Builder Search Page

In addition to the general Page Appearance components of the Builder Search page (see [Table 6-5](#)), you can configure the components detailed in [Table 6-7](#).

[Table 6-7](#) also details the callouts in [Figure 6-11](#).

Table 6-7. Builder Search Page Configuration Reference (Page 1 of 5)

| # | Description | Configured in |
|---|----------------------------|--|
| 1 | Web-Voyage Banner (header) | /m1/voyager/xxxdb/webvoyage/header.htm
For more, see The header.htm File on page 4-17 |

Table 6-7. Builder Search Page Configuration Reference (Page 2 of 5)

| # | Description | Configured in |
|----|------------------------------|--|
| 2 | Top toolbar | [Toolbar_Top] stanza of opac.ini
For more, see Top and Bottom Toolbar Configuration on page 4-12 |
| 3 | Database Name | Voyager System Administration>System>Default Address>Library Name field
For more, see the Voyager System Administration User's Guide |
| 4 | Search page instructions | /m1/voyager/xxxdb/etc/webvoyage/webvoyageDisplayDirectory/ht_buildersearch.htm |
| 5a | Active tab color | ActiveTabColor= variable of the [Boolean_Search_Page] stanza in the opac.ini file.
For more (on this callout group), see Shared Search Page Layout Components on page 6-1 |
| 5b | Tab text | Tab_Text=variable of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 5c | Active font color | ActiveFontColor= variable of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 6a | Inactive tab color | InActiveTabColor= variable of the corresponding stanza in the opac.ini file.
For more (on this callout group), see Shared Search Page Layout Components on page 6-1 |
| 6b | Tab text | Tab_Text= variable of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 6c | Inactive font color | InActiveFontColor= variable of the corresponding stanza in the opac.ini file. |
| 7a | Number of search fields | Numsets= variable of the [Boolean_Search_Page] stanza in the opac.ini file.
Must be between 1 and 20 |
| 7b | Search term field label | Search_For= variable of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 7c | Search term box size on page | InputBoxSize= variable of the [Boolean_Search_Page] stanza in the opac.ini file. |

Table 6-7. Builder Search Page Configuration Reference (Page 3 of 5)

| # | Description | Configured in |
|----|--|--|
| 7d | Search term field maximum number of characters | <p>InputBoxMaxLength= variable of the [Boolean_Search_Page] stanza in the opac.ini file.</p> <p>This length does not place any limitations on how many characters display onscreen in the search term field</p> <p>If nothing is entered after the InputBoxMaxLength variable, the default length will be 37 characters.</p> |
| 8a | Default search term option in drop-down | <p><i>nth</i>_SearchGroup= variable of the [Boolean_Search_Page] stanza in the opac.ini file.</p> <p><i>nth</i> is the position in the search field row sequence (the total number determined by 7a of this table). For example: 1st_SearchGroup=</p> <ul style="list-style-type: none"> • Entering a11 sets the default to AnyofThese= text • Entering as sets the default to AsAPhrase= text • Entering any sets the default to AllofThese= text <p>Must have as many sets of these as the number entered in the Num-sets= variable.</p> |
| 8b | Search term options text | AnyofThese=, AsAPhrase=, and AllofThese= variables of the [Boolean_Search_Page] stanza in the opac.ini file. The variables names themselves cannot be changed or appended. |
| 9a | Index searched (Search in: drop-down) | <p>Voyager System Administration>Search>Indexes - Keyword Definitions.</p> <p>All keyword searches not suppressed from WebVoyage (except for JKEY) are available here.</p> <p>For more, see the Voyager System Administration User's Guide</p> |
| 9b | Index searched label | Search_In= variable of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 9c | Index searched selection default | <p><i>nth</i>_WithinField= variable of the [Boolean_Search_Page] stanza in the opac.ini file.</p> <p><i>nth</i> is the position in the search field row sequence (the total number determined by 7a of this table). For example: 2nd_WithinField=</p> <p>Enter the keyword Search Name, exactly as it appears in Voyager System Administration>Search>Indexes - Keyword Definitions, of the desired default choice.</p> |

Table 6-7. Builder Search Page Configuration Reference (Page 4 of 5)

| # | Description | Configured in |
|-----|----------------------------------|--|
| 10a | Boolean operator default | <p><i>nth</i>_NextSetOper= variable of the [Boolean_Search_Page] stanza in the opac.ini file.</p> <p><i>nth</i> is the position in the search field row sequence before the operator set (the total number determined by 7a of this table). For example: 1st_NextSetOper= sets the default operator for a search including the first and second rows of search fields.</p> <p>Choices:</p> <ul style="list-style-type: none">• and• or• not <p>The final row in the sequence does not use a NextSetOper variable as it has no next set to interact with.</p> |
| 10b | Logical operator text | AND=, OR= and NOT= variables of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 11a | Records Per Page drop-down items | <p>The 1, 2, 3, and 4 variables in the [Records_Requested] stanza in opac.ini file.</p> <p>For more on this callout group, see Records Per Page Display Options on page 4-19</p> |
| 11b | Records Per Page label | Description= variable of the [Records_Requested] stanza in the opac.ini file. |
| 12 | Submit search button text | SubmitButton= variable of the [Boolean_Search_Page] stanza in the opac.ini file. |
| 13a | Reset search button text | <p>ResetButton= variable of the [Boolean_Search_Page] stanza in the opac.ini file.</p> <p>Clears all free-text fields and resets drop-down boxes</p> |
| 13b | Clear search button text | <p>ClearButton= variable of the [Boolean_Search_Page] stanza in the opac.ini file.</p> <p>NOTE:
This button is not pictured in Figure 6-6 on page 6-15. Button only appears after a search with no results is performed.</p> |

Table 6-7. Builder Search Page Configuration Reference (Page 5 of 5)

| # | Description | Configured in |
|-----|-------------------------------------|---|
| 14a | Set limits button | /m1/voyager/xxxdb/webvoyage/html/images/limit.gif
Only appears if the Limits= variable in the Search_Dialog stanza of the opac.ini file is set to True. |
| 14b | Clear limits button | /m1/voyager/xxxdb/webvoyage/html/images/clear.gif
NOTE:
This button is not pictured in Figure 6-6 on page 6-15 . Button only appears if limits are set on the Search Limits page (and the Limits= variable in the Search_Dialog stanza of the opac.ini file is set to True). |
| 15 | Bottom toolbar | [Toolbar_Bottom] stanza of opac.ini
For more, see Top and Bottom Toolbar Configuration on page 4-12 |
| 16 | Footer | /m1/voyager/xxxdb/webvoyage/html/images/footer.htm
For more, see The footer.htm File on page 4-18 |
| 17 | Blank lines between search row sets | StripBlankLines= variable of the [Boolean_Search_Page] stanza in the opac.ini file.
Set variable to: <ul style="list-style-type: none">• T to remove blank lines between search field sets• F to include blank lines between search field sets |

The [Boolean_Search_Page] stanza

The Builder Search Page is configured in the [Boolean_Search_Page] stanza (see [Figure 6-12](#)).

Line#

```

1  [Boolean_Search_Page]
2  Background=
3  Text=
4  BGCOLOR=
5  LINK=

```

Figure 6-12. Sample [Boolean_Search_Page] stanza

Line#

```
6  VLINK=
7  ALINK=
8  TableColor=
9  TableText=
10 Tab_Text=Builder Search
11 ActiveTabColor=#982848
12 InactiveTabColor=#606CC0
13 ActiveFontColor=#FFFFFF
14 InactiveFontColor=#FFFFFF
15 Search_For=Search for:
16 Search_In=Search in:
17 SubmitButton=Search
18 ClearButton=Clear
19 ResetButton=Reset
20 StripBlankLines=F
21 InputBoxSize=50
22 InputBoxMaxLength=100
23 NumSets=3
24 1st_SearchGroup=all
25 1st_WithinField=Title
26 1st_NextSetOper=or
27 2nd_SearchGroup=as
28 2nd_WithinField=Author Name
29 2nd_NextSetOper=or
30 3rd_SearchGroup=any
31 3rd_WithinField=Subject
32 AnyOfThese=any of these
```

Figure 6-12. Sample [Boolean_Search_Page] stanza (Continued)

| Line# | |
|-------|-------------------------|
| 33 | AllOfThese=all of these |
| 34 | AsAPhrase=as a phrase |
| 35 | AND=And |
| 36 | OR=Or |
| 37 | NOT=Not |

Figure 6-12. Sample [Boolean_Search_Page] stanza (Continued)

Search Field Sets

The NumSets, *_SearchGroup, *_WithinField and *_NextSetOper Fields allow you to configure the number of sets of search fields that will appear on the Builder (Boolean) search page. Each set of search fields includes the *Search For*, *Search In* and *boolean operator* (after it) fields.

Each field can be configured individually. For every field that appears onscreen, there must be one variable. This means that for each set of fields, there are three variables: *_SearchGroup, *_WithinField and *_NextSetOper.

Each set of variables begins with the same number and is numbered according to its position in the series. For example, the first set is made up of 1st_SearchGroup, 1st_WithinField and 1st_NextSetOper; the twentieth is made up of 20th_SearchGroup, 20th_WithinField and 20th_NextSetOper. All set numbers must be consecutive.

Combined Builder Search Configuration

Combined Search configuration consists of the following:

- [Enabling and Disabling Combined Builder Searches](#)
- [Customizing the Search History Page](#)
- [Enabling relevance ranking for Combined Builder Searches](#)

Enabling and Disabling Combined Builder Searches

You enable Combined Builder Searches in the CombinedSearches variable of the opac.ini file (/m1/voyager/xxxdb/etc/webvoyage). For the default CombinedSearches variable, see line 5 of [Figure 6-13](#).

- To enable Combined Builder Searches, set this variable to **y**.

-
- To disable Combined Builder Searches, set this variable to **N**.
-

Line#

```
1 [Search_History_Page]
2 Background=
3 Text=
4 -----Display Truncated-----
5 CombinedSearches=Y
6 Combine=Combine
7 Search=Search
8 msg1=You have not selected any searches to
      combine.
9 msg2=Search string cannot exceed 3,000
      characters. Please edit and retry your
      search.
```

Figure 6-13. Default [Search_History_Page] stanza of the opac.ini file

Customizing the Search History Page

You can customize the heading of the column containing the check boxes used to determine which searches are combined. This is done in the **Combine** variable of the **[Search_History_Page]** stanza of the **opac.ini** file (see line 6 of [Figure 6-13](#)). The text after this variable is the text of the heading of the **Combine** check box column, and the default is shown in [Figure 6-14](#).

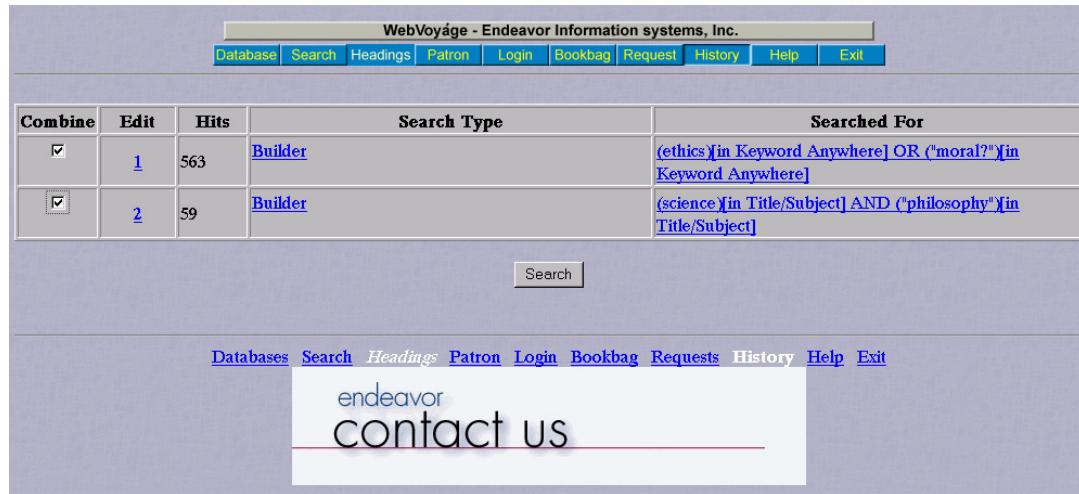


Figure 6-14. Search History page with Combined Searches enabled

You can customize the text of the button used to perform combined builder searches from the Search History page. This is done in the `Search` variable of the `[Search_History_Page]` stanza of the `opac.ini` file (see line 7 of [Figure 6-13](#)). The text after this variable is the text of the button used to perform combined builder searches, and the default is shown in [Figure 6-14](#).

Enabling relevance ranking for Combined Builder Searches

You can set the Combined Builder Searches feature to rank the results of combined builder searches by relevance. You set this in the `CombinedRelevance` variable of the `opac.ini` file (`/m1/voyager/xxxdb/etc/webvoyage`). For the default `CombinedSearches` variable, see line 5 of [Figure 6-15](#).

- To have combined builder search results ranked by relevance, set this variable to `Y` (the default).
- To have combined builder search results not ranked by relevance, set this variable to `N`. Search results will be ranked alphabetically by title.

Line#

| | |
|---|---------------------|
| 1 | [Search Dialog] |
| 2 | BooleanRelevance=N |
| 3 | SingleDisplay=True |
| 4 | Limits=True |
| 5 | CombinedRelevance=Y |

Figure 6-15. Default [Search Dialog] stanza

Configuring Saved Searches

The Saved Searches option is part of the MyOPAC functionality but can be enabled independently of the other MyOPAC options. Saved Searches allows patrons to save search strings to run on command (on all databases connected to in a given session) and/or automatically (if SDI is enabled and configured) at specified intervals, on the local database.

NOTE:

Saved Searches is disabled when remote patrons are logged in to UB-enabled databases. While logged in to that database, they will not be able to save search queries or run them.

Saved Search strings can be deleted or edited from the Search Query page at any time. The following sections detail configuring Saved Searches.

Use the following to configure Saved Searches.

- [Enabling Saved Searches](#)
- [Customizing the Search Queries Page](#)

The following steps are optional

- [Customizing the Saved Searches buttons](#)
- [Customizing the Save Search Query button in the Record Options section of the Titles Index page](#)
- [Customizing the Save Query button on the Patron Information page](#)

```
[Search_Questions_Page]
SaveOption=N
Search_Questions=Search Questions
SearchFor=Search For
SearchType=SearchType
Submit=Submit
NoSearches=You have no saved search queries.
```

Figure 6-16. Default [Search_Questions_Page] stanza in the opac.ini file

Enabling Saved Searches

Use the following to give patrons the ability to save search strings.

You enable/disable the Saved Searches in the `SaveOption` variable of the `[Search_Questions_Page]` stanza in the `opac.ini` file. The following is the default `SaveOption` variable:

`SaveOption=N`

The `SaveOption=` variable must be set to `Y` or `N`:

- To enable patrons to save search strings (turn Saved Searches on), set this variable to `Y`.
- To disable Saved Searches, set this variable to `N`.

Customizing the Search Queries Page

After enabling Saved Searches, you can customize the Search Queries page per your preferences. Do this from the `[Search_Questions_Page]` stanza of the `opac.ini` file. [Figure 6-17](#) contains an example of the `[Search_Questions_Page]` stanza. [Table 6-8](#) details the functions and descriptions of each variable in the stanza.

```
[Search_Questions_Page]
SaveOption=N
Search_Questions=Search Questions
SearchFor=Search For
SearchType=SearchType
Submit=Submit
NoSearches=You have no saved search queries.
```

Figure 6-17. Default [Search_Questions_Page] stanza

[Table 6-8](#) details the components of the [Search_Questions_Page] stanza.

Table 6-8. Components of the [Search_Questions_Page] stanza

| Variable Name | Description | Possible Values | Default Value |
|-------------------|---|-----------------|-----------------------------------|
| SaveOption= | Switches Saved Searches on and off | Y or N | N |
| Search_Questions= | Label for Search Questions page | Free text | Search Questions |
| SearchFor= | Label of column containing search strings | Free text | Search For |
| SearchType= | Label of column containing search types of saved search strings | Free text | Search Type |
| Submit= | Label of button used to update saved searches | Free text | Submit |
| NoSearches= | Message text displayed when no search strings are saved | Free text | You have no saved search queries. |

Customizing the Saved Searches buttons

The three graphics (.gif) files which serve as the Saved Searches buttons in the Top Toolbar section of WebVoyage are configured according to [Table 6-9](#).

To customize these buttons, edit the corresponding files in the /m1/voyager/xxxdb/webvoyage/html/images directory. Remember to save the default files as something else (as a backup) before editing them.

Table 6-9. Saved Searches Toolbar buttons

| Graphic name | Corresponding button |
|-------------------------|---|
| UpSavedSearch.gif | Displayed in top toolbar when not on Search Queries Page |
| DownSavedSearch.gif | Displayed in top toolbar when on Search Queries Page |
| DisabledSavedSearch.gif | Displayed in top toolbar when Search Queries Page not available (for example, when no search queries are saved) |

Customizing the Save Search Query button in the Record Options section of the Titles Index page

The text of the Save Search Query button in the Record Options section of the Titles Index page is set in the `SaveSearchQuery` variable of the [Mail_And_Requests] stanza of the `opac.ini` file.

The text following this variable displays on the save search queries button in the Record Options section of the Title Index page. To change the text on this button, enter the text you wish to display after the variable.

[Figure 6-18](#) shows the Search Query button in the Record Options section of the Titles Index page, based on the default `SaveSearchQuery` variable configuration.

| Record Options | | |
|--|---|--|
| Records | Select Download Format: <input type="button" value="Full Record"/> <input type="button" value="Format for Print/Save"/>
<input type="button" value="Save Search Query"/> | |
| <input type="radio"/> All on page
<input checked="" type="radio"/> Selected on page
<input type="radio"/> Selected all pages | Enter your email address: <input type="text"/>
<input type="button" value="Email"/> | |
| | Save results for later: <input type="button" value="Save To Bookbag"/> | |

Figure 6-18. Sample Save Search Query button in the Record Options section of the Titles Index page

Customizing the Save Query button on the Patron Information page

If your library is using Saved Searches, your WebVoyage will include a Saved Query button on the Patron Information page of WebVoyage, allowing patrons to access their Saved Searches from their Patron Information page.

To change the Save Query button on the Patron Information page of WebVoyage, edit the `savequerybutton.gif` file in the `/m1/voyager/xxxdb/webvoyage/html/images` directory. Remember to save the default `savequerybutton.gif` as something else (as a backup) before editing it. [Figure 6-19](#) shows the default Save Query button.

Button alternate (Mouse-Over) text

Set the alternate (mouse-over) text of the **Saved Searches** button in the `SavedSearches_Button_Alt_Text` variable of the `[Patron_Info_Page]` stanza of the `opac.ini` file.

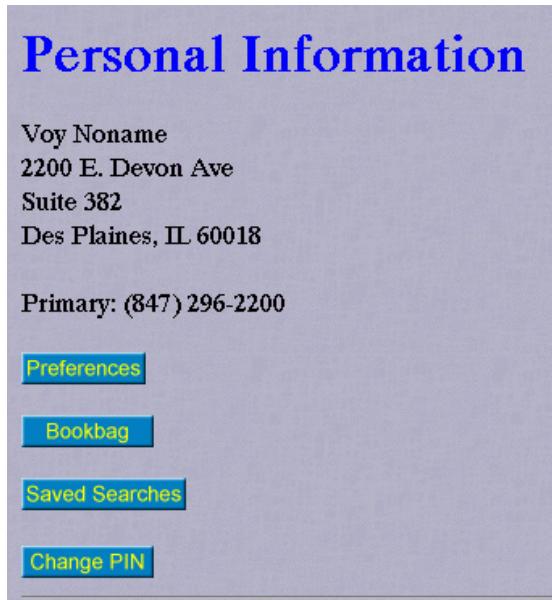


Figure 6-19. Sample Save Query button on the Patron Information page

If you want to enable SDI, allowing Voyager to perform saved searches (on the local database) automatically at set intervals, and E-mail the results to patrons, go to the [Configuring SDI options on page 6-36](#).

If you do not want to enable SDI, allowing patrons to run saved search queries only on command, go to [Using Saved Searches/SDI on page 5-36](#).

Selective Dissemination of Information (SDI)

SDI is a component of MyOPAC, and Saved Searches must be enabled to use SDI. SDI allows patrons to choose intervals for each saved search query to be run automatically (on the local database) and the results emailed to them in the form of a URI. The intervals available to patrons are set on the Saved Search Queries page.

NOTE:

- Saved Searches must be enabled and configured before enabling SDI. For more information on enabling/configuring Saved Searches, see [Configuring Saved Searches on page 6-30](#).

-
- SDI does not work for course reserve searches.
 - SDI uses the E-mail address specified in the patron record.
 - Opacjob job number 2 (SDI Searches) must be run for SDI to run search queries. For more information on Opacjob, see “SDI Searches program” in the *Voyager Technical User’s Guide*.
 - Opacjob job number 2 (SDI Searches) must be set to run at least as often as the shortest SDI “run search every” interval. For example, in order for SDI to run a search query every day, Opacjob must be run every day.

Use the following to configure SDI:

- [Enabling SDI](#)
- [Configuring SDI options](#)
- [Customizing the search results URL page sent to patrons by SDI](#)

The following steps are optional.

- [Customizing the help text for SDI](#)

Enabling SDI

You enable/disable SDI in the SDIOption variable of the [SDI_Page] stanza in the opac.ini file, by setting the variable to Y. The following is the default SDIOption variable:

SDIOption=N

The SDIOption= variable must be set to Y or N:

- Setting this variable to Y enables SDI.
- Setting this variable to N disables SDI.

Configuring SDI options

[Figure 6-20](#) contains an example of the [SDI_Page] stanza. [Table 6-10](#) details the functions and descriptions of each variable in the stanza.

```
[SDI_Page]
SDIOption=N
RunSearchEvery=Run Search Every:
GetNewHits=Y
NewHits>New Hits
None=None
Daily=Daily
Weekly=Weekly
Bi-Weekly=Bi-Weekly
Monthly=Monthly
```

Figure 6-20. The default [SDI_Page] stanza of the opac.ini file**Table 6-10.** Components of the [SDI_Page] stanza

| Variable Name | Description | Possible Values | Default Value |
|-----------------|---|---|------------------|
| SDIOption= | Switches SDI on and off | Y or N | N |
| RunSearchEvery= | Heading of column listing options for SDI/saved search intervals | Free text | Run Search Every |
| GetNewHits= | Switches the E-mail search results only if new search result information exists on and off. | Y or N

Y enables option to send results of query to patron only if new search result information exists.

N Disables option to send results of query to patron only if new search result information exists (results are sent by SDI whenever saved searches are performed). | Y |

Table 6-10. Components of the [SDI_Page] stanza

| Variable Name | Description | Possible Values | Default Value |
|---------------|--|-----------------|---------------|
| NewHits= | Heading of column containing the Y/N (yes/no) drop-down to select/deselect E-mail search results only if new search result information exists option. Only available if GetNewHits= above is set to Y. | Free text | New Hits? |
| None= | Text in drop-down list box of the Run Search Every column corresponding to no automated search execution. | Free text | None |
| Daily= | Text in drop-down list box of the Run Search Every column corresponding to the E-mail results every day option. | Free text | Daily |
| Weekly= | Text in drop-down list box of the Run Search Every column corresponding to the E-mail results weekly option. | Free text | Weekly |
| Bi-Weekly= | Text in drop-down list box of the Run Search Every column corresponding to the E-mail results bi-weekly option. | Free text | Bi-Weekly |
| Monthly= | Text in drop-down list box of the Run Search Every column corresponding to the E-mail results Monthly option. | Free text | Monthly |

Customizing the search results URL page sent to patrons by SDI

The page(s) containing the URLs sent to patrons by SDI, based on the saved search queries is customizable. This is done in the `sdiemail.ini` file. This file is in the `/m1/voyager/xxxdb/ini` directory.

Components of the sdiemail.ini file

This file is in the /m1/voyager/xxxdb/.ini directory (see [Figure 6-21](#) for the default). Customize the sections of this file according to your preferences. [Figure 6-22](#) shows an email generated by SDI.

NOTE:

- Make sure that the Address= entry in the [Webvoyage_Server] stanza contains the correct address of the server WebVoyáge is running on. (For example: Address=11.111.111.90:7777 or Address=www.seekandfind.edu).
- Any fields in the [Email] stanza left blank will yield the default text.
- The 80 character maximum length per line restriction includes the variable name and “=” sign.
- The footer for this e-mail uses the emailf.cfg file (/m1/xxxdb/etc/webvoyage/local).

```
##NOTE 80 character max for length of lines.

[Email]
Subject=Search Updates Results
Body1=The following URL contains the results of your automatic Search
Body2=Updates. Clicking the link will take you directly to the
Body3=WebVoyáge titles index.
SearchString=Search for:
SearchType=Search Type:

[Webvoyage_Server]
Address=XXXX
```

Figure 6-21. Default sdiemail.ini file

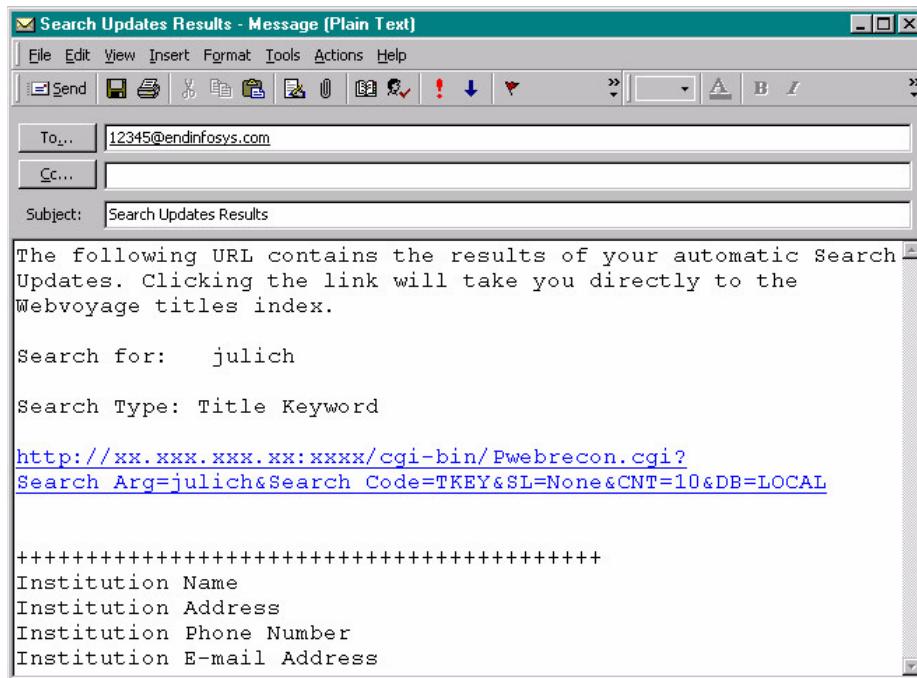


Figure 6-22. Sample e-mail containing url pointing to Saved Search results

Customizing the help text for SDI

The help text displayed for SDI is customizable. This is done in the `sdi.htm` file. This file can be found in the `/m1/voyager/xxxdb/webvoyage/html/help` directory.

Bookbag Configuration

NOTE:

Bookbag is disabled when remote patrons are logged in to UB-enabled databases. While logged in to that database, they will not be able to save records to their Bookbag, or makes changes to records in their Bookbag.

The following sections detail Bookbag configuration:

- [Customizing the Bookbag page](#)
- [Customizing Bookbag features in Record Options box of the Search Results page](#)

- [Customizing Bookbag messages](#)
- [Setting the name of the Bookbag page in the Title Bar](#)

Customizing the Bookbag page

The Bookbag page displays all of the records saved to a patron's bookbag, as well as the options for working with the saved records. The components of the Bookbag page are configured in the [Saved_Records_Page] stanza in the opac.ini file. This is also where the Bookbag feature is enabled.

Also note that if there is no information in the appropriate fields in the record, the information for those fields will not display on the Bookbag page.

- For author information to appear on the Bookbag page, at least one of the 1xx fields must be populated in the record saved to the Bookbag.
- For title information to appear on the Bookbag page, at least one of the 240, 242, or 245 fields must be populated in the record saved to the Bookbag.
- For publication date information to appear on the Bookbag page, the 260c field must be populated in the record saved to the Bookbag.

[Figure 6-23](#) shows a sample Bookbag page.

WebVoyage - Endeavor Information systems, Inc.

| Delete? | author | title | publisher_date | Save Date |
|--------------------------|--|--|----------------|------------------------|
| <input type="checkbox"/> | MacLaurin, Colin, 1698-1746. | Account of Sir Isaac Newton's philosophical discoveries. With a new introd. and index of names by L. L. Laundan. | 1968. | 2001-10-15
15:49:01 |
| <input type="checkbox"/> | Muralt, André de. | Idea of phenomenology : Husserlian exemplarism / André de Muralt ; translated by Garry L. Breckon. | 1974. | 2001-10-18
16:59:17 |
| <input type="checkbox"/> | Edie, James M. | Invitation to phenomenology; studies in the philosophy of experience. Edited with an introd. by James M. Edie. | 1965. | 2001-10-18
16:59:17 |
| <input type="checkbox"/> | Langer, Monika M. | Merleau-Ponty's Phenomenology of perception : a guide and commentary / Monika M. Langer. | c1989. | 2001-10-18
16:59:18 |
| <input type="checkbox"/> | Tibbetts, Paul. | Perception; selected readings in science and phenomenology. Edited with an introd. by Paul Tibbetts. | [1969] | 2001-10-18
16:59:18 |

Record Options

Select Download Format:

Figure 6-23. Sample Bookbag page

[Figure 6-24](#) shows the variables of the default [Saved_Records_Page] stanza.

```
[Saved_Records_Page]
SaveRecords=N
Background=
Text=
BGCOLOR=
Delete?=Delete?
SaveDate=SaveDate
DeleteSavedRecords=Delete Selected Titles
ClearBookbag=Clear Bookbag
ClearBookbagConfirm=Clearing the book bag deletes all records. Do you want to
proceed?
```

Figure 6-24. Sample [Saved_Records_Page] stanza

[Figure 4-6](#) details the possible configurations of the variables in the stanza.

Table 6-11. Components of the [Saved_Records_Page] stanza in the opac.ini file

| Variable Name | Description | Possible Values | Default Value | Page Number Reference |
|---------------|---------------------------------|--|---------------|-----------------------|
| SaveRecords= | Enables or disables the Bookbag | Y or N
Y enables Bookbag
N disables Bookbag | N | N/A |
| Background= | Background graphic (or color) | Valid graphic file or hexadecimal RGB color code 000000 to ffffff. | None | |
| Text= | Text color | Hexadecimal RGB color code 000000 to ffffff | None | |

Table 6-11. Components of the [Saved_Records_Page] stanza in the opac.ini file

| Variable Name | Description | Possible Values | Default Value | Page Number Reference |
|-----------------------|--|---|------------------------|---|
| BGCOLOR= | Background color | Hexadecimal RGB color code 000000 to ffffff | None | |
| Delete?= | Heading of the check box column of the Bookbag page used to designate records for deletion (upon clicking the Delete button) | Free text | Delete? | See Delete? column of the Sample Bookbag page (Figure 6-23 on page 6-42) |
| SaveDate= | Heading of the column of the Bookbag page displaying the time and date each record was saved to the bookbag | Free text | Save Date | See Save Date column of the Sample Bookbag page (Figure 6-23 on page 6-42) |
| DeleteSave-dRecords= | Text of button used to delete selected records. | Free text | Delete Selected Titles | See Delete Selected Titles button of the Sample Bookbag page (Figure 6-23 on page 6-42) |
| ClearBookbag-Confirm= | Confirmation dialog box text displayed when deleting the entire contents of bookbag | Free text | See file | N/A |

Customizing the Bookbag button on the Patron Information page

If your library is using Bookbag, your WebVoyáge will include a Bookbag button on the Patron Information page of WebVoyáge, allowing patrons to access their Bookbag from their Patron Information page.

To change the Bookbag button on the Patron Information page of WebVoyáge, edit the `cartbutton.gif` file in the `/m1/voyager/xxxdb/webvoyage/html/images` directory. Remember to save the default `cartbutton.gif` as something else (as a backup) before editing it.

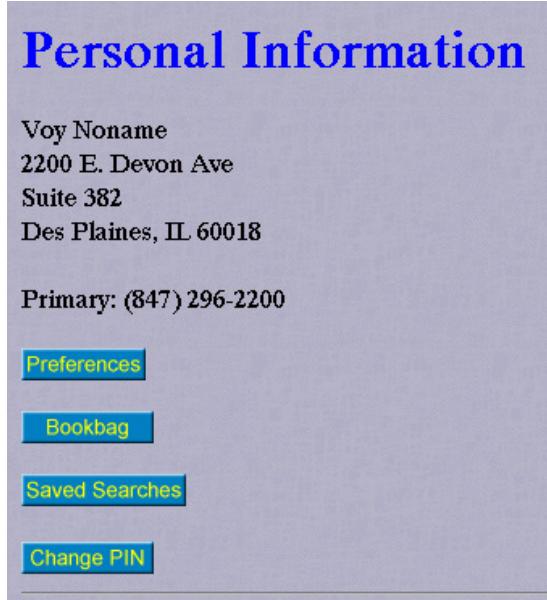


Figure 6-25. Sample Bookbag button on the Patron Information page

Button alternate (Mouse-Over) text

Set the alternate (mouse-over) text of the Bookbag button in the `Bookbag_Button_Alt_Text` variable of the `[Patron_Info_Page]` stanza of the `opac.ini` file.

Customizing buttons/linked text on the WebVoyáge toolbars

The **Bookbag** button and linked text on the Top and bottom Toolbars is configured in the `[Toolbar_Top]` and `[Toolbar_Bottom]` stanzas of the `opac.ini` file. As with the other toolbar buttons, the graphics files for these buttons are in the `/m1/voyager/xxxdb/webvoyage/html/images` directory.

[Figure 4-6](#) is an example of the `[Toolbar_Top]` stanza and [Figure 6-27](#) is an example of the `[Toolbar_Bottom]` stanza. These are followed by steps explaining how to configure the stanzas to display buttons for the Bookbag page. For more information on customizing the Top and/or Bottom Toolbars, see [Top and Bottom Toolbar Configuration](#) on [page 4-12](#).

Line

```
[Toolbar_Top]
1 Count=14

2 TextFont=WingDings
3 TextFontSize=
4 TextSeparator=||

5 Btn01Text=DATABASES
6 Btn01GraphicUp=UpDatabase.gif
7 Btn01GraphicDown=DownDatabase.gif
8 Btn01GraphicDisabled=DisabledDatabase.gif
9 Btn01Function=DATABASE
10 Btn01Link=
-----Display Truncated-----

11 Btn07Text=PREFERENCES
12 Btn07GraphicUp=UpPref.gif
13 Btn07GraphicDown=DownPref.gif
14 Btn07GraphicDisabled=DisabledPref.gif
15 Btn07Function=PREFERENCES
16 Btn07Text=Preferences
17 Btn07GraphicUp=UpPref.gif
18 Btn07GraphicDown=DownPref.gif

19 Btn08Text=BOOKBAG
20 Btn08GraphicUp=UpBookbag.gif
21 Btn08GraphicDown=DownBookbag.gif
22 Btn08GraphicDisabled=DisabledBookbag.gif
23 Btn08Function=BOOKBAG
```

Figure 6-26. Details of the [Toolbar_Top] stanza

Lines 19 through 23 of [Figure 4-6](#) illustrate the button variables and settings in the [Toolbar_Top] stanza. The referenced graphics files must be placed in the /m1/voyager/xxxdb/webvoyage/html/images directory with the other button graphics files. For an explanation of these variables, see [Table 4-4](#).

Table 6-12. Top Toolbar component descriptions

| Variable Name | Description | Possible Values | Default Value |
|-----------------------|--|-----------------------------|---------------------|
| BtnxxText= | Rollover text of Bookbag button, or text of link if not using a button | Free text | Bookbag |
| BtnxxGraphicUp= | Filename of Bookbag graphic in the “up” position | Valid .gif graphic filename | UpBookbag.gif |
| BtnxxGraphicDown= | Filename of Bookbag graphic in the “down” position | Valid .gif graphic filename | DownBookbag.gif |
| BtnxxGraphicDisabled= | Filename of Bookbag graphic when disabled | Valid .gif graphic filename | DisabledBookbag.gif |
| BtnxxFunction= | Points WebVoyage to correct page | BOOKBAG | BOOKBAG |

Line#

```
[Toolbar_Bottom]
1 Count=14

2 TextFont=
3 TextFontSize=
4 TextSeparator=||

5 Btn01Text=DATABASES
6 +Btn01GraphicUp=UpDatabase.gif
7 +Btn01GraphicDown=DownDatabase.gif
8 +Btn01GraphicDisabled=DisabledDatabase.gif
9 Btn01Function=DATABASE
10 Btn01Link=
-----Display Truncated-----

11 Btn07Text=PREFERENCES
12 +Btn07GraphicUp=UpPref.gif
13 +Btn07GraphicDown=DownPref.gif
14 +Btn07GraphicDisabled=DisabledPref.gif
15 Btn07Function=PREFERENCES

16 Btn08Text=BOOKBAG
17 +Btn08GraphicUp=UpBookbag.gif
18 +Btn08GraphicDown=DownBookbag.gif
19 +Btn08GraphicDisabled=DisabledBookbag.gif
20 Btn08Function=BOOKBAG
```

Figure 6-27. Details of the [Toolbar_Bottom] stanza

Lines 19 through 23 of [Figure 6-27](#) illustrate the button variables and settings in the [Toolbar_Top] stanza. The referenced graphics files must be placed in the /m1/voyager/xxxdb/webvoyage/html/images directory with the other button graphics files. For an explanation of these variables, see [Table 6-13](#).

Table 6-13. Top Toolbar component descriptions

| Variable Name | Description | Possible Values | Default Value |
|-----------------------|--|------------------------------|---------------------|
| BtnxxText= | Rollover text of Bookbag button, or text of link if not using a button | Free text | Bookbag |
| BtnxxGraphicUp= | Filename of Bookbag graphic in the “up” position | Valid .gif graphic file-name | UpBookbag.gif |
| BtnxxGraphicDown= | Filename of Bookbag graphic in the “down” position | Valid .gif graphic file-name | DownBookbag.gif |
| BtnxxGraphicDisabled= | Filename of Bookbag graphic when disabled | Valid .gif graphic file-name | DisabledBookbag.gif |
| BtnxxFunction= | Points WebVoyage to correct page | BOOKBAG | BOOKBAG |

Customizing Bookbag features in Record Options box of the Search Results page

There are three Bookbag features in the Record Options box on the Search Results page which are configurable (see [Figure 5-31](#) on [page 5-39](#)). This is done in the [Mail_And_Requests] stanza of the opac.ini file. [Figure 6-28](#) shows the Record Options box. [Figure 6-29](#) shows the default [Mail_And_Requests] stanza, and details the variables in this stanza.

[Figure 6-30](#) shows a “contents of Bookbag” email with the “Contents of Bookbag” Subject line, corresponding to line 3 of the default [Mail_And_Requests] stanza in [Figure 6-29](#). The structure of this email is configured in the email.cfg file.



Figure 6-28. Record Options box

Line#

| |
|---|
| [Mail_And_Requests] |
| Mail=Record Options |
| Format=Select Download Format: |
| Records=Records |
| All=All on Page |
| Selected=Selected On Page |
| SelectedRecsAllPages=Selected all Pages |
| Save=Format for Print/Save |
| EmailAddress=Enter your email address: |
| 1 SaveToBookbag1=Save results for later: |
| 2 SaveToBookbag2=Save To Bookbag |
| Email=Email |
| EmailSubject1=Opac %s Search for %s |
| 3 EmailSubject2=Contents of Bookbag |
| AuthorityRecEmailSubject=Authority Record |
| SaveSearchQuery=Save Search Query |

Figure 6-29. Default [Mail_And_Requests] stanza

Table 6-14. Details of Bookbag-related variables

| Variable Name | Description | Possible Values | Default Value |
|-----------------|---|-----------------|-------------------------|
| SaveToBookbag1= | Text of the heading next to the button used to save Bookbag | Free text | Save results for later: |

Table 6-14. Details of Bookbag-related variables

| Variable Name | Description | Possible Values | Default Value |
|-----------------|---|-----------------|---------------------|
| SaveToBookbag2= | Text of the button used to save records to the bookbag | Free text | Save To Bookbag |
| EmailSubject2= | Text of the subject line of emails sent to patron with the contents of Bookbag (from the record options of the Bookbag page). See Figure 6-30 | Free text | Contents of Bookbag |

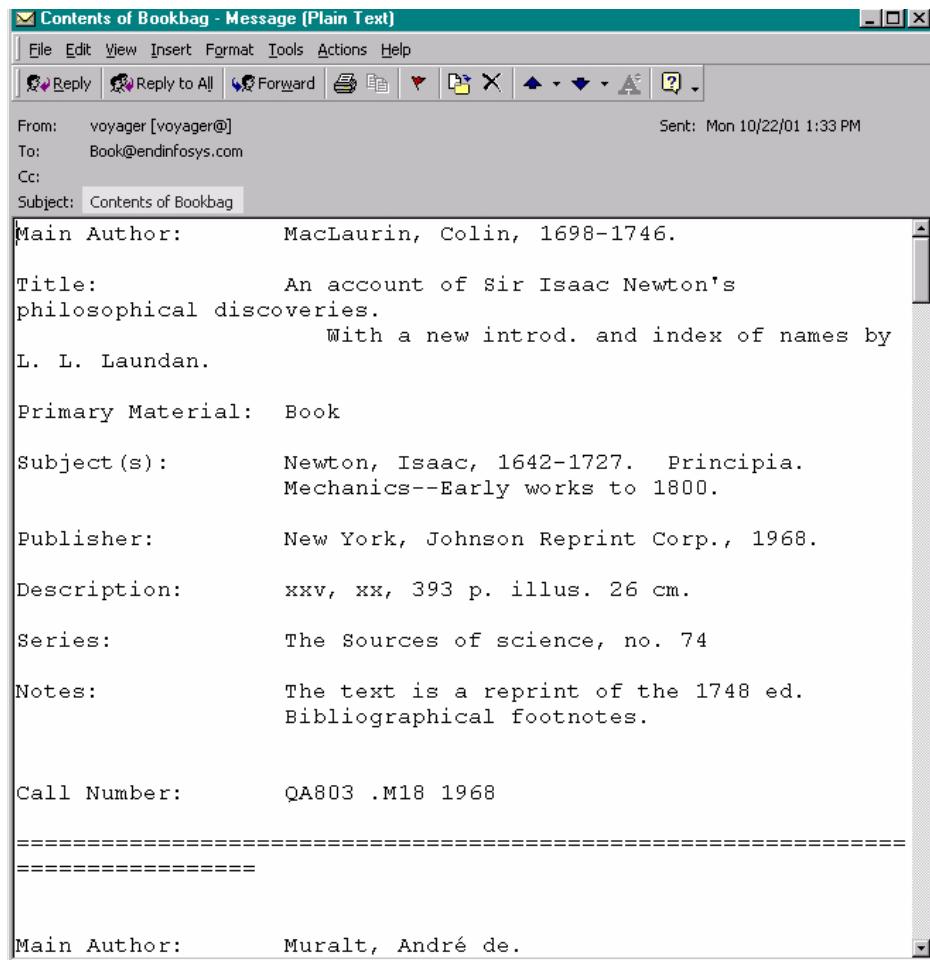


Figure 6-30. Example Contents of Bookbag email.

Customizing Bookbag messages

Bookbag uses seven messages, all of which are straightforward and can be customized per your preferences. This is done in the [Bookbag_Messages] stanza.

To modify the [Bookbag_Messages] stanza, change the text of the variables to your preference for each message.

[Figure 6-31](#) shows the default [Bookbag_Messages] stanza.

```
[Bookbag_Messages]
BookbagMessage1=Record Not Found or Has Been Deleted
BookbagMessage2=Database is no longer available
BookbagMessage3=No email address has been entered. Please enter an email
address.
BookbagMessage4=No records have been selected to save to the Bookbag
BookbagMessage5=To save to the Bookbag, you must login to your account
BookbagMessage6=%s records have been added to the Bookbag
BookbagMessage7=You may not save more than 1000 records to the Bookbag
```

Figure 6-31. Default [Bookbag_Messages] stanza

Setting the name of the Bookbag page in the Title Bar

To change the name of the Bookbag page in the Title Bar by modifying the [Title_Bar] stanza: Change the text after the Bookbag= variable in the [Title_Bar] stanza of the Opac.ini file. Choose the name of this title per your preferences, as it will display in the title bar. [Figure 6-32](#) shows a sample Bookbag variable.

```
Bookbag=View My Bookbag
```

Figure 6-32. Bookbag variable

Configuring Course Reserve Search Options

There are two available interface styles for Course Reserve searches:

- Drop-down interface- Contains drop-down lists of course reserve information such as instructor and department (see [Course Reserve Search Drop-Down Interface Configuration](#) on [page 6-54](#)).
- Browse interface- Contains abbreviated alphabetical browse lists of reserve items (see [Course Reserve Search Browse Interface Configuration](#) on [page 6-60](#))

Course Reserve Search Drop-Down Interface Configuration

The majority of the configuration for the Course Reserve drop-down interface is done in the [Course_Reserve_Search_Page] stanza of the opac.ini file (/m1/voyager/xxxdb/etc/webvoyageDisplayDirectory).

Setting the Course Reserve Display Type to Drop-Down

To set the Course Reserve interface type, configure the CourseReserveBrowse variable in the [Options] stanza of the opac.ini file (/m1/voyager/xxxdb/webvoyageDisplayDirectory).

- CourseReserveBrowse=N sets the course reserve interface to the drop-down style.

Enabling Drop-Down boxes and labels

Determine which categories of information are available to patrons by adding or removing text from the variables listed in [Table 6-15](#).

Table 6-15. Course Reserve Drop-Down Variables

| Variable | Drop-down box effected |
|------------|------------------------|
| Instructor | Instructor |
| Department | Department |
| Course | Course |
| Section | Section |

- To exclude a drop-down box from the Course Reserve Search page, remove all text after the variable (with the exception of the = symbol).

NOTE:

If you prefer not to delete any text from the stanza, you can exclude the drop-down from the page by commenting its variable out, instead of deleting the label text.

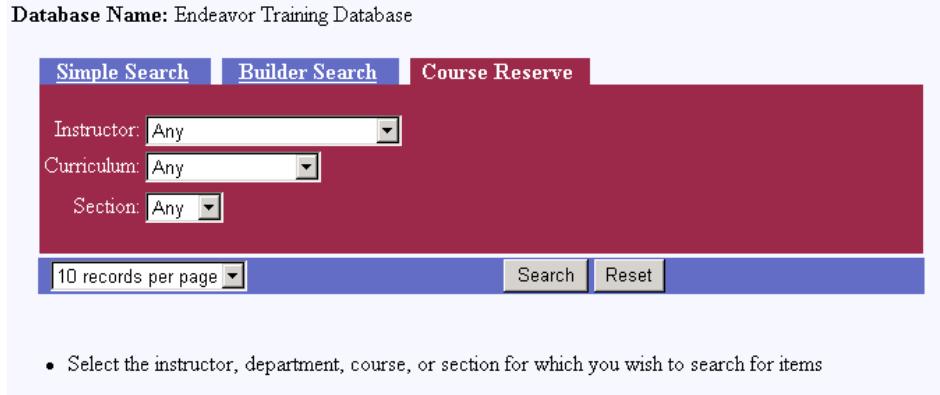
- If any text exists after the variable, that text displays as the label of the corresponding drop-down box.

For example, the example stanza in [Figure 6-33](#) would remove the course drop-down box from the Course Reserve Search page, and change the label of the department drop-down box (from the default of **Department:**) to **Curriculum:** (see [Figure 6-34](#)).

```
[Course_Reserve_Search_Page]
-----
Instructor=Instructor:
Department=Curriculum:
Course=
Section=Section:
```

Figure 6-33. Sample [Course_Reserve_Search_Page] stanza

Database Name: Endeavor Training Database



Simple Search | Builder Search | Course Reserve

Instructor: Any

Curriculum: Any

Section: Any

10 records per page | Search | Reset

- Select the instructor, department, course, or section for which you wish to search for items

Figure 6-34. Corresponding Course Reserve page

NOTE:

The reserve information from the Voyager Circulation Module determine the drop-down box contents, and related records.

Again, the same results can be attained by using the following as the `course` variable:

```
#Course=Course:
```

Informational text

Configure the informational text on the Course Reserve Search Page in the ht_coursereserve.htm file (/m1/voyager/xxxdb/etc/webvoyage/webvoyageDisplayDirectory). You can also change the position of this text in the [HelpPosition] stanza of the webvoyage.ini file.

Editing the Course Reserve Search Page

You can perform course reserve searches from the Course Reserve Search page. The Course Reserve Search page can use either the standard drop-down style, or a browse style (but not both).

[Figure 6-35](#) shows a sample Course Reserve search page in the drop-down interface style.

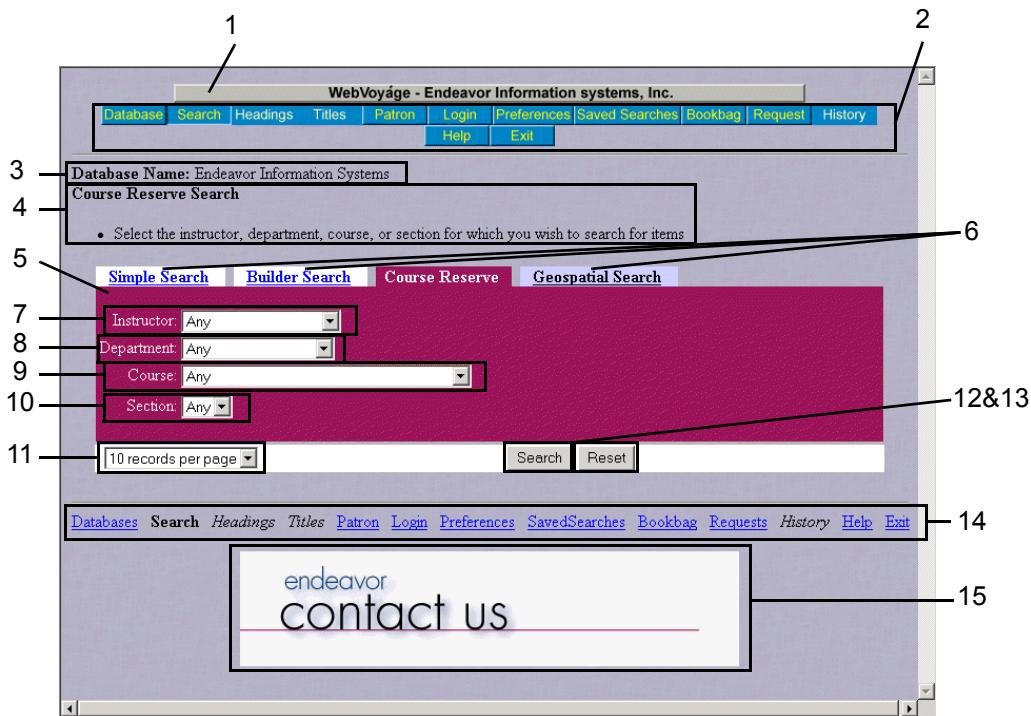


Figure 6-35. Course Reserve Search Page (drop-down interface)

In addition to the general Page Appearance components of the Course Reserve Search page (see [Table 6-5](#)), you can configure the components detailed in [Table 6-16](#).

[Table 6-16](#) also details the callouts in [Figure 6-35](#).

Table 6-16. Course Reserve Search Page Configuration Reference (Page 1 of 3)

| # | Description | Configured in |
|-----|-----------------------------------|---|
| 1 | WebVoyage Banner (header) | /m1/voyager/xxxdb/etc/webvoyage/header.htm
The header.htm File on page 4-17 |
| 2 | Top toolbar | The [Toolbar_Top] stanza of opac.ini file
Top and Bottom Toolbar Configuration on page 4-12 |
| 3 | Database Name | Voyager System Administration>>System>>Default Address>>Library Name field |
| 4 | Search page instructions | /m1/voyager/xxxdb/etc/webvoyage/local/ht_coursereserve.htm |
| 5a | Active tab color | ActiveTabColor= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file.
For more (on this callout group), see Shared Search Page Layout Components on page 6-1 |
| 5b | Tab text | Tab_Text= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 5c | Active font color | ActiveFontColor= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 6a | Inactive tab color | InActiveTabColor= variable of the corresponding stanza in the opac.ini file.
For more (on this callout group), see Shared Search Page Layout Components on page 6-1 |
| 6b | Tab text | Tab_Text= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 6c | Inactive font color | InActiveFontColor= variable of the corresponding stanza in the opac.ini file. |
| N/A | Text of Any drop down option | The Any= variable controls the entry in each of the four drop-down fields which patrons would select if they do not have a preference about which entry to choose. |
| 7a | Instructor search drop-down items | Instructors with courses linked to records in the Voyager Circulation module appear for selection here.
For more information, See the <i>Voyager Circulation User's Guide</i> |

Table 6-16. Course Reserve Search Page Configuration Reference (Page 2 of 3)

| # | Description | Configured in |
|-----|-----------------------------------|---|
| 7b | Instructor search drop-down label | Instructor= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 8a | Department search drop-down items | Departments with courses linked to records in the Voyager Circulation module appear for selection here.
For more information, See the <i>Voyager Circulation User's Guide</i> |
| 8b | Department search drop-down label | Department= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 9a | Course search drop-down items | Courses linked to records in the Voyager Circulation module appear for selection here.
For more information, See the <i>Voyager Circulation User's Guide</i> |
| 9b | Course search drop-down label | Course= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 10a | Section search drop-down items | Sections with courses linked to records in the Voyager Circulation module appear for selection here.
For more information, See the <i>Voyager Circulation User's Guide</i> |
| 10b | Section search drop-down label | Section= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 11a | Records Per Page drop-down items | The 1, 2, 3, and 4 variables in the [Records_Requested] stanza in opac.ini file.
For more (on this callout group), see Records Per Page Display Options on page 4-19 |
| 11b | Records Per Page label | Description= variable of the [Records_Requested] stanza in the opac.ini file. |
| 12 | Submit search button text | SubmitButton= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file. |
| 13a | Reset search button text | ResetButton= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file.
Clears all free-text fields and resets drop-down boxes |

Table 6-16. Course Reserve Search Page Configuration Reference (Page 3 of 3)

| # | Description | Configured in |
|-----|--------------------------|---|
| 13b | Clear search button text | ClearButton= variable of the [Course_Reserve_Search_Page] stanza in the opac.ini file.

NOTE:
This button is not pictured in Figure 6-6 on page 6-15 . Button only appears after a search with no results is performed. |
| 14 | Bottom toolbar | [Toolbar_Bottom] stanza of opac.ini
Top and Bottom Toolbar Configuration on page 4-12 |
| 15 | Footer | /m1/voyager/xxxdb/webvoyage/html/images/footer.htm
The footer.htm File on page 4-18 |

NOTE:

The display of the inactive tab for the Course Reserve drop-down interface is determined by the “inactive” variables in the [Course_Reserve_Search_Page] stanza.

The [Course_Reserve_Search_Page] stanza

The **Course Reserve Search Page** is configured in the [Course_Reserve_Search_Page] stanza (see [Figure 6-36](#)).

Line#

```

1  [Course_Reserve_Search_Page]
2  Background=
3  Text=
4  BGCOLOR=
5  LINK=
6  VLINK=
7  ALINK=
8  TableColor=

```

Figure 6-36. Sample [Course_Reserve_Search_Page] stanza

Line#

```
9  TableText=
10 ActiveTabColor=#982848
11 InactiveTabColor=#606CC0
12 ActiveFontColor=#FFFFFF
13 InactiveFontColor=#FFFFFF
14 Tab_Text=Course Reserve
15 Any=Any
16 Instructor=Instructor:
17 Department=Department:
18 Course=Course:
19 Section=Section:
20 SubmitButton=Search
21 ClearButton=Clear
22 ResetButton=Reset
```

Figure 6-36. Sample [Course_Reserve_Search_Page] stanza (Continued)

Course Reserve Search Browse Interface Configuration

Configuring the Course Reserve browse interface includes the following:

- [Setting the Course Reserve display type to the browse interface](#)
- [Configuring the Course Reserve Location Selection Page](#)
- [Configuring the Course Reserve Browse Alphabetical List page](#)
- [Configuring the Individual Browse Pages](#)
- [Editing the html block messages](#)

Setting the Course Reserve display type to the browse interface

To set the Course Reserve interface type, configure the CourseReserveBrowse variable in the [Options] stanza of the opac.ini file (/m1/voyager/xxxdb/webvoyageDisplayDirectory).

- CourseReserveBrowse=Y sets the course reserve interface to the Browse style.

- CourseReserveBrowse=N sets the course reserve interface to the drop-down box style.

Configuring the Course Reserve Location Selection Page

The page from which patrons select course reserve list circulation locations (see [Figure 6-37](#)) is customizable. Edit this page in the `Course_Reserve_Alpha_Page` stanza in the `opac.ini` file (`/m1/voyager/xxxdb/webvoyageDisplayDirectory`). [Figure 6-38](#) shows a sample `[Course_Reserve_Location_Page]` stanza.



Figure 6-37. Course Reserve Location page

```
[Course_Reserve_Location_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
```

Figure 6-38. Course_Reserve_Location_Page stanza

```
TableColor=
TableText=
ActiveTabColor=
InactiveTabColor=
ActiveFontColor=
InactiveFontColor=
```

Figure 6-38. Course_Reserve_Location_Page stanza (Continued)

The variables listed in [Figure 6-38](#), [Figure 6-39](#) act exactly as their counterparts in the [Combined_Search_Page] stanza, with the exception of the Active*Color variables, which are not applicable on the Course Reserve Browse Locations page.

Configuring the Course Reserve Browse Alphabetical List page

```
[Course_Reserve_Alpha_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
TableColor=
TableText=
ActiveTabColor=
InactiveTabColor=
ActiveFontColor=
InactiveFontColor=
Instructor_Name=
Department_Name=
Course_Name=
Instructor_Name_Display=
Department_Name_Display=
Course_Name_Display=
List_Entry_Style=
```

Figure 6-39. Sample [Course_Reserve_Alpha_Page] stanza

[Table 6-17](#) details the Course Reserve Browse Alphabetical List page-specific variables

Table 6-17. Detailed [Course_Reserve_Alpha_Page] variable descriptions

| Variable | Description |
|-----------------|---|
| Instructor_Name | Heading text above the Instructor alphabetical list |
| Department_Name | Heading text above the Department alphabetical list |
| Course_Name | Heading text above the Course alphabetical list |

Table 6-17. Detailed [Course_Reserve_Alpha_Page] variable descriptions

| Variable | Description |
|-------------------------|--|
| List_Entry_Style | Include CSS2 compliant code here to customize list text (the letters/numbers available for selection on the Alphabetical list page).

Example: List_Entry_Style=font-size:16pt; letter-spacing: 1px |
| Instructor_Name_Display | Determines the display and the order of display on the Course Reserve Alphabetical page. For each information category (instructor, department, course), set these variables to 1, 2, or 3, depending on the order in which you want them to appear. To hide one of them, enter a 0 after the *_Name_Display variable. |
| Department_Name_Display | |
| Course_Name_Display | |

Configuring the Individual Browse Pages

Each of the categories has a corresponding information page. These pages display the information for that category, linked to the material available. Configure the display options for these pages in the corresponding stanzas:

- [Course_Reserve_Instructor_Page]
- [Course_Reserve_Course_Page]
- [Course_Reserve_Department_Page]

```
[Course_Reserve_Instructor_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
TableColor=
TableText=
ActiveTabColor=
InactiveTabColor=
ActiveFontColor=
InactiveFontColor=
Tab_Text
```

Figure 6-40. Sample [Course_Reserve_Instructor_Page] stanza

```
[Course_Reserve_Course_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
TableColor=
TableText=
ActiveTabColor=
InactiveTabColor=
ActiveFontColor=
InactiveFontColor=
Tab_Text=
```

Figure 6-41. Sample [Course_Reserve_Course_Page] stanza

```
[Course_Reserve_Department_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
TableColor=
TableText=
ActiveTabColor=
InactiveTabColor=
ActiveFontColor=
InactiveFontColor=
Tab_Text=
```

Figure 6-42. Sample [Course_Reserve_Department_Page] stanza

The variables listed in [Figure 6-40](#), [Figure 6-41](#), and [Figure 6-42](#) act exactly as their counterparts in the `[Combined_Search_Page]` stanza (see [Table 6-6](#) on [page 6-15](#)).

Editing the html block messages

The informational messages displayed on the Course Reserve Browse pages are in the `/m1/voyager/xxxdb/webvoyage/html` directory. [Table 6-18](#) details html block messages and the Course Reserve Browse pages they affect.

Table 6-18. Course Reserve Browse html block message detail

| Message file | Page |
|--|---|
| <code>course_reserve_alpha.htm</code> | Course Reserve Browse alphabetical page |
| <code>course_reserve_course.htm</code> | Course selection page |
| <code>course_reserve_dept.htm</code> | Department selection page |
| <code>course_reserve_instructor.htm</code> | Instructor selection page |
| <code>course_reserve_locs.htm</code> | Course Reserve Browse location selection page |

Editing the Simultaneous Search Page

The Simultaneous Search page displays when a search is performed on more than one database.

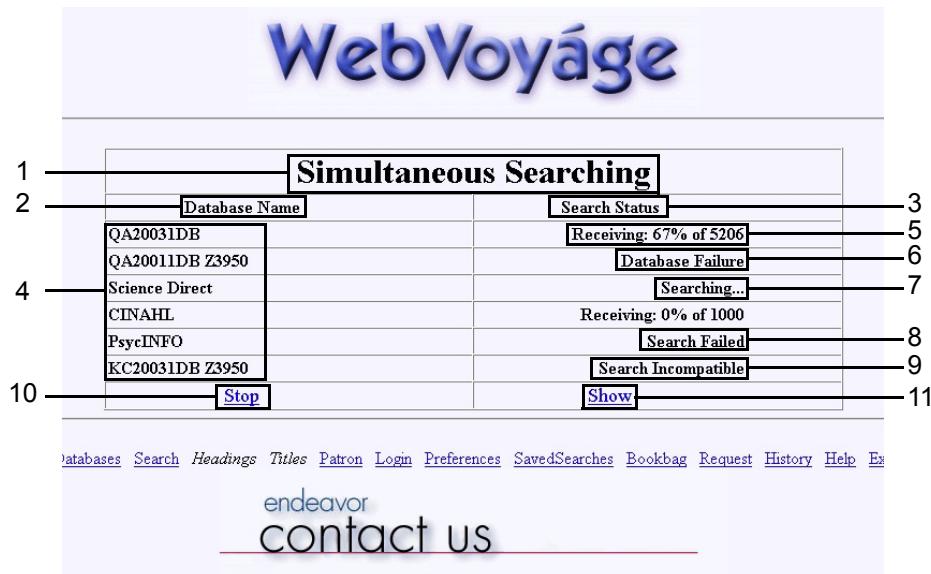


Figure 6-43. Simultaneous Search Page

In addition to the general Page Appearance components of the **Simultaneous Search Page** found in the [Sim_Search_Page] stanza of the opac.ini file, (see [Table 6-5](#)), you can configure the components detailed in [Table 6-19](#).

[Table 6-19](#) also details the callouts in [Figure 6-43](#).

Table 6-19. Simultaneous Search Page Configuration Reference (Page 1 of 2)

| # | Description | Configured in |
|---|-----------------------------|--|
| 1 | Simultaneous search heading | The <code>Simultaneous_Searching</code> variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 2 | Database name heading | The <code>Database_Name</code> variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 3 | Search status heading | The <code>Search_Status</code> variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 4 | Database name | Voyager System Administration>>Search>>Database Definitions>>(database)>>Name field |

Table 6-19. Simultaneous Search Page Configuration Reference (Page 2 of 2)

| # | Description | Configured in |
|----|--|---|
| 5 | Receiving records from database status | The Status_Receiving variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 6 | Database failure status | The Status_DBFail variable in the [Sim_Search_Page] stanza of the opac.ini file

Denotes that a connection cannot be established to that database. |
| 7 | Searching status | The Status_Searching variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 8 | Search failure status | The Status_SearchFail variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 9 | Incompatible search status | The Status_SearchIncompatible variable in the [Sim_Search_Page] stanza of the opac.ini file

Denotes a search is not the proper type for a particular database (for example, a Call Number search is performed against a Z39.50 database) |
| | Search finished status (not shown) | The Status_SearchDone variable in the [Sim_Search_Page] stanza of the opac.ini file |
| | Database resetting status (not shown) | The Status_DBReset variable in the [Sim_Search_Page] stanza of the opac.ini file |
| | Database version incompatible status (not shown) | The Status_DBVersion variable in the [Sim_Search_Page] stanza of the opac.ini file |
| | Database license block | The Status_DBLicense variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 10 | Stop button text | The Stop variable in the [Sim_Search_Page] stanza of the opac.ini file |
| 11 | Show records button text | The Show variable in the [Sim_Search_Page] stanza of the opac.ini file |
| | Table color | The TableColor variable in the [Sim_Search_Page] stanza of the opac.ini file |
| | Table text color | The TableText variable in the [Sim_Search_Page] stanza of the opac.ini file |

Simultaneous Search search.ini file

Some of the indexes available for Voyager database searches are not available for searching Z39.50 databases (for example, all headings indexes). If a simultaneous search using any of the indexes listed in [Table 6-20](#) is executed, the search will return a “Search Incompatible” error message (when sent to the Z39.50 database) for remote databases.

To avoid confusion for patrons performing simultaneous searches, a special `search.ini` file has been created for use with simultaneous searches. This `search.ini` is in the `/m1/voyager/xxxdb/etc/webvoyage` directory, and can be configured like the other `search.ini` files. When configuring this file, omit as many indexes not supported as you wish.

- To allow the maximum search options when searching multiple Voyager databases, make more of the indexes in [Table 6-21](#) available.
- To reduce the potential for “Search Incompatible” error messages, omit the indexes in [Table 6-20](#).

[Figure 6-44](#) shows the default Simultaneous Search `search.ini` file.

```
[Valid Tabs]
Simple
Boolean Search

[Simple_Search_Codes]
Counter=8
1=FT* Keyword Relevance Search
2=TKEY Title Keyword
3=NKEY Author Keyword
4=SKEY Subject Keyword
5=JKEY Journal Title Keyword
6=TALL Left Anchored Title
7=CMD* Command Search with Relevance
8=008D Date Search (Left Anchored)
```

Figure 6-44. Default Simultaneous Search `search.ini` file

NOTE:

Single remote connections still use the `search.ini` file normally associated with them. For example, a single remote connection to a Z39.50 citation database uses the `zcit` directory. For more information on the WebVoyage display

directories used in single remote connections, see [Customizing Display with WebVoyage Directories](#) on page 4-23.



IMPORTANT:

The following headings and call number indexes are invalid for Simultaneous Searches involving Z39.50 databases and will result in a "Search Incompatible" message:

Table 6-20. List of indexes unavailable in Z39.50 searches

| Index |
|--------|
| AHED * |
| AUTH |
| CALL |
| MCOD |
| MDEW |
| MLC# |
| MNLM |
| MOTH |
| MSUD |
| NAME |
| NHED * |
| SHED * |
| THED |
| TITL |

* Denotes a Staff Subject Headings search, available only if Endeavor's Authorities in WebVoyage extension module has been purchased.



IMPORTANT:

For Simultaneous Searches across Voyager databases only, the following are valid indexes:

Table 6-21. List of indexes available in Voyager simultaneous searches only

| Index |
|-------|
| CALL |

Table 6-21. List of indexes available in Voyager simultaneous searches only

| Index |
|-------|
| MCOD |
| MDEW |
| MLC# |
| MNLM |
| MOTH |
| MSUD |

Editing the Search History Page

The **Search History Page** allows the patron to view a list of all of the searches that have been made since the module was last restarted. Old searches can be selected from this list and performed again without having to re-enter the search through the search page.

In addition to the general Page Appearance components of the Search History Page (see [Table 6-5 on page 6-11](#)) found in the [Search_History_Page] stanza of the opac.ini file, you can configure the components detailed in [Table 6-22](#).

**Figure 6-45. Search History Page**

[Table 6-22](#) details the Search History page callouts in [Figure 6-45](#).

Table 6-22. Search History page Reference (Page 1 of 2)

| # | Description | Configured in |
|----|---|---|
| 1a | Table color | The <code>TableColor</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 1b | Table text color | The <code>TableText</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 2a | Combined Builder Search option | CombinedSearches=y in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file enables combining of Builder Searches (and this check box column)

NOTE:
Only Builder Searches may be combined. No other searches display check boxes in this column. |
| 2b | Combined Builder Search column heading | The <code>Combine</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 3 | Edit column heading | The <code>Edit</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 4 | Number of hits column heading | The <code>Hits</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 5 | Search type column heading | The <code>Search_Type</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 6 | Searched for column heading | The <code>Searched_For</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file |
| 7 | Browse/Simultaneous search results text (not shown) | If search is a simultaneous search or a browse, the text of the <code>Browse_Simul</code> variable in the <code>[Search_History_Page]</code> stanza of the <code>opac.ini</code> file displays, instead of the number of hits. |
| 8 | Combined Builder Searches database message text | /m1/voyager/xxxdb/etc/webvoyage/local/combined.htm |

Table 6-22. Search History page Reference (Page 2 of 2)

| # | Description | Configured in |
|---|--|---|
| 9 | Combined Builder Search button text | The Search variable in the [Search_History_Page] stanza of the opac.ini file

NOTE:
Button only displays when two or more Builder Searches are in the search history |
| | No Builder Searches selected for combination message (not shown) | The msg1 variable in the [Search_History_Page] stanza of the opac.ini file

Message displays if no Builder Searches are selected in the Combine column check boxes, and the Search button is clicked. |
| | Maximum search string size exceeded message (not shown) | The msg2 variable in the [Search_History_Page] stanza of the opac.ini file

Message displays if search string created by combining builder searches exceeds 3,000 characters. |

[NoHits_Redirect] Stanza

The database redirect feature provides patrons with access to any another database after they have performed a search which resulted in zero hits. For example, a student performs a keyword search in the local catalog and receives the message Your Search Resulted in No Hits. If configured in this stanza, a button would display which the patron can click and be redirected to another database. When the patron clicks the redirect button, his search is automatically re-executed in the new database. You can configure this stanza to redirect to any database at all. This is especially useful when used with the Voyager Universal Catalog.

There are three variables in this stanza (see [Figure 6-46](#)):

| |
|--|
| [NoHits_Redirect] |
| RedirectEnabled=Y |
| ReSearchSubmitButton=Search Another Database |
| DatabaseToSearch=UCDB |

Figure 6-46. NoHits_Redirect stanza

[Table 6-23](#) details the [NoHits_Redirect] stanza variables.

Table 6-23. Variables for the [NoHits_Redirect] stanza

| Variable | Description |
|-----------------------|---|
| Redirect Enabled | The RedirectEnabled variable controls the switch which enables the redirect functionality. To allow the redirect feature, enter a “Y” (yes) after the equals sign. If you do not want the redirect feature to be available in WebVoyage, enter a “N” (no) after the equals sign. The default for the RedirectEnabled variable is “N.” “No” is the default if this variable is left blank. |
| ReSearchSubmit-Button | The ReSearchViaSubmitButton variable controls the text that displays on the redirect button. For example, if you enter “Search Another Database” after the equals sign, then “Search Another Database” displays on the redirect button in WebVoyage. If you have enabled the redirect feature by setting the RedirectEnabled variable to ‘Yes’, but do not enter anything after the ReSearchVia-SubmitButton variable, no text displays on the redirect button. |
| DatabaseToSearch | The DatabaseToSearch variable allows you to define the database to which the system redirects. This can be any database at all. For example, you could redirect the search to another library with whom you have special lending or borrowing agreements; you could redirect the search to a citation database if the patron was unable to find any “books” in the local catalog; if your consortium or group contributes to a Voyager Universal Catalog, you could redirect the search to the Universal Catalog. |



IMPORTANT:

The redirect database must be defined in the System Administration module and configured in the connect.ini file in order for the redirect to work correctly.

To define the redirect database, enter the database code after the equals sign in the *DatabaseToSearch* variable, for example, DatabaseToSearch=BLAKE. The code must match **exactly** the code assigned to the database in System Administration (see [Figure 6-47](#)).

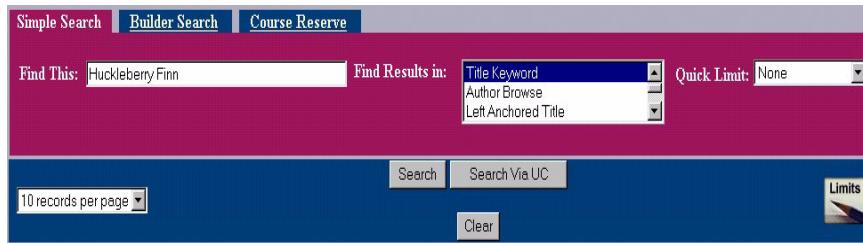


Figure 6-47. Search Redirect Button ... “Search Via UC”

Search Results Display Configuration

This section details the pages which display the results of various searches.

Headings Page

When performing a headings search, the results of the search display in list format, according to the number of records specified on the search page. Edit the headings page in the [Headings_Page] stanza of the opac.ini file.

NOTE:

If you perform a headings *browse*, the browse page display configuration is used (*not* the Headings Page display). The browse page display configuration is detailed in [Editing the Browse Page on page 6-80](#).

Editing the Headings Page

[Figure 6-48](#) shows a sample headings page.

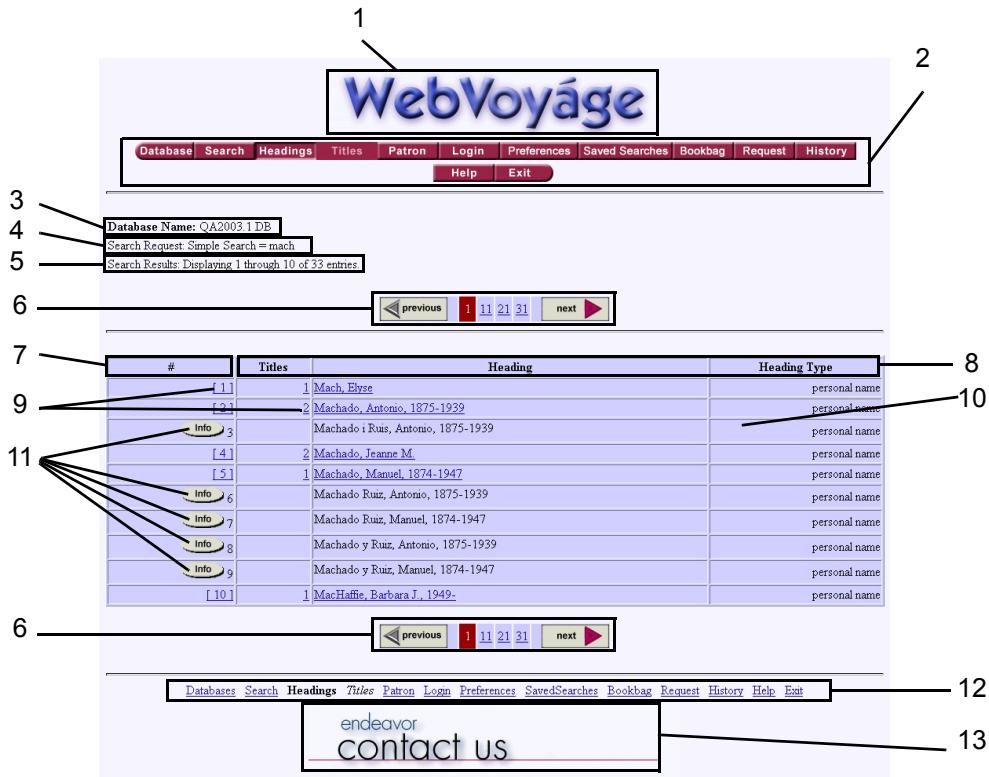


Figure 6-48. Headings Page

In addition to the general Page Appearance components of the Headings Page (see [Table 6-5](#)), you can configure the components detailed in [Table 6-24](#).

[Table 6-24](#) also details the callouts in [Figure 6-48](#).

Table 6-24. Headings Page Configuration Reference (Page 1 of 4)

| # | Description | Configured in |
|----|---------------------------|--|
| 1 | WebVoyage Banner (header) | /m1/voyager/xxxdb/webvoyage/header.htm
For more, see The header.htm File on page 4-17 |
| 2 | Top toolbar | [Toolbar_Top] stanza of opac.ini file
For more, see Top and Bottom Toolbar Configuration on page 4-12 |
| 3a | Database Name label | The Database_Name= variable in the [Misc_Strings] stanza of the opac.ini file |

Table 6-24. Headings Page Configuration Reference (Page 2 of 4)

| # | Description | Configured in |
|----|------------------------------------|--|
| 3b | Database Name | Voyager System Administration>>System>>Default Address>>Library Name field

For more, see the <i>Voyager System Administration User's Guide</i> |
| 4a | Search performed information label | The <code>Search_Request=</code> variable in the [Results] stanza of the <code>opac.ini</code> file |
| 4b | Search type performed information | The variable in the [Search_Text] stanza of the <code>opac.ini</code> file, corresponding to the search performed.

Example: To display Author Browse here when performing a <code>NAME+</code> search, enter <code>NAME+=Author Browse</code> in the [Search_Text] stanza. |
| 4c | Search term | Not configurable. Taken from search term entered in search box |
| 5a | Search results label | The <code>Search_Results=</code> variable in the [Results] stanza of the <code>opac.ini</code> file |
| 5b | Search results record numbers | The <code>Regular=</code> variable in the [Results] stanza of the <code>opac.ini</code> file

! IMPORTANT:
<i>Do not remove the %'s from the variable text</i> |
| 6a | Previous button | Active: <code>/m1/voyager/xxxdb/webvoyage/html/images/s-prev.gif</code>

Inactive: <code>/m1/voyager/xxxdb/webvoyage/html/images/d-prev.gif</code> |
| 6b | Previous button alternate text | The <code>Previous=</code> variable in the [TextTool] stanza of the <code>opac.ini</code> file |
| 6c | Jumpbar | The [JumpBar] stanza of the <code>opac.ini</code> file. |
| 6d | Next button | Active: <code>/m1/voyager/xxxdb/webvoyage/html/images/s-next.gif</code>

Inactive: <code>/m1/voyager/xxxdb/webvoyage/html/images/d-next.gif</code> |
| 6e | Next button alternate text | The <code>Next=</code> variable in the [TextTool] stanza of the <code>opac.ini</code> file |

Table 6-24. Headings Page Configuration Reference (Page 3 of 4)

| # | Description | Configured in |
|-----|---|---|
| 7 | Number column heading text | #= variable in the [Headings_Page] stanza of the opac.ini file

This column lists the chronological order of the headings found as a result of the search as well as any note or reference links that are associated with the headings. |
| 8 | Record information column headings | Titles=, Heading=, and Heading_Type= in the [Headings_Page] stanza of the opac.ini file

These variables control the headings of the columns to the right of the number (#) column. |
| 8a | Classification column information | Some classification text (such as LC subject headings) for this column can be edited. Do this in the [Classification_Type] stanza of the opac.ini file. |
| 9a | Hyperlinked text options | HotLink_#=, HotLink_1=, HotLink_2=, HotLink_3= in the [Headings_Page] stanza of the opac.ini file

Setting any of these to x hyperlinks the text in that column to the first record display page. Treat the # column as column 0. |
| 9b | Leading and trailing text for # column hyperlinks | The Leading#Text and Trailing#Text variables allow you to make the hypertext link connected to the number in the # column larger. To do so, specify extra characters to display before and after each record number that appears in the # column. These characters simply appear onscreen in order to allow the hypertext link to be much larger than the single digits that sometimes appear in this column.

Entering a pipe (" ") after the variable will cause a space to appear onscreen. (Entering spaces after the variable will not cause spaces to appear onscreen.) |
| 10 | Browse list table color | MainData variable in the [Table_Colors] stanza of the opac.ini file

NOTE:
This variable also controls the color of other tables. |
| 11a | Additional information links | If the authority record contains reference field information, one of the following linked graphics displays. <ul style="list-style-type: none">• /m1/voyager/xxxdb/webvoyage/html/images/seealso.gif (links to references page)• /m1/voyager/xxxdb/webvoyage/html/images/note.gif (links to scope notes page) |

Table 6-24. Headings Page Configuration Reference (Page 4 of 4)

| # | Description | Configured in |
|-----|--|---|
| 11b | Additional information button alternate text | <p>Below are the alternate text variables for the additional information graphics. Variables with multiple types of information in them (such as RefNote) display when those types of information (reference for See_Also, scope note for Note, and authority record for AUTH) are all linked in the authority record.</p> <ul style="list-style-type: none"> • ALT_Note= • ALT_See_Also= • ALT_Auth= • ALT_Reference= • ALT_AuthRef= • ALT_AuthNote= • ALT_RefNote= • ALT_AuthRefNote= |
| 12 | Bottom toolbar | <p>The [Toolbar_Bottom] stanza of opac.ini file
For more, see Top and Bottom Toolbar Configuration on page 4-12</p> |
| 13 | Footer | <p>/m1/voyager/xxxdb/webvoyage/html/images/footer.htm
For more, see The footer.htm File on page 4-18</p> |

The [Headings_Page] stanza

The **Headings Page** is configured in the [Headings_Page] stanza (see [Figure 6-49](#)).

Line#

```

1  [Headings_Page]
2  Background=
3  Text=
4  BGCOLOR=
5  LINK=
6  VLINK=

```

Figure 6-49. Sample [Headings_Page] stanza

Line#

```
7 ALINK=
8 #=Item No.
9 Titles=
10 Heading=
11 Heading_Type=
12 ALT_Note=Note
13 ALT_See_Also=See Also
14 ALT_Auth=Authority
15 ALT_Reference=Reference
16 ALT_AuthRef=Auth/Ref
17 ALT_AuthNote=Auth/Note
18 ALT_RefNote=Ref/Note
19 ALT_AuthRefNote=Auth/Ref/Note
20 HotLink_#=Y
21 HotLink_1=Y
22 HotLink_2=Y
23 HotLink_3=N
24 Leading#Text=[ ]
25 Trailing#Text=| ]
```

Figure 6-49. Sample [Headings_Page] stanza (Continued)

Browse Page

When performing a browse, the results of the browse display in list format, according to the number of records specified on the search page. Edit the **Browse** (results) **Page** in the [Browse_Page] stanza of the opac.ini file.

Editing the Browse Page

You can perform various browses, selecting the desired information (heading, name, and so on) from a list. [Figure 6-50](#) shows a sample browse page.

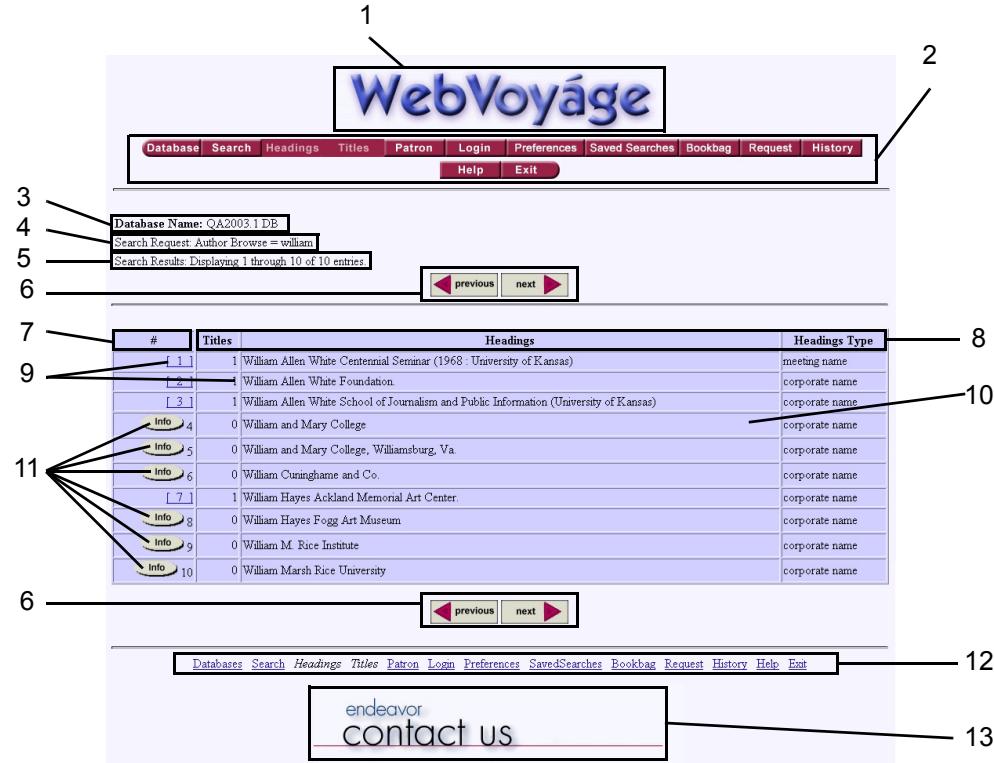


Figure 6-50. Browse Page

In addition to the general Page Appearance components of the **Browse Page** (see [Table 6-5](#)), you can configure the components detailed in [Table 6-25](#).

[Table 6-25](#) also details the callouts in [Figure 6-50](#).

Table 6-25. Browse Page Configuration Reference (Page 1 of 4)

| # | Description | Configured in |
|----|---------------------------|--|
| 1 | WebVoyage Banner (header) | /m1/voyager/xxxdb/webvoyage/header.htm
For more, see The header.htm File on page 4-17 |
| 2 | Top toolbar | [Toolbar_Top] stanza of opac.ini file
For more, see Top and Bottom Toolbar Configuration on page 4-12 |
| 3a | Database Name label | The Database_Name= variable in the [Misc_Strings] stanza of the opac.ini file |

Table 6-25. Browse Page Configuration Reference (Page 2 of 4)

| # | Description | Configured in |
|----|------------------------------------|--|
| 3b | Database Name | Voyager System Administration>>System>Default Address>>Library Name field
For more, see the Voyager System Administration User's Guide |
| 4a | Search performed information label | The Search_Request= variable in the [Results] stanza of the opac.ini file |
| 4b | Search type performed information | The variable in the [Search_Text] stanza of the opac.ini file, corresponding to the search performed.

Example: To display Author Browse here when performing a NAME+ search, enter NAME+=Author Browse in the [Search_Text] stanza. |
| 4c | Search term | Not configurable. Taken from search term entered in search box |
| 5a | Search results label | The Search_Results= variable in the [Results] stanza of the opac.ini file |
| 5b | Search results record numbers | The Regular= variable in the [Results] stanza of the opac.ini file

 IMPORTANT:
<i>Do not remove the %'s from the variable text</i> |
| 6a | Previous button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-prev.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-prev.gif |
| 6b | Previous button alternate text | The Previous variable in the [TextTool] stanza of the opac.ini file |
| 6c | Next button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-next.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-next.gif |
| 6d | Next button alternate text | The Next variable in the [TextTool] stanza of the opac.ini file |

Table 6-25. Browse Page Configuration Reference (Page 3 of 4)

| # | Description | Configured in |
|-----|--|---|
| 7 | Number column heading text | = variable in the [Browse_Page] stanza of the opac.ini file

This column lists the chronological order of the headings found as a result of the search as well as any note or reference links that are associated with the headings. |
| 8 | Record information column headings | Col1=, Col2=, and Col3= in the [Browse_Page] stanza of the opac.ini file

These variables control the headings of the columns to the right of the number (#) column. So treat the # column as column 0. |
| 9a | Hyperlinked text options | HotLink_#=, HotLink_1=, HotLink_2=, HotLink_3=

Setting any of these to x hyperlinks the text in that column to the first record display page |
| 9b | Leading and trailing text for # column hyper-links | The Leading#Text and Trailing#Text variables allow you to make the hypertext link connected to the number in the # column larger. To do so, specify extra characters to display before and after each record number that appears in the # column. These characters simply appear onscreen in order to allow the hypertext link to be much larger than the single digits that sometimes appear in this column.

Entering a pipe (" ") after the variable will cause a space to appear onscreen. (Entering spaces after the variable will not cause spaces to appear onscreen.) |
| 10 | Browse list table color | MainData variable in the [Table_Colors] stanza of the opac.ini file

NOTE:
This variable also controls the color of other tables. |
| 11a | Additional information links | If the authority record contains reference field information, one of the following linked graphics displays. <ul style="list-style-type: none"> • /m1/voyager/xxxdb/webvoyage/html/images/seealso.gif (links to references page) • /m1/voyager/xxxdb/webvoyage/html/images/note.gif (links to scope notes page) |

Table 6-25. Browse Page Configuration Reference (Page 4 of 4)

| # | Description | Configured in |
|-----|--|---|
| 11b | Additional information button alternate text | <p>Below are the alternate text variables for the additional information graphics. Variables with multiple types of information in them (such as RefNote) display when those types of information (reference for See_Also, scope note for Note, and authority record for AUTH) are all linked in the authority record.</p> <ul style="list-style-type: none"> • ALT_Note= • ALT_See_Also= • ALT_Auth= • ALT_Reference= • ALT_AuthRef= • ALT_AuthNote= • ALT_RefNote= • ALT_AuthRefNote= |
| 12 | Bottom toolbar | <p>The [Toolbar_Bottom] stanza of opac.ini file
 For more, see Top and Bottom Toolbar Configuration on page 4-12</p> |
| 13 | Footer | <p>/m1/voyager/xxxdb/webvoyage/html/images/footer.htm
 For more, see The footer.htm File on page 4-18</p> |

The [Browse_Page] stanza

The **Browse Page** is configured in the [Browse_Page] stanza (see [Figure 6-51](#)).

Line#

```

1  #=#  

2  Background=  

3  Text=  

4  BGCOLOR=  

5  LINK=  

6  VLINK=

```

Figure 6-51. Sample [Browse_Page] stanza

Line#

```
7      ALINK=
8      Col1=Titles
9      Col2=Headings
10     Col3=Headings Type
11     ALT_Note=Note
12     ALT_See_Also=See Also
13     ALT_Auth=Authority
14     ALT_Reference=Reference
15     ALT_AuthRef=Auth/Ref
16     ALT_AuthNote=Auth/Note
17     ALT_RefNote=Ref/Note
18     ALT_AuthRefNote=Auth/Ref/Note
19     HotLink_#=Y
20     HotLink_0=N
21     HotLink_1=N
22     HotLink_2=N
23     HotLink_3=N
24     Leading#Text=[ ]
25     Trailing#Text=[ ]
```

Figure 6-51. Sample [Browse_Page] stanza (Continued)

Displaying thumbnails

Thumbnails are small graphic files that display in the far right column on the title level results display in WebVoyage (see [Figure 6-52](#) for an example).

WebVoyage - Endeavor Information Systems

[Databases](#) [Search](#) [Titles](#) [Login](#) [Patron](#) [Request](#) [Home](#) [Help](#) [History](#) [Exit](#)

Database Name: Endeavor Library
 Search Request: Keyword w/Relevance = sdc
 Search Results: Displaying 81 through 120 of 367 entries.

[previous](#) [next](#)

| # | Relevance | Title | Date | Author | |
|-----------------------------|-----------|--|------|--------------------------|--|
| <input type="checkbox"/> 81 | | [16mm aircraft wing gun camera [object]: Made movies during diving] / David (Adapted it) Owen | 1950 | Owen, David (Adapted it) | |
| <input type="checkbox"/> 82 | | [Bottom temperature recorder - early [object]: In pressure case] / L. Thayer | 1950 | Thayer, L. | |
| <input type="checkbox"/> 83 | | [Ocean current recorder - 400-day [object]: Unattended instrument. Pictures of instrument but no instrument found] / A.A. Klebba | 1950 | Klebba, A.A. | |

Figure 6-52. thumbnails displayed in search results

The display of such graphic files in the far right column of the title level display in WebVoyage depend upon a number of factors. The following is a summarization of the rules governing the generation of thumbnails:

- Thumbnail generation must be enabled in WebVoyage
- an 856 field must exist in the bib record
- only the first 856 field in the bib record can be used as a thumbnail
- only still graphic files (as opposed to other media types such as avi, mpeg, etc) can be thumbnails. However, generic images can be used in place of certain file types that cannot be used as thumbnails (see [The \[Generic Images\] Stanza](#) on page 6-88 for more information).

NOTE:

It is up to the person creating or modifying the bib record to make sure that the 856 field they wish to use as a thumbnail in WebVoyage is the FIRST 856 field, is properly formatted, and is of a type that can be used as a thumbnail.

For information about entering an 856 field into a bibliographic record, see the Bibliographic Record section of the *Voyager Cataloging User's Guide*.

Enabling Thumbnail Generation

Enabling thumbnail generation requires the following:

- Application placement on the server (see [Applications involved with thumbnail generation](#))
- Configuration in the webvoyage.ini file (see [Thumbnail configuration in the webvoyage.ini file](#))

Applications involved with thumbnail generation

In order for thumbnail generation to function properly, the applications involved in the generation of thumbnails must reside in certain locations. Pwebrecon.cgi, WebVoyage.cgi, thumbgen.exe, tmb.cgi, webrecon.exe, webrecon.ini, and webvoyage.ini must reside in the following directory:

/m1/voyager/xxxdb/webvoyage/cgi-bin

In addition, the filesvr application must reside in the following directory:

/m1/voyager/bin

The address, port and time-out of the filesvr application are specified in the voyager.ini file.

Thumbnail configuration in the webvoyage.ini file

There are two stanzas in the webvoyage.ini file that need to be configured for thumbnail generation to function properly. These are:

- The [Thumbnails] stanza
- The [Generic Images] stanzas

The [Thumbnails] stanza

Activate

The *Activate=* variable controls whether or not the thumbnails column displays on the title level results display in WebVoyage. The thumbnails column must be activated in order for thumbnails to display. If you want the thumbnails column to display on the title level results display in WebVoyage, type *TRUE* after the *Activate=* variable (*Activate=TRUE*). If you do not want the thumbnails column to display on the title level results display in WebVoyage, type *FALSE* after the *Activate=* variable (*Activate=FALSE*). If nothing is entered after the *Activate=* variable, *FALSE* will be used as the default.

Thumbgen

Thumbgen is an application that is used during the generation of thumbnails. After the *Thumbgen*= variable, enter the path of the directory *on the webserver* in which thumbgen.exe resides. At the time of installation, thumbgen resides at: /m1/voyager/xxxdb/cgi-bin/thumbgen.exe

Temp_Location

At a certain point during the generation of the thumbnails display, temporary files are created. After the *Temp_Location*= variable, enter the path of the temp directory in which these temporary files should be stored. For example, you might enter:

```
Temp_Location=/tmp
```

or

```
Temp_Location=/m1/voyager/tmp
```

Temp_File_Name

At a certain point during the generation of thumbnails, temporary files are created. After the *Temp_File_Name*= variable, enter the name that you would like to be used as the prefix of all temporary files created during thumbnail generation.

time-out

The *time-out*= variable specifies the number of seconds after which the generation of a thumbnail will be aborted. For example, if you want the generation of thumbnails to be aborted after 60 seconds, you would type 60 after the *time-out*= variable (Timeout=60). If nothing is entered after the *time-out*= variable, 60 will be used as the default.

The [Generic Images] Stanza

The [Generic Images] stanza of the webvoyage.ini file is where you should specify the location of generic image files, *on the database server* that can be used as thumbnails. If the first 856 field of a bib record contains information that cannot be used as a thumbnail, a generic image specified in the [Generic Images] stanza will be used if there is a generic image available for the type of information that was entered in the 856 field of the bib record. For example, if a .txt file is specified in the first 856 field of a bib record, the generic image specified after the *TXTImage*= variable will be used as a thumbnail. The generic image entered after the *ErrorImage*= variable will be used if an error occurs at any time during the generation of a thumbnail.

DOI Stanza

URN and DOI Resources

URN (Uniform Resource Name) and DOI (Digital Object Identifier) work different than URL addresses (Uniform Resource Locator) in that the URN or DOI identification in the 856 field of the MARC record does not point directly to the digital item. Rather, the URN or DOI identification is first routed through a handler server which then maps the URN or DOI to the physical location of the digital item.

WebVoyage can display links to URN and DOI resources in MARC records. In order to use these links, you need to include the following two variables in the [Connection Apps] stanza of the opac.ini file: URN= and DOI=. The variables should be followed by the URL addresses of the URN and DOI handler servers.

Type the variable name (e.g. *URN* or *DOI*), then an equals sign (=), followed by the complete URL address of the URN or DOI handler server. (URN=http://hdl.handle.net/)

Capitalization does not matter in the variable (i.e., urn= is the same as URN=). However, capitalization is crucial in the URL. There are no defaults if URN= or DOI= are not defined. If URN= or DOI= are not defined, any valid URN or DOI links in the 856 field of the MARC record will not be shown in the Display window.

For information about entering URN or DOI links in the 856 field of a MARC record, see "DOI and URN Links" in the Bibliographic Records section of the *Voyager Cataloging User's Guide*.

Editing the References/Scope Notes Page

The References/Scope Notes page (the References page) is the page that displays when the See Also or the Notes button is clicked from the headings list. This page displays other information that is related to the displayed heading, such as other references, related terms to search, or other information related to the search.

Ref_Page Stanza

The first six variables of the [Ref_Page] stanza work the same as the variables within the [Html_Body] stanza. See [Global Page Color Options \(the \[Html_Body\] Stanza\)](#) on [page 4-10](#) for explanations of the *Background*, *Text*, *BGCOLOR*, *LINK*, *VLINK*, and *ALINK* variables. The *History*, *Note*, *Search_Also_Under*, *Search_Under* and *Reference_Information* variables control different pieces of text that display on the Reference page depending on the kind of scope note that is associated with a heading. The information entered after these variables will be used as text labels or headers. The information entered after the *History* variable

will be used when the 665 scope note tag is associated with a heading. The information entered after the *Note* variable will be used when the 666 or 680 tag is associated with a heading. The information entered after the *Search_Also_Under* variable will be used when the 360 or 663 scope note tag is associated with a heading. The information entered after the *Search_Under* variable will be used when the 260 or 664 scope note tag is associated with a heading. If nothing is entered after these variables, the following defaults will be used: *History*, *Note*, *Search Also Under*, *Search Under*, *Reference Info*.

Banner and Footer Images

The images used for the banner and at the bottom of every page appears on almost every page in WebVoyage. The banner image appears above everything else on-screen; the toolbar at the top of the page appears just below it. The footer image appears at the bottom of the page below the bottom toolbar. You can customize these images or the entire header and footer by editing the header.htm and footer.htm files.

Toolbars

The toolbar for the References page is made up of the same set of buttons that appear on the Simple Search page. Edits such as changing buttons or turning buttons on and off are applied in exactly the same fashion to all of the pages that use the toolbar.

Components of the References/Scope Notes Page

Background Image

You can specify a particular image to appear in the background of the page by entering the name of the image (including the full path) after the Background= variable in the Ref_Page stanza of the opac.ini file. If a background color is also specified (see below), this image takes precedence.

Background Color

You can specify the color of the background by entering an RGB color code after the BGCOLOR= variable in the Ref_Page stanza of the opac.ini file. If a background image is also specified, the color will not be used.

Text Color

You can specify the color of the text on the page by entering an RGB color code after the Text= variable in the Ref_Page stanza of the opac.ini file.

Link Color

You can specify the color of the unvisited links on the page by entering an RGB color code after the LINK= variable in the Ref_Page stanza of the opac.ini file.

Visited Link Color

You can specify the color of the visited links on the page by entering an RGB color code after the VLINK= variable in the Ref_Page stanza of the opac.ini file.

Selected Link Color

You can specify the color of the link being clicked by entering an RGB color code after the ALINK= variable in the Ref_Page stanza of the opac.ini file.

References label

To specify the label for the content of the current search, enter the description after the Search_References variable in the Results stanza of the opac.ini file. There is no default text. (If no text is entered, a colon will appear.)

References Informational text

You can change the actual informational text that appears above the Reference Information box. This text is contained in the html file refer.htm in the directories under /m1/voyager/xxxdb/etc/webvoyage. The contents of this file can be edited to contain anything that you might want.

History Label

You can change the label that precedes history information on the scope note page by editing the text following the History variable in the Ref_Page stanza of the opac.ini file. If no text is entered, the label will default to history. This variable is only used on the scope notes page.

Note Label

You can change the label that precedes note information on the scope note page by editing the text following the Note variable in the Ref_Page stanza of the opac.ini file. If no text is entered, the label will default to Note. This variable is only used on the scope notes page.

Search Under Label

You can change the label that precedes “search under” information on the scope note page by editing the text following the Search_Under variable in the Ref_Page stanza of the opac.ini file. If no text is entered, the label will default to Search Under. This variable is only used on the scope notes page.

Search Also Under Label

You can change the label that precedes “search also under” information on the scope note page by editing the text following the Search_Also_Under variable in the Ref_Page stanza of the opac.ini file. If no text is entered, the label will default to Search Also Under. This variable is only used on the scope notes page.

Reference Info Label

You can change the label that precedes “reference information” information on the scope note page by editing the text following the Reference_Information= variable in the Ref_Page stanza of the opac.ini file. If no text is entered, the label will default to Reference Info. This variable is only used on the scope notes page.

Links at bottom of page:

The links at the bottom of the page are defined in the [Toolbar_Bottom] stanza of the opac.ini file. These can be set to display as text or as images. See the Toolbars section above for more information.

The Titles List Page

The **Titles List Page** appears slightly differently depending on whether it was generated directly by a title search or indirectly by choosing a subject on a headings list. [Figure 6-53](#) shows a sample Titles List Page

The screenshot shows the WebVoyage Titles List Page. At the top, there's a navigation bar with links for Database, Search, Headings, Titles, Patron, Login, Preferences, Saved Searches, Bookbag, Request, and History. Below the navigation bar is a search form with fields for 'Find This' (containing 'refra'), 'Find Results in' (set to 'Left Anchored Title'), and 'Quick Limit' (set to 'None'). There are also buttons for 'Submit' and 'Reset'. The main area displays a table of search results with columns for '#', 'Title <', 'Author', 'Date', and 'Full Title'. Each result row has a checkbox next to it. Callouts numbered 1 through 19 point to various elements: 1 points to the database name 'OA2003.1 DB'; 2 points to the search request 'Search Request: Left Anchored Title = refra'; 3 points to the search results message 'Search Results: Displaying 1 through 4 of 4 entries.'; 4 points to the 'Find This' field; 5 points to the 'Submit' button; 6 points to the 'next' button; 7 points to the 'previous' button; 8 points to the 'Quick Limit' dropdown; 9 points to the 'Post Limit' dropdown; 10 points to the 'Sort by' dropdown; 11 points to the 'Post Limit' dropdown; 12 points to the first column header '#'; 13 points to the first row of the search results table; 14 points to the second 'Sort by' dropdown; 15 points to the 'Post Limit' dropdown; 16 points to the 'Clear Selected' and 'Retain Selected' buttons; 17 points to the 'previous' and 'next' navigation buttons; 18 points to the 'Record Options' section which includes a 'Records' dropdown set to 'All on Page', an 'Enter your email address' input field, and checkboxes for 'Selected On Page' and 'Selected all Pages'; 19 points to the bottom search form.

Figure 6-53. Sample Title Page

In addition to the general Page Appearance components of the **Titles List Page** (see [Table 6-5](#)), you can configure the components detailed in [Table 6-26](#).

[Table 6-26](#) also details the callouts in [Figure 6-53](#).

Table 6-26. Title Page Configuration Reference (Page 1 of 7)

| # | Description | Configured in |
|----|-------------------------------------|--|
| 1a | Database name display on Title Page | Set the ShowDatabaseName=y in the [Title_Page] stanza of the opac.ini file to enable the Database Name display at the top of the form. |

Table 6-26. Title Page Configuration Reference (Page 2 of 7)

| # | Description | Configured in |
|----|--|---|
| 1b | Database name display label | The Database_Name variable in the [Misc_Strings] stanza of the opac.ini file |
| 1c | Database Name | Voyager System Administration>System>Default Address>Library Name field |
| 2a | Search request display on Title Page | Set the ShowSearchRequest=y in the [Title_Page] stanza of the opac.ini file to enable the Search Request display at the top of the form. |
| 2b | Search request label | The Search_Request variable in the [Results] stanza of the opac.ini file. |
| 2c | Search request text | <ul style="list-style-type: none"> • For Simple searches: The [Search_Text] stanza of the opac.ini file for standard searches, or Simple Search for user-defined searches • For Builder Searches: Voyager System Administration>Search>Indexes - Keyword Definitions
All keyword searches not suppressed from WebVoyage (except for JKEY) are available here |
| 3a | Search results summary display on Title Page | Set the ShowSearchResults=y in the [Title_Page] stanza of the opac.ini file to enable the Search Request display at the top of the form. |
| 3b | Search results label | The Search_Results variable in the [Results] stanza of the opac.ini file. |
| 3c | Search results text | <p>If number of records retrieved is greater than the number of records per page (based on the 1, 2, 3, 4, and Default variables in the [Records_Requested] stanza):</p> <ul style="list-style-type: none"> • The Regular variable in the [Results] stanza of the opac.ini file <p>If number of records retrieved is fewer than the number of records per page (based on the 1, 2, 3, 4, and Default variables in the [Records_Requested] stanza):</p> <ul style="list-style-type: none"> • The BibHold variable in the [Results] stanza of the opac.ini file |
| 4a | Search bar on top of page | Set the DisplaySearchFormTop=y in the [Title_Page] stanza of the opac.ini file to enable the search bar at the top of the form. |

Table 6-26. Title Page Configuration Reference (Page 3 of 7)

| # | Description | Configured in |
|----|--------------------------------------|---|
| 4b | Search bar color | The ActiveTabColor variable in the [Title_Page] stanza of the opac.ini file. |
| 4c | Search bar font color | The ActiveFontColor variable in the [Title_Page] stanza of the opac.ini file. |
| 4d | Find This label text | The SearchBoxText variable in the [Title_Page] stanza of the opac.ini file. |
| 4c | Find Results In label | The FindResultsText variable in the [Title_Page] stanza of the opac.ini file. |
| 4d | Find Results In search types | The search.ini file of database connected to.
For example, if connected to the local database: /m1/voyager/xxxdb/etc/webvoyage/local/search.ini. If connected to a Z39.50 database using Z3950 as its display configuration directory: /m1/voyager/xxxdb/etc/webvoyage/Z3950/search.ini. |
| 4e | Quick Limits drop down box | Setting the DisplayQuickLimitsDropDown=Y variable in the [Title_Page] stanza of the opac.ini file. |
| 4b | Quick Limits drop down label | The QuickLimitsText variable in the [Title_Page] stanza of the opac.ini file. |
| 5a | Records Per Page drop-down items | The 1, 2, 3, and 4 variables in the [Records_Requested] stanza in opac.ini file.
For more (on this callout group), see Records Per Page Display Options on page 4-19 |
| 5b | Records Per Page label | Description= variable of the [Records_Requested] stanza in the opac.ini file. |
| 6 | Submit button text | The SubmitButton variable in the [Title_Page] stanza of the opac.ini file. |
| 7 | Reset button text | The ResetButton variable in the [Title_Page] stanza of the opac.ini file. |
| 8a | Search bar button section color | The InactiveTabColor variable in the [Title_Page] stanza of the opac.ini file. |
| 8b | Search bar button section font color | The InactiveFontColor variable in the [Title_Page] stanza of the opac.ini file. |

Table 6-26. Title Page Configuration Reference (Page 4 of 7)

| # | Description | Configured in |
|-----|---|---|
| 9a | Previous button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-prev.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-prev.gif |
| 9b | Previous button alternate text | The Previous variable in the [TextTool] stanza of the opac.ini file |
| 9c | Jumpbar | The [JumpBar] stanza of the opac.ini file. |
| 9d | Next button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-next.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-next.gif |
| 9e | Next button alternate text | The Next variable in the [TextTool] stanza of the opac.ini file |
| 10a | Post sort (Sort by) menu display at top | Set the DisplayPostSortMenuTop=y variable in the [Title_Page] stanza of the opac.ini file. |
| 10b | Post sort menu label | The PostSortMenuLabel variable in the [Title_Page] stanza of the opac.ini file. |
| 10c | Post sort menu sort options | The Title, Author, PubDate, PubDateDesc, and Relevance variables in the [Title_Page] stanza of the opac.ini file. |
| 11 | Post limit button display at top | Set the DisplayPostLimitButtonTop=y variable in the [Title_Page] stanza of the opac.ini file. |
| 12a | Hyperlinked text options | HotLink_#=, HotLink_1=, HotLink_2=, HotLink_3= in the [Headings_Page] stanza of the opac.ini file

Setting any of these to y hyperlinks the text in that column to the first record display page. Treat the # column as column 0. |
| 12b | Text of the # column | The # variable in the [Title_Page] stanza of the opac.ini file. |

Table 6-26. Title Page Configuration Reference (Page 5 of 7)

| # | Description | Configured in |
|-----|---|---|
| 12c | Leading and trailing text for # column hyperlinks | The <code>Leading#Text</code> and <code>Trailing#Text</code> variables in the <code>[Title_Page]</code> stanza allow you to make the hypertext link connected to the number in the # column larger. To do so, specify extra characters to display before and after each record number that appears in the # column. These characters simply appear onscreen in order to allow the hypertext link to be much larger than the single digits that sometimes appear in this column.

Entering a pipe (" ") after the variable will cause a space to appear onscreen. (Entering spaces after the variable will not cause spaces to appear onscreen.) |
| 12d | Record information columns | Voyager System Administration>>Search>>Indexes-(index type)>>(index)>>Search Results tab

For more information, see the <i>Voyager System Administration User's Guide</i> . |
| | Thumbnail (non-ImageServer) alternate text | The <code>ThumbnailAltText</code> variable in the <code>[Title_Page]</code> stanza of the <code>opac.ini</code> file. |
| | ImageServer thumbnail alternate text | The <code>ScandocAltText</code> variable in the <code>[Title_Page]</code> stanza of the <code>opac.ini</code> file. |
| 13a | Holdings information | Set the <code>DisplayHoldingsInfo=y</code> variable in the <code>[Title_Page]</code> stanza of the <code>opac.ini</code> file to display holdings information |
| 13b | Holdings information section color | The <code>HoldingsInfoBackgroundColor</code> variable in the <code>[Title_Page]</code> stanza of the <code>opac.ini</code> file. |
| 13c | Holdings information section font color | The <code>HoldingsInfoForegroundColor</code> variable in the <code>[Title_Page]</code> stanza of the <code>opac.ini</code> file. |
| 13d | Holdings information section font italics | The <code>HoldingsInfoItalics</code> variable in the <code>[Title_Page]</code> stanza of the <code>opac.ini</code> file. |

Table 6-26. Title Page Configuration Reference (Page 6 of 7)

| # | Description | Configured in |
|------|--|---|
| 13e | Hotlink holdings area information | Set the following variables to y to hyperlink the corresponding display text to the detailed record view: <ul style="list-style-type: none"> • HotLink_Location • HotLink_CallNumber • HotLink_Status • HotLink_NoHoldings • HotLink_MultipleHoldings |
| 13f' | Holdings information labels | <ul style="list-style-type: none"> • Label_Location • Label_CallNumber • Label_Status in the [Title_Page] stanza of the opac.ini file |
| 13g | Holdings information section messages | <ul style="list-style-type: none"> • NoHoldingsMessage • MultipleHoldingsMessage • NoltemsMessage • MultipleItemsMessage in the [Title_Page] stanza of the opac.ini file |
| 14a | Post sort (Sort by) menu display at bottom | Set the DisplayPostSortMenuBottom=y variable in the [Title_Page] stanza of the opac.ini file. |
| 14b | Post sort menu label | The PostSortMenuLabel variable in the [Title_Page] stanza of the opac.ini file. |
| 14c | Post sort menu sort options | The Title , Author , PubDate , PubDateDesc , and Relevance variables in the [Title_Page] stanza of the opac.ini file. |
| 15 | Post limit button display at top | Set the DisplayPostLimitButtonBottom=y variable in the [Title_Page] stanza of the opac.ini file. |
| 16a | Clear selected records button text | The ClearButton variable in the [Title_Page] stanza of the opac.ini file. |
| 16b | Retain selected records button text | The RetainButton variable in the [Title_Page] stanza of the opac.ini file. |

Table 6-26. Title Page Configuration Reference (Page 7 of 7)

| # | Description | Configured in |
|-----|--------------------------------|--|
| 17a | Previous button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-prev.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-prev.gif |
| 17b | Previous button alternate text | The Previous variable in the [TextTool] stanza of the opac.ini file |
| 17c | Jumpbar | The [JumpBar] stanza of the opac.ini file. |
| 17d | Next button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-next.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-next.gif |
| 17e | Next button alternate text | The Next variable in the [TextTool] stanza of the opac.ini file |
| 18 | Print/Save/Email dialog box | The [Mail_And_Requests] stanza of the opac.ini file.
For more information, see Record Options Box Configuration on page 4-29 |
| 19 | Search bar on bottom of page | Set the DisplaySearchFormBottom=y in the [Title_Page] stanza of the opac.ini file to enable the search bar at the bottom of the form.

Remaining configuration is the same as 4a through 8b in this table. |
| | Item status text | The variables in the # Item Statuses section of the [Title_Page] stanza of the opac.ini file

The substitution tokens in Table 6-27 are also valid in this stanza: |

[Table 6-27](#) details the in transit item information substitution tokens for the Item Statuses section of the [Title_Page] stanza of the opac.ini file.

Table 6-27. In Transit Item Status Substitution Tokens

| Substitution Token | Display | Variable Displaying Text for Missing Status |
|--------------------|--|---|
| \rsloc | Location from which item was routed ("routing source location"). | RoutingSourceLocationUnknown |

Table 6-27. In Transit Item Status Substitution Tokens

| Substitution Token | Display | Variable Displaying Text for Missing Status |
|--------------------|--|---|
| \rslib | Library from which item was routed ("routing source library") | RoutingSourceLibraryUnknown |
| \rtloc | Location to which item was routed ("routing target location"). | RoutingTargetLocationUnknown |
| \rlib | Library to which item was routed ("routing target library"). | RoutingTargetLibraryUnknown |
| \rd | Date on which item was routed ("routing date"). | RoutingDateUnknown |

Order of Search Results

The order of the holdings records in the search results set can be automatically sorted depending on the location of the computer running WebVoyage or the patron group of the patron executing the search. This order may be customized in the **OPAC Holdings Sort Group Definitions** dialog. For more information, see the *Voyager System Administration User's Guide*.

Limits Display

This section details configuring the display of limits options.

Search Limits Page

The **Search Limits Page** contains the available limits to filter searches.

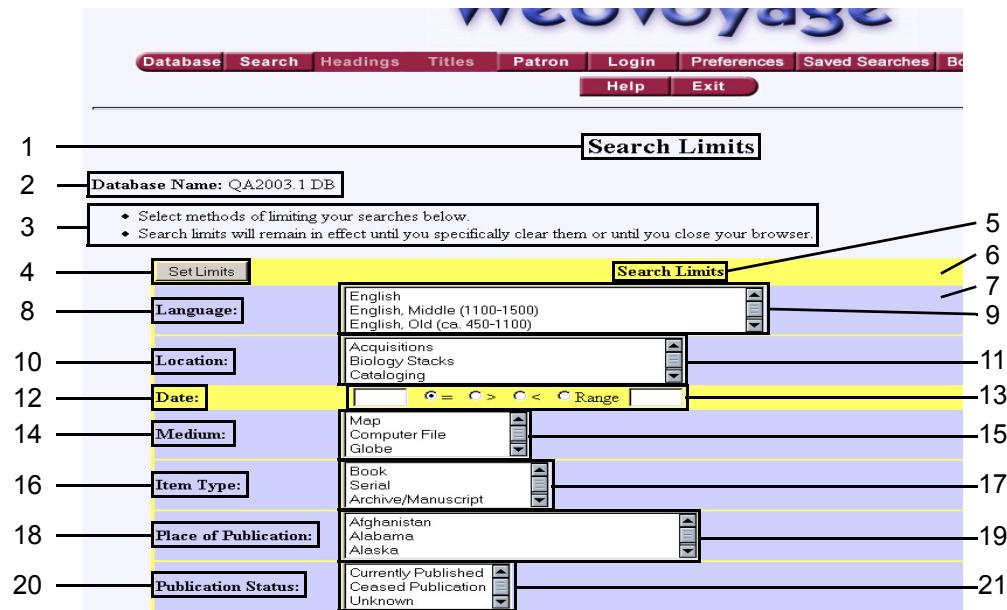


Figure 6-54. Search Limits Page

In addition to the general Page Appearance components of the **Search Limits Page** (see [Table 6-5](#)), you can configure the components detailed in [Table 6-28](#).

[Table 6-28](#) also details the callouts in [Figure 6-54](#).

Table 6-28. Search Limits Page Configuration Reference (Page 1 of 3)

| # | Description | Configured in |
|----|----------------------|--|
| | Enable Search Limits | Set Limits=y in the [Search Dialog] stanza of the opac.ini file to enable Search Limits. |
| 1 | Page title | The Page_Title variable in the [Limit_Page] stanza of the opac.ini file |
| 2a | Database Name label | The Database_Name= variable in the [Misc_Strings] stanza of the opac.ini file |
| 2b | Database Name | Voyager System Administration>System>Default Address>Library Name field

For more, see the <i>Voyager System Administration User's Guide</i> |
| 3 | Instructional text | /m1/voyager/xxxdb/etc/webvoyage/local/set-limmsg.htm |

Table 6-28. Search Limits Page Configuration Reference (Page 2 of 3)

| # | Description | Configured in |
|----|----------------------------------|--|
| 4 | Set Limits button text | The SubmitButton variable in the [Limit_Page] stanza of the opac.ini file |
| 5 | Search Limits table heading text | The Search_Limits variable in the [Limit_Page] stanza of the opac.ini file |
| 6 | Table heading and border color | The Top_Background_Color variable in the [Limit_Page] stanza of the opac.ini file |
| 7 | Table background color | The Table_Background_Color variable in the [Limit_Page] stanza of the opac.ini file |
| | Table font color | The Font_Color variable in the [Limit_Page] stanza of the opac.ini file |
| | Limits selection sections | <p>The [Limits] stanza of the opac.ini file. List the sections in the [Limits] stanza in the order you want them to appear on the page.</p> <p>The available sections are:</p> <ul style="list-style-type: none">• Date (matches on the 008)• Language (matches on the 008)• Item Type (matches on Leader bytes 6 and 7)• Medium (matches on First character of 007)• Location (MFHD location)• Place of Publication (matches on the 008)• Publication Status (matches on the 008) |
| 8 | Language section label text | The Language variable in the [Limit_Page] stanza of the opac.ini file |
| 9 | Language limits | The [Language] stanza of the limits.ini file |
| 10 | Location section label text | The Location variable in the [Limit_Page] stanza of the opac.ini file |
| 11 | Location limits | <p>The Voyager System Administration>>System>>Location Limit Groups>>(location)>>Name field</p> <p>A group will not display if it has the Suppress in OPAC check box selected. See the <i>Voyager System Administration User's Guide</i> for more information.</p> |
| 12 | Date section label text | The Date variable in the [Limit_Page] stanza of the opac.ini file |
| 13 | Language limits | The [Date] stanza of the limits.ini file |

Table 6-28. Search Limits Page Configuration Reference (Page 3 of 3)

| # | Description | Configured in |
|----|---------------------------------------|---|
| 14 | Medium section label text | The Medium variable in the [Limit_Page] stanza of the opac.ini file |
| 15 | Medium limits | The [Medium] stanza of the limits.ini file |
| 16 | Item Type section label text | The Type variable in the [Limit_Page] stanza of the opac.ini file |
| 17 | Item Type limits | The [Type] stanza of the limits.ini file |
| 18 | Publication Place section label text | The Place variable in the [Limit_Page] stanza of the opac.ini file |
| 19 | Publication Place limits | The [Place] stanza of the limits.ini file |
| 20 | Publication Status section label text | The Status variable in the [Limit_Page] stanza of the opac.ini file |
| 21 | Publication Status limits | The [Status] stanza of the limits.ini file |

Simple Limits

Patrons can set a small set of limits (Simple limits) quickly and directly from the search pages. These Simple Limits are configured in the [Simple_Limits] Stanza of the opac.ini file.

The Simple_Limits Stanza

The [Simple_Limits] and any following stanzas allow you to specify what limits will appear in the Simple Limits drop-down on the Simple Search page.

The contents of the [Simple_Limits] stanza appear as the entries in the Simple Limits drop-down menu. Note that the first line of the stanza *must* be the Counter=X. The X represents how many entries follow the Counter line in the stanza and should be the line number of the last entry in the list. The remaining entries in the stanza (1=, 2=, and so on) are the different limits that will appear in the list. The information that you type after each variable is the description that will appear in the drop-down list.

```
[Simple_Limits]
None=None
Counter=5
1=After 1990
2=After 2000
3=Videorecording
4=Serials in English
5=Main Library
```

Figure 6-55. Sample [Simple_Limits] Stanza

Limit Definition Stanzas

Each remaining stanza describes each limit in turn. The name of each stanza should be the *exact* name that you entered in the [Simple_Limits] stanza. The limit is defined by creating a list of limits under each stanza that will all be applied when that name is selected. You may have as many limits appear in a stanza as you want.

For example, if you wanted a limit to limit searches to Musical Scores in French, published in the United States, stored at the Hagstrom Law Library, you would increment the counter in the [Simple_Limits] stanza, add the new stanza name to the [Simple_Limits] stanza, and create a stanza for the new simple limit.

[Figure 6-56](#) shows the edited [Simple_Limits] stanza.

[Figure 6-57](#).shows the new stanza created for the new simple limit.

```
[Simple_Limits]
None=None
Counter=6
1=After 1990
2=After 2000
3=Videorecording
4=Serials in English
5=Main Library
6=Musical Scores in French, published in America...
```

Figure 6-56. Modified [Simple_Limits] Stanza

```
[Musical Scores in French, published in America...]
1=TYPE=cm
2=LANG=FRE
3=PLAC=xxu
4=LOCA=Hagstrom Law Lib.
```

Figure 6-57. Sample Limit Definition Stanza

Each stanza is made up of a numbered list of limit types. After each number and equals sign is a pair of expressions: [Limit Type]=[Limit Code]. For example, a line might read:

1=LANG=CHI

The Limit Type is used to specify what kind of limit this entry is to be (i.e., Date, Language, Location, Medium, Place, Status, Item Type). The Limit Type must be in all capital letters; lowercase is not allowed. The Limit Type must be one of the following:

Table 6-29. Limit Codes and Names

| Limit Code | Limit Name |
|------------|------------|
| DATE | Date |
| LANG | Language |
| LOCA | Location |

Table 6-29. Limit Codes and Names (Continued)

| Limit Code | Limit Name |
|------------|------------|
| MEDI | Medium |
| PLAC | Place |
| STAT | Status |
| TYPE | Item Type |

The Limit Code is the identifying string of between one and three characters that refers to the specific limit. This code can be found in either the limits.ini file or in the System Administration module.

- For Language, Medium, Type, Status and Place limits, the limit codes are all listed in the limits.ini. Under each of those respective stanzas in the limits.ini is a list of limit codes. The code in each line is the string that precedes the name of a particular limit. For example, for a Medium limit of Map, you would look for Map in the Medium Limits stanza, for which the limit code is **a**.
- The list of Location limits comes from the **System> Location Limit Groups>>(group)>>Name** in the System Administration module. Any limit groups in the list that do not have the **Suppress in OPAC** button pressed will be available to select as limits in WebVoyage.

See the *Voyager System Administration User's Guide* for more information.

- The Date limit cannot be configured. Simply enter the dates between which you want to search, separated by a hyphen. To indicate a date before or after which you want results, enter -Date or -Date to specify "up to" or "after." The dates must be in four digit form. For example:

1=DATE=1990-2000

(between 1990 and 2000)

or

1=DATE=-1990

(before 1990)

Order of Limits Sets

You can specify the order of the Language, Location, Date, Medium, Type, Place, and Status limits as they appear on-screen by arranging into the new order the search limit types that follow the [Limits] stanza in the limits.ini. You can also remove a set of search limits by removing that limit type from the [Limits] stanza. Map Limits cannot be reordered.

Initial Persistent Location Limit

In order to automatically narrow the scope of searches by location, particularly in a database comprised of numerous libraries, WebVoyage includes a default initial persistent location limit. This limit is a basic location limit that is in effect throughout a session, until or unless manually removed. All subsequent searches subject to search limits will have this location limit applied to them. This limit can be overridden on the Search Limits page.

Initial Persistent Location Limits is useful if you are using virtual hosts with multiple WebVoyage configurations, if you have multiple libraries connecting to the same server, for instance.

NOTE:

If you remove the limit from the Search Limits page, it will be reset by restarting the WebVoyage session. Also, searches not subject to limits will still not be subject to limits.



IMPORTANT:

The Initial Persistent Location limit only applies to searching the LOCAL database.

The persistent limit is not valid for single connections to Voyager, Citation, or Z39.50 databases selected from the databases page. The persistent limit is also not valid for any Simultaneous Searches.

You may configure multiple server aliases & WebVoyage directories to use multiple Persistent Locations. For example, a database comprised of multiple libraries can set up as many aliases as necessary in order to limit search results to each particular library. For each opac.ini file, you may specify a different DefaultLocationLimit.

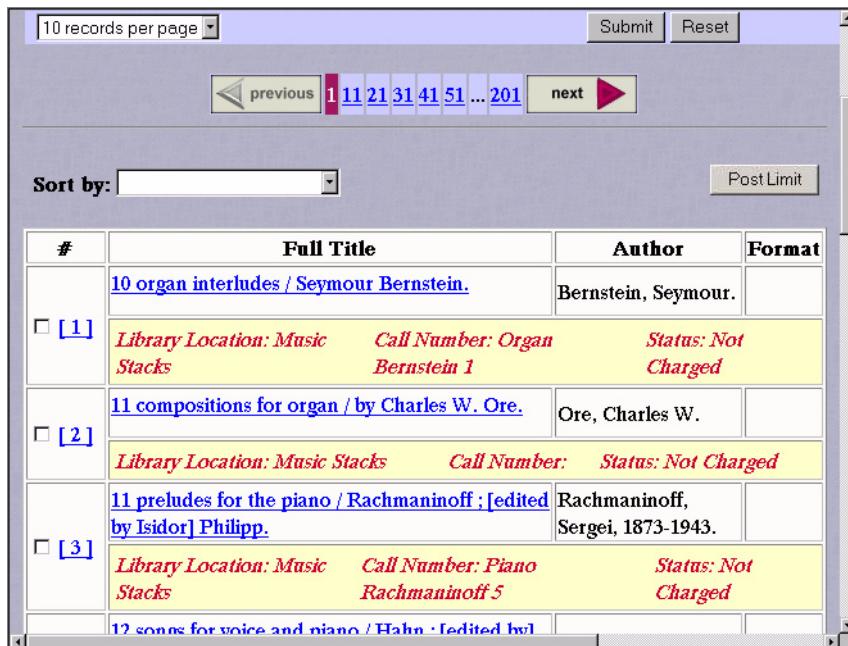
Setting the Location Limit

Specify the limit in the `DefaultLocationLimit=` variable of the [Search Dialog] stanza of the `opac.ini` file. Use the *Location Group Limit Name* as entered in Voyager The System Administration Module (in Location Limit Groups).

See [Figure 6-58](#) for an example of the `DefaultLocationLimit` variable. [Figure 6-59](#) shows the results of a search performed with the Music Stacks location set as the Initial Persistent Location Limit.

[Search Dialog]
 BooleanRelevance=N
 SingleDisplay=True
 Limits=True
 DefaultLocationLimit=Music Stacks

Figure 6-58. Sample DefaultLocationLimit variable



The screenshot shows a search results page with the following interface elements:

- Top navigation: "10 records per page" dropdown, "Submit" button, and "Reset" button.
- Page navigation: "previous" and "next" buttons, with page numbers 1, 11, 21, 31, 41, 51, ..., 201.
- Sort by: A dropdown menu and a "Post Limit" button.
- Table header: "#", Full Title, Author, Format.
- Table data (rows 1-3):
 - Row 1: [1] [10 organ interludes / Seymour Bernstein.](#) Bernstein, Seymour.
 - Row 2: [2] [11 compositions for organ / by Charles W. Ore.](#) Ore, Charles W.
 - Row 3: [3] [11 preludes for the piano / Rachmaninoff ; \[edited by Isidor\] Philipp.](#) Rachmaninoff, Sergei, 1873-1943.
- Table footer: Row 12: [12 songs for voice and piano / Hahn ; \[edited by\]](#)

Figure 6-59. Search results

NOTE:

- The default entry in the DefaultLocationLimit variable is blank, so the default limit is *none*.
- This limit will display on the Advanced Limits page if the Advanced Limits page is configured. Other limits can be added on the Advanced Limits page, to further limit the search. The Initial Persistent Location Limit will work in conjunction with the added Advanced Limits.

[Figure 6-60](#) shows the Music Stacks Persistent Location Limit in the Advanced Search Limits page.

The screenshot shows the 'Search Limits' interface for the 'Endeavor Information Systems' database. The page has a header 'Search Limits' and a sub-header 'Database Name: Endeavor Information Systems'. Below these are instructions: 'Select methods of limiting your searches below.' and 'Search limits will remain in effect until you specifically clear them or until you close your browser.' There are six sections for setting limits:

- Language:** English, English, Middle (1100-1500), English, Old (ca. 450-1100)
- Location:** Microform Room, **Music Stacks** (highlighted in green), Periodicals Room
- Date:** Date range selection buttons
- Medium:** Map, Computer File, Globe
- Item Type:** Book, Serial, Archive/Manuscript
- Place of Publication:** Afghanistan, Alabama

Figure 6-60. Advanced Search Limits page

- Only one location group name may be specified for the key: Do not enter more than one limit in the variable.

Initial Persistent Limits and Quick Limits

If a Quick Limit is applied, it overrides the persistent limit and the persistent limit is ignored.

Add the location group limit code to any and all Quick Limits so the location limit is available as a quick limit. If, for example, `Music Stacks` is the `DefaultLocationLimit` key, add `Music Stacks` to all Quick Limits in order to continue limiting the search by location (see [Figure 6-61](#)). [Figure 6-62](#) shows the corresponding `[Simple_Limits]` stanza in the `limits.ini` file.



Figure 6-61. Location Limit in Quick Limits drop-down

```
[Simple_Limits]
None=None
Counter=8
1=Last 10 Years
2=Videorecording
3=Serials in English
4=Acquisitions
5=Last 10 Years, Music Stacks
6=Videorecording, Music Stacks
7=Serials in English, Music Stacks
8=Acquisitions, Music Stacks
```

Figure 6-62. Corresponding [Simple_Limits] stanza in limits.ini

The persistent limit will be reapplied when the Quick Limit is removed.

Initial Persistent Limits and Post Limits

Persistent limits work in conjunction with Post Limits, as if it were an applied Advanced Limit set prior to the search.

Quick Limits

Quick Limits allow patrons to place a small number of limits on searches quickly, from the Search pages.

Quick Limits for Simple Searches

You can enable or disable Quick Limits selection boxes for the **Simple Search** page and for the **Search Results** (Titles List) page for Simple Searches.

The `DisplayQuickLimitsDropDown` variable controls whether the simple limit drop-down field will appear. The default setting is to display the quick limits on both pages.

Set the variable to `y` to enable the quick limits selection box. Set the variable to `n` to disable the box.

- To include the Quick Limits box on the **Simple Search** page, set the `DisplayQuickLimitsDropDown` variable in the `[Combined_Search_Page]` stanza of the `opac.ini` file.
- To include the Quick Limits box on the **Search Results** page for simple searches, set the `DisplayQuickLimitsDropDown` variable in the `[Title_Page]` stanza of the `opac.ini` file.

Quick Limits Box Style

The `QuickLimitDropDownSize` variable in the `[Combined_Search_Page]` stanza of the `opac.ini` file controls the style and the size (in rows) of the Quick Limits list that displays on the Combined Search (Simple Search) page. Enter the style number after the `QuickLimitDropDownSize` variable.

- Entering 1 will cause the list to display as a single entry in a drop-down list (default behavior, if quick limits display enabled).
- Entering any other number (2 or greater) will display a box of the specified size.

For example, to display a list with five entries, you would enter 5 after the `QuickLimitDropDownSize` variable.

If the number of quick limit *options* exceeds the number in the `QuickLimitDropDownSize` variable, the quick limits box includes scroll bars so patrons can access the remaining options. The box essentially becomes as in the default, except that a larger window of options is visible in the drop-down box.

[REDACTED]

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Record Display Configuration

7

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Overview

This chapter details configuration of record display options.

The MARCINFO.INI File

The marcinfo.ini file contains all possible data elements/combinations from the 000 (positions 06 and 07), 007 (position 00), and 006 (position 00) field tags of the MARC bibliographic record.

The marcinfo.ini file is located in the /m1/voyager/xxxdb/etc/webvoyage directory.

Each combination has a text descriptor that displays under one of three labels in the Voyager OPAC (the labels themselves are defined in the distributed displayn.cfg files as “Primary Material,” “Physical Description,” and “Includes,” respectively).

You can modify all data elements in this configuration file. However, Endeavor strongly recommends that you do not delete any data elements or their corresponding variable names. This could result in a code being displayed to your patrons instead of the appropriate format, physical characteristic, or material type.

Refer to *USMARC Format for Bibliographic Data* (Washington, D.C.: Library of Congress, latest edition) for complete definitions and guidelines on the use of these three fields. As you can see by reviewing the list of data elements, Voyager includes new values effective with format integration so that your OPAC displays will use MARC bibliographic data appropriately both before and after format integration goes into effect.

No Entry in Marcinfo File Message

If there is not an appropriate corresponding entry for a title in the marcinfo.ini file (located in the `/m1/voyager/xxxdb/etc/webvoyage` directory), the information entered after the *NoEntry* variable will display on the View Record Pages. If nothing is entered after this variable, *Entry not found* will be used as the default.

Editing the Record Display

When a user selects a record entry from a WebVoyáge index to display the record's detail, the system looks for data in the MARC bibliographic record, the MARC holdings record, the line item in the purchase order, and the item record. Whenever any of these records are present, the system displays data based on a variety of factors including:

- Definitions in the `*.ini` and `*.cfg` files (described in this section), including:
 - the `[View_Record_Page]` stanza of the `opac.ini`,
 - `displayn.cfg` files (where *n* is the number in the sequence of buttons on the View Record pages),
and
 - various display codes
- Available data in the MARC bibliographic record
- Available data in the linked MARC holdings record(s)
- Available data in the linked line item copy or copies of a purchase order(s)
- Available data in the linked item record(s)

However, before the system constructs a display from this data, it first considers whether or not records have been set for suppression from WebVoyáge displays. This is accomplished by the manual or automatic setting of the Suppress from OPAC values in either the MARC bibliographic record or the MARC holdings record, or both.

[Figure 7-1](#) illustrates the configuration file division of a View Record page.

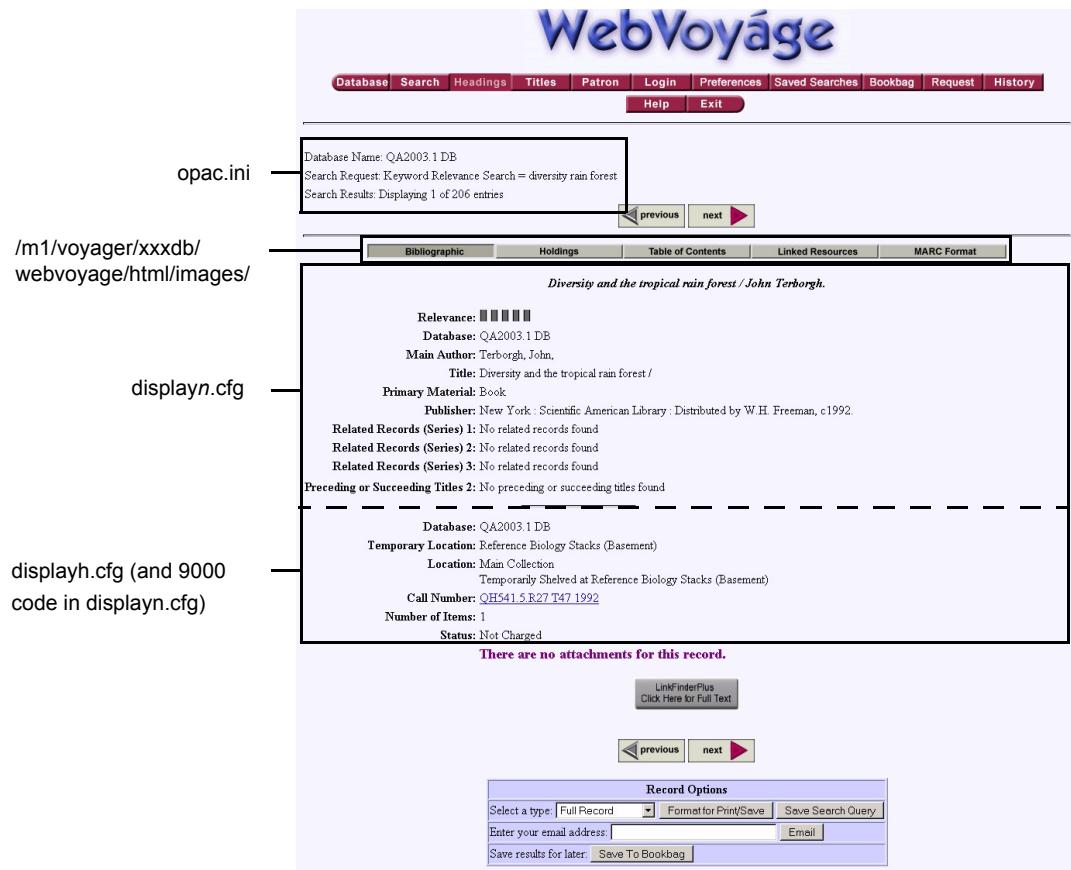


Figure 7-1. General View Record Page Configuration Diagram

[Figure 7-2](#) shows a sample View Record page, using the `display1.cfg` and with the holdings information displayed (according to the `displayh.cfg` file) using the `9000` code, toward the bottom of the page.

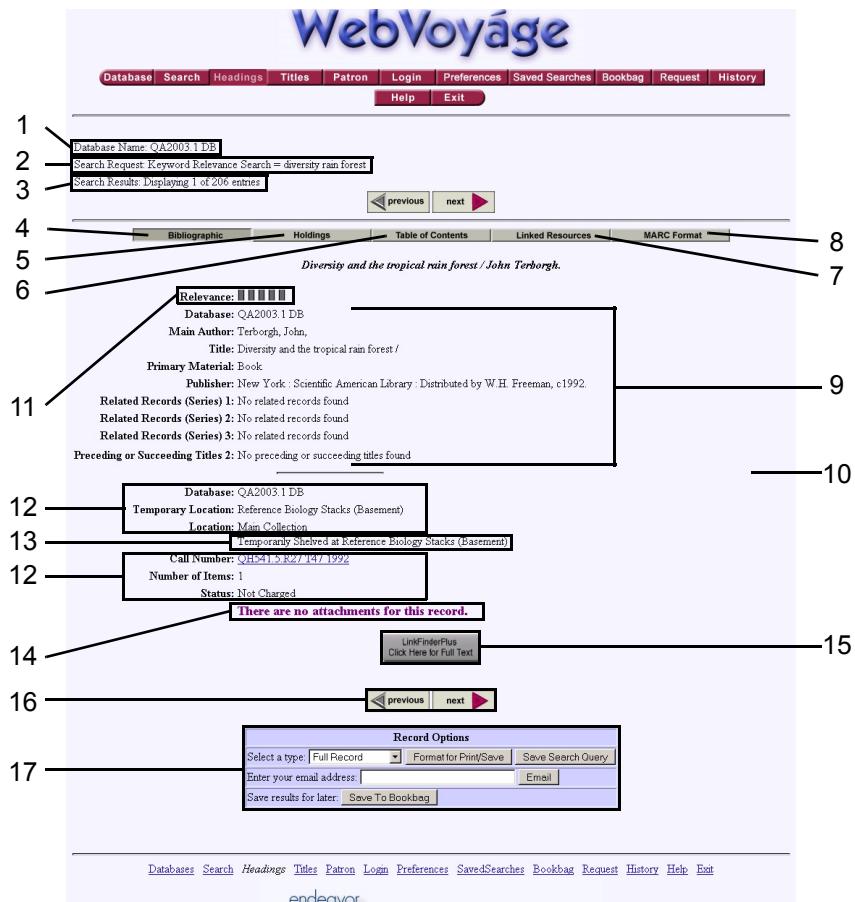


Figure 7-2. Sample View Record page Components

In addition to the general Page Appearance components of the View Record pages (see [Table 4-3](#)), you can configure the components detailed in the following sections (and tables).

The [View_Record_Page] Stanza

The [View_Record_Page] stanza of the opac.ini file contains general information which displays on most of the View Record pages.

[Table 7-1](#) details the first set of callouts in [Figure 7-2](#).

Table 7-1. Title Page Configuration Reference (Page 1 of 2)

| # | Description | Configured in |
|----|--|--|
| 1a | Database name display on Title Page | Set the ShowDatabaseName=y in the [View_Record_Page] stanza of the opac.ini file to enable the Database Name display at the top of the form. |
| 1b | Database Name | Voyager System Administration>System>Default Address>Library Name field |
| 2a | Search request display on Title Page | Set the ShowSearchRequest=y in the [View_Record_Page] stanza of the opac.ini file to enable the Search Request display at the top of the form. |
| 2b | Search request label | The Search_Request variable in the [Results] stanza of the opac.ini file. |
| 2c | Search request text | <ul style="list-style-type: none"> For Simple searches: The [Search_Text] stanza of the opac.ini file for standard searches, or Simple Search for user-defined searches For Builder Searches: Voyager System Administration>Search>Indexes - Keyword Definitions
All keyword searches not suppressed from WebVoyage (except for JKEY) are available here |
| 3a | Search results summary display on Title Page | Set the ShowSearchResults=y in the [View_Record_Page] stanza of the opac.ini file to enable the Search Request display at the top of the form. |
| 3b | Search results label | The Search_Results variable in the [Results] stanza of the opac.ini file. |
| 3c | Search results text | The BibHold variable in the [Results] stanza of the opac.ini file |
| | Previous button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-prev.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-prev.gif |
| | Previous button alternate text | The Previous variable in the [TextTool] stanza of the opac.ini file |

Table 7-1. Title Page Configuration Reference (Page 2 of 2)

| # | Description | Configured in |
|---|----------------------------|--|
| | Next button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-next.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-next.gif |
| | Next button alternate text | The Next variable in the [TextTool] stanza of the opac.ini file |

The displayn.cfg files

The middle section of each View Record page is configured by the displayn.cfg files which correspond to the buttons toward the top of the page (callouts 4 through 8 in [Figure 7-2](#)). The *n* denotes the position of the file's button on the View Record pages. For example, the second button from the left on the page (callout number 5) corresponds to the display2.cfg file.

[Table 7-2](#) details the displayn.cfg-related of callouts in [Figure 7-2](#).

Table 7-2. Title Page Displayn.cfg-related Configuration Reference (Page 1 of 3)

| # | Description | Configured in |
|----|--|---|
| 4a | Record view page one button | /m1/voyager/xxxdb/webvoyage/html/images/view1.gif in the up or unpressed position
/m1/voyager/xxxdb/webvoyage/html/images/view1a.gif in the down or pressed position |
| 4b | Record view page one button alternate text | the 1 variable of the display.ini file (m1/voyager/xxxdb/etc/webvoyage/local) |
| 9 | Record display information | The display1.cfg file (shown). |
| 10 | Page layout | the [View1_Page] stanza of the opac.ini file (m1/voyager/xxxdb/etc/webvoyage/local) |
| 5a | Record view page two button | /m1/voyager/xxxdb/webvoyage/html/images/view2.gif in the up or unpressed position
/m1/voyager/xxxdb/webvoyage/html/images/view2a.gif in the down or pressed position |

Table 7-2. Title Page Displayn.cfg-related Configuration Reference (Page 2 of 3)

| # | Description | Configured in |
|----|--|---|
| 5b | Record view page two button alternate text | the 2 variable of the display.ini file (m1/voyager/xxxdb/etc/webvoyage/local) |
| 9 | Record display information | The display2.cfg file (not shown). |
| 10 | Page layout | the [View2_Page] stanza of the opac.ini file (m1/voyager/xxxdb/etc/webvoyage/local) (not shown) |
| 6a | Record view page three button | /m1/voyager/xxxdb/webvoyage/html/images/view3.gif in the up or unpressed position
/m1/voyager/xxxdb/webvoyage/html/images/view3a.gif in the down or pressed position |
| 6b | Record view page three button alternate text | the 3 variable of the display.ini file (m1/voyager/xxxdb/etc/webvoyage/local) |
| 9 | Record display information | The display3.cfg file (not shown). |
| 10 | Page layout | the [View3_Page] stanza of the opac.ini file (m1/voyager/xxxdb/etc/webvoyage/local) (not shown) |
| 7a | Record view page four button | /m1/voyager/xxxdb/webvoyage/html/images/view4.gif in the up or unpressed position
/m1/voyager/xxxdb/webvoyage/html/images/view4a.gif in the down or pressed position |
| 7b | Record view page four button alternate text | the 4 variable of the display.ini file (m1/voyager/xxxdb/etc/webvoyage/local) |
| 9 | Record display information | The display4.cfg file (not shown). |
| 10 | Page layout | the [View4_Page] stanza of the opac.ini file (m1/voyager/xxxdb/etc/webvoyage/local) (not shown) |
| 8a | Record view page five button | /m1/voyager/xxxdb/webvoyage/html/images/view5.gif in the up or unpressed position
/m1/voyager/xxxdb/webvoyage/html/images/view5a.gif in the down or pressed position |

Table 7-2. Title Page Displayn.cfg-related Configuration Reference (Page 3 of 3)

| # | Description | Configured in |
|----|---|---|
| 8b | Record view page five button alternate text | the 5 variable of the display.ini file (m1/voyager/xxxdb/etc/webvoyage/local) |
| 9 | Record display information | The display5.cfg file (not shown). |
| 10 | Page layout | the [View5_Page] stanza of the opac.ini file (m1/voyager/xxxdb/etc/webvoyage/local) (not shown) |

You can modify or delete everything in the displayn.cfg files. However, deleting certain information could disable your patrons from accessing available information about your records. A sample displayn.cfg file is shown in [Figure 7-3](#) on [page 7-9](#).

For each label, you assign one or more MARC field tags, indicator values, and subfields. You can also edit and reorder the labels to suit your needs, reorder the sequence of multiple fields displaying under one label, or split out the grouped field tags with individual labels.

In [Figure 7-3](#), xx indicates that any indicator values apply. To indicate a blank, use the pipe or vertical bar (|). For the 000, 006, 007, and 008 fields, when the system finds these byte position values in the MARC record, the label from the displayn.cfg file displays, followed by the corresponding text descriptor from the marcinfo.ini file.

Editing the displayn.cfg Files

To display bibliographic information in the Record Display, in the appropriate displayn.cfg file, specify the following:

1. Type the label for the bibliographic information as you want it to display in the Record Display. This label should be typed flush against the left margin.
2. Optional: You can also include textual messages to display when no information is returned for a particular label. After the label, type a space followed by a plus sign (+) and then the message that you want displayed. For example, typing +No Data Available after the Holdings Information label will display that message when no information is available from the MARC holdings record.

NOTE:

The system uses the textual messages for all records. For example, if you added “+No recent issues received” as a display constant for the “Recent Issues” label (information that displays from a serial receipt history, not the MARC holdings record), that display constant would appear for all monographic materials as well since they do not have serial receipt histories.

3. Type the appropriate code (as listed above) or the MARC bibliographic tag, followed by the indicators (use XX if the indicator values can be anything), indicators, and subfields in the format below:

100 XX aq

This line must be indented 3 spaces from the left margin.

If no there is no information associated with the code or MARC tag, then nothing will display (including the label), unless information is included after the plus sign (see step 2).

You can leave up to one blank line between all labels and codes or tags. If you insert more than one blank line, only one blank line will display.

Repeat the above instructions for all the bibliographic information that you want to display. A sample `displayn.cfg` file is shown below.

```
Database: +No information available
5000
Main Author:
 100 XX aq
 110 XX ab
Conference:
 111 XX acnd
Title:
 130 XX aplskf
 240 XX {a[%}plskf"]"
 245 XX ab
In:
 773 XX abdghikmnoprst
```

Figure 7-3. Sample displayn.cfg File

Primary Material:
000 06 2

Physical Description:
007 00 1

Includes:
006 00 1

Publisher:
260 XX abc

Related Records (Series) 1: +No related records found
3500 2450440A

Related Records (Series) 2: +No related records found
3500 ISSNCOMP

Related Records (Series) 3: +No related records found
3500 7731

Preceding or Succeeding Titles 1: +No preceding or succeeding titles found
3500 ISSNPREC

Preceding or Succeeding Titles 2: +No preceding or succeeding titles found
3500 ISSNSUCC

Holdings Information: +No Data Available--Ask at Reference
9000

Figure 7-3. Sample displayn.cfg File (Continued)

Record Display Additional Information Codes

The displayn.cfg files can also contain any tag, indicator, subfield combination from a MARC Bibliographic record, as well as text labels for those combinations.

In addition, the `displayn.cfg` files can contain one of the codes listed in [Table 7-3](#).

Table 7-3. Additional Record Display Codes

| | |
|------|---|
| | |
| 2000 | Table of Contents (505 subfields a, r, t, g) |
| 3000 | 856 Links (Linked Resources from 856 field) |
| 4000 | Marc record |
| 5000 | Database name of Bib Record |
| 9000 | Holdings Information, which is defined in the <code>displayh.cfg</code> . |
| 9500 | Display Holdings Summary information. |

[Table 7-4](#) details the remaining callouts in [Figure 7-2](#).

Table 7-4. Title Page Displayn.cfg-related Configuration Reference (Page 1 of 2)

| # | Description | Configured in |
|----|---------------------------|---|
| 11 | Relevance ranking heading | The <code>Relevance</code> variable in the <code>[View_Record_Page]</code> stanza of the <code>opac.ini</code> file |
| 12 | Holdings information | Include the 9000 code in the <code>displayn.cfg</code> (in this case, the <code>display1.cfg</code>).

Record information display for holdings is determined by the <code>displayh.cfg</code> file (the <code>h</code> does not represent anything, it is just an <code>h</code>). For more information about the <code>displayh.cfg</code> file, see Displaying Holdings Information using the displayh.cfg File on page 7-17. |
| 13 | Status information | <ul style="list-style-type: none"> • <code>Shelved_At</code> • <code>Temp_Shelved</code> • <code>Pre_Order_Process</code> • <code>Copy_Received</code> • <code>Copies_Received</code> • <code>Copy_Claimed</code> • <code>Copies_Claimed</code> • <code>Copy_Ordered</code> • <code>Copies_Ordered</code> |
| 14 | No attachments message | <code>/m1/voyager/xxxdb/etc/webvoyage/local/noatt-msg.htm</code> |

Table 7-4. Title Page Displayn.cfg-related Configuration Reference (Page 2 of 2)

| # | Description | Configured in |
|-----|---|--|
| | No holdings message (not shown) | /m1/voyager/xxxdb/etc/webvoyage/local/noholdmsg.htm |
| 15 | LinkFinder button (LinkFinder customers only) | The LinkFinderButtonGraphic variable of the opac.ini file, and place the file referenced in the LinkFinderButtonGraphic variable in /m1/voyager/xxxdb/webvoyage/html/images/

For more information about enabling and configuring Web-Voyage for use with LinkFinder, see Configuring View Record Page OpenURL link display for WebVoyage on page 12-2 |
| 16a | Previous button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-prev.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-prev.gif |
| 16b | Previous button alternate text | The Previous variable in the [TextTool] stanza of the opac.ini file |
| 16c | Next button | Active: /m1/voyager/xxxdb/webvoyage/html/images/s-next.gif
Inactive: /m1/voyager/xxxdb/webvoyage/html/images/d-next.gif |
| 16d | Next button alternate text | The Next variable in the [TextTool] stanza of the opac.ini file |
| 17 | Print/Save/Email dialog box | The [Mail_And_Requests] stanza of the opac.ini file.
For more information, see Record Options Box Configuration on page 4-29 |

Holdings Jump Bar Function

The Holdings Jump Bar feature enables the end user to quickly move through a long holdings list by “jumping” to the database selected from the “Held at.” list and “jumping back to the library list” by using “Back to library list” available at the end of each database holdings list.

```
[View_Record_Page]  
...  
DBHoldingsJumpBar=Y  
DBHoldingsJumpBarText=Held at:  
DBHoldingsJumpBarBack=Back to library list
```

Figure 7-4. Holdings Jumpbar variables

Implementing this new function generates the following search results viewing capability (see [Figure 7-5](#)):

Title: Journal of abnormal and social psychology.
Publisher: [Washington, etc.] American Psychological Association [etc.]
Description: 49 v. ill.
v. 20-69; Apr. 1925-Dec. 1964.
Notes: Continued in part by: Journal of abnormal psychology, ISSN 0021-843X, and Superseded in part by: Journal of personality and soc
psychology, ISSN 0022-3514.
Subject(s): [Psychology](#), [Pathological](#)-[Periodicals](#).
[Psychology](#)-[Periodicals](#).
[Social psychology](#)-[Periodicals](#).
Continues: [Journal of abnormal psychology and social psychology](#)
Held at: [Fort Valley State University](#) 
[North Georgia College & State University](#)
[Georgia Institute of Technology](#)
[Columbus State University](#)

Institution Name: Fort Valley State University
Location: Bound periodicals located on Second floor
Call Number: RC321.J7 Copy 1
Number of Items: 1
Status: Not Charged
Volumes Owned: VOL 40-42 1945-1947
VOL 44-64 1949-1962
VOL 67-69 1963-1964
[\[Back to library list\]](#) 

Figure 7-5. Holdings Jump Bar Feature

This function can be tailored to local preferences. DBHoldingsJumpBar= can be set to Y(es) or N(o). To invoke the “Jump Bar” function, this needs to be set to Y which is also the default. DBHoldingsJumpBarText= specifies the text that precedes the list of holding databases.

"Held at:" is the default text. It can be changed to match local preferences. The order of the resulting displayed "Held at:" locations is determined by weights set in database definitions. Similarly, DBHoldingsJumpBarBack= specifies the text that displays for the end-user to click to "jump back" to the list of holding databases. This text, too, can be modified to match local preferences.

Search Re-directs

You can re-direct your searches by adding a hypertext link for Author, Title, Subject, Call Number, and Date after your search display information. After the search display config information, add a space and enter:

- **A** (author)
- **T** (title)
- **S** (subject)
- **C** (call number)
- **D** (date),

followed by the subfields which you want to build as a hypertext linked display. The search responds however you have your searches set up in the `opac.ini` file (left-anchored and so on).

NOTE:

If a particular search is not included on the Builder Search tab, no hypertext link will display for that subfield.

Following is a sample search redirect portion of a `display2.cfg` file. [Figure 7-6](#) shows sample MARC record information displayed by the `display2.cfg` file in [Figure 7-7](#).

Example:

Other Author(s) :

700 XX aqd A aq
710 XX ab A ab

700 1_ |a Hall, G. Stanley |q (Granville Stanley), |d 1844-1924.
710 2_ |a American Psychological Association.
710 2_ |a American Association for Applied Psychology.

Figure 7-6. MARC Record Information

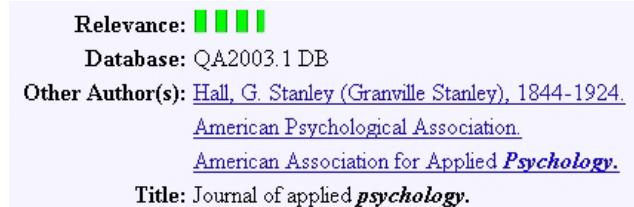


Figure 7-7. Sample Search Redirect display

Search Redirect Settings

[Table 7-5](#) details the default redirected search type and redirected search label configuration.

Table 7-5. Redirected Search Type and Label Configuration

| Variable and Description | Configuration |
|---|---|
| AuthorSearchRedirect
Type of search performed during Author search redirect: <ul style="list-style-type: none"> Authority performs a Name Headings Search. Authority Browse performs a name headings browse. Name/Title performs a Name/Title headings search. Name/Title Browse performs a Name/Title headings browse. | To designate what type of Author redirect search to perform, specify the following in the [View_Record_Page] stanza:
AuthorSearchRedirect=search type
Where search type is one of the following search types: <ul style="list-style-type: none"> Authority Authority Browse Authority Keyword Name/Title Name/Title Browse |
| AuthorSearchText
Description of search type that appears for redirected author searches on the Title List, Headings List, Record Display and Search History pages. | AuthorSearchText=text |

Table 7-5. Redirected Search Type and Label Configuration

| Variable and Description | Configuration |
|---|--|
| TitleSearchRedirect
Type of search performed during Title search redirect. | To designate what type of Title redirect search to perform, specify the following in the [View_Record_Page] stanza:

TitleSearchRedirect=search type
Where <i>search type</i> is one of the following search types: <ul style="list-style-type: none">• Authority• Authority Keyword• Browse• Left Anchored• Keyword |
| TitleSearchText
Description of the search type that appears for redirected title searches on the Title List, Headings List, Record Display and Search History pages. | TitleSearchText=text |
| SubjectSearchRedirect
Specify type of search performed during a Subject search redirect. | To designate type of Subject redirect search to perform, specify the following in the [View_Record_Page] stanza:

SubjectSearchRedirect=search type
Where <i>search type</i> is one of the following search types: <ul style="list-style-type: none">• Authority• Authority Keyword• Browse |
| SubjectSearchText
Description of search type that appears for redirected subject searches on the Title List, Headings List, Record Display and Search History pages. | SubjectSearchText=text |

Table 7-5. Redirected Search Type and Label Configuration

| Variable and Description | Configuration |
|--|---|
| <p>CallNumberSearchRedirect
Specify type of search performed during a Call Number search redirect.</p> | <p>Specify whether search will find call numbers via browse or left anchored searching.</p> <ul style="list-style-type: none"> • Left Anchored searching provides greater precision, but less recall. • Browse searching provides less precision, but greater recall. <p>To designate what type of Call Number redirect search to perform from the Builder Search tab, specify the following in the [View_Record_Page] stanza:</p> <p>CallNumberSearchRedirect=search type</p> <p>Where search type is one of the following search types:</p> <ul style="list-style-type: none"> • Browse • Left Anchored |
| <p>CallNumberText
Description of search type that appears on the Title List, Headings List, Record Display and Search History pages.</p> | <p>CallNumberText=text</p> |

Displaying Holdings Information using the displayh.cfg File

The displayh.cfg file is located in each of the /m1/voyager/xxxdb/etc/webvoyage/display subdirectories (/local, /Z3950, /vcit, /zcit, etc.) and displays holdings information when the 9000 code is used in a displayn.cfg file.

The displayh.cfg file, can contain any tag, indicator, subfield combination from a MARC Holdings record (refer to **USMARC Format for Holdings Data** for definitions), as well as text labels for those combinations.

You can also include other information from the Voyager modules as specified by one of the following codes:

Table 7-6. Codes From Voyager Modules (Page 1 of 3)

| Code | Description | Configured in |
|------|---|---|
| 1000 | OPAC Display Name for the Location (copy and location info for item) | Voyager System Administration>>System>>Locations>>OPAC Display Name field |
| 1002 | Database Name for the Item | Voyager System Administration>>Search>>Database Definitions>>Database Tab>>Name field |
| 1010 | Number of Items linked to the MARC holdings record | Items linked to MFHD |
| 1012 | Item Status from the Item Record. If there is only one existing item, its status will always display. If there is more than one item linked to the MARC holdings record, only the items with exceptional statuses (charged, lost, in bindery, etc.) will have their statuses displayed. Exceptional statuses are any status but Available or Not Charged. | See Customizing Item Statuses Display on page 7-33 for information about defining item status terminology in WebVoyáge. |
| 1020 | Recent Issues from Serials | Taken from the serial receipts as recorded in Serials Check-In (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In) |
| 1021 | Recent Issues from Serials displayed according to the WebVoyáge XML for Serials feature. | Taken from the serial receipts as recorded in Serials Check-In (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In).
For more information about WebVoyáge XML for Serials, see WebVoyáge XML for Serials on page 7-20 |
| 1022 | Supplemental Issues from Serials | Taken from the serial receipts for supplement components as recorded in Serials Check-In (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In) |

Table 7-6. Codes From Voyager Modules (Page 2 of 3)

| Code | Description | Configured in |
|------------------------|--|---|
| 1023 | Supplemental Issues from Serials displayed according to the WebVoyage XML for Serials feature. | Taken from the serial receipts for supplement components as recorded in Serials Check-In (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In).

For more information about WebVoyage XML for Serials, see WebVoyage XML for Serials on page 7-20 |
| 1024 | Indexes from Serials | Taken from the serial receipts for index components as recorded in Serials Check-In (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In) |
| 1025 | Indexes from Serials displayed according to the WebVoyage XML for Serials feature. | Taken from the serial receipts for index components as recorded in Serials Check-In (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In)

For more information about WebVoyage XML for Serials, see WebVoyage XML for Serials on page 7-20 |
| 1030 | Order Status as shown in the line items of purchase orders. | For more information about setting order statuses, see (see <i>The Voyager Acquisitions User's Guide</i> for more information on Serials Check-In)

For information about defining order status terminology in OPAC see Order Statuses on page 7-39 |
| 1040,
1042,
1044 | Compressed serials information | Taken from MFHD 853/863, 854/864, and 855/865 fields. See "Serial Issues Collapsing" in the <i>Voyager Acquisitions User's Guide</i> for more information. |
| 1041,
1043,
1045 | Compressed serials information displayed according to the WebVoyage XML for Serials feature. | For more information about WebVoyage XML for Serials, see WebVoyage XML for Serials on page 7-20 |

Table 7-6. Codes From Voyager Modules (Page 3 of 3)

| Code | Description | Configured in |
|------|--|---|
| 1050 | E-item information
Includes enumeration, chronology, year information, and caption linked to the E-Item | E-Item tab in the Reserve work space in the Voyager Circulation module. The enumeration, chronology, and year information from the E-Items tab display, along with the caption as the text of the link, and the link information as the target of the link. |



IMPORTANT:

The information contained in this file is only accessed when the 9000 code is included in one of the displayn.cfg files (see [The displayn.cfg files](#) on [page 7-6](#) for more information). You cannot include any of these codes in the displayn.cfg files.

Serials Display

The 1040, 1042, and 1044 codes display serials information in WebVoyáge. Information from the holdings records 86X (863, 864, and 865) fields displays if the first indicator is a 3, 4 or 5. Information in the chronology subfields displays according to its numeric designator mapping (1-12 for the months, 21-24 for the seasons). If there is no corresponding mapping, the literal contents of the subfield display.

WebVoyáge XML for Serials

Customize serials information display using WebVoyáge XML for Serials feature. This feature uses a number of xml and xsl files to determine the information displayed.

[Table 7-7](#) details the displayh.cfg codes/file name, and level of expertise required to modify the file. All files are in the /m1/voyager/xxxdb/etc/webvoyage/local directory.

NOTE:

These codes only apply to `displayh.cfg` files for Voyager Bibliographic databases. WebVoyage ignores them in `displayh.cfg` files for Z39.50 and/or citation databases.

Table 7-7. WebVoyage XML For Serials Files

| File | Description | Expertise Required for Modification |
|----------------------|---|--|
| 1021.xsl | Invoked by reference to a "1021" code in the <code>etc\webvoyage\local\displayh.cfg</code> file | High |
| 1023.xsl | Invoked by reference to a "1021" code in the <code>etc\webvoyage\local\displayh.cfg</code> file. | High |
| 1025.xsl | Invoked by reference to a "1021" code in the <code>etc\webvoyage\local\displayh.cfg</code> file. | High |
| 102X_config.xml | Configuration options that are loaded by the 1021.xsl, 1023.xsl, and 1025.xsl files. | Low |
| 102X_display.xsl | Invoked by the 1021.xsl, 1023.xsl, and 1025.xsl files. Processes XML data that conforms to the <code>displayh 1021-23-25.dtd</code> format. | High |
| 1041.xsl | Invoked by reference to a "1041" code in the <code>etc\webvoyage\local\displayh.cfg</code> file. | High |
| 1043.xsl | Invoked by reference to a "1043" code in the <code>etc\webvoyage\local\displayh.cfg</code> file. | High |
| 1045.xsl | Invoked by reference to a "1045" code in the <code>etc\webvoyage\local\displayh.cfg</code> file. | High |
| 104X_chronValues.xml | Converts numeric values defined in MARC for month and season codes, into chronological names. | Low |
| 104X_config.xml | Configuration options that are loaded by the 1041.xsl, 1043.xsl, and 1045.xsl files. | Low |
| 104X_display.xsl | Invoked by the 1041.xsl, 1043.xsl, and 1045.xsl files. Processes XML data that conforms to the <code>MARC21slim.xsd</code> format. | High |

E-Items

WebVoyage can display E-Items linked to in the Voyager Circulation Module. E-Items are electronic journals or other items which are accessible over the Web. Adding the code 1050 to the `displayh.cfg` file displays the E-Item information entered in The Voyager Circulation Module, including hyperlinked caption text for the link.

The E-item information displayed in WebVoyage comes from the E-Item information entered in the fields on the E-Item tab in the **Reserve** work space in the Voyager **Circulation** module. The enumeration, chronology, and year information from the E-Items tab display, along with the caption as the text of the link, and the link information as the target of the link.

For example, if you wanted the caption “E-Items” to display before the 1050 code, you would type:

E-Items:

1050

For more information about creating and linking E-Items, see *The Voyager Circulation User’s Guide*.

Temporary Location Display

To display the temporary location in place of the permanent location, for holdings records, include the 1005 display directive in the `displayh.cfg` file.

The temporary location displays for each item with a temporary location. If all of the items have the same temporary location, the temporary location information collapses to show only that one temporary location.

This feature also uses the `Temp_Shelfed` variable in the `[View_Record_Page]` stanza of the `opac.ini` file for the Temporarily Shelved at `text`.

Holdings Summary Display using the 9500 code

To display a brief holdings summary on a View Record page (including Location, Call Number, and Status), include the 9500 code in a `displayn.cfg`. [Figure 7-8](#) shows holdings information displayed by including the 9500 code in the `display1.cfg` file.

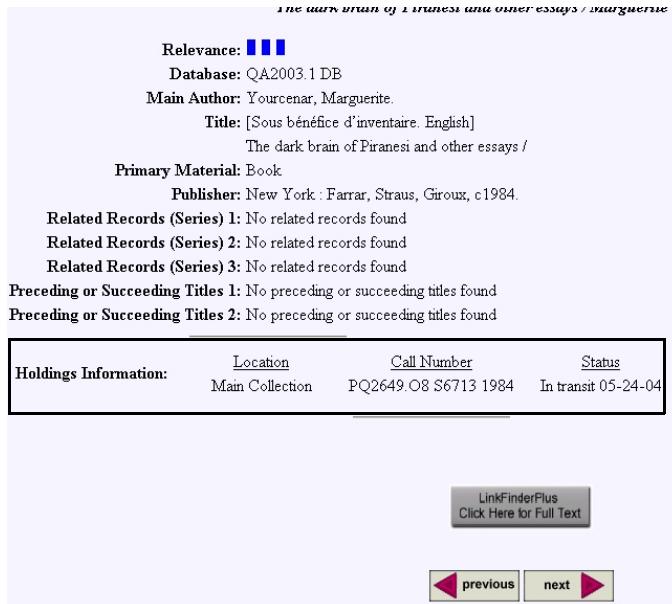


Figure 7-8. Holdings Summary (9500 Code) Example

- The label of the section (*Holdings Information*) is configured in the `display1.cfg`.
- The **Location** column heading is configured in the `Location` variable of the `[View_Record_Page]` stanza of the `opac.ini` file.
- The **Call Number** column heading is configured in the `CallNumber` variable of the `[View_Record_Page]` stanza of the `opac.ini` file.
- The **Status** column heading is configured in the `Status` variable of the `[View_Record_Page]` stanza of the `opac.ini` file.
- The status text is configured in the `[Item_Statuses]` stanza of the `opac.ini` file.

Adding Punctuation to MARC Record Configuration Files

You need not manually input MARC record punctuation, but can instead use the enhanced functionality of display, e-mail, request, and save configuration files to provide for the correct display of records in WebVoyage. For example, the forward slash between the 245 `‡b` and `‡c` is added to a display configuration file. When a

patron searches for and displays a bibliographic record in WebVoyáge, the system uses the appropriate display configuration file to add the punctuation to the record display.

Voyager does not automatically add any punctuation to records. Changing the configuration files to include punctuation allows some sites to forego the manual input of punctuation into MARC records and to customize the display of records in WebVoyáge without altering the contents of the records themselves.

Those sites which have added punctuation explicitly will continue to do so without any problems in record display. However, all sites should review their current configuration files in regard to the 240 and 6xx fields. Punctuation for those fields (the brackets for the 240 field and the double hyphens for the 6xx fields) was previously pre-established for correct display in WebVoyáge. Beginning with the Voyager 2001.1 release, the punctuation is included in the standard configuration files that all sites receive upon upgrade.



IMPORTANT:

If you have edited any of your configuration files, please do not automatically replace the standard Voyager files with your edited files without first comparing the 240 and 6xx fields.

In order to display proper punctuation in WebVoyáge, several configuration files must be edited to include the punctuation (for a list of these files, see [Configuration Files](#) on [page 7-26](#)). The new syntax which is used to display punctuation in WebVoyáge signals the system to look for subfield data in the MARC record and add the punctuation specified in the configuration file.

There are three pieces of information that interact to display punctuation in WebVoyáge.

- Punctuation
- Configuration files
- New syntax

In other words, punctuation is added to configuration files using a new syntax to correctly display bibliographic, holdings, and authority information in WebVoyáge.

Punctuation

[Table 7-8](#) lists some examples of punctuation which can be added implicitly by adding the punctuation to the standard configuration files used by Voyager for record display. Voyager does not impose any kind of restriction on the punctuation used in the MARC records themselves.

Table 7-8. Punctuation

| Character | Label |
|----------------------|-----------------------------|
| . | Period |
| ; | Semicolon |
| : | Colon |
| - | Hyphen |
| (| Left parenthesis |
|) | Right parenthesis |
| ,) | Comma and right parenthesis |
| / | Forward slash |
| + | Plus sign |
| = | Equal sign |
| -- | Double hyphens |
| [| Left square bracket |
| Right square bracket | |
| < | Left angle bracket |
| > | Right angle bracket |



IMPORTANT:

The brackets for the 240 field and the double hyphens for 6xx fields will be added to the display configuration files that all sites receive upon upgrading to Voyager 2001.1 and later.

Configuration Files

In Voyager, each site can determine what bibliographic, holdings, and authority data should display in WebVoyage. Voyager uses multiple configuration (.cfg) files to properly display MARC record information in WebVoyage. [Table 7-9](#) lists the configuration files to which punctuation can be added.

Table 7-9. Configuration Files

| File | Description |
|---------------|---|
| display1.cfg | Full or abbreviated MARC bibliographic record data |
| display2.cfg | Full or abbreviated MARC bibliographic record data |
| display3.cfg | Table of contents (505 field) from bibliographic record |
| display4.cfg | Linked resources (856 field) from bibliographic record |
| display5.cfg | MARC view of bibliographic record |
| displayA1.cfg | Full MARC authority record details. Available to sites who have purchased Web Authorities. |
| displayA2.cfg | Linked resource (856 field) from authority record. Available to sites who have purchased Web Authorities. |
| displayA3.cfg | MARC view of authority record. Available to sites who have purchased Web Authorities. |
| email.cfg | Bibliographic record data that can be e-mailed |
| emailA.cfg | Authority record data that can be e-mailed. Available to sites who have purchased Web Authorities. |
| emailh.cfg | MARC holdings record data that can be e-mailed |
| request.cfg | Bibliographic level requests |
| requesth.cfg | MARC holdings level requests |
| save.cfg | Bibliographic record data that can be saved |
| saveA.cfg | Authority record data that can be saved. Available to sites who have purchased Web Authorities. |
| saveh.cfg | MARC holdings record data that can be saved |

Punctuation Syntax

Punctuation is added to the configuration files using a special syntax. The syntax determines how each line of MARC tag information is to be read and displayed in WebVoyage. There are four basic variables, listed in [Table 7-10](#), which are used by the punctuation syntax.

Table 7-10. Punctuation Syntax

| Symbol | Description |
|--|---|
| {
Left-hand
brace | This symbol indicates the start of a section of a MARC record which has associated punctuation.

The left-hand brace must always be used in a pair with the right-hand brace.

NOTE:
If no braces are associated with a particular subfield, the system will insert the text that already exists in the record, without additional punctuation. |
| }
Right-hand
brace | This symbol indicates the end of a section of a MARC record which has associated punctuation.

The right-hand brace must always be used in a pair with the left-hand brace.

NOTE:
If no braces are associated with a particular subfield, the system will insert the text that already exists in the record, without additional punctuation. |
| %
Percent
sign | This symbol identifies the textual data that already exists within the bibliographic or authority subfield which is to be inserted for display.

The percent sign must always be used with the left- and right-hand braces. |
| “ ”
Left- and
right-hand
quotes | These symbols are used to indicate ending punctuation, such as a period. |

Voyager reads each line in the configuration file, retrieves the corresponding data from the MARC record, adds the designated punctuation, and displays the result in WebVoyage.

[Figure 7-9](#) shows a 650 line from a display configuration file which includes the new syntax and implicit punctuation, followed by a sample 650a and 650x in a record (see [Figure 7-10](#)):

```
Subject(s):
 650 xx abcd{v--%} {x--%} {z--%} {y--%}
```

Figure 7-9. Sample 650 line

```
650 | | 0 | †a Literature †x History and criticism.
```

Figure 7-10. Sample 650a and 650x in record

Based on the 650 line in the configuration file in [Figure 7-9](#), Voyager displays the 650 information presented in [Figure 7-10](#) as follows:

- Displays the `a` subfield information as it appears in the record.
- Since there is a `†x`, the information from the `†x` is preceded by double hyphens, followed by the data from the `†x` subfield (see [Figure 7-11](#)).

```
Subject(s): Literature--History and criticism.
```

Figure 7-11. Sample corresponding 650 in WebVoyage display

Syntax Rules

There are a few general rules that must be followed when adding punctuation implicitly to configuration files. These rules provide for the correct WebVoyage display of the record.

Rule 1

An opening brace must always be followed by a closing brace.

Correct:

```
650 xx abcd{v--%} {x--%} {z--%} {y--%}
```

Incorrect:

```
650 xx abcd{v--% {x--% {z--% {y--%
```

Rule 2

Each subfield must be contained within its own pair of braces.

Correct:

```
650 xx abcd{v--% }{x--% }{z--% }{y--% }
```

Incorrect:

```
650 xx abcd{v--% x--% z--% y--% }
```

Rule 3

If braces are present in a line of a configuration file, the spaces must be added to the configuration file exactly as it should display.

MARC record:

```
650 xx †a Education buildings †z Washington (D.C.) †y 1890-1910
```

Correct Spacing in Configuration file:

```
650 xx abcd{v--% }{x--% }{z--% }{y--% }
```

Correct WebVoyáge display:

Educational buildings--Washington (D.C.)--1890-1910

Incorrect Spacing in Configuration file:

```
650 xx abcd {v-- %} {x-- %} {z-- %} {y-- %}
```

Incorrect WebVoyáge display:

Educational buildings -- Washington (D.C.) -- 1890-1910

Rule 4

The next rule accounts for the position of the punctuation in the configuration file. Any implicit punctuation must *follow* the identification of the subfield rather than preceding the subfield delimiter as in the MARC display.

In the examples below, look at the syntax for `‡v`. The system must first identify the subfield, then insert the punctuation (a double hyphen) followed by the subfield data. The same is true for `‡x`, `‡z`, and `‡y`. The system identifies the subfield first, then inserts the punctuation followed by the subfield data.

In other words, reading the configuration line from left to right, the character immediately following a left brace must always be a valid subfield value. This format is required to display the punctuation properly if the identified subfield does not exist in a record.

MARC record:

650 xx ‡a Education buildings ‡z Washington (D.C.) ‡y 1890-1910

Correct Punctuation in Configuration file:

650 xx abcd{v--%}{x--%}{z--%}{y--%}.

Correct WebVoyage display:

Educational buildings--Washington (D.C.)--1890-1910.

Incorrect Punctuation in Configuration file:

650 xx abcd{--v%}{--x%}{--z%}{--y%}

Incorrect WebVoyage display:

Educational buildings

Rule 5

You can mix implicit and explicit punctuation at the field level. This means sites can add punctuation for most fields implicitly by adding the punctuation to the configuration files. For special situations, however, sites may want to add punctuation explicitly to the MARC record. As long as the implicit punctuation is used for fields other than those used by the explicit punctuation, records will display correctly in WebVoyage.

If you applied implicit punctuation (defined in the configuration file) to a MARC record which contained explicit punctuation (defined in the MARC record) for the same tags, the punctuation will be duplicated in the WebVoyage display.

For example, if the MARC record includes explicit punctuation as:

650 xx ‡a Education buildings--‡z Washington (D.C.)--‡y
1890-1910

and the configuration file includes the line:

650 xx abcd{v--%}{x--%}{z--%}{y--%}

then the record displays in WebVoyage as:

Educational buildings----Washington (D.C.)----1890-1920

Special Considerations

This change to how Voyager handles punctuation only affects the full record display, not index displays. Any time a patron searches WebVoyage using a headings search, the results display in a headings or index list rather than a title list. If a site chooses to add implicit punctuation to their configuration files, then the index list displays without punctuation. However, any explicit punctuation added to a MARC record will display correctly in WebVoyage.

The following examples illustrate how a 245 tag in a bibliographic record displays in an index list in WebVoyage using implicit punctuation.

For example, if the MARC record includes implicit punctuation:

245 xx #a Van Loon's geography #b the story of the world
we live in #c written and illustrated by Hendrik Willem
van Loon

the titles list displays in WebVoyage as:

**Van Loon's geography the story of the world we live in
written and illustrated by Hendrik Willem van Loon**

If the same tag was added to the MARC record with explicit punctuation, that is, the punctuation is manually inserted into the record, the titles list display would include the punctuation.

For example, if the MARC record includes explicit punctuation:

245 xx #a Van Loon's geography : #b the story of the
world we live in / #c written and illustrated by Hendrik
Willem van Loon

the titles list displays in WebVoyage as:

**Van Loon's geography : the story of the world we live in / written and
illustrated by Hendrik Willem van Loon**



Procedure 7-1. Editing a Configuration File for Punctuation

In order to display proper punctuation in WebVoyage, the configuration files must be edited to include the punctuation. The new syntax which is used to display punctuation in WebVoyage signals the system to look for subfield data in the MARC record and add the appropriate punctuation specified in the configuration file.

Punctuation can be added to any of the configuration files listed in [Table 7-9](#) on [page 7-26](#).

1. Open the configuration file you want to edit.
2. In the appropriate line, add the necessary syntax symbols, subfields, punctuation, and spacing.
3. Save and close the configuration file.
4. Verify that any additions to the configuration files are displaying correctly in WebVoyage.

Continue editing the configuration files as needed.

Item record Display

This section details item record display configuration options.

Time Stanza

The keys within the [Time] stanza are used to define how the time will appear on an item's Record Display in WebVoyage.

Table 7-11. Time-Related Variables

| Variable | Description |
|----------|---|
| AM | Displays after the time on an item's Record Display if the time is during the first half of a day. |
| PM | Displays after the time on an item's Record Display if the time is during the second half of a day. |

Table 7-11. Time-Related Variables

| Variable | Description |
|-----------|--|
| Separator | Separates the hour and minute of a time displayed on an item's Record Display. |
| 24HR | To use twenty-four hour time wherever a time appears on an item's Record Display, enter y after the 24HR variable. For example, if you enter Yes after the 24HR= variable, the thirteenth hour of the day would display as "13:00" rather than "1:00" (12 hour time). To use twelve hour time wherever a time appears on an item's Record Display, enter No after the 24HR variable. |

Copy Number Information

The *Copy_Number* variable controls the information that displays before an item's copy number. A copy number may display in many places throughout WebVoyage (commonly on the request forms). Enter the information that you want to display before an item's copy number after the *Copy_Number* variable. For example, if you entered *copy* after the *Copy_Number* variable, the first copy of an item might display as "copy 1." If nothing is entered after the *Copy_Number* variable, *c.* will be used as the default.

Customizing Item Statuses Display

Item statuses can be set up to display differently in WebVoyage than in the staff modules. For example, your institution may want the "Charged" item status that displays in the staff modules to display as "Charged - due on (date) (time)" in WebVoyage. The [Item Statuses] stanza of the opac.ini file controls how each item status displays in WebVoyage. This stanza only controls how item statuses display in WebVoyage, not in the staff modules (for information about item statuses in the staff modules and item status hierarchy, see "Statuses" in the Item Record section of the *Cataloging User's Guide*, "Item Statuses" in the *Circulation User's Guide*, and the "Item Creation and Maintenance" sections in the *Acquisitions User's Guide*).

In order for item statuses to be displayed in WebVoyage with an item's Holdings information, the 1012 code (for item status) must be included in the Displayh.cfg file and the 9000 code (for Holdings information) must be included in one of the Displayn.cfg files (see page 17 for further information).

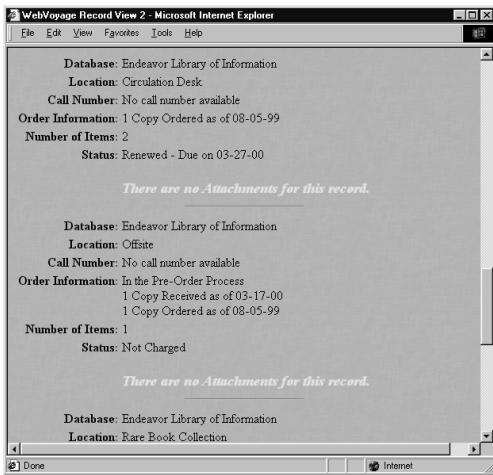


Figure 7-12. An item's Holdings information displayed in WebVoyage, including the "Not Charged" item status

The codes in [Table 7-12](#) can be used for any of the item statuses:

Table 7-12. Item Status Substitution Tokens

| \i | displays the standard item information (i.e., enumeration, chronology, etc) |
|----|---|
| \c | displays the outstanding number of requests |
| \d | displays the date |
| \e | displays the date, unless the date is today |
| \t | displays the time |
| \u | displays the time, if the date is today |
| \l | displays the location |

```
[Item Statuses]
NotCharged=Not Checked Out
NotChargedReq=i has \c requests
Charged=Charged - Due on \d \u
ChargedReq=Charged (Requests: \c) - Due on \d \u
Renewed=Renewed - Due on \d \u
RenewedReq=Renewed (Requests: \c) - Due on \d \u
Overdue=Overdue - Due on \d \u
OverdueReq=Overdue (Requests: \c) - Due on \d \u
RecallRequest=Recall Requests: \c
HoldRequest=Hold Requests: \c
OnHold=On hold at \l
OnHoldReq=On hold at \l (Requests: \c)
InTransit=In transit \d
InTransitReq=In transit \d (Requests: \c)
InTransitDischarged=In transit to \l \d
InTransitDischargedReq=In transit to \l \d (Requests: \c)
InTransitOnHold=In transit to \l \d
InTransitOnHoldReq=In transit to \l \d (Requests: \c)
Discharged=Discharged - \d \u
DischargedReq=Discharged - \d \u (Requests: \c)
Missing=Missing - \d
MissingReq=Missing - \d (Requests: \c)
LostLibraryApplied=Lost - \d
LostLibraryAppliedReq=Lost - \d (Requests: \c)
LostSystemApplied=Lost - \d
LostSystemAppliedReq=Lost - \d (Requests: \c)
AtBindery=At Bindery - \d
AtBinderyReq=At Bindery - \d (Requests: \c)
Scheduled=Scheduled (Requests: \c)
InProcess=In Process \d
InProcessReq=In Process \d (Requests: \c)
CallSlipRequest=Call Slip Requests: \c
ShortLoanRequest=Short Loan Requests: \c
RemoteStorageRequest=Remote Storage Requests: \c
```

Figure 7-13. Example of the [Item Statuses] stanza in the opac.ini file

The variables with the “Req” extension (NotChargedReq=, MissingReq=, etc.) are only used for items that have one or more requests placed on them.

[Table 7-13](#) details the item status variables.

Table 7-13. Item Status Variables (Page 1 of 5)

| Status | Variable | Notes |
|--------------------|------------|--|
| Not Charged Status | NotCharged | If nothing is entered after the <i>Charged=</i> variable, this status will not display in WebVoyáge. |

Table 7-13. Item Status Variables (Page 2 of 5)

| Status | Variable | Notes |
|--|---------------|--|
| Not Charged With Requests Pending Status | NotChargedReq | Only used if the item has one or more requests placed on it.
If nothing is entered after the <i>NotChargedReq</i> = variable, this status will not display in WebVoyáge. |
| Charged Status | Charged | If nothing is entered after the <i>Charged</i> = variable, this status will not display in WebVoyáge. |
| Charged With Requests Pending Status | ChargedReq | This variable will only be used if the item has one or more requests placed on it.
If nothing is entered after the <i>ChargedReq</i> = variable, this status will not display in WebVoyáge. |
| Renewed Status | Renewed | If nothing is entered after the <i>Renewed</i> = variable, this status will not display in WebVoyáge. |
| Renewed With Requests Pending Status | RenewedReq | If nothing is entered after the <i>RenewedReq</i> = variable, this status will not display in WebVoyáge. |
| Overdue Status | Overdue | If nothing is entered after the <i>Overdue</i> = variable, this status will not display in WebVoyáge. |
| Overdue With Requests Pending Status | OverdueReq | If nothing is entered after the <i>OverdueReq</i> = variable, this status will not display in WebVoyáge. |
| Recall Request Placed Status | RecallRequest | If nothing is entered after the <i>RecallRequest</i> = variable, this status will not display in WebVoyáge. |
| Hold Request Placed Status | HoldRequest | If nothing is entered after the <i>HoldRequest</i> = variable, this status will not display in WebVoyáge. |
| On Hold Status | OnHold | If nothing is entered after the <i>OnHold</i> = variable, this status will not display in WebVoyáge. |
| On Hold With Requests Pending Status | OnHoldReq | If nothing is entered after the <i>OnHoldReq</i> = variable, this status will not display in WebVoyáge. |
| In Transit Status | InTransit | If nothing is entered after the <i>InTransit</i> = variable, this status will not display in WebVoyáge. |

Table 7-13. Item Status Variables (Page 3 of 5)

| Status | Variable | Notes |
|---|------------------------|--|
| In Transit With Requests Pending Status | InTransitReq | If nothing is entered after the <i>InTransitReq</i> = variable, this status will not display in WebVoyáge. |
| Discharged, In Transit Status | InTransitDischarged | If nothing is entered after the <i>InTransitDischarged</i> = variable, this status will not display in WebVoyáge. |
| Discharged, In Transit With Requests Pending Status | InTransitDischargedReq | If nothing is entered after the <i>InTransitDischargedReq</i> = variable, this status will not display in WebVoyáge. |
| In Transit On Hold | InTransitOnHold | If nothing is entered after the <i>InTransitOnHold</i> = variable, this status will not display in WebVoyáge. |
| In Transit On Hold With Requests Pending Status | InTransitOnHold-Req | If nothing is entered after the <i>InTransitOnHold-Req</i> = variable, this status will not display in WebVoyáge. |
| Discharged Status | Discharged | If nothing is entered after the <i>Discharged</i> = variable, this status will not display in WebVoyáge. |
| Discharged With Requests Pending Status | DischargedReq | If nothing is entered after the <i>DischargedReq</i> = variable, this status will not display in WebVoyáge. |
| Missing Status | Missing | If nothing is entered after the <i>Missing</i> = variable, this status will not display in WebVoyáge. |
| Missing With Requests Pending Status | MissingReq | If nothing is entered after the <i>MissingReq</i> = variable, this status will not display in WebVoyáge. |
| Lost Library Applied Status | LostLibraryApplied | Item has been marked as lost by staff in one of the staff modules (Circulation, Cataloging, Acquisitions).
If nothing is entered after the <i>LostLibraryApplied</i> = variable, this status will not display in WebVoyáge. |

Table 7-13. Item Status Variables (Page 4 of 5)

| Status | Variable | Notes |
|---|-----------------------|---|
| Lost Library Applied With Requests Pending Status | LostLibraryAppliedReq | Item marked as lost by staff in one of the staff modules (Circ, Cat, Acq).
If nothing is entered after the <i>LostLibraryAppliedReq</i> = variable, this status will not display in WebVoyage. |
| Lost System Applied Status | LostSystemApplied | Item marked as lost by the system (circjob 2 - see <i>The Voyager Technical User's Guide</i>).
If nothing is entered after the <i>LostSystemApplied</i> = variable, this status will not display in WebVoyage. |
| Lost System Applied With Requests Pending Status | LostSystemAppliedReq | Item has been marked as lost by the system (circjob 2 - see <i>The Voyager Technical User's Guide</i>).
If nothing is entered after the <i>LostSystemAppliedReq</i> = variable, this status will not display in WebVoyage. |
| At Bindery Status | AtBindery | If nothing is entered after the <i>AtBindery</i> = variable, this status will not display in WebVoyage. |
| At Bindery With Requests Pending Status | AtBinderyReq | If nothing is entered after the <i>AtBinderyReq</i> = variable, this status will not display in WebVoyage. |
| Scheduled Status | Scheduled | Item scheduled in the Media Scheduling module.
If nothing is entered after the <i>Scheduled</i> = variable, this status will not display in WebVoyage. |
| In Process Status | InProcess | If nothing is entered after the <i>InProcess</i> = variable, this status will not display in WebVoyage. |
| In Process With Requests Pending Status | InProcessReq | Item ordered and received through Acquisitions but is still in the preparation process, and that has one or more requests placed on it.
If nothing is entered after the <i>InProcessReq</i> = variable, this status will not display in WebVoyage. |
| Call Slip Request Status | CallSlipRequest | Item has one or more call slip requests placed on it.
If nothing is entered after the <i>CallSlipRequest</i> = variable, this status will not display in WebVoyage. |

Table 7-13. Item Status Variables (Page 5 of 5)

| Status | Variable | Notes |
|-------------------------------|----------------------|---|
| Short Loan Request Status | ShortLoanRequest | If nothing is entered after the <i>ShortLoanRequest=</i> variable, this status will not display in WebVoyage. |
| Remote Storage Request Status | RemoteStorageRequest | If nothing is entered after the <i>RemoteStorageRequest=</i> variable, this status will not display in WebVoyage. |

Order Statuses

Order statuses can be set up to display differently in WebVoyage than in the staff modules. For example, your institution may want the “Pending” order status that displays in the staff modules to display as “In the Pre-Order Process” in WebVoyage. The [Order Statuses] stanza of the opac.ini file controls how order statuses display in WebVoyage. This stanza only controls how order statuses display in WebVoyage, not in the staff modules.

For the order status of an item to be displayed in WebVoyage with the item’s Holdings information, the 1030 code (for order status) must be included in the Displayh.cfg file and the 9000 code (for Holdings information) must be included in one of the Displayn.cfg files (see [Displaying Holdings Information using the displayh.cfg File](#) on [page 7-17](#) for more information).

NOTE:

The presence of a call number in the MFHD turns off the display of order status. To display order status:

- Do not link to an existing holdings when in the Copies/Funds field of the line item, but instead let the system create one for you without a call number.
- Remove the call number from the 852 of the mfhd. That way the order status will display in the OPAC.

NOTE:

If there is no call number in the mfhd and the item is on a Pending PO, the order status will be **In the Pre-Order Process**. If the item is on an Approved PO the status will be **# Copy order as of mm/dd/yy**, and if the line item has been received, it will show **# Copy Received as of mm/dd/yy**.

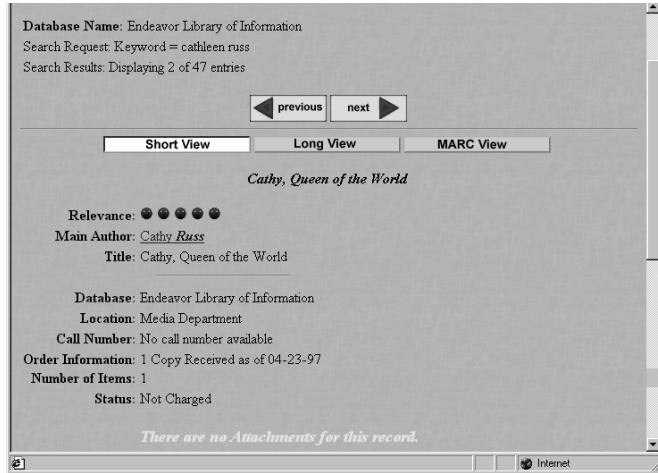


Figure 7-14. An item's Holdings information displayed in WebVoyage, including the "Received Complete" order status

The following codes can be used in any of the order statuses:

- \c displays the number of copies
- \d displays the date on which the status was applied

```
[Order Statuses]
Pending=In the Pre-Order Process
Pending+=In the Pre-Order Process
Approved=\c Copy Ordered as of \d
Approved+=\c Copies Ordered as of \d
Claimed=\c Copy Claimed as of \d
Claimed+=\c Copies Claimed as of \d
ReceivedComplete=\c Copy Received as of \d
ReceivedComplete+=\c Copies Received as of \d
```

Figure 7-15. Example of the [Order Statuses] stanza in the opac.ini file

The variables without the "+" (Pending=, Approved=, etc.) are used if there is only a single copy in the ordering process. The variables with the "+" (Pending+=, Approved+=, etc.) are used if there are multiple copies in the ordering process.

[Table 7-14](#) details the Order Status variables.

Table 7-14. Order Status Variables

| Status | Notes |
|--|---|
| Pending/
Pending+ | After the <i>Pending=</i> and <i>Pending+=</i> variables, enter a display name to identify the “Pending” order status in WebVoyage. You can use the \c code to display the number of copies and the \d code to display the date on which the status was applied.

If nothing is entered after the <i>Pending=</i> and <i>Pending+=</i> variables, the pending order status for single or multiple copies will not display in WebVoyage. |
| Approved/
Approved+ | After the <i>Approved=</i> and <i>Approved+=</i> variables, enter a display name to identify the “Approved” order status in WebVoyage. You can use the \c code to display the number of copies and the \d code to display the date on which the status was applied.

If nothing is entered after the <i>Approved=</i> and <i>Approved+=</i> variables, the approved order status for single or multiple copies will not display in WebVoyage. |
| Claimed/
Claimed+ | After the <i>Claimed=</i> and <i>Claimed+=</i> variables, enter a display name to identify the “Claimed” order status in WebVoyage. You can use the \c code to display the number of copies and the \d code to display the date on which the status was applied.

If nothing is entered after the <i>Claimed=</i> and <i>Claimed+=</i> variables, the claimed order status for single or multiple copies will not display in WebVoyage. |
| Received-
Complete/
Received-
Complete+ | After the <i>ReceivedComplete=</i> and <i>ReceivedComplete+=</i> variables, enter a display name to identify the “Received Complete” order status in WebVoyage. You can use the \c code to display the number of copies and the \d code to display the date on which the status was applied.

If nothing is entered after the <i>ReceivedComplete=</i> and <i>ReceivedComplete+=</i> variables, the received complete order status for single or multiple copies will not display in WebVoyage. |

HelpLocation Stanza

The [HelpLocation] controls the position of the help text on the different search pages within WebVoyage. The help text can be positioned at the top of the search pages (above the field(s) used to specify searching criteria), in the middle of the search pages (below the Search and Reset buttons), or at the bottom of the search pages (below the records per page drop-down list. Enter *T* after the *Position=* variable (*Position=T*) to position the help text at the top of the search pages. Enter *M* after the *Position=* variable (*Position=M*) to position the help text in the middle of the search pages. Enter *B* after the *Position=* variable (*Position=B*) to position the help text at the bottom of the search pages. If nothing is entered after the *Position=* variable, *T* will be used as the default.

Record Display Buttons List

The image files that are used by this page in its default configuration are listed below. Note that if you do not know html, you can also customize the pages by deleting the old file and copying a new image that has the same name as the old file into the image directory. This is the same method to use when changing images that are used in the non-static-html pages.

These images are located in the `/m1/voyager/xxxdb/webvoyage/html/images` directory on the server.

Table 7-15. Record Display Buttons List

| Image | File | Target |
|-------------------|--|------------------------------------|
| TOOLBAR | | |
| “Database” button | UpDatabase.gif | Database page |
| “Search” button | UpSearch.gif | default Search page |
| “Headings” button | DisabledHeadings.gif OR
UpHeadings.gif | Headings page |
| “Titles” button | UpTitles.gif | Titles page |
| “Patron” button | UpPatron.gif | Patron Info page |
| “Login” button | UpLogin.gif | Patron Login page |
| “Request” button | UpRequest.gif | Submit Request page |
| “History” button | UpHistory.gif OR
DisabledHistory.gif | Search History page |
| “Remote” button | UpRemote.gif | Remote Libraries page (remote.htm) |

Table 7-15. Record Display Buttons List

| Image | File | Target |
|--|---|---|
| “Help” button | UpHelp.gif | Help page
(search.htm) |
| “Exit” button | UpExit.gif | Restarts Web-Voyage (intro page) |
| OTHER BUTTONS | | |
| “Header” image
(WebVoyage bar) | banner.gif | Restarts Web-Voyage |
| “Footer” image
(Endeavor image) | footer.gif | Endeavor Home Page |
| Relevance - 5 marker
5 - 1/2 marker
4
4 - 1/2 marker
3
3 - 1/2 marker
2
2 - 1/2 marker
1
1 - 1/2 marker | s-rel1.gif
s-rel5h.gif
s-rel2.gif
s-rel2h.gif
s-rel2.gif
s-rel3.gif
s-rel4.gif
s-rel4.gif
s-rel5.gif
s-rel5h.gif | NOTE:
These files are only used if the record was searched for using relevance. |
| “Previous” button
“Previous” - grayed | s-prev.gif
d-prev.gif | Previous set of headings |
| “Next” button
“Next” - grayed | s-next.gif
d-next.gif | Next set of headings |
| Bibliographic button
(Bib pressed) | view1.gif
view1a.gif | Bibliographic info on this page |
| Holdings button
(Hldgs pressed) | view2.gif
view2a.gif | Holdings info on this page |
| Tbl of Cnts button
(TOC pressed) | view3.gif
view3a.gif | Table of Contents info on this page |
| Linked Res button
(LR pressed) | view4.gif
view4a.gif | Linked Resources info on this page |
| MARC Record
(MARC pressed) | view5.gif
view5a.gif | MARC Record info on this page |
| “Save” button | save.gif | Displays bibs in saveable form |

Table 7-15. Record Display Buttons List

| Image | File | Target |
|----------------|-----------|---|
| "Email" button | email.gif | Sends email and displays confirmation/rejection message |

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Logging In

If you are not logged in, the Patron Login page will display when you click the Request button. In addition, if you are not logged in and you click the Databases button, only the publicly accessible databases will be available to you. You must login in order for the system to present you with the specific databases that your library allows you to search.



Procedure 8-1. Logging in

Use the following steps to log in.

1. Click the Login button. The Patron Login page displays.



Figure 8-1. Patron Login page

NOTE:

If your home library is using multiple clusters, you must select your home cluster from the drop-down box.

2. Select a login type from the drop-down box, and enter your login information. See the Circulation Desk for questions about your patron login information.

Your library can select whether you are required to enter your Institution ID, Social Security Number or your barcode in order to log in.

3. Click the **Login** button to login. Click the **Reset** button to clear text entered into the fields on screen.

If your login is successful, you will be returned to the page from which you clicked the **Login** button. If your login is unsuccessful, a warning message will appear on the Login page and you must re-enter your login information.

Once you successfully login, you will be able to place holds and/or recalls, and call slips for items with Patron Request. You can hold or recall a specific copy at a specific location, any copy at a specific location, or any copy at any location. You can specify the pickup location (depending on the policies of your institution). You can also submit requests specific to your library.

Logging Off

If you log into WebVoyáge, you should generally log out of or reset WebVoyáge when you are done. This will prevent anyone else from being able to access your personal information or submit requests.

To log out of WebVoyáge, click the Logoff button.

Using Personal Identification Numbers (PINs)

If your institution has enabled and configured PINs, whenever a login page is invoked, it will include the PIN field (requiring you to enter a PIN). This field is in addition to the other information normally required on the Login page. [Figure 8-2](#) shows the PIN field (highlighted) on the Login page.

The screenshot shows a login interface with the following text at the top: "Please enter your Patron Barcode and Last Name, then click the OK button." Below this, there are four input fields: "Home Library" (set to "Local Library"), "Barcode" (with a dropdown arrow), "PIN" (highlighted with a red box), and "Last Name". At the bottom are "Login" and "Reset" buttons.

Figure 8-2. Example of the PIN field on the Login page



Procedure 8-2. Changing a PIN from WebVoyage

You can change your PIN at any time from the Patron Information page. Use the following to change your PIN.

1. Click the Patron button on the Top Toolbar of WebVoyage, or click the Patron text link on the Bottom Toolbar of WebVoyage.

Result: This invokes the Patron Information page (see [Figure 8-3](#)).

NOTE:

If not already logged in, the Login page is invoked. Enter required patron information in the fields, including the current PIN.

[Figure 8-3](#) shows the Change PIN button (highlighted) on the Patron Information page.

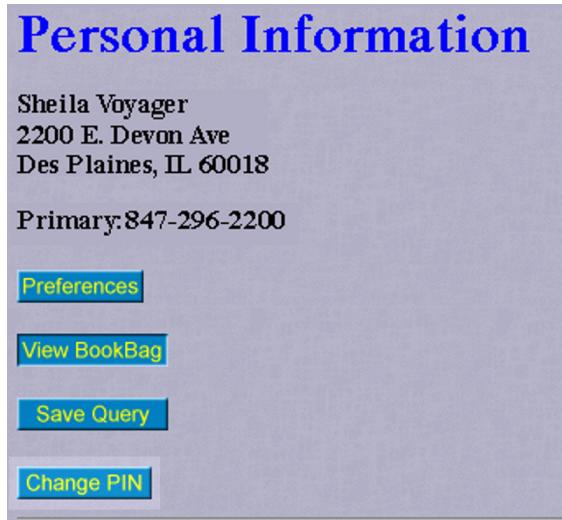


Figure 8-3. Example of the Change PIN button on the Patron Information page

2. Click the **Change PIN** button in the **Personal Information** section.

Result: This invokes the Change PIN page (see [Figure 8-4](#)).

The image shows a close-up of a user interface for changing a PIN. It consists of three text input fields stacked vertically, each preceded by a label: "Current PIN:", "New PIN:", and "Confirm PIN:". Below these fields is a single "SUBMIT" button.

Figure 8-4. Close-up of the Change PIN section of the Change PIN page

3. Enter the current PIN in the **Current PIN** field.
4. Enter the new PIN in the **New PIN** field.
5. Enter the new PIN, again in the **Confirm PIN** field.

NOTE:

- Make certain that this PIN is alphanumeric and between 5 and 12 characters long. Avoid using special characters in the PIN. The PIN is also case sensitive.
- Each of the above three fields will not accept PINs over 12 characters long.

6. Click the **SUBMIT** button when finished.
-

Using Preferences

If you have already set MyOPAC preferences, upon logging in, those preferences display on the WebVoyage search page.

If you have not already set MyOPAC preferences, after logging in the WebVoyage search page will display with your library's default settings. To set preferences, you must go to the Preferences page, by:

- Clicking the **Preferences** button in the top toolbar section,
- Clicking the **Preferences** text link in the bottom toolbar section, or

-
- Clicking the **Preferences** button from the Patron Information page.

Once at the Search Preferences page, you can set preferences for any and all of three sections enabled by your library. Clicking the **Save** button stores the selected preferences.

Clicking the **Clear** button clears all selected preferences.

NOTE:

- The radio button selected in the Search Type section on the Search Preferences page is now the default search type, with the parameters selected. Only one of the radio button options in this section will be saved as the default for searches.

WebVoyáge will not save options selected for one Search Type subsection if a patron sets preferences for another Search Type subsection afterward and saves those preferences. For example, WebVoyáge will not save your Course Reserve preferences *and* your Simple Search preferences even if you select the Course Reserve preferences and then set the Simple Search preferences.

When finished using WebVoyáge, logout as usual.

Patron Function Configuration

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Patron Function Configuration

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Patron Login and Logoff

Patrons must login in to access patron information, to place requests, or to be presented with specific database options.

WebVoyáge Patron Login ID Options

WebVoyáge allows patrons to use one of the following when logging in:

- Barcode
- Social Security Number
- Institution ID

Patrons select one of the login types from the drop-down box, next to the field where they enter the information, on the Patron Login page (see [Figure 9-10](#)).

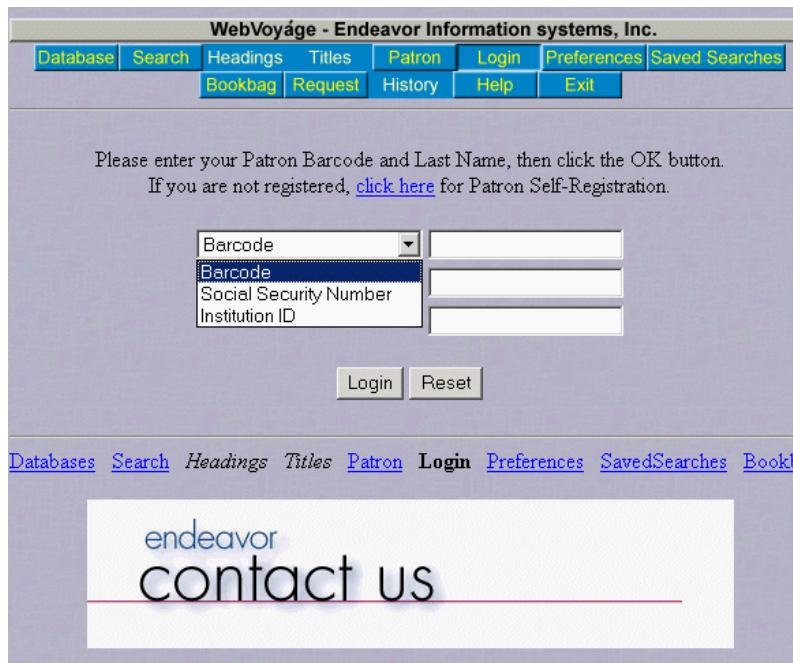


Figure 9-1. Patron Login Types drop-down box

The [Login Types] Stanza

You can make any or all of the login types available for selection in the drop-down box by patrons when logging in. Do this by configuring the [Login Types] stanza of the opac.ini file (for an example, see [Figure 9-2](#)).

```
[Login Types]
```

```
BC=Barcode
```

```
SSN=Social Security Number
```

```
IID=Institution ID
```

Figure 9-2. A sample [Login Types] stanza

Make a login type available to patrons by including its code, followed by an equals sign (=), followed by descriptive text of the type, on a line in the [Login Types] stanza. The login type code must be one of those in [Table 9-1](#). The text following it can be of any length, but this length affects the width of the drop-down box of the page so test your configuration.

Table 9-1. Login Type codes

| Login type | Code |
|------------------------|------|
| Barcode | BC |
| Social Security Number | SSN |
| Institution ID | IID |

NOTE:

If you change the options in the login types in the drop-down box, make sure you make any necessary changes to the login instructions in the `logonmsg.htm` file (`/m1/voyager/xxxdb/etc/webvoyage/webvoyage Display Directory`).

PIN Configuration

The PIN (Personal Identification Number) feature allows greater security for patrons, by allowing libraries to require each patron to enter a PIN whenever they log into MyOPAC, access their patron information, or submit a request.

You must set a default PIN for all patrons to use the first time, after which they can change their PINs. If you do not set a default PIN, patrons will not be able to log in and will receive an error message when attempting to do so.

However you set the default PIN, make sure to notify your patrons in advance so they will be aware of the change to their login processes.

You can also determine which staff members will have the ability to change PINs.

Use the following to configure a PIN.

- [Enabling PINs](#)
 - [Setting a default PIN](#)
 - [Giving staff users permission to change PINs](#)

The following steps are optional:

- [Customizing the PIN field name on the Login page](#)

-
- [Customizing the Change PIN button on the Patron Information page](#)
 - [Customizing the layout of the Change PIN page](#)
 - [Changing the PIN messages](#)

Enabling PINs

To enable the PIN feature, modify the `UsePIN` variable in the `[Options]` stanza of the `opac.ini` file (`/m1/voyager/xxxdb/etc/webvoyage/local`, `/m1/voyager/xxxdb/etc/webvoyage/vcit`, and so on), and set it to `Y`. [Figure 9-3](#) contains an example of the default `UsePIN` variable in the `[Options]` stanza.

```
[Options]
UsePIN=N
```

Figure 9-3. Default UsePIN variable in the [Options] stanza

The `UsePIN=` variable must be set to `Y` or `N`.

- To enable the PIN feature, set this variable to `Y`.
- To disable the PIN feature, set this variable to `N`.

Setting a default PIN

The default PIN is set in the `DefaultPIN` variable in the `[Options]` stanza of the `opac.ini` file. [Figure 9-4](#) contains an example of the default `DefaultPIN` variable in the `[Options]` stanza.

```
[Options]
UsePIN=N
DefaultPIN=
```

Figure 9-4. Default DefaultPIN variable in the [Options] stanza

To set a default PIN, enter the PIN after the `DefaultPIN=` variable. PINs must be alphanumeric and between 5 and 12 characters long. Avoid using special characters in the PIN. PINs are also case sensitive.



IMPORTANT:

Since Voyager can only validate PINs when patrons log in, and not before, make certain that the default PIN is valid. Otherwise every patron who tries to log in will receive a You may not have entered your barcode and name correctly error message, be unable to log in, and not know why. (To customize this error message, see [Customizing the Login page error messages on page 9-15](#)).



IMPORTANT:

Make sure that your patrons are aware that PINs must be alphanumeric and between 5 and 12 characters long. They should also avoid using special characters in the PIN. The PIN is also case sensitive.

Entering a PIN

Patrons must enter their PINs according to how you have configured the DefaultPIN variable in the [Options] stanza of the opac.ini file until they change their PINs.

This PIN can be changed any time by the patron from the Patron Information page (see [Changing a PIN from WebVoyage on page 8-4](#)).

For more information on setting the default PIN, see [Setting a default PIN on page 9-4](#).

For more information on changing a PIN from the Circulation module, see [Changing PINs in the Circulation module on page 9-7](#).



Procedure 9-1. Giving staff users permission to change PINs

Use the following to give or remove the ability to change patron PINs.

1. Go to **Voyager System Administration module>Security>Circulation Profiles**
2. Select the patron
3. Select the **Patron** tab

NOTE:

Make sure that the **Add/Update Patron Records** check box is selected (if it is not, select it now). See [Figure 9-5](#).

-
4. Select the **Update PINs** check box (located below the **Add/Update Patron Records** check box). See the highlighted check box in [Figure 9-5](#).

NOTE:

If the Add/Update Patron Records check box is cleared, the Update PINs check box will be inactive. If the Update PINs check box is dimmed, select the Add/Update Patron Records check box, then complete step 4.

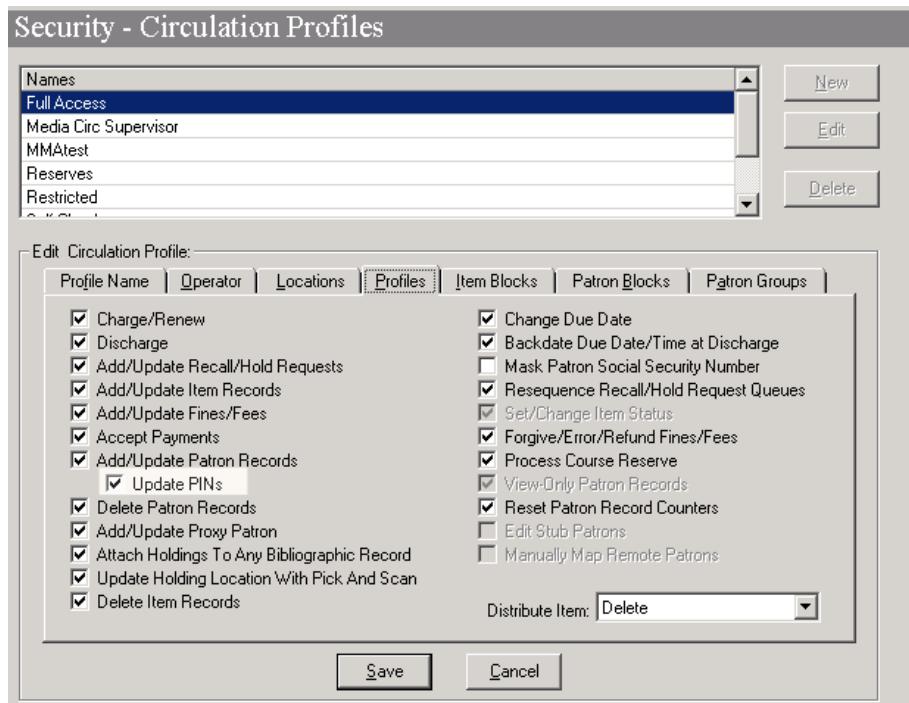


Figure 9-5. Update PINs check box in the Circulation Profile Definition section of System Administration (highlighted)

5. To apply changes Click the **Save** button.

To discard changes (and return to the **Security Configuration** menu), Click the **Cancel** button.

NOTE:

If a staff member does not have permission to change PINs, a supervisor override may be used to change a PIN, if the supervisor performing the supervisor override has permission to change PINs.



Procedure 9-2. Changing PINs in the Circulation module

Use the following steps to change a PIN in the Circulation module.

1. Log in to the **Circulation Module**.
-

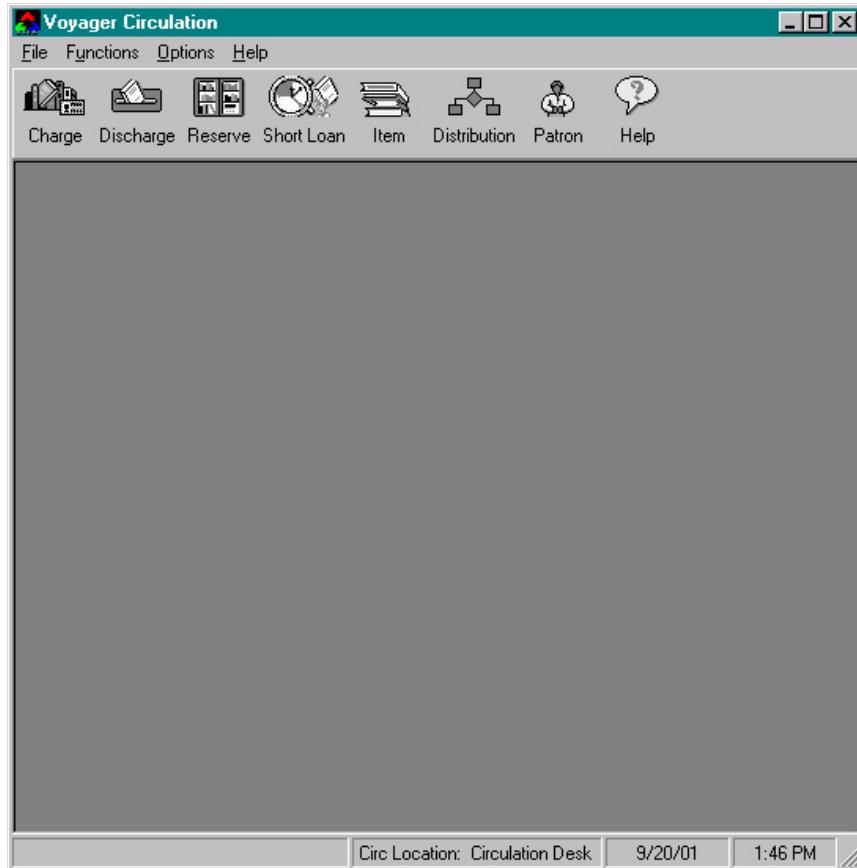


Figure 9-6. Circulation module introduction page

| If... | Then... |
|---------------------------------|--|
| If no patron records are active | <ol style="list-style-type: none">1. click the Patron button2. select Patron... from the Functions menu, or press Ctrl+P. |

If a patron record is already active

1. select **Search for patron...** from the **Patron** menu.

Result: This invokes the **Patron Search** box (see [Figure 9-7](#)).

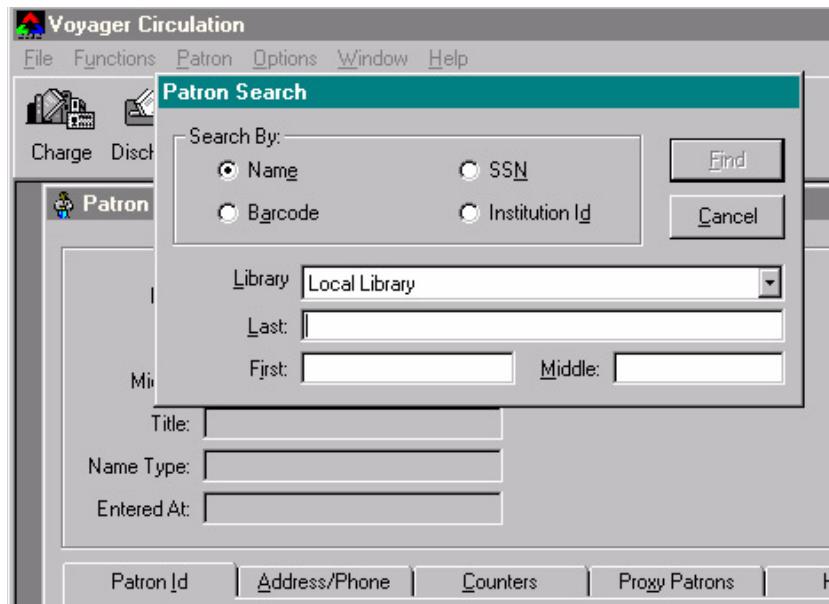


Figure 9-7. Patron Search dialog box in the Circulation module

2. Locate the desired patron record using the Name, Barcode, Social Security Number, or Institution ID search option.
3. After locating the patron record, select the **Change Patron PIN** option from the **Patron** menu, or right-click anywhere in the **Patron ID** combo box and select the **Change Patron PIN** option.

[Figure 9-8](#) shows the Change Patron PIN option in the Patron menu in the Circulation Module.

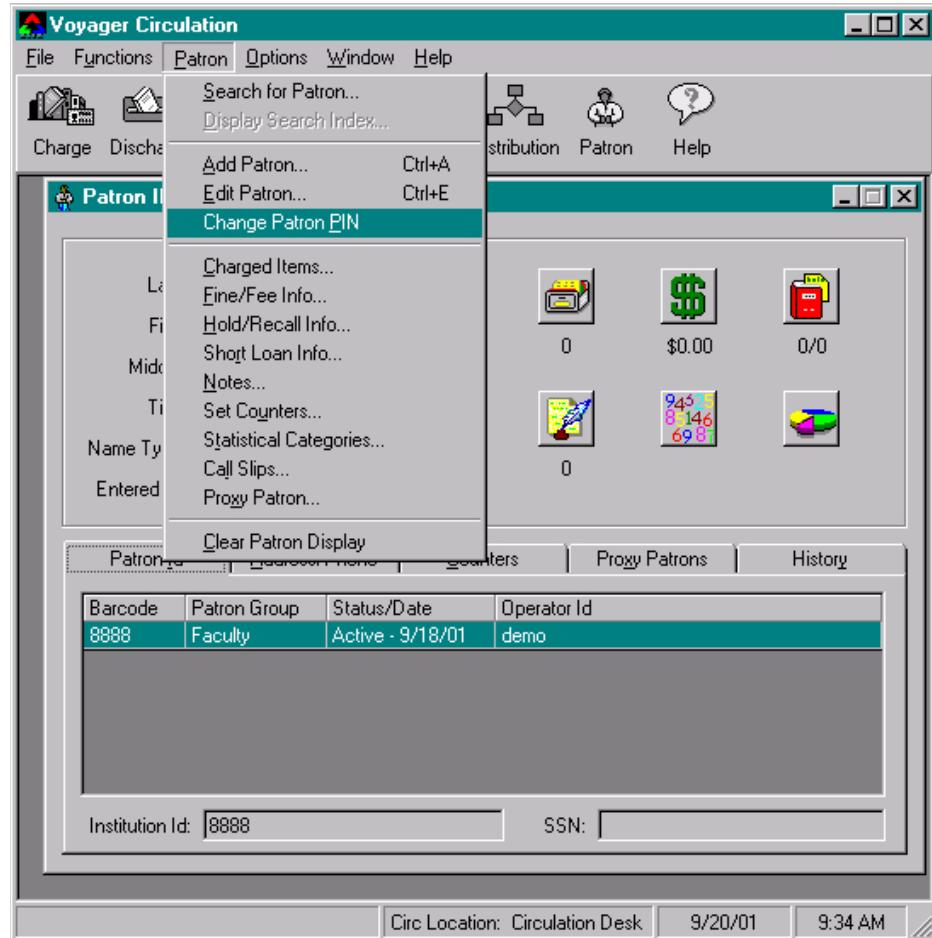


Figure 9-8. Change Patron PIN option in the Patron Menu in the Circulation Module

Selecting the **Change Patron PIN** option invokes the **Change Patron PIN** dialog box (see [Figure 9-9](#)).

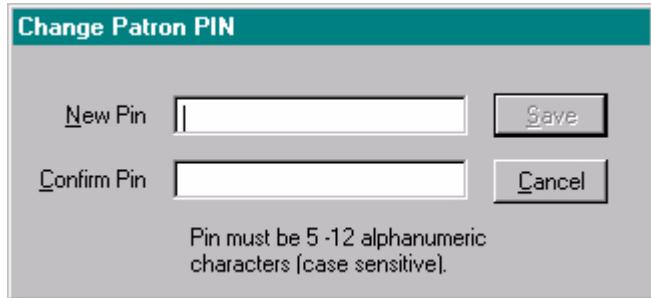


Figure 9-9. Change Patron PIN dialog box

4. Enter the new PIN in the **New PIN** field of the **Change Patron PIN** dialog box.



IMPORTANT:

Make certain that this PIN is alphanumeric and between 5 and 12 characters long. Avoid using special characters in the PIN. The PIN is also case sensitive.

5. Enter the PIN again, in the **Confirm PIN** field.
6. To save the new PIN, click the **Save** button.

To discard the new PIN, click the **Cancel** button.

NOTE:

- The Save button is inactive until you enter at least five characters into both the New PIN field and the Confirm PIN field.
- Both of these fields (New PIN and Confirm PIN) will not accept PINs over 12 characters long.
- If two different PINs are entered into the New PIN and Confirm PIN fields, an error message displays (see [Figure 9-10](#)).



Figure 9-10. PINs do not match error message in the Circulation Module

Customizing the PIN field name on the Login page

If your library is using PINs, your WebVoyage will include a **PIN** field on the **Login** page of WebVoyage. This field allows patrons to enter their PINs when logging in.

To change the **PIN** field on the Login page of WebVoyage, locate the following variable in the **[Logon_Page]** stanza of the **opac.ini** file:

PIN=

Change the text of the **PIN** field heading after the variable, as you want it to appear on the Login page of WebVoyage.

The following is the default of the PIN field name set in the **[Logon_Page]** stanza of the **opac.ini** file ([Figure 9-11](#)), followed by that field name as it displays in the Login page ([Figure 9-12](#))

```
[Logon_Page]
PIN=PIN:
```

Figure 9-11. Example of the PIN Field Name Set in the [Logon_Page] Stanza of the opac.ini File

Please enter your Patron Barcode and Last Name, then click the OK button.

Home Library: Local Library

Barcode:

PIN:

Last Name:

Figure 9-12. Example of the PIN Field Name Displaying in the Login Page

Customizing the Change PIN button on the Patron Information page

If your library is using PINs, your WebVoyage will include a Change PIN button on the Patron Information page of WebVoyage, allowing patrons to change their PINs from their Patron Information page.

To change the Change PIN button on the Patron Information page of WebVoyage, edit the `changepin.gif` file in the `/m1/voyager/xxxdb/webvoyage/html/images` directory. Remember to save the default `changepin.gif` as something else (as a backup) before editing it.

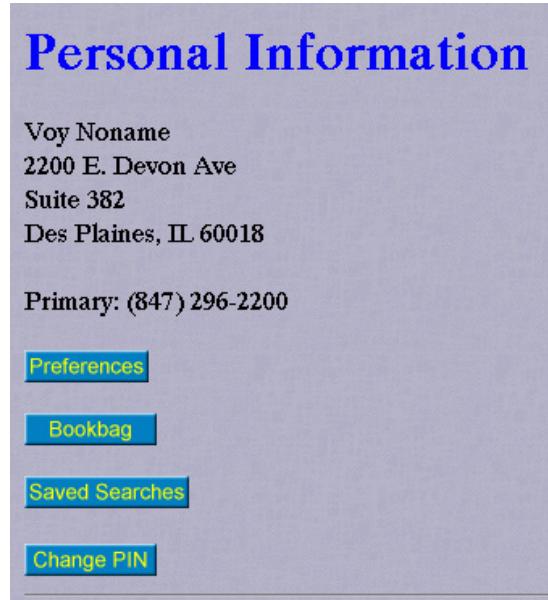


Figure 9-13. Example of the ChangePIN button displaying on the Patron Information page

Customizing the layout of the Change PIN page

You can customize the appearance of the Change PIN page by setting the following variables in the [Change_PIN] stanza of the opac.ini file. [Figure 9-14](#) contains a sample [Change_PIN] stanza in the opac.ini file.

```
[Change_PIN]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
CurrentPIN=Current PIN:
NewPIN>New PIN:
ConfirmPIN=Confirm PIN:
SubmitButton=Save
```

Figure 9-14. Sample [Change_PIN] stanza of the opac.ini file

[Table 9-2](#) details the Variable settings for the [Change_PIN] stanza of the opac.ini file.

Table 9-2. Variable settings

| Variable Name | Description | Possible Values | Default Value |
|---------------|--|--|---------------|
| Background= | Background graphic (or color) | Valid graphic file or Hexadecimal RGB color code 000000 to ffffff. | None |
| Text= | Text color | Hexadecimal RGB color code 000000 to ffffff | None |
| BGCOLOR= | Background color | Hexadecimal RGB color code 000000 to ffffff | None |
| LINK= | Color of unclicked (unvisited) links | Hexadecimal RGB color code 000000 to ffffff | None |
| VLINK= | Color of previously clicked (visited) links | Hexadecimal RGB color code 000000 to ffffff | None |
| ALINK= | Color of links while being clicked | Hexadecimal RGB color code 000000 to ffffff | None |
| CurrentPIN= | Title of field that patron enters current PIN into | Alphanumeric, between 5 and 12 characters long.
Avoid special characters.
Case sensitive | Current PIN: |

Table 9-2. Variable settings (Continued)

| Variable Name | Description | Possible Values | Default Value |
|---------------|---|---|-----------------|
| NewPIN= | Title of field that patron enters their new PIN into | Alphanumeric, between 5 and 12 characters long.
Avoid special characters.
Case sensitive | New PIN: |
| ConfirmPIN= | Title of field that patron enters their new PIN into after entering it into the New PIN field, to confirm change to new PIN | Alphanumeric, between 5 and 12 characters long.
Avoid special characters.
Case sensitive. | Confirm PIN: |
| SubmitButton= | Text of button used to submit the PIN change | Free text | <i>See file</i> |

Changing the PIN messages

[Figure 9-15](#) shows the default PIN messages as configured in the [Pin_Messages] stanza of the opac.ini file. You can customize these messages per your preferences.

```
[PIN_Messages]
PINMessage1=You have not entered your current PIN correctly.
PINMessage2=Not all fields have been entered. Please try again.
PINMessage3=New PIN does not contain 5-12 characters. Please enter again.
PINMessage4=New PIN and Confirm PIN do not match. Please enter again.
PINMessage5=New PIN matches existing PIN. Please enter again.
PINMessage6=Unable to change PIN. Please ask for help at the Circulation or Reference Desk.
```

Figure 9-15. PIN messages configured in the [Pin_Messages] stanza

Customizing the Login page error messages

You can also customize the three error message HTML files for the Login page. There are three user ID types available in the drop-down box below and to the left of the **Home Library** drop-down box.

Each of these user ID types has an HTML error message file associated with it. These error messages, by default, indicate an incorrect user ID or Name entry. They do not include an invalid PIN message of any sort, because PINs can be disabled. Therefore, if you want these messages to include an invalid PIN

message, you must edit these files accordingly. These three files are in each of the WebVoyage view directories (local, vcit, zcit, z3950 and so on) and must be edited for each directory you use. The local, vcit, zcit, and z3950 directories are in the /m1/voyager/xxxdb/etc/webvoyage directory by default.

The three user ID types appear in [Table 9-3](#) followed by their corresponding HTML error message files.

Table 9-3. User ID Message Files

| User ID type... | Message edited in... |
|------------------------|----------------------|
| Barcode | patronmsg.htm |
| Social Security Number | patronsocmsg.htm |
| Institution ID | patroniidmsg.htm |

The default patronmsg.htm file, for example, appears in [Figure 9-16](#).

```
<B><FONT SIZE=+1 COLOR="PURPLE">

You may not have entered your barcode and name correctly.

<BR>Retry your request or ask for help at the Circulation or Reference Desk.
</FONT></B>
```

Figure 9-16. Default patronmsg.htm file

[Figure 9-17](#) shows the error message that the patronmsg.htm file generates when a patron inputs an incorrect Barcode or Name (or both).

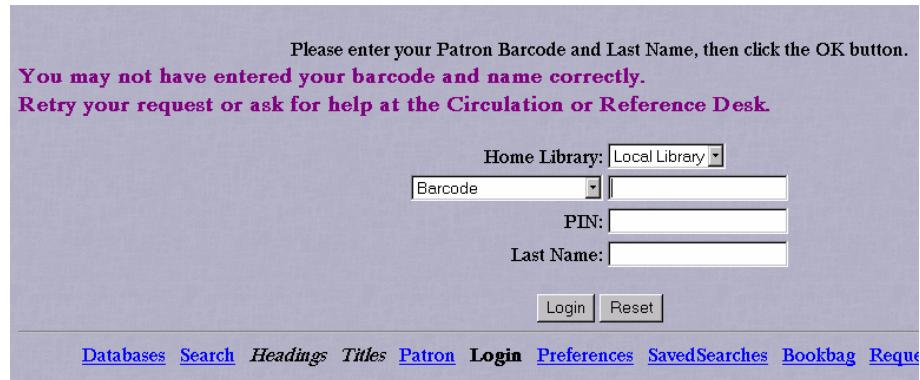


Figure 9-17. Error message generated by the patronmsg.htm file

[Figure 9-18](#) shows a customized patronmsg.htm file with additional text indicating that the PIN may not have been entered correctly.

```
<B><FONT SIZE=+1 COLOR="PURPLE">  
  
You may not have entered your barcode, PIN and name correctly.  
  
<BR>Retry your request or ask for help at the Circulation or Reference Desk.  
</FONT></B>
```

Figure 9-18. Customized patronmsg.htm file

[Figure 9-19](#) shows the error message generated by the customized patronmsg.htm file in [Figure 9-18](#).

Please enter your Patron Barcode and Last Name, then click the OK button.
You may not have entered your barcode, PIN and name correctly.
Retry your request or ask for help at the Circulation or Reference Desk.

| | |
|---|--|
| Home Library: | <input type="button" value="Local Library"/> |
| Barcode | <input type="text"/> |
| PIN: | <input type="text"/> |
| Last Name: | <input type="text"/> |
| <input type="button" value="Login"/> <input type="button" value="Reset"/> | |
| Databases Search Headings Titles Patron Login Preferences SavedSearches Bookbag Request | |

Figure 9-19. Error message generated by the customized patronmsg.htm file

MyOPAC (Optional)

The MyOPAC features allow for easier and more efficient use of WebVoyáge by saving important patron-specified information and automating certain WebVoyáge tasks. [Table 9-4](#) lists the MyOPAC features and a brief description of each.

Table 9-4. MyOPAC Features

| Feature | Description |
|---|---|
| MyOPAC Preferences on page 9-19 | This preference allows patrons to store search preferences (in the database) to be used as default settings each time they use WebVoyáge. |
| Saved Searches on page 5-35 | This preference allows patrons to save up to 25 search queries to run on command. |
| Selective Dissemination of Information (SDI) on page 6-35 | This preference, along with Saved Searches, allows patrons to have saved searches performed automatically at specified intervals (days/weeks), and the results emailed to them. |



IMPORTANT:

MyOPAC is not particularly disk space-consuming, but you should consider disk space, and the number of patrons using MyOPAC, when deciding which features you will use. Endeavor has a MyOPAC Server Disk Space Requirements table on SupportWeb.

NOTE:

MyOPAC functionality is disabled when remote patrons are logged in to UB-enabled databases. While logged in to that database, they will not be able to use or change their MyOPAC options.

MyOPAC Preferences

The MyOPAC Preferences feature allows each patron to have default search preferences saved to the database. The preferences that can be specified by patrons are:

- Search type
 - Simple
 - Index
 - Builder (complex)
 - Course reserve preferences
 - Instructor
 - Course
 - Course section
 - Department
- Number of records displayed per page
- Databases to search

Patrons must login to use MyOPAC Preferences because the preferences are based on Patron ID.

Additional WebVoyage configuration is necessary to enable MyOPAC Preferences and customize it. The following sections explain how to configure MyOPAC Preferences, as well as from where in the existing WebVoyage configuration MyOPAC Preferences draws information.

MyOPAC Preferences Sections

[Table 9-5](#) lists the Preferences sections available to patrons and the corresponding sections of WebVoyage configuration. [Figure 9-20](#) shows a sample MyOPAC Preferences page with all three of the sections enabled.

NOTE:

[Table 9-5](#) lists where in the WebVoyage configuration files MyOPAC Preferences obtains the options made available to patrons to be set as options. For example, if

you do not offer 50 as a “number of records displayed per page” variable in the [Records_Requested] stanza, it will not be available for patrons to set as a preference in MyOPAC Preferences.

Table 9-5. MyOPAC preferences option retrieval

| Option Category | Based on | For configuration, see |
|--------------------------------------|--|--|
| Search type | search.ini | Configuring Available Searches on page 6-6 |
| Number of records displayed per page | opac.ini | Records Per Page Display Options on page 4-19 |
| Databases searched | connect.ini and System Administration | Database Selection Display Configuration on page 2-1 |
| Index
(Simple Search only) | search.ini | Configuring available Simple Searches on page 6-8. |
| Course reserve options | Course Reserves configured in the Circulation module | “Course Reserve” in the <i>Voyager Circulation user’s guide</i> . |

The screenshot shows the 'Search Preferences' page of the WebVoyage system. At the top, there is a navigation bar with links for Database, Search, Headings, Titles, Patron, Logout, Preferences, Saved Searches, Bookbag, Request, Remote, Help, and Exit. A note below the bar says 'Logout when finished using MyOPAC'. The main content area has a title 'Search Preferences' and a section titled 'Search Type'. It includes several search parameters: 'Index Type' set to 'Subject Browse' with a dropdown arrow; 'Simple Search' (radio button), 'Complex Search' (radio button), 'Course Reserve' (radio button) selected, with dropdown menus for Instructor (Any), Department (Any), Course (Any), and Section (Any); and 'Geospatial Search' (radio button). Below this is a section titled 'Records per page' with a dropdown menu set to '50 records per page'. The next section is 'Databases' with a 'Database Name' field containing 'Endeavor Library of Information'. Under 'Local Libraries', 'Local Database' is selected. Under 'Other Databases', 'Science Direct' is selected, with 'Dev20011db' and 'SilverPlatter' listed. At the bottom of the page is a toolbar with buttons for Save and Clear, and links for Databases, Search, Headings, Titles, Patron, Logout, Preferences, Saved Searches, Bookbag, Requests, Remote, Help, and Exit.

Figure 9-20. Sample Search Preferences page in WebVoyage

Configuring MyOPAC Preferences

Most of the MyOPAC Preferences configuration is done in the `opac.ini` file on your server. The following is an overview of configuring MyOPAC Preferences.

- [Setting the name of MyOPAC Preferences in the Title Bar](#)
 - [Enabling MyOPAC Preferences section\(s\)](#)

The following steps are optional:

- [Configuring the layout of the Preferences page](#)
- [Customizing MyOPAC Preferences messages](#)
- [Customizing buttons/linked text on the WebVoyage toolbars](#)

Opac.ini configuration

The following sections detail the MyOPAC configuration set up in the opac.ini file.

Enabling MyOPAC Preferences

Before enabling each MyOPAC Preferences section, you must enable MyOPAC Preferences itself. Use the following to enable the MyOPAC Preferences globally by modifying the SavePreferences variable in the [Preferences] stanza.

After enabling the MyOPAC Preferences option see [Enabling MyOPAC Preferences section\(s\) on page 9-22](#) to enable the individual sections of MyOPAC Preferences.

To enable the MyOPAC Preferences option, set the SavePreferences= variable to **Y**.

To completely disable MyOPAC Preferences, set the SavePreferences= variable to **N**.

[Figure 9-21](#) shows the default [Preferences] stanza.

```
[Preferences]
SavePreferences=N
SearchPreferences=N
RecordsDisplayed=N
DatabasePreferences=N
```

Figure 9-21. Default [Preferences] stanza in the opac.ini file

Enabling MyOPAC Preferences section(s)

Use the following to enable the MyOPAC Preferences section(s) by modifying the [Preferences] stanza.

You enable/disable the three different sections of the MyOPAC Search Preferences page in the [Preferences] stanza in the opac.ini file (after enabling the MyOPAC Preferences option itself in the SavePreferences= variable). The three sections of the Preferences Page are:

- Search type

- Number of records displayed
- Databases to connect to

Each of the three sections is enabled in its corresponding variable in the [Preferences] stanza. [Figure 9-21](#) shows the default [Preferences] stanza:

The `SearchPreferences=` variable must be set to **Y** or **N**:

- Setting this variable to **Y** displays the Search Type section of the Search Preferences page in WebVoyage (see [Sample Search Preferences page in WebVoyage on page 9-21](#)).
- Setting this variable to **N** hides the Search Type section of the Search Preferences page in WebVoyage.

[Figure 9-22](#) shows an example of the Search Type section of the Search Preferences page enabled in WebVoyage.

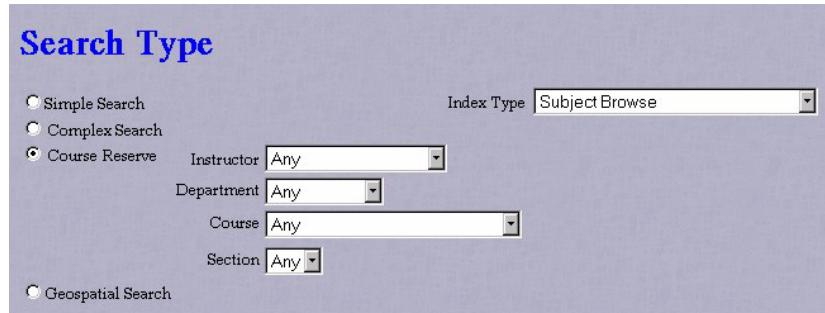


Figure 9-22. Sample Search Type section of Search Preferences page

The `RecordsDisplayed=` variable must be set to **Y** or **N**:

- Setting this variable to **Y** displays the Records Per Page section of the Search Preferences page in WebVoyage (see [Sample Search Preferences page in WebVoyage on page 9-21](#)).
- Setting this variable to **N** hides the Records Per Page section of the Search Preferences page in WebVoyage.

[Figure 9-23](#) shows an example of the Records Per Page section of the Search Preferences page enabled in WebVoyage.



Records per page

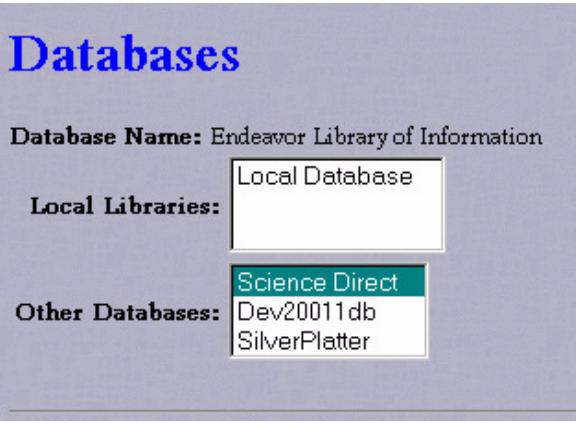
50 records per page ▾

Figure 9-23. Sample Records per page section of Search Preferences page

The DatabasePreferences= variable must be set to Y or N:

- Setting this variable to Y displays the Databases section of the Search Preferences page in WebVoyage (see [Sample Search Preferences page in WebVoyage on page 9-21](#)).
- Setting this variable to N hides the Databases section of the Search Preferences page in WebVoyage.

[Figure 9-24](#) shows an example of the Databases section of the Search Preferences page enabled in WebVoyage.



Databases

Database Name: Endeavor Library of Information

Local Libraries: Local Database

Figure 9-24. Sample Databases section of Search Preferences page

Setting the name of MyOPAC Preferences in the Title Bar

To change the name of MyOPAC Preferences in the Title Bar by modifying the [Title_Bar] stanza: Change the text after the MyOPAC= variable in the [Title_Bar] stanza of the Opac.ini file, to the name of your library's MyOPAC option. Choose the name of this title per your preferences, as it will display in the title bar. The following is the default MyOPAC variable in the [Title_Bar] stanza of the Opac.ini file:

MyOPAC=MyOPAC

Figure 9-25. MyOPAC variable

Configuring the layout of the Preferences page

Customize the layout and text of the different sections of the MyOPAC Search Preferences page by configuring the [Preferences_Page] stanza according to [Table 9-6](#). [Figure 9-26](#) contains a sample [Preferences_Page] stanza.

```
[Preferences_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
PreferencesScreen=Search Preferences
Search=Search
SimpleSearch=Simple Search
IndexType=Index Type
ComplexSearch=Complex Search
CourseReserve=Course Reserve
CourseDepartment=Department
CourseInstructor=Instructor
Course=Course
CourseSection=Section
MapSearching=Geospatial Search
RecordsPerPage=Records per page
DatabasesSearched=Databases
SubmitButton=Save My Preferences
ClearButton=Clear My Preferences
ClearPreferencesConfirm=Clearing the Preferences will clear all preferences.
Would you like to proceed?
```

Figure 9-26. The [Preferences_Page] stanza in the opac.ini file

[Table 9-6](#) details the description, possible values, and system default value of each line in the [Preferences_Page] Stanza.

Table 9-6. Components of the [Preferences_Page] stanza in the opac.ini file

| Variable Name | Description | Possible Values | Default Value |
|---------------|-------------------------------|--|---------------|
| Background= | Background graphic (or color) | Valid graphic file or hexadecimal RGB color code 000000 to ffffff. | None |
| Text= | Text color | Hexadecimal RGB color code 000000 to ffffff | None |

Table 9-6. Components of the [Preferences_Page] stanza in the opac.ini file

| Variable Name | Description | Possible Values | Default Value |
|----------------------|--|---|----------------------|
| BGCOLOR= | Background color | Hexadecimal RGB color code 000000 to ffffff | None |
| LINK= | Color of unclicked, or unvisited links | Hexadecimal RGB color code 000000 to ffffff | None |
| VLINK= | Color of previously clicked, or visited links | Hexadecimal RGB color code 000000 to ffffff | None |
| ALINK= | Color of links while being clicked | Hexadecimal RGB color code 000000 to ffffff | None |
| PreferencesScreen= | Title of Search Preferences page | Free text | Search Preferences |
| Search= | Heading of Search Type section | Free text | Search |
| SimpleSearch= | Label of Simple Search radio button in the Search Type section | Free text | Simple Search |
| IndexType= | Label of Index Type drop-down box in the Search Type section | Free text | Index Type |
| Complex-Search= | Label of Complex Search radio button in the Search Type section | Free text | Complex Search |
| CourseReserve= | Label of Course Reserve radio button in the Search Type section | Free text | Course Reserve |
| CourseDepartment= | Label of Course Department drop-down box in Course Reserve subsection of Search Type section | Free text | Department |

Table 9-6. Components of the [Preferences_Page] stanza in the opac.ini file

| Variable Name | Description | Possible Values | Default Value |
|--------------------------|--|-----------------|----------------------|
| CourseInstructor= | Label of Instructor drop-down box in Course Reserve sub-section of Search Type section | Free text | Instructor |
| Course= | Label of Course drop-down box in Course Reserve sub-section of Search Type section | Free text | Course |
| CourseSection= | Label of Section drop-down box in Course Reserve sub-section of Search Type section | Free text | Section |
| MapSearching= | Label of Geospatial Search radio button in the Search Type section (if available) | Free text | Geospatial Search |
| RecordsPerPage= | Heading of Records per page section | Free text | Records per page |
| Databases-Searched= | Heading of Databases section | Free text | Databases |
| SubmitButton= | Text of the button used to submit changes to preferences | Free text | Save My Preferences |
| ClearButton= | Text of the button used to remove all preferences | Free text | Clear My Preferences |
| ClearPreferencesConfirm= | Text of the confirmation message displayed when clearing preferences | Free text | See file |

Customizing MyOPAC Preferences messages

MyOPAC Preferences uses a logout message, and three other messages in various places. These messages are straightforward and can be customized per your preferences. This is done in the [MyOPAC Messages] stanza.

To modify the [MyOPAC Messages] stanza, change the text of the variables to your preference for each message.

[Figure 9-27](#) is an example of the default [MyOPAC Messages] stanza.

```
[MyOPAC Messages]
Logout=Logout when finished using MyOPAC
PrefMessage1=Your search type and/or index is not available
PrefMessage2=The records per page preference is no longer available
PrefMessage3=One or more of the selected databases is not available
NoDatabase=There are no databases defined!!!
```

Figure 9-27. Default [MyOPAC Messages] stanza

Customizing the Preferences button on the Patron Information page

The preferences.gif graphics file activates the MyOPAC Preferences button on the Patron Information page, when placed in the /m1/voyager/xxxdb/webvoyage/html/images directory.

To customize the Preferences button on the Patron Information page of WebVoyage, edit the preferences.gif file in the /m1/voyager/xxxdb/webvoyage/html/images directory. Remember to save the default preferences.gif as something else (as a backup) before editing it.

[Figure 9-28](#) contains an example of the MyOPAC preferences button on the Patron Information Page.

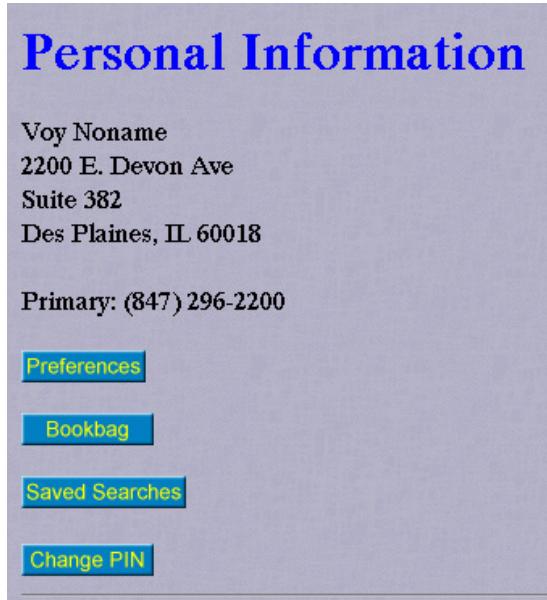


Figure 9-28. Sample Preferences button on the Patron Information page

Button alternate (Mouse-Over) text

Set the alternate (mouse-over) text of the **Preferences** button in the `Preferences_Button_Alt_Text` variable of the `[Patron_Info_Page]` stanza of the `opac.ini` file.

Customizing buttons/linked text on the WebVoyage toolbars

The **Preferences** buttons/linked text on the Top and bottom Toolbars are configured in the `[Toolbar_Top]` and `[Toolbar_Bottom]` stanzas of the `opac.ini` file. As with the other toolbar buttons, the graphics files for these buttons are in the `/m1/voyager/xxxdb/webvoyage/html/images` directory.

[Figure 9-29](#) is an example of the `[Toolbar_Top]` stanza and [Figure 9-30](#) is an example of the `[Toolbar_Bottom]` stanza. These are followed by steps explaining how to configure the stanzas to display buttons for the MyOPAC preferences page.

Line

```
[Toolbar_Top]
1 Count=14

2 TextFont=WingDings
3 TextFontSize=
4 TextSeparator=||| 

5 Btn01Text=Databases
6 Btn01GraphicUp=UpDatabase.gif
7 Btn01GraphicDown=DownDatabase.gif
8 Btn01GraphicDisabled=DisabledDatabase.gif
9 Btn01Function=DATABASE
10 Btn01Link=
-----Display Truncated-----

11 Btn06Text=Login
12 Btn06ToggleText=Logout
13 Btn06GraphicUp=UpLogin.gif
14 Btn06ToggleGraphicUp=UpLogout.gif
15 Btn06GraphicDown=DownLogin.gif
16 Btn06GraphicDisabled=DisabledLogin.gif
17 Btn06Function=LOGINOUT
18 Btn06Link=

19 Btn07Text=Preferences
20 Btn07GraphicUp=UpPref.gif
21 Btn07GraphicDown=DownPref.gif
22 Btn07GraphicDisabled=DisabledPref.gif
23 Btn07Function=PREFERENCES
```

Figure 9-29. Details of the [Toolbar_Top] stanza

Lines 19 through 23 of [Figure 9-29](#) illustrate the button variables and settings in the [Toolbar_Top] stanza. The referenced graphics files must be placed in the /m1/voyager/xxxdb/webvoyage/html/images directory with the other button graphics files. For an explanation of these variables, see [Table 9-7](#).

Table 9-7. Top Toolbar component descriptions

| Variable Name | Description | Possible Values | Default Value |
|-----------------------|---|------------------------------|------------------|
| BtnxxText= | Rollover text of MyOPAC Preferences button, or text of link if not using button | Free text | Preferences |
| BtnxxGraphicUp= | Filename of Preferences graphic in the “up” position | Valid .gif graphic file-name | UpPref.gif |
| BtnxxGraphicDown= | Filename of Preferences graphic in the “down” position | Valid .gif graphic file-name | DownPref.gif |
| BtnxxGraphicDisabled= | Filename of Preferences graphic when disabled | Valid .gif graphic file-name | DisabledPref.gif |
| BtnxxFunction= | Points WebVoyage to correct page | PREFER-ENCES | PREFER-ENCES |

Line

| | |
|----|--|
| 1 | [Toolbar_Bottom] |
| | Count=14 |
| 2 | TextFont= |
| 3 | TextFontSize= |
| 4 | TextSeparator= |
| 5 | Btn01Text=Databases |
| 6 | +Btn01GraphicUp=UpDatabase.gif |
| 7 | +Btn01GraphicDown=DownDatabase.gif |
| 8 | +Btn01GraphicDisabled=DisabledDatabase.gif |
| 9 | Btn01Function=DATABASE |
| 10 | Btn01Link= |
| | -----Display Truncated----- |
| 11 | Btn06Text=Login |
| 12 | Btn06ToggleText=Logout |
| 13 | Btn06GraphicUp=UpLogin.gif |
| 14 | +Btn06ToggleGraphicUp=UpLogout.gif |
| 15 | +Btn06GraphicDown=DownLogin.gif |
| 16 | +Btn06GraphicDisabled=DisabledLogin.gif |
| 17 | Btn06Function=LOGINOUT |
| 18 | Btn06Link= |
| 19 | Btn07Text=Preferences |
| 20 | +Btn07GraphicUp=UpPref.gif |
| 21 | +Btn07GraphicDown=DownPref.gif |
| 22 | +Btn07GraphicDisabled=DisabledPref.gif |
| 23 | Btn07Function=PREFERENCES |

Figure 9-30. Details of the [Toolbar_Bottom] stanza

Lines 19 through 23 of [Figure 9-30](#) illustrate the button variables and settings in the [Toolbar_Top] stanza. The referenced graphics files must be placed in the /m1/voyager/xxxdb/webvoyage/html/images directory with the other button graphics files. For an explanation of these variables, see [Table 9-8](#).

Table 9-8. Top Toolbar component descriptions

| Variable Name | Description | Possible Values | Default Value |
|-----------------------|--|-----------------------------|------------------|
| BtnxxText= | Rollover text of MyO-PAC Preferences button, or text of link if not using button | Free text | Preferences |
| BtnxxGraphicUp= | Filename of Preferences graphic in the up position | Valid .gif graphic filename | UpPref.gif |
| BtnxxGraphicDown= | Filename of Preferences graphic in the down position | Valid .gif graphic filename | DownPref.gif |
| BtnxxGraphicDisabled= | Filename of Preferences graphic when disabled | Valid .gif graphic filename | DisabledPref.gif |
| BtnxxFunction= | Points WebVoyage to correct page | PREFERENCES | PREFERENCES |

Patron-Initiated Request

If this feature is available at your institution, you can place holds, recalls, short loans, ARTEmail-compatible requests and call slips for items retrieved from WebVoyage module (depending on your institution's policies). You can also place requests that your library has customized, such as requests for purchases, photocopies, or an item to be placed on reserve.

Click the **Request** button (as shown to the left) to place a request. If you are not logged in, the OPAC Patron Login page displays; once you log in, you will be presented with the request selection page. If you are logged in, clicking the **Request** button allows you to choose the type of request you want to make.

If you receive a message saying that you have no requests available to you on the system, you are not allowed by your library to submit any requests.

Enabling Patron Requests

Configure whether or not the entire request menu will or will not appear in WebVoyage by editing the `PatronRequests` variable in the `[Options]` stanza of the `opac.ini` file. This includes Holds, Recalls, and Call Slips as well as any other library-defined requests.

- `PatronRequests=Y` activates the Request menu
- `PatronRequests=N` deactivates the Request menu

NOTE:

If the `PatronRequests=` variable is absent from the `[Options]` stanza or if nothing is entered after it, this variable defaults to `N`.

After enabling patron requests in the `[Options]` stanza, you can restrict or allow access to request forms by Patron Group.

Patron Self-Registration

The Patron Self-Registration feature allows patrons to enter the information required to create a patron record. The purge date of these records is the same day they are created. Patrons can then go to the Circulation Desk to have a barcode added and the purge date changed. This allows your library to reduce staff time creating patron records, while maintaining control of the information required and barcodes attached to the patron records.

NOTE:

The purge date will not display in the History tab of the records in the Voyager Circulation Module, but can be viewed by clicking the calendar expansion button in the Purge: field when editing the patron records.

For example, you might set up a separate workstation where patrons input their own patron information, requiring your Circulation staff only to verify the patron information and assign barcodes. If your library has a large number of public users, viewing library materials for short periods of time, use Patron Self-Registration to quickly create temporary patron records.

Patron Self-Registration resides on a separate port and runs independently of WebVoyage. You can create a link to your **Patron Self-Registration** page from WebVoyage. [Figure 9-31](#) shows the default Patron Self-Registration page.



Patron Self Registration

The required fields are displayed in bold.

| | | | |
|---------------|----------------------|----------|----------------------|
| SSN | <input type="text"/> | Address | <input type="text"/> |
| | | Address2 | <input type="text"/> |
| Title | <input type="text"/> | | <input type="text"/> |
| First Name | <input type="text"/> | | <input type="text"/> |
| LastName | <input type="text"/> | City | <input type="text"/> |
| | | State | <input type="text"/> |
| Primary Phone | <input type="text"/> | Country | <input type="text"/> |
| Other Phone | <input type="text"/> | ZipCode | <input type="text"/> |

Figure 9-31. Default Patron Self-Registration page



IMPORTANT:

Make sure the AutoComplete Settings of the web browsers on library computers using Patron Self-Registration are set to not save data input into forms. AutoComplete stores previous entries in fields and suggests matches. This might allow patrons to use a previous patron's record information. Disable these settings when the browser is being used to input information. The procedure for disabling this feature depends on your browser, so if you need help consult your browser's documentation.

After submitting your information successfully, a confirmation message displays (for an example, see [Figure 9-32](#) and for configuration of this message, see [Customizing the Patron Self-Registration messages](#) on [page 9-39](#)).

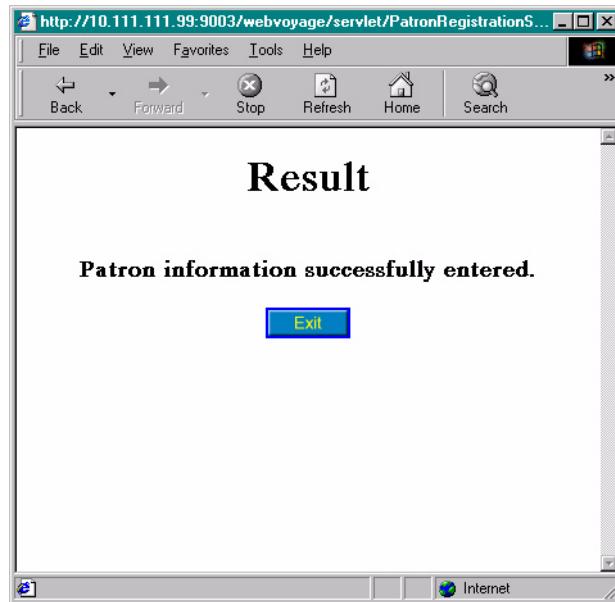


Figure 9-32. Patron information successful message

For security purposes, after successful creation of a record through Patron Self-Registration, the original form is cleared. If the **Back** button is clicked in the browser, the previously entered patron information will not be available (see [Figure 9-33](#) for an example).

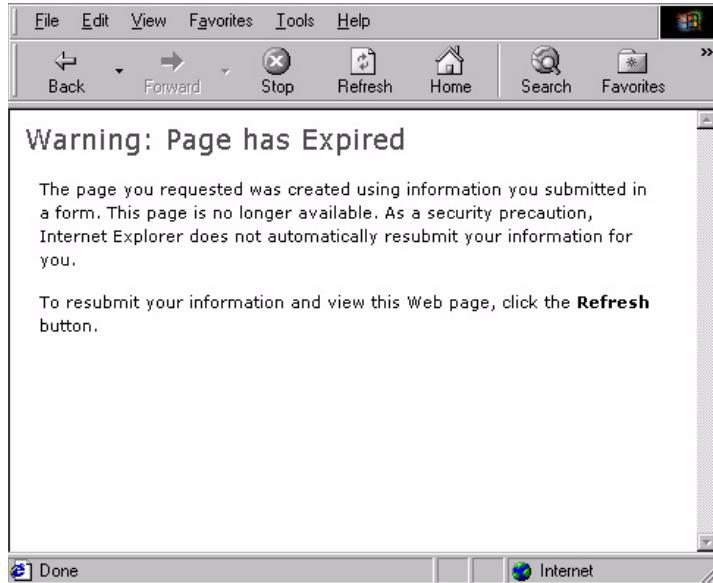


Figure 9-33. Page expired message after clicking Back button

Configuration of Patron Self-Registration consists of the following steps:

- [Specifying the IP address and port number of the OPAC server](#)
- Optional: [Customizing the Patron Self-Registration messages](#)
- Optional: [Customizing the Patron Self-Registration page](#)
- Optional: [Adding a link to Patron Self-Registration from the Login page](#)

Specifying the IP address and port number of the OPAC server

To enable Patron Self-Registration, you must first specify the IP address and port of your OPAC server. Do this in the `voytomcat.ini` file, in the `/m1/voyager/xxxdb/tomcat/webapps/webvoyage/ini` directory (see [Figure 9-34](#) for an example).

Line#

```
1      ## Opac server IP address and port ##
2      Server=xxx.xxx.xxx.xxx
3      Port=xxxx
4      Message1=Patron information successfully entered.
5      Message2=A database error occurred while trying to add a patron record.
6      Message3=An error occurred while adding patron information. Please
7      consult the Circulation Desk for assistance.
     PatronSelfRegistrationURL=http://xxx.xxx.xxx.xxx:xxxx
```

Figure 9-34. Default voytomcat.ini file

Server= variable:

Line 2 shows the server IP address specification line. Enter the IP address of your OPAC server on this line.

Port= variable:

Line 3 shows the port specification line. Enter the port of your OPAC server on this line.

PatronSelfRegistrationURL= variable:

Line 7 shows the URL specification of your Patron Self-Registration page. Enter that URL after this variable. This is the URL that patrons will connect to upon clicking the Exit button after successfully submitting patron information (see [Figure 9-32 on page 9-37](#)). This button is controlled by the `exit.gif` file in the `/m1/voyager/xxxdb/webvoyage/html/images` directory.

NOTE:

To connect back to WebVoyage after patrons submit their information using Patron Self-Registration, put the URL of your WebVoyage page here. Clicking the Exit button will then take the patron back to that WebVoyage page.

Customizing the Patron Self-Registration messages

The messages generated by Patron Self-Registration can be customized. These messages are in the `voytomcat.ini` file, in the `/m1/voyager/xxxdb/tomcat/webapps/webvoyage/ini` directory (see lines 4 through 6 of [Figure 9-34](#) for the default, and [Figure 9-35](#) for sample display of message 3).

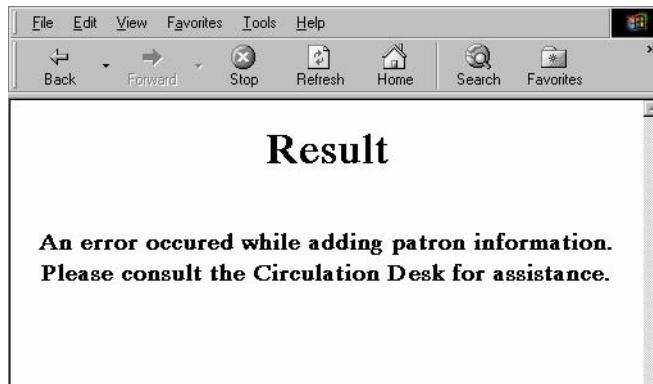


Figure 9-35. Message3 display

Customizing the Patron Self-Registration page

The information on the **Patron Self-Registration** page can be customized. This includes the display of the page, the field titles, which fields are required, and which fields display. You can customize the **Patron Self-Registration** page by configuring the following files:

Table 9-9. Patron Self-Registration files

| File name | Description |
|------------|--|
| patron.xml | Determines the fields for input on the Patron Self-Registration page. Also switches field display, and required status, on and off. |
| patron.xsl | Contains the rules for converting the patron.xml file to html, and verifying the input.

Change the order of the fields on the Patron Self-Registration page by changing the order of the elements in the <table> sub-element of the <form> element. You can also remove any unwanted fields here, as long as they are not marked required in the patron.xml file. |
| patron.css | Determines some display options of the page, including background color, text alignment, and margins. |

These files are in the /m1/voyager/xxxdb/tomcat/webapps/webvoyage/ini directory.



CAUTION:

The patron.xml, patron.xsl and patron.css files are configured to properly display and execute the Patron Self-Registration page, in conjunction. Customization beyond the page headings, messages, field elements, and variables detailed above should only be done by personnel familiar with XML, XSL, and Cascading Style Sheets (css).

The patron.xml file

The patron.xml is an XML file which determines the fields for input on the **Patron Self-Registration** page. [Figure 9-36](#) shows a sample patron.xml file.

```
<?xml version="1.0" encoding="utf-8"?>
<?xml-stylesheet type="text/xsl" href="patron.xsl"?>
<!----- Patron Self Registration ----->
<Patron>
    <Heading>
        <Visible>Y</Visible>
        <Caption>Patron Self Registration</Caption>
    </Heading>
    <Instructions>
        <Visible>Y</Visible>
        <Caption>Please enter the required fields (bold)</Caption>
    </Instructions>
    <id>
        <Visible>Y</Visible>
        <Idtype>S</Idtype>
        <Caption>SSN</Caption>
    </id>
    <Title>
```

Figure 9-36. Sample patron.xml file

```
<Visible>N</Visible>
<Required>N</Required>
<Caption>Title</Caption>
</Title>
<FirstName>
    <Visible>Y</Visible>
    <Required>N</Required>
    <Caption>First Name</Caption>
</FirstName>
<MiddleName>
    <Visible>N</Visible>
    <Required>N</Required>
    <Caption>Middle Name</Caption>
</MiddleName>
<LastName>
    <Caption>Last Name</Caption>
</LastName>
<PrimaryPhone>
    <Visible>Y</Visible>
    <Required>Y</Required>
    <Caption>Primary Phone</Caption>
</PrimaryPhone>
<OtherPhone>
    <Visible>Y</Visible>
    <Required>N</Required>
    <Caption>Other Phone</Caption>
</OtherPhone>
<Address1>
    <Caption>Address</Caption>
</Address1>
<Address2>
    <Visible>Y</Visible>
    <Required>N</Required>
```

Figure 9-36. Sample patron.xml file (Continued)

```
</Address2>
<Address3>
    <Visible>Y</Visible>
    <Required>N</Required>
</Address3>
<Address4>
    <Visible>Y</Visible>
    <Required>N</Required>
</Address4>
<Address5>
    <Visible>Y</Visible>
    <Required>N</Required>
</Address5>
<City>
    <Visible>Y</Visible>
    <Required>N</Required>
    <Caption>City</Caption>
</City>
<State>
    <Visible>Y</Visible>
    <Required>Y</Required>
    <Caption>State</Caption>
</State>
<Country>
    <Visible>Y</Visible>
    <Required>Y</Required>
    <Caption>Country</Caption>
</Country>
<ZipCode>
    <Visible>Y</Visible>
    <Required>Y</Required>
    <Caption>Zip Code</Caption>
</ZipCode>
```

Figure 9-36. Sample patron.xml file (Continued)

```

<EmailAddress>
    <Visible>Y</Visible>
    <Required>Y</Required>
    <Caption>Email Address</Caption>
</EmailAddress>
<message>
    <Caption>You have not entered the required fields.</Caption>
</message>
</Patron>

```

Figure 9-36. Sample patron.xml file (Continued)

Most elements (see note following) of the `patron.xml` file corresponding to fields on the Patron Self-Registration have three variables associated with them. These variables are listed and described in [Table 9-10](#).

NOTE:

Other than last name and Address1, all the fields have an option to be visible or not and an option to be required or not. ID is required, if visible. Last Name and Address1 are always visible and required.

Table 9-10. Field element variable descriptions

| Element | Description | Valid values |
|----------|---|--|
| Visible | Determines whether or not the field is visible to patron. | Y= field is visible
N= field is not visible |
| Required | Determines whether or not the field is required. | Y= input into field is required
N= input into field is not required |
| Caption | Caption of the field as displayed on the page | Any alphanumeric |

NOTE:

- Last name and Address1 are always required and visible

- The ID field is always required if it is visible. This field can have an Idtype value of **S** or **I**. [Table 9-11](#) details the `idtype` element options.

Table 9-11. Idtype element option details

| idtype | Description | Field limits |
|--------|------------------------|----------------------------|
| S | Social Security Number | 9 numeric characters |
| I | Institution ID | 30 alphanumeric characters |

Change the values of the field elements in the `patron.xml` file by changing the text between the appropriate tags. For example, to change the Other Phone field to required, and the caption to Local Phone, change the `N` between the `<Required>` tags to a `Y`, and change the text between the `<Caption>` tags.

```
<OtherPhone>
<Visible>Y</Visible>
<Required>N</Required>
<Caption>Other Phone</Caption>
</OtherPhone>
```

Figure 9-37. Default Other Phone field

```
<OtherPhone>
<Visible>Y</Visible>
<Required>Y</Required>
<Caption>Local Phone</Caption>
</OtherPhone>
```

Figure 9-38. Revised Other Phone field

Changing the layout of the fields in the patron.xsl file

To alter the layout of the fields on the Patron Self-Registration page, change the table specification in the `patron.xsl` file (lines 9 through 28 of [Figure 9-40](#)).

The first <table> element containing the page field element tags (see [Figure 9-39](#)) corresponds to the left-hand column of fields on the Patron Self-Registration page and the second corresponds to the right-hand column (see [Figure 9-31](#) on [page 9-36](#)).

```
<xsl:apply-templates select="XX">
```

Figure 9-39. Page field element tag format

The page field element name ("XX") components of the page field element tags correspond to the elements in the patron.xml file. Changing the order of these tags in the patron.xsl file will change the order of the field on the Patron Self-Registration page.



IMPORTANT:

Make sure that you do not delete any page field element tags that are marked as required in the patron.xml file. For example, if the <Required> tag of the <Address2> element is set to Y, a <xsl:apply-templates select="Address2"> tag must appear in a table element specification in the patron.xsl file.

Line#

```
1  <form method="post" action="/webvoyage/servlet/PatronRegistrationServlet"
2    name="patronselfreg">
3      <table width="800" border="0" cellspacing="0" cellpadding="1"
4        align="center">
5          <tr><td><xsl:apply-templates select="message"/>
6          </td>
7          </tr>
8          <tr valign="top">
9            <td WIDTH="50%">
10           <table>
11             <xsl:apply-templates select="id"/>
12             <xsl:apply-templates select="Title"/>
13             <xsl:apply-templates select="FirstName"/>
```

Figure 9-40. Table specification section of patron.xsl file

| Line# | |
|-------|--|
| 12 | <xsl:apply-templates select="MiddleName"/> |
| 13 | <xsl:apply-templates select="LastName"/> |
| 14 | <xsl:apply-templates select="OtherPhone"/> |
| 15 | <xsl:apply-templates select="PrimaryPhone"/> |
| 16 | </table> |
| 17 | </td> |
| 18 | <td WIDTH="50%"> |
| 19 | <table> |
| 20 | <xsl:apply-templates select="Address1"/> |
| 21 | <xsl:apply-templates select="Address2"/> |
| 22 | <xsl:apply-templates select="Address3"/> |
| 23 | <xsl:apply-templates select="Address4"/> |
| 24 | <xsl:apply-templates select="Address5"/> |
| 25 | <xsl:apply-templates select="City"/> |
| 26 | <xsl:apply-templates select="State"/> |
| 27 | <xsl:apply-templates select="Country"/> |
| 28 | <xsl:apply-templates select="ZipCode"/> |
| 29 | <xsl:apply-templates select="EmailAddress"/> |
| 30 | </table> |
| 31 | </td> |
| 32 | </tr> |
| 33 | </table> |
| 34 | <table width="800" border="0" cellspacing="2" cellpadding="3" align="center"> |
| 35 | <tr><td colspan="2" valign="middle" align="center"> |
| 36 | <input type="button" name="Submit" value="Submit" DEFANGED_OnClick="checkValues(document.forms[0].Message.value)"></input> |
| 37 | <input type="reset" name="Submit2" value="Reset"></input> |
| 38 | </td> |
| 39 | </tr> |
| 40 | </table> |
| 41 | </form> |

Figure 9-40. Table specification section of patron.xsl file (Continued)

For example, if you want the **Primary Phone** field to display above the **Other Phone** field, rearrange the order of the `<xsl:apply-templates select="OtherPhone"/>` and `<xsl:apply-templates select="PrimaryPhone"/>` tags in the patron.xsl file.

To move the Other Phone field to the right-hand column on the Patron Self-Registration page, move the <xsl:apply-templates select="OtherPhone"/> tag to the second table element (containing the page field element tags).

Patron Record Creation with Patron Self-Registration

Once a library patron inputs the required information, a patron record is created in the Voyager Circulation Module for that person. This record will *not* contain a barcode, and will have an purge date of the date the record is created.

You must then assign a barcode to the patron record, and change the purge date at the circulation desk. Patron records created using Patron Self-Registration have an Operator ID of OPAC.

[Figure 9-41](#) shows information entered into a Patron Self-Registration page. [Figure 9-42](#) shows the corresponding patron record created in the Voyager Circulation Module.

The screenshot shows a web-based form titled "Patron Self Registration". The header features the "SmartDesign SOLID Decision" logo and "Web Voyage" branding. The form contains the following fields:

| | | | |
|----------------------|----------------|-----------------|-------------------|
| SSN | 666666666 | Address | 2200 E. Devon Ave |
| | | Address2 | Ste. 382 |
| Title | | | |
| First Name | Bob | | |
| Last Name | Noname | City | Des Plaines |
| | | State | IL |
| Primary Phone | (847) 296-2200 | Country | USA |
| Other Phone | | Zip Code | 60018 |

At the bottom of the form are "Submit" and "Reset" buttons.

Figure 9-41. Sample patron information in Patron Self-Registration page

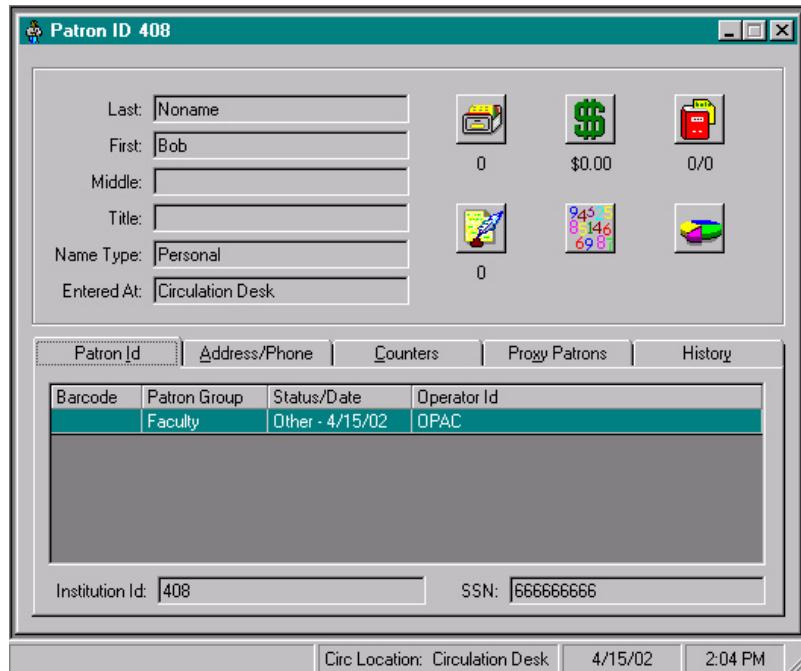


Figure 9-42. Patron record in Voyager Circulation Module

Configuring Patron Self-Registration in System Administration

Voyager System Administration contains three items which affect Patron Self-Registration. Configure these items in **System Administration>Circulation>Policies**. [Table 9-12](#) describes each item.

[Table 9-12](#) details the Circulation Policy Field descriptions.

Table 9-12. Circulation Policy Field Descriptions

| Configuration Item | Description |
|--------------------|--|
| OPAC Circ Desk | The Circulation Desk associated with WebVoyage. Scope not limited to Patron Self-Registration but affects records created by Patron Self-Registration |
| Set Purge | The purge date is the date that will be used with a special job that will remove patron records from the database. At this time this date is not being used. |

Table 9-12. Circulation Policy Field Descriptions

| Configuration Item | Description |
|----------------------|---|
| Default Patron Group | Default patron group which records created will be assigned to. |

Adding a link to Patron Self-Registration from WebVoyáge

If you are using Patron Self-Registration in conjunction with WebVoyáge, you can provide a link to the Patron Self-Registration page in WebVoyáge. One possible scenario is to provide this link from the **Login** page. Customers using WebVoyáge who must create a patron record can then do so.

Adding a link to Patron Self-Registration from the Login page

One way to do this is to add a link to the `logonmsg.htm` file, containing the IP address and port of the Patron Self-Registration page (see line 4 of [Figure 9-43](#) for an example). [Figure 9-44](#) shows the resulting link on the **Login** page of WebVoyáge.

| Line# | |
|-------|---|
| 1 | <CENTER> |
| 2 | Please enter your Patron Barcode and Last Name, then click the OK button. |
| 3 |
 |
| 4 | If you are not registered, click here for Patron Self-Registration. |
| 5 | </CENTER> |

Figure 9-43. The logonmsg.htm file with link

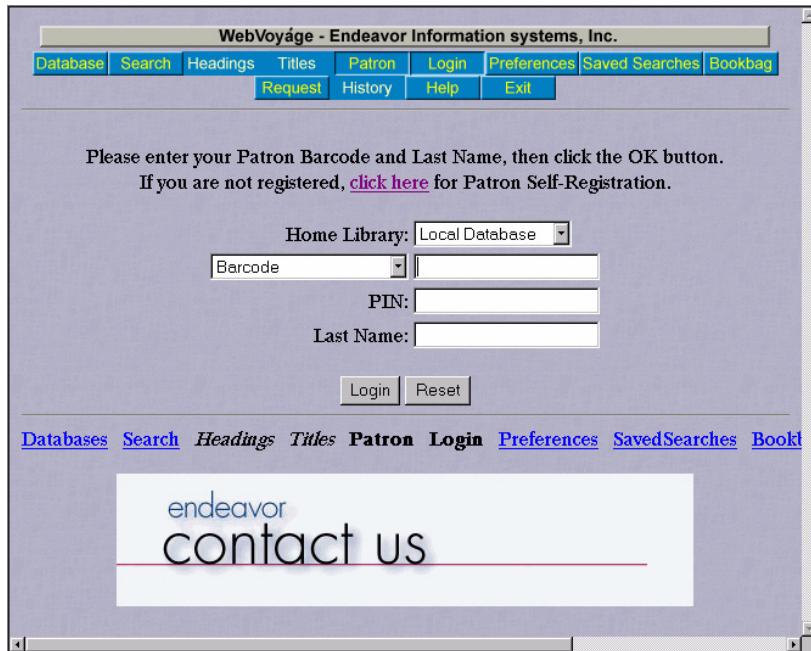


Figure 9-44. Link to Patron Self-Registration on the Login page

Status Patron Groups

The Status Patron Groups feature allows you to use Circulation module configuration to display messages to the public. For example, you can create patron groups corresponding to special locations, such as the bindery or study carrels. You can then display this information in WebVoyage by charging the item to one of the Status Patron Groups. If an item is charged to a certain study carrel, WebVoyage will then reflect that fact. You can also charge items out to particular study carrels to be kept at those carrels.

The library-configurable messages corresponding to the "Charged" status will display to the public, as will charged items with requests pending against them. So an item charged to Study carrel 3 will appear in WebVoyage as charged to that study carrel. You configure the message text in the opac.ini file, so you can have multiple sets of messages for multilingual WebVoyage configurations.

Each patron group has one independent message for charged items and one for charged items with requests pending. You can also display the first and last name information for each patron record, so each specific patron within a status patron group can display slightly different information.

For instance, you may create a status patron group for study carrels (Carrel), then use the first and last name in each patron record to store the carrel location and number. Items charged to a given Carrel will display in WebVoyage using the message specified in the opac.ini file.

Configuring Patron Groups to Display Charged Status

In order to display the customized messages associated with status patron groups, the **Display OPAC Message for Charged Items** check box must be selected in the Voyager System Administration module (Circulation>Patron groups).



IMPORTANT:

If you select this check box, it is possible to display, in WebVoyage, the first and last names of the patrons to which items are charged. Make sure you only select this check box if you want to make the display of patron first and/or last names possible.

Configuring WebVoyage to Display Charged Messages

The charged messages display in two sections of WebVoyage:

- The Titles page
- The View Record page

Customize the status patron group messages in the [Title_Page] and [View_Record_Page] stanzas of the opac.ini file.

For each status patron group, you must create an entry in these stanzas containing the code of the patron group, and the messages you wish to display. These entries follow the format detailed in [Figure 9-45](#).

Status Patron Group Code=Message for charged items
Status Patron Group Code+Req=Message for charged items with pending request(s).

Figure 9-45. Status Patron Group message format

NOTE:

If no entry exists in these stanzas in the opac.ini file the default Charged and ChargedReq messages display.

For example, after creating a patron group called **BINDERY**, and selecting the Display OPAC Message for Charged Items, create the following entries:

```
[Title_Page]
...
Bindery=At Bindery
...
```

Figure 9-46. Sample Message Text in [Title_Page] stanza

```
[View_Record_Page]
...
Bindery=At Bindery for repair
Bindery+Req=At Bindery for repair, with pending requests
...
```

Figure 9-47. Sample Message Text in [View_Record_Page]

You can also use the standard substitution tokens in these messages (see [Table 9-13](#)), as well as two Status Patron Group-specific tokens (see [Table 9-14](#)).

Table 9-13. Standard substitution tokens

| Substitution token | Information displayed |
|--------------------|--|
| \i | Standard item information (enumeration, chronology, for example) |
| \c | Outstanding number of requests |
| \d | Date |
| \e | Date, unless date is today |
| \t | Time |
| \u | Time, if date is today |
| \l | Location |

Table 9-14. Patron Block Information-specific tokens

| Substitution token | Information displayed |
|--------------------|-------------------------------------|
| \F | First name field from patron record |
| \L | Last name field from patron record |

! IMPORTANT:

Make sure to only use the \F and \L tokens for patron groups whose first and last name information you want displayed in WebVoyage (that is, for patron status groups).

[Figure 9-48](#) shows an example of substitution tokens in a message.

[View_Record_Page]

...

Carrel=\i shelved at Carrel \L until \d

Carrel+Req=\i shelved at Carrel \L until \d. Requests:\ c.

...

Figure 9-48. Sample Substitution tokens in Message Text

Patron Self-Renewal

If the Patron Self-Renewal feature is provided by your institution, the Renewal options will appear in the Charged section of the Patron Information page. However, even if your institution provides the self-renewal feature, the Renewal options will not appear on the Charged tab if your patron status is “Blocked” by your institution for any reason or if you do not have at least one item charged out.

NOTE:

The patron self renewal option enables patron self-renewal at the highest level. To set individual self-renewal options, you must also configure the renew all and/or the renew single items features (see [Renewal Options](#) on [page 9-55](#)).

Allowing Patrons to Self-Renew Items

To allow patrons to self-renew items, edit the `SelfRenew` variable in the `[Patron_Info_Page]` stanza of the `opac.ini` file.

- `SelfRenew=Y` enables patron self-renewal
- `SelfRenew=N` disables patron self-renewal

Renewal Options

The Renew All feature on the Patron Information page renews all items charged to a patron. UB charges will automatically be polled for renewal when the request is submitted. Rather than selecting charged items one at a time and renewing them, patrons can select the Renew All drop-down options and renew them all at once. You can also retain the renew single items feature or disable it.



IMPORTANT:

For any patron renewal options to work, you must first enable Patron Self-Renewal (see [Patron Self-Renewal on page 9-54](#)).

On the Patron Information page, if the Renew All feature is enabled (see [Text of the Renewal Button on page 9-58](#)) a drop-down box displays, along with a Renew All button. The drop-down box contains the available renewal options. [Figure 9-49 on page 9-56](#) shows the Renew All button on the Patron Information page, along with the renewal options drop-down box.

| Charged Items | | |
|--------------------------|---|-----------------------|
| Dev20031db Cluster B | | |
| Renew? | Item | Status |
| <input type="checkbox"/> | Cummer Gallery of Art. Artists of Victoria's England. [Catalogue of exhibition] February 2-March 14, 1965. Location: B: Main Collection N6767.5.P7 C85 1965 | Charged: Due 09-22-03 |
| <input type="checkbox"/> | O'Hara, Eliot, 1890-1969. Watercolor with O'Hara. Location: B: Main Collection ND2135 .O54 | Charged: Due 09-22-03 |
| <input type="checkbox"/> | Cronicas de los reyes de Castilla / desde Don Alfonso el Sabio hasta los Catolicos Don Fernando Y Donna Isabel .. v.3 Location: B: Main Collection S946 C94 | Renewed: Due 09-22-03 |

| Dev20031db Cluster A | | |
|--------------------------|---|-----------------------|
| Renew? | Item | Status |
| <input type="checkbox"/> | Brunet, Roger, 1931- Pyrenees / par Roger Brunet, Serge Lerat, et Michel Vigouroux. Location: A: Main Collection 944.89 B895p | Charged: Due 10-10-03 |

| 2003.1 NCDB UB Development Test Library | | |
|---|---|-----------------------|
| Renew? | Item | Status |
| <input type="checkbox"/> | Brooks, Van Wyck, 1886-1963. Helen Keller; sketch for a portrait. Location: Main Collection HV1624.K4 B7 | Renewed: Due 12-18-03 |
| <input type="checkbox"/> | Impressionist and post-impressionist paintings in Soviet museums / [Introductory article by Marina Bessonova ; notes by Anna Barskaya ... et al. ; translated from the Russian by Yun Panfilov]. Location: Main Collection ND547.5.I4 I463 1983 | Renewed: Due 12-18-03 |

Figure 9-49. Renewal Button and Drop-Down Box

The Renewal Options Drop-Down Box

The Renew Options drop-down box displays different renew options, depending on the how the `RenewAll` and `RenewSingleItems` variables are set. [Table 9-15](#) contains a renewal option configuration matrix.

For more information about setting the renew all and renew single items variables in the configuration file, see [Text of the Renewal Button](#) on [page 9-58](#)

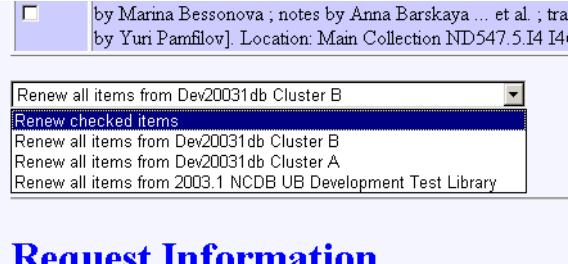
Table 9-15. Renewal Options Matrix

| Renew All | Renew Single Items | Display |
|-----------|--------------------|---|
| Enabled | Enabled | Drop-down displays renew all by cluster, and renew checked items options. |
| Enabled | Disabled | Drop-down displays renew all by cluster option only. |
| Disabled | Enabled | Only the Renew Items button displays.
Renew checked items using the Renew Items button |

Table 9-15. Renewal Options Matrix

| Renew All | Renew Single Items | Display |
|-----------|--------------------|------------------------------|
| Disabled | Disabled | No renewal options available |

[Figure 9-50](#) shows the renewal options drop-down box with both the renew all and renew single items enabled.

**Figure 9-50. Renew Items Drop-Down**

Renewal Option Button Configuration

The following are related to use the Renew All button feature:

- Enable the feature in the opac.ini (Required)
- Text of the renewal button
- Display of the renew single items drop-down
- Display of the renew all drop-down
- Text of the renew all limit message

[Figure 9-51](#) shows the Renewal option variables (minus the SubmitButton variable).

```
RenewAll=Y  
RenewLimitMessage=Only 50 items may be renewed at once. Select  
the Renew Items button again to renew the remaining  
items.  
RenewSingleItems=Y  
RenewSingleItemsText=Renew checked items  
RenewAllItemsText=Renew all items from
```

Figure 9-51. Sample Renew All Variables

Enabling the Renew All feature

Enable the Renew All feature by setting the `RenewAll` variable in the `[Patron_Info_Page]` stanza in the `opac.ini` file.

- `RenewAll=Y` displays the text of the `RenewAllItemsText` variable in the renewal options drop-down box, and enables the renew all option
- `RenewAll=N` disables the Renew All drop-down option and feature.

Enabling the renew single items drop-down option

The renew single items check box column, and renewal options drop-down entry, can be configured. Disabling the renew single items feature can be useful in streamlining the interface if your patrons will be using the Renew All button exclusively.

Enable the renew single items display feature by editing the `RenewSingleItems` variable of the `[Patron_Info_Page]` stanza of the `opac.ini` file.

- `RenewSingleItems=Y` enables the renew single items feature
- `RenewSingleItems=N` disables the renew single items feature

Editing the text of the Renew Single Items drop-down text

To edit the text of the Renew Single Items drop-down, edit the `RenewSingleItemsText` variable.

Text of the Renewal Button

Set the label of the renewal button by editing the `SubmitButton` variable in the `[Patron_Info_Page]` stanza in the `opac.ini` file.

Editing the Text of the Renew All Limit Message

You can configure the message that displays if a patron attempts to renew more than 50 checked records when using the Renew Single Items option.

NOTE:

The maximum number of records that can be renewed by a patron is 50, when using the Renew Single Items feature.

Editing the Patron Login Page

The patron login page allows the patron, when logged in, to submit requests and view information about their account.

Components of the Patron Login Page

Background Image

You can specify a particular image to appear in the background of a page by entering the name of the image (including the full path) after the Background= variable in the Logon_Page stanza of the opac.ini file. If a background color is also specified (see below), this image takes precedence. For more information, see "Logon_Page Stanza".

Background Color

You can specify the color of the background by entering an RGB color code after the BGCOLOR= variable in the Logon_Page stanza of the opac.ini file. If a background image is also specified, the color will not be used. For more information, see "Logon_Page Stanza".

Text Color

You can specify the color of the text on the page by entering an RGB color code after the Text= variable in the Logon_Page stanza of the opac.ini file. For more information, see "Logon_Page Stanza".

Link Color

You can specify the color of the unvisited links on the page by entering an RGB color code after the LINK= variable in the Logon_Page stanza of the opac.ini file. For more information, see "Logon_Page Stanza".

Visited Link Color

You can specify the color of the visited links on the page by entering an RGB color code after the VLINK= variable in the Logon_Page stanza of the opac.ini file. For more information, see “Logon_Page Stanza”.

Selected Link Color

You can specify the color of the link being clicked by entering an RGB color code after the ALINK= variable in the Logon_Page stanza of the opac.ini file. For more information, see “Logon_Page Stanza”.

Informational Text

The text that appears between the banner and the request drop-down can be modified. There are three different files that contain this informational text. Depending on the method of login required, the following files are used:

Table 9-16. Login Files

| Method of Login | Filename |
|------------------------|-----------------|
| Institution ID | logoniidmsg.htm |
| Barcode | logonmsg.htm |
| Social Security Number | logonsocmsg.htm |

These files can be edited like any html file; the contents of the file can be edited to contain anything that you might want.

Login Information Required

You can change the type of information required to allow your patrons to verify their identity. You may specify which of the following login types are available to patrons when logging in:

- Barcode
- Institution ID
- Social Security Number

You can provide however many of these you wish (as long as there's at least one type available to patrons. This is done in the [Login Types] stanza of the opac.ini file.

LastName

The *LastName* variable controls the label that appears beside the second free-text field on the Login Page. This is the field in which patrons enter their last name in order to acquire access to certain protected features and information (for instance, their personal information). Enter the text that you want to appear as the label beside the second free-text field after the *LastName* variable. If nothing is entered after the *LastName* variable, *Last Name:* will be used as the default.

SubmitButton

The *SubmitButton* variable controls the text that appears on the button that patrons press to submit their login information. Enter the text that you want to appear on the “Login” button after the *SubmitButton=* variable. For example, if you wanted the text on the button to be “Login”, you would enter *Login* after the *SubmitButton* variable. If nothing is entered after the *SubmitButton* variable, the text on the button will default to *Login*.

ResetButton

The *ResetButton* variable controls the text that appears on the button that patrons press to clear the fields on the Login Page. Enter the text that you want to appear on the “Reset” button after the *ResetButton=* variable. For example, if you wanted the text on the button to be “Reset”, you would enter *Reset* after the *ResetButton* variable. If nothing is entered after the *ResetButton* variable, the text on the button will default to *Reset*.

DefaultCluster

For libraries using multiple clusters, the *DefaultCluster* variable determines which cluster acts as the default in the drop-down box used to select the cluster Patrons log in to. If this variable is left blank, the clusters sort alphabetically in the drop-down box.

HomeLibrary

For libraries using multiple clusters, the *HomeLibrary* variable determines the label text of the drop-down box containing the clusters available for logging in to.

Patron Information Page

The Patron Information Page is divided into four or five sections (depending on whether you use Fines and Fees, and Demerits). They are:

- Personal Information
- Patron Blocks

- Charged Items
 - Request Information
 - Penalty information:
 - Fines and Fees
- or
- Demerit Points

In addition to the general Page Appearance components of the Patron Information page (see [Table 4-3 on page 4-11](#)), you can configure the components detailed in the individual sections of the Patron Information page (as detailed in the following sections).

The screenshot shows the WebVoyage Patron Information Page (Full). The top navigation bar includes Database, Search, Headings, Titles, Patron, Logout, Preferences, Saved Searches, Bookings, Request, History, Help, and Exit.

Personal Information:

- Name: Lorraine Miller
- Address: 2200 E Devon Ave, Law Campus, Suite 100, Des Plaines, IL 60018
- Phone: (847) 294-2200

Patron Blocks:

No blocks.

Charged Items:

| Review Item | Status |
|---|---------------------------|
| <input type="checkbox"/> Social change in the capitalist world economy / edited by Barbara Hockley Kaplan. Location: Main Collection RC31.S63 | Charged - Due on 05-13-04 |
| <input type="checkbox"/> Williams, T. C. (Terence Charles). Concept of the categorical imperative : a study of the place of the categorical imperative in Kant's ethical theory, by T. C. Williams. Location: Main Collection B2799.E5 WS | Charged - Due on 05-13-04 |

[Review items](#) | [Reset](#)

Request Information:

Requests Pending:

| Cancel? | Item | Status |
|--------------------------|---|---------------------------|
| <input type="checkbox"/> | Shakespeare and the allegory of evil: the history of a metaphor in relation to his major villains | Accepted - 04-29-04 10:55 |

[Cancel Requests](#) | [Reset](#)

Fines and Fees:

| Date | Item | Fee/Pending Type | Fee | Pending Balance |
|----------|---|------------------|------|-----------------|
| 04-29-04 | Symbolism and symbolism / by Robert L. Delevoye ; translated from the French by Barbara Bray, Elizabeth Wrightson, and Bernard C. Smith | ILL Fee | 2.00 | 2.00 |
| | Total Amount Due | | 2.00 | |

[Database](#) [Search](#) [Headings](#) [Titles](#) [Patron](#) [Logout](#) [Preferences](#) [Saved Searches](#) [Bookings](#) [Request](#) [History](#) [Help](#) [Exit](#)

[endeavor](#)
[contact us](#)

Figure 9-52. The Patron Information Page (Full)

Editing the Personal Information Section

The Personal Information Section of the Patron Information Page contains general contact information for the patron. This information comes from the patron record. This section also contains the Buttons for accessing more advanced patron options (such as Preferences and Saved Searches).



Figure 9-53. Personal Information Section of Patron Information Page

[Table 9-17](#) details the callouts in [Figure 9-53](#).

Table 9-17. Personal Information Section Reference (Page 1 of 2)

| # | Description | Configured in |
|---|--------------------------------------|--|
| 1 | Personal Information section heading | <p>The Personal variable of the Personal Information section of the [Patron_Information_Page] stanza of the opac.ini file determines the alternate text of the button.</p> <p>NOTE:
Commenting the entire variable out prevents the Personal Information Section from displaying.</p> |
| 2 | Preferences button | <p>The SavePreferences variable in the [Preferences] stanza of the opac.ini file enables the Preferences feature /m1/voyager/xxxdb/webvoyage/html/images/pref-button.gif is the button graphic</p> <p>The Preferences_Button_Alt_Text variable of the Misc section of the [Patron_Information_Page] stanza of the opac.ini file determines the alternate text of the button.</p> |

Table 9-17. Personal Information Section Reference (Page 2 of 2)

| # | Description | Configured in |
|---|-----------------------|--|
| 3 | Bookbag button | The SaveRecords variable in the [Saved_Records_Page] stanza of the opac.ini file enables the Bookbag feature

/m1/voyager/xxxdb/webvoyage/html/images/cart-button.gif is the button graphic

The Bookbag_Button_Alt_Text variable of the Misc section of the [Patron_Information_Page] stanza of the opac.ini file determines the alternate text of the button. |
| 4 | Saved searches button | The SaveOption variable in the [Search_Quesries_Page] stanza of the opac.ini file enables the Saved Searches feature

/m1/voyager/xxxdb/webvoyage/html/images/save-querybutton.gif is the button graphic

The SavedSearches_Button_Alt_Text variable of the Misc section of the [Patron_Information_Page] stanza of the opac.ini file determines the alternate text of the button. |

Editing the Patron Blocks Section

The Patron Blocks section of the Patron Information page displays block status reasons to patrons so they know why they are being blocked.

This feature is intended to inform patrons why they cannot place requests through WebVoyage, so patron blocks are determined by the Circulation Policy Group that the OPAC Circ Desk belongs to.

- For patrons with multiple active patron groups, a list of blocks will display for each of the patron's active barcodes.
- In a Universal Borrowing Cluster environment, patron blocks will display for both the patron's home cluster and any remote clusters in which the patron is blocked.

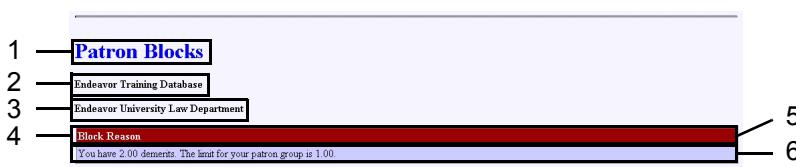


Figure 9-54. Patron Blocks Section of Patron Information Page

[Table 9-18](#) details the callouts in [Figure 9-54](#).

Table 9-18. Personal Information Section Reference (Page 1 of 2)

| # | Description | Configured in |
|----|--|---|
| 1a | Patron Block section heading text | The PatronBlocks variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 1b | Patron Block section heading font color | The PatronBlockSectionLabelColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 2a | Database name | The Database_Name= variable in the [Misc.Strings] stanza of the opac.ini file |
| 2b | Database name font color | The PatronBlockPatronGroupNameColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 3a | Patron Group display | Voyager System Administration Module>>Circulation>>Patron Groups>>Display Name of currently logged in patron |
| 3b | Patron Group display font color | The PatronBlockPatronGroupNameColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 3c | All Patron Groups block section text (not shown)
Text that displays blocks not tied to patrons patron group | The AllPatronGroups variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Table border size | The PatronBlockBorderVal variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 4a | Patron Block table header text | The BlockReason variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 4b | Patron Block header color | The PatronBlockHeaderColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 4c | Patron Block header font color | The PatronBlockHeaderFontColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 5a | Patron Block table row color | The PatronBlockDataColor variable in the [Patron_Info_Page] stanza of the opac.ini file |

Table 9-18. Personal Information Section Reference (Page 2 of 2)

| # | Description | Configured in |
|----|-----------------------------------|--|
| 5b | Patron Block table row font color | The <code>PatronBlockDataFontColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| 6 | Block reason | Remaining variables in the Patron Blocks Section of the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |

The remaining variables in the Patron Blocks Section of the `[Patron_Info_Page]` stanza of the `opac.ini` file determine the block message text displayed in the Patron Blocks section.

The following blocks are placed based on the patron group: Charge Limit, Fine Limit, Overdue Limit, Overdue Recall Limit, Recall Limit (Patron Group), Claims Returned List, Lost Limit, Self-Shelved Limit, Short Loan Limit, Callslip Limit, Demerits Limit, UB Charge Limit, UB Fine Limit, UB Overdue Limit, UB Overdue Recall Limit, UB Claims Returned Limit, UB Lost Limit, UB Self-shelved Limit.

The following blocks are placed on a general policy: Patron Expired, Address Expired, Address Invalid, Suspension, UB Ineligible.

[Figure 9-55](#) shows an example of the Patron Blocks section of the `opac.ini` file.

```
Expired_patron=Your patron record expired on \d.  
Address_expired_patron=The address in your patron record expired on \d.  
Address_invalid_patron=The address in your patron record is invalid.  
charge_limit_patron=You have \p items charged. The limit for your patron group is \b.  
fine_limit_patron=You have \p in fines and fees. The limit for your patron group is \b.  
odue_limit_patron=You have \p overdue items. The limit for your patron group is \b.  
odue_recall_limit_patron=You have \p overdue recalled items. The limit for your patron group is \b.  
recall_limit_patron=You have recalled \p items. The limit for your patron group is \b.  
claims_ret_limit_patron=You have claimed to have returned \p items. The limit for your patron group is \b.  
lost_limit_patron=You have lost \p items. The limit for your patron group is \b.  
sshelfed_limit_patron=You have \p self-shelved items. The limit for your patron group is \b.  
short_loan_limit_patron=You have \p pending Short Loan requests. The limit for your patron group is \b.
```

Figure 9-55. Patron Blocks section of the opac.ini

```
call_slip_limit_patron=You have \p pending Call Slip requests. The limit for your patron group is \b.  
suspension_patron=Your borrowing privileges are suspended until \d.  
demerits_limit_patron=You have \p demerits. The limit for your patron group is \b.  
ub_ineligible_patron=You are not eligible to use Universal Borrowing.  
charge_limit_ub_patron=You have \p Universal Borrowing items charged. The limit for your patron group is \b.  
fine_limit_ub_patron=You have \p in Universal Borrowing fines. The limit for your patron group is \b.  
odue_limit_ub_patron= You have \p Universal Borrowing overdue items. The limit for your patron group is \b.  
odrecall_limit_ub_patron=You have \p Universal Borrowing recalled items. The limit for your patron group is \b.  
claims_ret_limit_ub_patron=You have \p Universal Borrowing claims returned items. The limit for your patron group is \b.  
lost_limit_ub_patron=You have \p Universal Borrowing lost items. The limit for your patron group is \b.  
sshelfed_limit_ub_patron= You have \p Universal Borrowing self-shelved items. The limit for your patron group is \b.  
charge_limit_item_policy=You have \p items charged. The limit for your patron group in this item's policy is \b.  
charge_limit_item_type=You have \p items charged that have the item type \i. The limit for your patron group is \b.  
charge_limit_item_policy_type=You have \p items charged that have the item type \i. The limit for your patron group is \b.
```

Figure 9-55. Patron Blocks section of the opac.ini (Continued)

Edit each message according to your preference. For each message, you can use the following variables:

- \p for the amount of the block from the patron's account.
- \b for the value of the limit where borrowing privileges are suspended (from the Circ Policy).
- \d for the date (for suspension and expiration dates)
- \i for the item type the block point is associated with.

NOTE:

For patrons who belong to more than one patron group, all blocks for all patron groups will appear on the Patron Information Page, according to patron group.

If you use multiple clusters, and the patron has circulation activity in multiple clusters, Voyager will also sort blocks and display them by cluster.

Editing the Charged Items Section

The Charged Items section contains patrons' charged item due dates, statuses, and item information, such as title, enumeration, and chronology (see "ItemInfo", "ChargedItem", "RenewedItem", and "RecalledItem" in the Patron Info Stanza section of [Installing WebVoyage](#) to learn about configuring the information on the Charged Items tab). If your institution allows you to, you can renew a charged item by clicking in the check box next to the item and then clicking the **Renew Items** button.

| Renew? | Item | Item Type | Status | Renewal Status |
|--------------------------|---|-----------|-----------------------|-----------------------|
| <input type="checkbox"/> | Kaufman, George S. (George Simon), 1889-1961. Dinner at eight : a play / by George S. Kaufman and Edna Ferber. Location: A: Main Collection PS3521.A727 D5 1932 | book | Charged: Due 09-17-04 | |
| <input type="checkbox"/> | Annual review of psychology. Location: A: Main Collection BF30_A56 | book | Charged: Due 09-20-04 | |
| <input type="checkbox"/> | Artforum. Location: A: Main Collection N1_A814 | book | Renewed: Due 09-20-04 | Renewed: Due 09-20-04 |

1 **Charged Items**
2 Renew?
3 Item
4 Item Type
5 Status
6 Renewal Status
7
8
9
10
11
12 Renew checked items
13 Renew Items | Reset
14

Figure 9-56. Charged Items Section of Patron Information Page

The following sections detail the different portions of the Charged Items section of the Patron Information Page.

Charged Items Section Heading Configuration

[Table 9-19](#) details the Section Heading-related callouts in [Figure 9-56](#).

Table 9-19. Charged Items Section Heading Reference

| # | Description | Configured in |
|----|---|---|
| 1a | Charged Items section heading text | The <code>Charged</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file

NOTE:
Commenting the entire variable out prevents the Charged Items Section from displaying. |
| 1b | Charged Items section heading font color | The <code>ChargedItemsSectionLabelColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Database Name text color
(Not shown) | The <code>ChargedItemsDatabaseNameColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | No charged items message
(not shown- only displays when patron has no items charged) | The <code>NoCharges</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |

Charged Items Table Heading Configuration

[Table 9-20](#) details the Table Heading-related configuration callouts in [Figure 9-56](#).

Table 9-20. Charged Items Table Heading Reference (Page 1 of 2)

| # | Description | Configured in |
|---|----------------------------------|---|
| | Charged Items table border size | The <code>ChargedItemsBorderVal</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Charged Items heading color | The <code>ChargedItemsHeaderColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Charged Items heading font color | The <code>ChargedItemsHeaderFontColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |

Table 9-20. Charged Items Table Heading Reference (Page 2 of 2)

| # | Description | Configured in |
|---|--|---|
| 2 | Renewal column heading text | The Renew variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 3 | Item column heading text | The Item variable in the Misc section of the [Patron_Info_Page] stanza of the opac.ini file |
| 4 | Item Type heading text | The ItemType variable in the Misc section of the [Patron_Info_Page] stanza of the opac.ini file |
| 5 | Status column heading text | The Status variable in the Misc section of the [Patron_Info_Page] stanza of the opac.ini file |
| 6 | Renewal Status heading text

NOTE:
Only displays directly after patron renews an item(s) | The RenewalStatus variable in the [Patron_Info_Page] stanza of the opac.ini file |

Charged Items Table Body Configuration

[Table 9-21](#) details the table body-related, callouts in [Figure 9-56](#).

Table 9-21. Charged Items Table Body Section Reference (Page 1 of 2)

| # | Description | Configured in |
|---|---|--|
| | Charged Items table row color | The ChargedItemsDataColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Charged Items table row font color | The ChargedItemsDataFontColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 7 | Renewal item check boxes

NOTE:
Only display if patron self renewal enabled | SelfRenew=Y in the [Patron_Info_Page] stanza of the opac.ini file enables option.

For more on renewal options, see Renewal Options on page 9-55 |

Table 9-21. Charged Items Table Body Section Reference (Page 2 of 2)

| # | Description | Configured in |
|----|---|---|
| 8 | Item information column | The <code>ItemInfo</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file

For more information on item information substitution tokens, see Item Information Substitution Tokens on page 9-72. |
| 9 | Item Type information column | Voyager System Administration>>System>>Item Types>><i>item type</i>>>Display Name field |
| 10 | Item status column | If an item status exists in the <code>[Item Statuses]</code> stanza of the <code>opac.ini</code> file, that status displays.

If not, one of the statuses from the following variables of the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> : <ul style="list-style-type: none">• <code>ChargedItem</code>• <code>RenewedItem</code>• <code>RecalledItem</code>
For more information on charged item status substitution tokens, see Item Status Substitution Tokens on page 9-72. |
| 11 | Renewal status column

Only displays after patron has renewed (or attempted to renew) an item | If a renewed item status exists in the <code>[Item Statuses]</code> stanza of the <code>opac.ini</code> file, that status displays.

If not, one of the statuses from the following variables of the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> : <ul style="list-style-type: none">• <code>RenewedDue</code>• <code>NotRenewed</code>
For more information on renewed item status substitution tokens, see Renewed Item Substitution Tokens on page 9-73. |

Item Information Substitution Tokens

You can enter any of the following codes after the `ItemInfo` variable to display the codes' corresponding information:

Table 9-22. Item Information Substitution Tokens

| Substitution token | Displays |
|--------------------|---|
| \t | the item's title |
| \i | the item's enumeration, chronology and year |
| \n | the item's copy number |
| \c | the item's call number |
| \b | the item's barcode |
| \l | the item's location |
| \a | the item's author |

Item Status Substitution Tokens

An item's status displays in the Status column on the Charged Items section of the Patron Information window. Any text that you enter after the `ChargedItem` variable will display in the Status column. In addition, you can use any of the following codes to display additional status information:

Table 9-23. Item Status Substitution Tokens

| Substitution token | Displays |
|--------------------|--|
| \d | displays the item's Due Date |
| \e | displays the item's Due Date, if the Due Date is not Today |
| \t | displays the item's Due Time |
| \u | displays the item's Due Time, if the Due Date is Today |

Renewed Item Substitution Tokens

Any text that you enter after the *RenewedItem* variable will display in the Status column. In addition, you can use any of the codes listed for the *ChargedItem* variable in [Table 9-23](#) as well as the codes listed below to display additional renewal status information:

Table 9-24. Renewed Item Substitution Tokens

| Substitution token | Displays |
|--------------------|---|
| \f | the item's Original Due Date |
| \g | the item's Original Due Date, if the Original Due Date is not Today |
| \v | the item's Original Due Time |
| \x | the item's Original Due Time, if the Original Due Date is Today |

Charged Items Renewal Button Configuration

[Table 9-25](#) details the renewal button-related callouts in [Figure 9-56](#).

Table 9-25. Charged Items Renewal Reference (Page 1 of 2)

| # | Description | Configured in |
|----|-------------------------|--|
| 12 | Renew options box | <ul style="list-style-type: none"> For single item renewal: The <i>RenewSingleItemsText</i> variable in the <i>[Patron_Info_Page]</i> stanza of the <i>opac.ini</i> if <i>RenewSingleItems</i> is set to Y For renew of all items: The <i>RenewAllItemsText</i> variable in the <i>[Patron_Info_Page]</i> stanza of the <i>opac.ini</i> if <i>RenewAll</i> is set to Y <p>You can enable either or both of these. For more information about renewal button options, see Renewal Option Button Configuration on page 9-57.</p> |
| 13 | Renew items button text | The <i>SubmitButton</i> variable in the <i>[Patron_Info_Page]</i> stanza of the <i>opac.ini</i> file |
| 14 | Reset button text | The <i>ResetButton</i> in the <i>Misc</i> section of the <i>[Patron_Info_Page]</i> stanza of the <i>opac.ini</i> file |

Table 9-25. Charged Items Renewal Reference (Page 2 of 2)

| # | Description | Configured in |
|---|---|--|
| | Renew limit message text (not shown)
Only displays if patron attempts to renew more than 50 checked items at once with the Renew Single Items option | The RenewLimitMessage variable in the [Patron_Info_Page] stanza of the opac.ini file |

Editing the Request Information Section

The Request Information section of the Patron Information Page contains information about patrons' requested items. [Figure 9-57](#) shows a sample Request Information section.

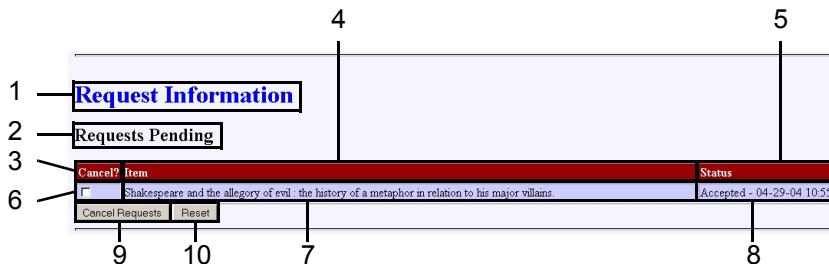


Figure 9-57. Request Information Section of Patron Information Page

[Table 9-26](#) details the Request Information section callouts in [Figure 9-57](#).

Table 9-26. Request Information Section Reference (Page 1 of 3)

| # | Description | Configured in |
|----|--|---|
| 1a | Request Information section heading text | The Requests variable in the [Patron_Info_Page] stanza of the opac.ini file
NOTE:
Commenting the entire variable out prevents the Request Information Section from displaying. |

Table 9-26. Request Information Section Reference (Page 2 of 3)

| # | Description | Configured in |
|----|--|--|
| 1b | Request Information section heading font color | The RequestsSectionLabelColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Database Name text color
(Not shown) | The RequestsDatabaseNameColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | No requests pending and no requests available messages (not shown) | The NoReqPending and NoReqAvail variables in the [Patron_Info_Page] stanza of the opac.ini file |
| | Request Information table border size | The RequestsBorderVal variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Request Information heading color | The RequestsHeaderColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Request Information heading font color | The RequestsHeaderFontColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 2 | Requests Pending text | The ReqPending variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 3a | Ability of patrons to cancel their requests in WebVoyage | The CancelRequests variable in the [Patron_Info_Page] stanza of the opac.ini file

Set CancelRequests=y to enable patron initiated request cancellations

Set CancelRequests=n to disable patron initiated request cancellations |
| 3b | Cancel column heading text | The Cancel variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 4 | Item column heading text | The Item variable in the Misc section of the [Patron_Info_Page] stanza of the opac.ini file |
| 5 | Status column heading text | The Status variable in the Misc section of the [Patron_Info_Page] stanza of the opac.ini file |

Table 9-26. Request Information Section Reference (Page 3 of 3)

| # | Description | Configured in |
|----|--|--|
| | Request Information table row color | The RequestsDataColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Request Information table row font color | The RequestsDataFontColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 6 | Cancel item check boxes | Set the CancelRequests variable in the [Patron_Info_Page] stanza of the opac.ini file to <code>y</code> enable this column and check boxes. |
| 7 | Item information column | The ItemInfo variable in the [Patron_Info_Page] stanza of the opac.ini file

For more information on item information substitution tokens, see Item Information Substitution Tokens on page 9-72 . |
| 8a | Request status column | <ul style="list-style-type: none">For the Expiration date, the Position, -, and Expires variables in the [Patron_Info_Page] stanza of the opac.ini file. For more information, see The Position, -, and Expires Variables on page 9-76The text for the remaining statuses is defined by editing the text that follows any of the variables in the CallslipStatusCodes stanza of the opac.ini file. Keep in mind that these statuses are also used to display Call Slip statuses in WebVoyáge. |
| 9 | Cancel request button | The CancelButton variable in the [Patron_Info_Page] stanza of the opac.ini file |

The Position, -, and Expires Variables

The Position, -, and Expires variables controls information in the status column of the Request Information section of the Patron Information page that informs patrons of the progress of their requests. An example of the information that displays in this column might be *Position: 1 - Expires: 11-05-99*. Three parts of this information that can be configured.

The `Position` variable controls the text at the very beginning of this information. The position of the request (the number 1, 2, etc.) in the request queue will be automatically displayed after the text that you enter after the `Position` variable.

The `-` variable controls the information that separates the position information from the expiration date information. Enter the information that you want to separate the position information from the expiration date information after the `-` variable.

The `Expires` variable controls the text in the second half of this information, which displays before the expiration date of the request. The expiration date of the request (for example, 11-6-99) automatically displays after the text that you entered after the `Expires` variable. If nothing is entered after this variable, `Expires` will be used as the default.

Call Slip Status Codes

After a patron has placed a call slip request, that patron can view the status of the call slip request, as well as the date and time when the status was applied, from the Patron Information page in WebVoyage. If a call slip request has been processed and Filled by a Call Slip operator, the Title of the requested item and the status of Filled will NOT display on the Requests Pending subheading of the Request Information section. Rather, the Title of the item, the date after which the item is no longer available (Expires), and the Pickup Location of the item display on the Items Available subheading.

The following [CallSlipStatusCodes] stanza is the default stanza distributed with the generic opac.ini file that remains effective unless it is manually altered. In addition, this default remains effective even if the [CallSlipStatusCodes] stanza has not been entered in the opac.ini file.

```
[CallSlipStatusCodes]
1=Accepted
2=Printed
3=Reassigned
4=Filled
5=Not Filled
6=Expired
7=Cancelled
8=Error!!!
9=Promoted
```

Figure 9-58. The [CallSlipStatusCodes] stanza of the opac.ini file

[Table 9-27](#) details the Call Slip Status codes in the [CallSlipStatusCodes] stanza of the opac.ini file.

Table 9-27. Call Slip Status Codes

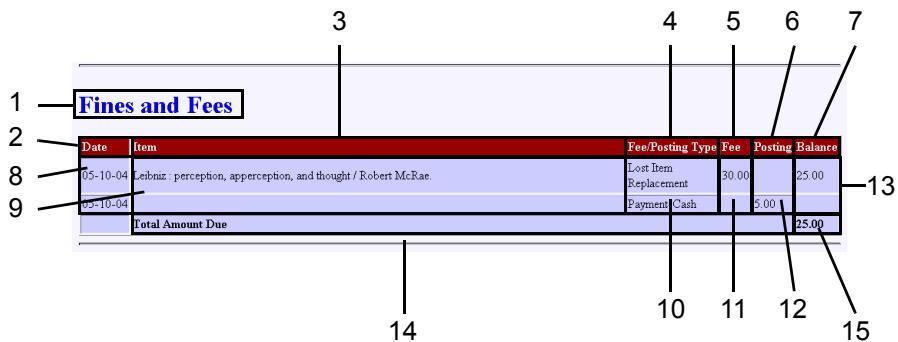
| Variable/
Default | Denotes |
|----------------------|--|
| 1= Accepted | Request has been placed by patron but has not been viewed or processed by a Call Slip operator. |
| 2= Printed | Request has been viewed by a Call Slip operator but has not yet been processed. |
| 3= Reassigned | Request routed to another Call Slip Queue by operator before it has been processed. |
| 4= Filled | Request has been processed and filled by a call slip operator. |
| 5= Not Filled | Request has been processed but not filled by a Call Slip operator. No fill reason chosen by the Call Slip operator also displays beside the status in WebVoyage. |
| 6= Expired | Unprocessed request has surpassed the expiration period as defined in System Administration. |
| 7= Cancelled | Request has been cancelled. |

Table 9-27. Call Slip Status Codes

| Variable/
Default | Denotes |
|----------------------|---|
| 8= Error!!! | An error has occurred during the processing of the request. |
| 9= Promoted | Request promoted to another database or cluster. |

Editing the Fines and Fees Section

The Fines and Fees section of the Patron Information page lists patron's monetary penalty information. [Figure 9-59](#) shows a sample Fines and Fees section of the Patron Information page.

**Figure 9-59. Fines and Fees Section of Patron Information Page**

[Table 9-28](#) details the Fines and Fees section callouts in [Figure 9-59](#).

Table 9-28. Request Information Section Reference (Page 1 of 3)

| # | Description | Configured in |
|----|---|--|
| 1a | Fines and Fees section heading text | The <code>Fines</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| 1b | Fines and Fees section heading font color | The <code>FinesFeesSectionLabelColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |

Table 9-28. Request Information Section Reference (Page 2 of 3)

| # | Description | Configured in |
|---|---|---|
| | Database Name text color
(Not shown) | The <code>FinesFeesDatabaseNameColor</code> variable
in the <code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| | No fines or fees message (not shown) | The <code>NoFines</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| | Fines and Fees table border size | The <code>FinesFeesBorderVal</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| | Fines and Fees table heading color | The <code>FinesFeesHeaderColor</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| | Fines and Fees table heading font color | The <code>FinesFeesHeaderFontColor</code> variable in
the <code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| 2 | Date column heading text | The <code>Date</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| 3 | Item column heading text | The <code>Item</code> variable in the <code>Misc</code> section of the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| 4 | Fee/Posting Type column heading text | The <code>FeePostingType</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| 5 | Fee column heading text | The <code>Fee</code> variable in the <code>[Patron_Info_Page]</code>
stanza of the <code>opac.ini</code> file |
| 6 | Posting column heading text | The <code>Posting</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| 7 | Balance column heading text | The <code>Balance</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| | Fines and Fees table row background color | The <code>FinesFeesDataColor</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |
| | Fines and Fees table row font color | The <code>FinesFeesDataFontColor</code> variable in the
<code>[Patron_Info_Page]</code> stanza of the
<code>opac.ini</code> file |

Table 9-28. Request Information Section Reference (Page 3 of 3)

| # | Description | Configured in |
|----|-------------------------|---|
| 8 | Date column | Date Fine/Fee was created |
| 9 | Item information column | Item information displayed in the Voyager Circulation module. |
| 10 | Fee/Posting type | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Fines/Fees>>Add>>Fee Type |
| 11 | Fee | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Fines/Fees>>Add>>Amount |
| 12 | Posting | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Fines/Fees>>Post>>Amount |
| 13 | Item balance | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Fines/Fees>>Balance |
| 14 | Total Due text | The TotalAmountDue variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 15 | Total balance | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Fines/Fees>>Balance |

Editing the Demerit Points Section

The Demerit Points section of the Patron Information page lists patrons' non-monetary penalties (for libraries using Demerits). [Figure 9-60](#) shows a sample Demerit Points section of the Patron Information page.

| | 3 | 4 | 5 | 6 | 7 |
|---|-----------------------|--|--------------|----------------|-----------------|
| 1 | Demerit Points | | | | |
| 2 | Date | Item | Posting Type | Demerit Points | Posting Balance |
| 8 | 05-10-04 | Art-idea / Edited by Benjamin Rowland, Jr. | Demerit | 10.00 | 7.00 |
| 9 | 05-10-04 | | Forgive | 3.00 | 7.00 |
| | Total | | | 7.00 | |
| | | | 10 | 11 | 12 |
| | | | | | 15 |
| | | | 14 | | |

Figure 9-60. Demerit Points Section of Patron Information Page

[Table 9-29](#) details the Demerit Points section callouts in [Figure 9-60](#).

Table 9-29. Demerit Points Section Reference (Page 1 of 3)

| # | Description | Configured in |
|----|---|---|
| 1a | Demerit Points section heading text | The <code>Demerits</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| 1b | Demerits section heading font color | The <code>DemeritsSectionLabelColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Database Name text color
(Not shown) | The <code>DemeritsDatabaseNameColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | No demerits message (not shown) | The <code>NoDemerits</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Demerits table border size | The <code>DemeritsBorderVal</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Demerits table heading color | The <code>DemeritsHeaderColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |
| | Demerits table heading font color | The <code>DemeritsHeaderFontColor</code> variable in the <code>[Patron_Info_Page]</code> stanza of the <code>opac.ini</code> file |

Table 9-29. Demerit Points Section Reference (Page 2 of 3)

| # | Description | Configured in |
|----|---|--|
| 2 | Date column heading text | The Date variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 3 | Item column heading text | The Item variable in the Misc section of the [Patron_Info_Page] stanza of the opac.ini file |
| 4 | Demerit Posting Type column heading text | The PostingType variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 5 | Demerit Points column heading text | The Demerits variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 6 | Posting column heading text | The Posting variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 7 | Balance column heading text | The Balance variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Demerit points table row background color | The DemeritsDataColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| | Demerit points table row font color | The DemeritsDataFontColor variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 8 | Date column | Date demerits were applied |
| 9 | Item information column | Item information displayed in the Voyager Circulation module. |
| 10 | Posting type | Not configurable for demerits |
| 11 | Demerit Points | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Demerits>>Add>>Amount |
| 12 | Posting | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Demerits>>Post>>Amount |
| 13 | Item balance | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Demerits>>Balance |

Table 9-29. Demerit Points Section Reference (Page 3 of 3)

| # | Description | Configured in |
|----|----------------|--|
| 14 | Total Due text | The Total variable in the [Patron_Info_Page] stanza of the opac.ini file |
| 15 | Total balance | Voyager Circulation>>(Patron Record) Fines/Fees>>Outstanding Demerits>>Total Demerits |

Request Information Section

The Request Information section is made up of two parts: Requests Pending and Items Available.

Requests Pending

The Requests Pending section contains information about items for which a patron has issued a hold, recall, call slip, or short loan request. This section displays the title of the requested item, the date on which the request expires, its position in the holding queue, the status, and the date and time when the status was applied (only call slip requests that have not been filled display a status, status date and status time).

Request Information

Requests Pending

| Cancel? | Item | Status |
|-------------------------------------|---|---|
| <input checked="" type="checkbox"/> | 500 hats of Bartholomew Cubbins / by Dr. Seuss. | 03-17-00 (18:00 - 19:00) Pick up at Short Loan Circulation Desk |

Figure 9-61. Requests Pending Section

For a call slip request that has not been filled, only the title of the item requested, the status of the call slip request, and the date and time when the status was applied will display in the Requests Pending section. For a call slip request that has been filled and put on hold by a Call Slip operator, the title of the item, the date that the hold expires, and the pickup location of the item display in the Items

Available section. If your library charges the item when the call slip request is Filled, the item displays in the Charged Items section in addition to displaying in the Items Available section.

The Requests Pending section displays the statuses of any call slip requests you have placed but that have not been filled (see [Table 9-30](#)).

Table 9-30. Status Descriptions

| Status | Description |
|-------------------------|--|
| Accepted | the request has been successfully placed but it has not yet been viewed by a Call Slip operator. |
| Printed | the request has been viewed by a Call Slip operator but has not yet been processed. |
| Not Filled | the request has been processed but not filled by a Call Slip operator. The No Fill reason will display with this status. |
| Cancelled | the request has been cancelled by the patron or by the Circulation staff. |
| Expired | the call slip request has expired. |
| Error | an error has occurred during the processing of the call slip request. |
| Cancel Requests Pending | Any pending request that displays in the Requests Pending section (hold, recall, call slip and short loan) can be cancelled by the patron. Cancelling a pending call slip request will alter the status of the request to cancelled. Cancelling a pending hold, recall or short loan request will remove the request from the Requests Pending section. In addition, a request that is cancelled will not be counted on a patron's record. |

NOTE:

This feature will only be available if the CancelRequests variable in the [Patron_Info_Page] stanza of the opac.ini file is set to `y`.

To cancel requests pending:

- Click one or more requests in the Requests Pending section of the Patron Information window.
- Click the **Cancel Request** button. The request(s) will then either be removed from the Requests Pending section (without a warning message) or, if it is a call slip request, be assigned a status of cancelled.

The screenshot shows a "Request Information" section with a message: "You have no requests pending. You have no items available." Below this are two buttons: "Cancel Requests" and "Reset".

Figure 9-62. Requests Pending Page - After Canceling Requests

Items Available

The Items Available section contains information about any requests with items that are currently available. This tab displays the Title of the requested item, the date the availability of the item expires (Expiration), and the location for pickup (Pickup Location).

The screenshot shows an "Items Available" section with a table. The table has columns for "Cancel?", "Item", "Expires:", and "Pickup Location". There is one row showing a request for "500 hats of Bartholomew Cubbins / by Dr. Seuss." with an expiration date of "Short Loan Circulation Desk". Below the table are "Cancel Requests" and "Reset" buttons.

Figure 9-63. Items Available Section

Cancel Items Available

Any request that displays available item information in the Items Available section can be cancelled by the patron. Canceling a request with an available item will remove the request from the Items Available section. In addition, a request that is cancelled will not be counted on a patron's record. For example, this means that if a patron who is allowed 15 hold requests places a hold request on an item but then cancels it, that patron will still be allowed to place 15 hold requests.

NOTE:

This feature will only be available if the CancelRequests variable in the [Patron_Info_Page] stanza of the opac.ini file is set to **y**.

To cancel items available:

- Click one or more requests in the Items Available section of the Patron Information window.
- Click the **Cancel Request** button. The request(s) will then be removed from the Items Available section (without a warning message).

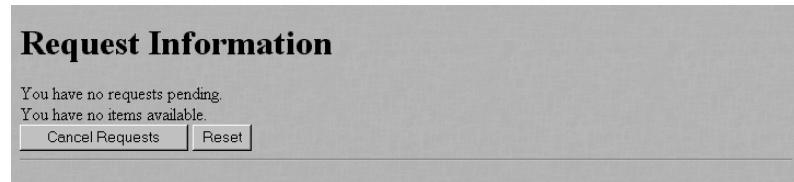


Figure 9-64. Items Available Section

Fines and Fees

The Fines and Fees section contains monetary charges the patron has acquired, with the total amount due listed at the top. Also included: the Date the charge was assessed or paid, a Title if applicable, the type of charge or payment (Fee/Posting Type), amount (Fee), a payment (Posting), and balance (Balance).

| Fines and Fees | | | | | |
|-----------------------|--|----------------------|-------|---------|---------|
| Date | Item | Fee/Posting Type | Fee | Posting | Balance |
| | Total Amount Due | | | | 22.75 |
| 03-20-00 | 500 hats of Bartholomew Cubbins / by Dr. Seuss. | Overdue | 2.75 | | 2.75 |
| 03-20-00 | Motor carriers' road atlas, 1998 : United States, Canada, Mexico / Rand McNally. | Lost Item Processing | 20.00 | | 20.00 |

Figure 9-65. Fines and Fees Section

[REDACTED]

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Request Selection Page

The Request Selection page allows you to choose which type of request you want to submit. You can open the Request Selection page by clicking the **Request** button. If you have not logged in, the **Patron Login** page will appear; once you have logged in, the Request Selection page appears.



Figure 10-1. Request Selection Page

From this page you can select the type of request that you would like to submit and click the **Submit** button. Click the **Clear** button to restore the page to its default setting.

Placing Holds and Recalls

If this feature is available at your institution, you can hold or recall a specific copy of an item at a specific location, any copy at a specific location, or any copy at any location. You may also be able to select the pickup location (depending on your institution's policies). Recalls can be placed only for items that are charged out. Both Holds and Recalls can only be placed from an item's Record Display. In addition, you must be logged in to place a hold or recall request.



Procedure 10-1. Placing a hold or recall request

Use the following steps to place a hold or recall request on an item.

1. Execute a search for the item that you want to place a hold or recall request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.
2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
4. Click the **Request** button on the toolbar.
If you have already logged in, the **Request Selection** page appears.
If you have not yet logged in, the **Patron Login** page appears. See [Patron Login and Logoff](#) on [page 9-1](#) for information about logging in. Once you have logged in, the **Request Selection** page appears.

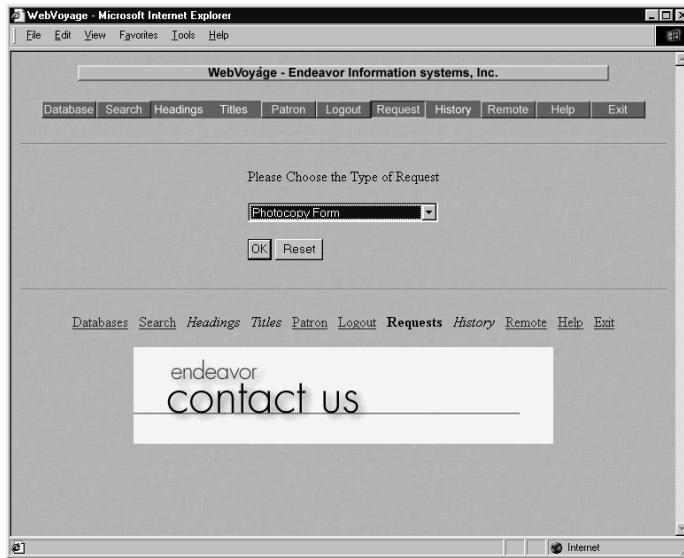


Figure 10-2. Request Selection Page

5. In the Request Type drop down, click the drop-down arrow and select the type of patron request that you want to make, **Hold** or **Recall**, and click **OK**. (A recall can only be made (if it is available to you) when an item is checked out to another patron.) The Hold or Recall page will appear.

Opac Request Hold

Title: America's light trucks
Instructions: Please select an item
 Any Copy Any Copy
 [C1222 Offsite]
Barcode: _____
Comment:
Pick Up At: Cardiff Short Loan Desk
Not Needed After: 30 Day(s)

Submit Request | Clear Form

Figure 10-3. Hold Page

Opac Request Recall

Title: America's light trucks
Instructions: Please select an item
 Any Copy Any Copy
 [C1222 Offsite]
Barcode: _____
Comment: Please save it for me! I'm nice!
Pick Up At: Cardiff Short Loan Desk
Not Needed After: 30 Day(s)

Submit Request | Clear Form

Figure 10-4. Recall Page

6. On the request form:

- click the **Any Copy** radio button to place the hold for any available copy of the item,

or

- click the radio button next to the copy information drop-down to place the request for a specific copy.
7. Enter any comments that you want your institution's circulation staff to view in the Comments text box.
 8. Select the location where you want to pick up the item from the "Pick Up At" drop-down list.
 9. Specify the number of days that the hold and/or recall should remain active in the "Not Needed After" text box (0-999).
 10. Click **Submit Request** to submit your request(s); or click **Clear Form** to remove information entered onto the form.

Customizing Holds and Recalls

NOTE:

Unless otherwise noted, all of the following variables are contained in the **Hold_Recall_Page** stanza of the opac.ini file.

For more information on configuring the Holds and Recalls page, see [Request Page Overview](#) on [page 11-1](#).

Placing Call Slip Requests

If allowed by your library, you can place call slip requests for items retrieved from the Public Access catalog that are not readily available to the public. For example, you may need to place a call slip request for an item that resides in a closed stacks area. A call slip request can be made only from the Record Display page for an item. (The Record Display page appears as the result of performing a search and clicking a record from the Title List page.). You must login before you can place a call slip request.

NOTE:

For information about what must be set up in order for the call slip feature to work properly, see the Call Slip section of the *Callslip User's Guide* and "Call Slip Print Groups" in the *Voyager System Administration User's Guide*.



Procedure 10-2. Placing a Callslip Request

Use the following steps to place a call slip request for an item:

1. Execute a search for the item that you want to place a call slip request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.
2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
4. On the Record Display page, click the **Request** button on the toolbar. If you have not yet logged in, the **OPAC Patron Login** page appears. Enter your patron barcode and last name in the appropriate fields and then click the **Login** button. Once you have logged in, the **Request Selection** page appears.



Figure 10-5. Request Selection Page

5. Click the drop-down menu and select **Call Slip** (your institution may name this differently). The number of call slip requests you are allowed to place displays in parentheses beside “Call Slip” in the drop-down menu. Click the **OK** button. The Call Slip Request page displays.
-

The screenshot shows a Microsoft Internet Explorer window with the title bar "WebVoyage - Microsoft Internet Explorer". The address bar contains the URL "http://207.56.64.96:7708/cgi-bin/Pwebrecn.cgi". The main content area displays a form titled "WebVoyage Request Call Slip". The form fields include:

- Title: America's light trucks.
- Instructions: Fill out form
- Select an item:
- Specify an issue:
- Pick Up At:
- Barcode:
- Comment:

At the bottom of the form are two buttons: "Submit Request" and "Clear Form". Below the form is a navigation menu with links: Search, Headlines, Titles, Patron, Loaner, Requests, History, Remote, Help, Print. The "Requests" link is highlighted. The status bar at the bottom shows "Done" and "Internet".

Figure 10-6. Call Slip Request Page

6. Click the radio button for **Select an item** if you want to place a callslip request for a specific item; or click the radio button for **Specify an issue** if you want to enter the item information yourself.
If you specify **Select an item** you must choose a specific copy from the drop-down menu.
If you select **Specify an issue** you must enter the information on the copy of the item that you want to request into the **Volume**, **Date** and **Year** fields.

NOTE:

Depending on your institution’s policies, one of these may be unavailable.

7. Select the location from where you want to pick up the item from the **Pick Up At** drop-down menu. This can be enabled or disabled. See “Call Slip Print Groups Definition” in the *Voyager System Administration User’s Guide* for more information.
8. Enter your barcode into the **Barcode** field. Depending on your institution’s policies, you may instead have to enter your Social Security Number or Institution ID.

-
- 9. Enter any comments that you want your institution's circulation staff to view in the **Comment** field.
 - 10. Click **Submit Request** to submit your request. Click **Clear Form** to reset all of the fields of the request.
-

For more information on configuring the Call Slip page, see [Editing the Call Slip Request Screen on page 11-10](#).

Placing Short Loan Requests

If allowed by your library, you can place a short loan request. Short Loans allow your patrons to place a reservation on an item for a specific time period. The item is then picked up and charged out at the scheduled time. A short loan request may only be submitted for an item which has been designated as a short loanable item. The request must also be for a specific item. You may select the pickup location and the times and dates that the short loan is to occur. You must be logged in to submit a short loan request.



Procedure 10-3. Placing a Short Loan Request

Use the following to place a short loan request for an item.

- 1. Execute a search for the item that you want to place a short loan request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.
- 2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
- 3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
- 4. Click the **Request** button on the toolbar.
If you have not yet logged in, the **OPAC Patron Login** page appears. Enter your patron barcode and last name in the appropriate fields and then click the **OK** button. Once you have logged in, the **Request Selection** page appears.

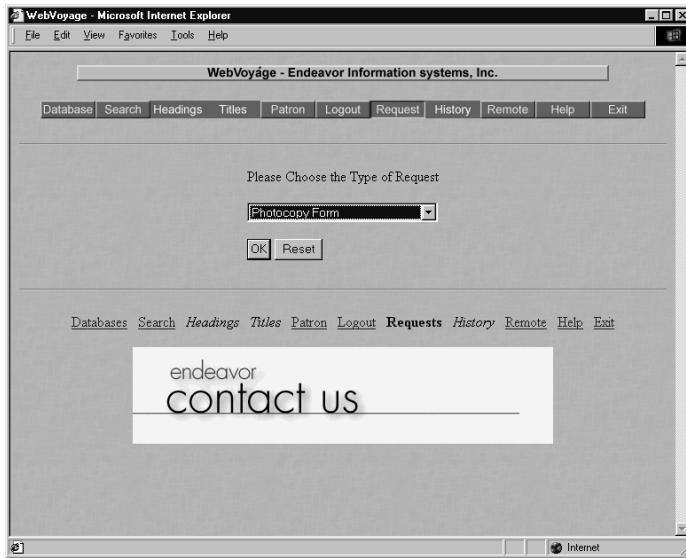


Figure 10-7. Request Selection Page

5. Select Short Loans from the list.

NOTE:

Your institution may give this form a different name. The OPAC Request: Short Loan page appears.

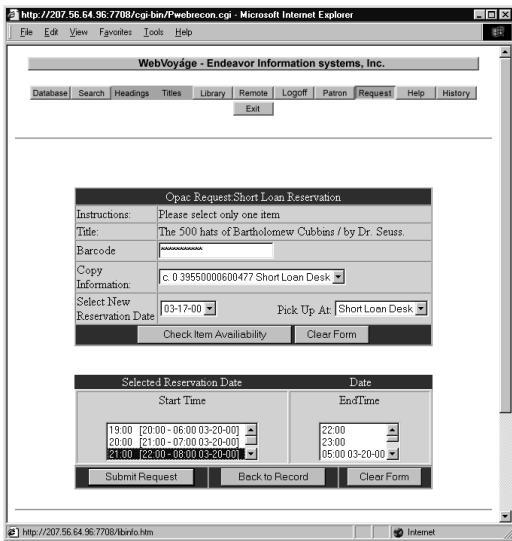


Figure 10-8. Short Loan Request page

6. Enter your barcode into the **Barcode** field. Depending on your institution's policies, you may be required to enter your Social Security Number or Institution ID instead.
7. Select the copy for which you want to submit a request by clicking the drop-down arrow in the **Copy Information** field and selecting a copy from the list.
8. Select the date upon which you want the request to occur by clicking the drop-down arrow in the **Select New Reservation Date** field and selecting a date from the list.
9. Select a pick-up location by clicking the drop-down arrow next to the **Pick Up At** field and selecting a location from the list.
10. If your browser is incapable of running Javascript, you can click this button to search for the available times on the day that you selected. The times will appear in the **Start Time** column, below.
11. Select a start time for the booking in the **Start Time** list. The available end dates will appear in the End Time list.
12. Select an end time for the booking in the **End Time** list.

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13. Click **Submit Request** to send the request; click **Clear Form** to clear the information entered into the form; or click **Back to Record** to return to the record without submitting the request. If you click **Submit Request** and the request is allowed to be submitted, a page will appear that reads "Your Patron Initiated Request was successful." Click the **Back to Record** button to continue.

For more information on configuring the Call Slip page, see [Short Loan Requests](#) on [page 11-12](#).

Placing ARTEmail Requests

If allowed by your library, you can submit an ILL request for either a specific volume to be loaned, or for photocopies of a particular volume. This is done by using the ARTEmail Request Form, which is a special type of structured email that is ARTTel-compatible (Automated Request Transmission by Telecommunications). This form will be both emailed to an address specified in the System Administration module as well as output to a file on the server. You may enter information on the volume you wish to request, as well as a Not Needed After date. The fields that appear in boldface are required.



Procedure 10-4. Placing an ARTEmail Request

Use the following to place an ILL loan or photocopy request:

1. Execute a search for the item that you want to place a ARTEmail request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.
2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
4. Click the **Request** button on the toolbar.
If you have not yet logged in, the **OPAC Patron Login** page appears. Enter your patron barcode and last name in the appropriate fields and then click the **Login** button. Once you have logged in, the **Request Selection** page appears.



Figure 10-9. Request Selection Page

5. Click the drop-down menu and select **ILL Photocopy Request** or **ILL Loan Request**. (Your institution may name these requests differently). Click the **OK** button. The page for the appropriate request type displays.

A screenshot of a Microsoft Internet Explorer window titled "WebVoyage - Endeavor Information systems, Inc.". The main content area is a form titled "Opac Request Book Form". It contains fields for "Author", "Title", "Place of Pub", "Publisher", "Edition", "Year", "Volume", "Barcode", and "Not Needed After [30] Day(s)". Below the form are two buttons: "Submit Request" and "Clear Form". At the bottom of the page, there is a horizontal menu bar with links: Database, Library, Remote, Patron, Logout, Request, Help, and History. A watermark-like text "endeavor" is overlaid at the bottom of the page.

Figure 10-10. ILL Email Loan Request page

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6. If you submitted a request for an ILL Loan, enter the appropriate information into the **Author, Title, Place of Pub, Publisher, Edition, Year, Volume, and Barcode** fields. Fields in **boldface** are required. You may change the Not Needed After days as well. Click the **Submit Request** button to submit the request or click the **Clear Form** button to remove information entered into the fields onscreen.
-

The screenshot shows a Windows application window titled "Opac Request: Photocopy Form". The window has a menu bar with File, Edit, View, Favorites, Tools, and Help. Below the menu is a toolbar with Database, Search, Headings, Titles, Library, Remote, Logoff, Patron, Request, Help, History, and Exit. The main area contains a form with the following fields:

- Instructions: (checkbox)
- Journal Title: (text input field)
- Volume: (text input field)
- Part: (text input field)
- Year: (text input field)
- Article Title: (text input field)
- Article Author: (text input field)
- Pages: (text input field)
- Barcode: (text input field)
- Not Needed After: (text input field) followed by a dropdown menu showing "30 Day(s)"

At the bottom of the form are two buttons: "Submit Request" and "Clear Form". Below the form is a footer with links to Database, Library, Remote, Patron, and Help. The footer also includes the Endeavor logo and a status bar with "Done" and "Internet".

Figure 10-11. ILL email Photocopy page

7. If you submitted a request for ILL Photocopies, enter **Volume, Part, Year, Article Title, Article Author, Pages** and **Barcode** information into the fields. You may also change the Not Needed After days. Click the **Submit Request** button to submit the request or click the **Clear Form** button to remove information entered into the fields onscreen.
 8. At this point the request will be emailed.
-

Placing Remote Storage Requests

If allowed by your library, you can submit a Remote Storage request for an item that is kept at an offsite location. This is done by using the Remote Storage form to request the item. The Remote Storage form is a system-defined form with a form code of ARS. Each submitted request is written to a file on the server (see "OPAC Request Forms" in the *Voyager System Administration User's Guide* for

(more information). You can select which item you want to request and the location where you want to pick up the item. The fields that appear in boldface onscreen are required.



Procedure 10-5. Placing a Remote Storage Request

To place a Remote Storage request:

1. Execute a search for the item that you want to place a remote storage request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.
2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
4. Click the **Request** button on the toolbar.
If you have not yet logged in, the **OPAC Patron Login** page appears. Enter your patron barcode and last name in the appropriate fields and then click the **Login** button. Once you have logged in, the **Request Selection** page appears.



Figure 10-12. Request Selection Page

5. Click the drop-down menu and select **Remote Storage**. (Your institution may name these requests differently). Click the **OK** button. The Remote Storage Request page displays.
-

A screenshot of the "WebVoyage Request: Remote Request" form. The form fields include:
Title: Sensory mechanisms.
Instructions: Select item to retrieve
Select an item: c. 0
Pick Up At: Circulation Desk
Barcode: (empty field)
Buttons: Submit Request, Clear Form

Figure 10-13. Remote Storage Request page

-
6. Select the specific item that you want to request by clicking the **Select an item** drop-down arrow.
 7. Select the pickup location by clicking the **Pick Up At** drop-down arrow (depending on your institution's policies, this may be unavailable).
 8. Enter the Barcode of the patron submitting the request into the **Barcode** field (depending on your institution's policies, you may instead have to provide your Social Security Number or Institution ID). Note that your institution may have changed the names of the fields.
 9. Click the **Submit Request** button to submit the request. Click the **Clear Form** button to restore the form to its original state.
-

Blank Request Form

Your institution may allow you to submit a **Blank Form** request. Your institution can define the types of information that can be entered into the form. This form may be used for any purpose and may not be called a Blank Form onscreen. The information that gets entered into this form is emailed upon submission of the form. No bibliographic or item information is transmitted with this form - only the information that is entered into this form.

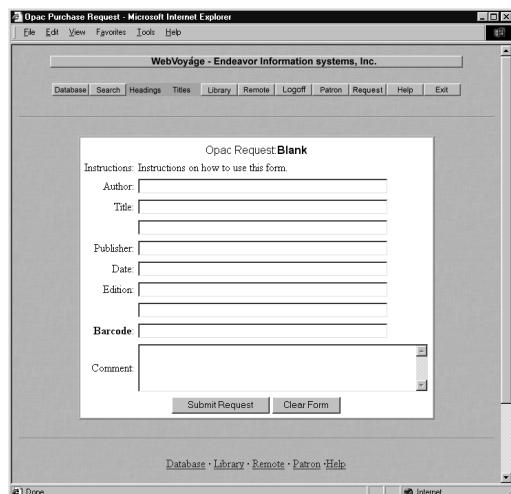


Figure 10-14. Sample Blank Request Form

After the request form has been completed, the form is then emailed to the person specified in the System Administration module.

As an example, your library might use this form to create a “Get Me” request form for the purpose of submitting a purchase request for material that the library does not own. If you wanted to submit a “Get Me” request, you might have to do something similar to the following:

1. If the request button is not enabled, you must log in before making a request. Click **Request>Login** from the main menu to log in.
2. Click the **Request** button.
This opens the **Available Patron Requests** page.
3. Click the drop-down arrow and from the list select **Get Me**. Click **OK**.
This opens the “Get Me” OPAC Purchase Request page.
4. Fill out the form with the appropriate information.
5. Click **OK** to send the request, or click **Cancel** to discard the request.

For more information on configuring the Blank Request page, see [Request Page Overview](#) on [page 11-1](#).

Bibliographic Level Request Form

Your institution may allow you to submit a **Bibliographic Level** request. Your institution can define the types of information that can be entered into the form. This form may be used for any purpose and may not be called a Bibliographic Level request onscreen. When a Bibliographic Level form is submitted, the system looks up the information on the bibliographic record and gathers all of the information together as a single request.

The request must be submitted while a bibliographic record is on display in OPAC; the request will be placed for that item.

Once the request is placed, the bibliographic information is gathered from the database. The form is then emailed to the person specified in the System Administration module.

To submit a bibliographic-level request:

1. Execute a search for the item that you want to place a bibliographic level request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.

-
2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
 3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
 4. Click the **Request** button on the toolbar.
If you have not yet logged in, the **OPAC Patron Login** page appears. Enter your patron barcode and last name in the appropriate fields and then click the **Login** button. Once you have logged in, the **Request Selection** page appears.
-



Figure 10-15. Request Selection Page

5. Click the drop-down menu and select the bibliographic level-type request. This may be something like **Bibliographic Request**. (Your institution may name these requests differently). Click the **OK** button. The Bibliographic Level Request page displays.

The screenshot shows a Microsoft Internet Explorer window titled "Opac Request Form - Microsoft Internet Explorer". The main title of the form is "Opac Request Bib Level Request". The form contains several fields and sections:

- Title:** America's light trucks.
- Instructions:** Other Author(s): Motor Vehicle Manufacturers Association of the United States.
- Bib Info:** Call Number: TL230 .A523

Below these fields, there is a large text area containing the following bibliographic information:

Title: America's light trucks.
Primary Material Book
Subject(s): Trucks--United States.
Motor vehicles--United States.
Publisher: [Detroit, Mich.: Motor Vehicles Manufacturer's Association of the United States], 1986.
Description: 36 p. : col. ill. ; 28 cm.
Notes: Cover title.

Figure 10-16. Bibliographic Level Request Form

6. Select the pickup location by clicking the **Pick Up At** drop-down arrow (depending on your institution's policies, this may be unavailable).
7. Enter the Barcode of the patron submitting the request into the **Barcode** field (depending on your institution's policies, you may instead have to provide your Social Security Number or Institution ID). Note that your institution may have changed the names of the fields.
8. Click the **Submit Request** button to submit the request. Click the **Clear Form** button to restore the form to its original state.

For more information on configuring the Bibliographic Level Request page, see [Request Page Overview](#) on [page 11-1](#).

Item Level Request Form

Your institution may allow you to submit an **Item Level** request. Your institution can define the types of information that can be entered into the form. This form may be used for any purpose and may not be called an Item Level request onscreen. When an Item Level form is submitted, the system looks up the information on that item and gathers all of the information together as a single request.

The request must be submitted while a bib record is on display in OPAC; the request will be placed for that item.

When the request is submitted, the information will be stored in the database waiting to be transferred to a file.

To submit a item-level request:

1. Execute a search for the item that you want to place a item level request for. Depending on the type of search performed, the list that appears is either a **Headings List** or a **Titles List**.
2. If the **Headings List** appears, click the appropriate heading. This will cause the titles under that heading to appear on the Title List page.
3. If the **Titles List** appears, click the appropriate title. This will cause the **Record Display page** to appear.
4. Click the **Request** button on the toolbar.
If you have not yet logged in, the **OPAC Patron Login** page appears. Enter your patron barcode and last name in the appropriate fields and then click the **Login** button. Once you have logged in, the **Request Selection** page appears.



Figure 10-17. Request Selection Page

5. Click the drop-down menu and select the item level-type request. This may be something like **Item Request**. (Your institution may name these requests differently). Click the **OK** button. The Item Level Request page displays.
-

The screenshot shows a Microsoft Internet Explorer window displaying the 'WebVoyage - Endeavor Information systems, Inc.' interface. The main content is the 'Opac Request: Item Request' form. It includes fields for 'Title' (America's light trucks.), 'Page', 'Item', 'Barcode', and a large 'Comment' area. Below the form are 'Submit Request' and 'Clear Form' buttons. The browser's title bar reads 'Opac Request Form - Microsoft Internet Explorer' and the address bar shows 'Http://207.56.64.96:7708/webvoy.htm'. The footer features a 'contact us' link and links to Database, Library, Remote, Patron, and Help.

Figure 10-18. Item Level Request Form

6. Select the pickup location by clicking the **Pick Up At** drop-down arrow (depending on your institution's policies, this may be unavailable).
7. Enter the Barcode of the patron submitting the request into the **Barcode** field (depending on your institution's policies, you may instead have to provide your Social Security Number or Institution ID). Note that your institution may have changed the names of the fields.
8. Click the **Submit Request** button to submit the request. Click the **Clear Form** button to restore the form to its original state.

For more information on configuring the Item Level Request page, see [Request Page Overview](#) on [page 11-1](#).

WebVoyáge Universal Borrowing

Request display notes

There are a couple of notes relating to cancelling requests, as it pertains to displaying in WebVoyáge:

- For a pending request, even one that has been promoted to a new library, if you cancel the request in the WebVoyáge patron info page, the pending request still appears with the status of cancelled. Once you run Pcircjob 8, the request leaves the patron info page.
- For a processed request (the processing done in the call slip with a status of intransit on hold): In WebVoyáge, the request appears and the status reads In transit to “holding library.”

Request Configuration

11

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This section details Request Display configuration.

Request Page Overview

The WebVoyáge request pages are configured in a mixture of places, including WebVoyáge configuration files, and the Voyager Modules (especially System Administration). This section details the screens related to placing Requests.

Request Selection Page

The request selection screen allows the patron, when logged in, to submit requests. Types of requests include holds, recalls, and call slips, as well as a number of requests that can be defined by your institution, such as photocopy requests, purchases, and so on.

Enabling and Disabling the Requests Selection Page

You can allow or prevent your patrons from submitting any kind of request at all by turning the request selection screen on or off. Disabling the Request Selection screen also disables the Request button or linked text in the Top and Bottom Toolbars.

Configure the Request Selection Page display option in the PatronRequests variable of the [Options] stanza of the opac.ini file:

- PatronRequests=y enables the Request Selection page
- PatronRequests=n disables the Request Selection page

In addition to the general Page Appearance components of the Patron Information page (see [Table 6-5](#) on [page 6-11](#)), you can configure the components detailed in [Table 11-1](#).



Figure 11-1. Request Selection Page

[Table 11-1](#) details the callouts in [Figure 11-1](#).

Table 11-1. Personal Information Section Reference (Page 1 of 2)

| # | Description | Configured in |
|---|--------------------|--|
| 1 | Informational text | /m1/voyager/xxxdb/etc/webvoyage/local/reqsel.htm |

Table 11-1. Personal Information Section Reference (Page 2 of 2)

| # | Description | Configured in |
|---|---|---|
| 2 | Available requests | <ul style="list-style-type: none"> Restrict requests by database in System Administration:
Voyager System Administration>>OPAC Configuration>>Request Forms>>(request)>>Databases <p>and/or</p> <ul style="list-style-type: none"> Restrict requests by patron group in System Administration:
Voyager System Administration>>OPAC Configuration>>Request Forms>>(request)>>Patron Groups |
| | Number of items available text | The Available variable in the [Request_Select_Page] stanza of the opac.ini file

For an example of this text, see Figure 11-2 . |
| 3 | Request selection verification (OK) button text | The SubmitButton variable in the [Request_Select_Page] stanza of the opac.ini file |
| 4 | Reset button text | The ResetButton variable in the [Request_Select_Page] stanza of the opac.ini file |

**Figure 11-2. Text of Available variable in drop-down**

General Request Page Configuration

This section contains configuration information for general request page configuration. Much of the request form configuration affects multiple request forms.

Request Page Appearance Variables

Configure the general page appearance (see [Table 6-5](#) on [page 6-11](#) for the relevant variables) of the system-generated request forms in the following stanzas of the `opac.ini` file:

Table 11-2. System Generated Appearance Stanzas

| System-Generated Request | Configuration Stanza |
|--------------------------|--------------------------|
| Hold | [Hold_Recall_Page] |
| Recall | [Hold_Recall_Page] |
| Call Slip | [Req_Call_Slip_Page] |
| Short Loan | [Request_ShortLoan_Page] |
| Blank Form | [Req_No_Bib_Page] |

Request Dialogs Stanza

The `[Request Dialogs]` stanza of the `opac.ini` file allows you to define all of the labels that appear on the different varieties of WebVoyage request forms. In fact, because all of the variables in the `[Request Dialogs]` stanza do not have default values, you must define each label if you want that label to display on the WebVoyage request form. [Figure 11-3](#) shows an example of a `[Request Dialogs]` stanza.

```
[Request Dialogs]
Generic_Title=Opac Request:
Field1=Author:
Field2=Title:
Field3=
Field4=Publisher:
Field5=Date:
Field6=Edition:
Field7=
BibInfo=Bib Info:
Select_New_Date=Select New Reservation Date
Comment=Comment:
```

Figure 11-3. Sample [Request_Dialog] Stanza

```

Instructions=Instructions:
PickUp=Pick Up At:
NotNeededAfter=Not Needed After:
NotNeededAfterDays=30
Title=Title:
Title_Short_Loan=Opac Request: Short Loan Reservation
Copy_Info=Copy Information:
Check_Item_Avail=Check Item Availability
Submit=Submit Request
Reset=Clear Form
PatronInfo=Patron Info:
Database=Database:
BibInfo=Bib Info:
CallSlipPick>Select an item:
CallSlipSpecify=Specify an issue:
AnyCopy=Any Copy
AnyCopyAt=Any Copy At:
Note=Note:

```

Figure 11-3. Sample [Request_Dialog] Stanza (Continued)

Since many of the variables in the [Request_Dialog] stanza apply to multiple request types, [Table 11-3](#) lists the configuration components by variable. The table also includes a list of forms that each variable pertains to.

Table 11-3. General Request Form Variables

| Variable | Appears on | Description |
|---|------------|---|
| The Requests variable in the [Table_Colors] stanza of the opac.ini file | All | Request Form (Table) Color

Controls the color of request forms in WebVoyage. If nothing is entered after the Requests variable, the color of request forms in WebVoyage will default to the settings of the web browser. |

Table 11-3. General Request Form Variables

| Variable | Appears on | Description |
|--|--|--|
| [Request_For_m_Page] stanza of the opac.ini file | User created request forms | User created (in Voyager System Administration) forms use the [Request_Form_Page] stanza to configure the general page appearance (see Table 6-5 on page 6-11) of the forms. |
| Generic_Title | All | Generic WebVoyage Request text. Displays before the name of the request, as configured in Voyager System Administration>>OPAC Configuration>>Request Forms>>callslip>>Form Name field |
| Comment | Blank Form, Bib level, Item level, Call Slip, Hold/Recall | Comment dialog box |
| Instructions | Bib level, Item level, Call Slip, Short Loans, Remote | Instructional text |
| Pickup | Bib level, Short Loans, Hold/Recall | Request Item pick up location |
| NotNeededAfter | Bib Level, Hold/Recall | Not Needed After field label |
| NotNeededAfter-Days | Bib Level, Hold/Recall | Default number of days in the Not Needed After field |
| Title | Bib level, Item level, Call Slip, Short Loans, Remote, Hold/Recall | Record title display field caption |
| Database | Blank Form, Bib level | Database information label on the e-mail message generated from Blank Form or Bib Level requests |
| PatronInfo | Blank Form, Bib level | Patron Information label on e-mail message generated when patron submits Blank Form or Bib Level requests |

Table 11-3. General Request Form Variables

| Variable | Appears on | Description |
|--|------------------------------|---|
| Field1-Field7 | Blank Form | Labels which display beside the fields on all blank form requests, in order from top (field1) to bottom (field7) |
| BibInfo | Bib level | Bibliographic information field caption on all bib level requests that contain an item's bibliographic information. Located below the Title and Instructions fields on all bib level requests |
| AnyCopy | Hold | Any copy radio button caption |
| AnyCopyAt | Hold | Item Location choice radio button caption |
| Select_New_Date | Short Loan | Reservation date field caption |
| Title_Short_Loan | Short Loan | Header text. This information can act as a title for the request form |
| Copy_Info | Short Loan | Copy selection drop-down field caption |
| Check_Item_Avail | Short Loan | Text of button which checks the database for available items on the selected date |
| Note | NLNZ BibU, Index New Zealand | Note field caption |
| Submit | All request forms | Text of button to submit request |
| Reset | All request forms | Text of button to clear the request form |
| BackToRecord
(in the
[Request_Page]
stanza) | All request forms | Text of button to return to record from request submission acknowledgement page. |

Request Acknowledgement Page

Configure the page that displays after a request submission is attempted (whether it succeeds or fails) in the [Request_Page] stanza of the `opac.ini` file.

[Figure 11-4](#) shows a sample Request Acknowledgment page (with a successful request).



Figure 11-4. Sample Request Acknowledgment page

[Table 11-4](#) summarizes the messages displayed on the Request Acknowledgement page.

Table 11-4. Request Related Messages

| Error Message File | Default Error Text |
|--------------------|---|
| arsblock1.htm | Your Patron Initiated Retrieval System Request failed. This item is not a Remote Storage item. |
| arsblock2.htm | Your Patron Initiated Retrieval System Request failed. This item has already been requested from Remote Storage. |
| arsblock3.htm | Your Patron Initiated Retrieval System Request failed. This item is not available for Remote Storage request. |
| arsnoitems.htm | Your Patron Initiated Automated Retrieval System Request failed. No items are available for Remote Storage request. |
| callslipblock1.htm | Your Patron Initiated Call Slip Request failed. You have placed the maximum number of Call Slip requests. |
| callslipblock2.htm | Your Patron Initiated Call Slip Request failed. You are not authorized to place a Call Slip request for this item. |

Table 11-4. Request Related Messages

| Error Message File | Default Error Text |
|---------------------|---|
| callslipblock3.htm | Your Patron Initiated Call Slip Request failed. You already have a Call Slip request for this item. |
| callslipblock4.htm | Your Patron Initiated Call Slip Request failed. This item is not available for Call Slip requests. |
| callslipnoitems.htm | Your Patron Initiated Request failed. No items are available for Call Slip requests. |
| norequests.htm | You have no requests available on this database. |
| reqblok1.htm | Your Patron Initiated Request failed. No Holdings Are Available. |
| reqblok2.htm | Your Patron Initiated Request failed. It is on order. |
| reqblok3.htm | Your Patron Initiated Request failed. It is not charged. |
| reqblok4.htm | Your Patron Initiated Request failed. It is missing. |
| reqblok5.htm | Your Patron Initiated Request failed. It is Lost. |
| reqblok6.htm | Your Patron Initiated Request failed. It is at the bindery. |
| reqblok7.htm | Your Patron Initiated Request failed. No items are available for recall. |
| reqblok8.htm | Your Patron Initiated Request failed. You already have a request for it. |
| reqblok9.htm | Your Patron Initiated Request failed. No recall policy is defined for this item. |
| reqblok10.htm | Your Patron Initiated Request failed. No hold policy is defined for this item. |
| reqblok11.htm | Your Patron Initiated Request failed. This item has been scheduled through media booking. |
| reqblok12.htm | Your Patron Initiated Request failed. This item is not available for Hold. |
| reqbloknoitems.htm | Your Patron Initiated Request failed. No items are available for Hold requests. |
| reqfail.htm | Your Patron Initiated Request failed. |
| reqgood.htm | Your Patron Initiated Request was successful. |
| reqsel.htm | Please Choose the Type of Request |

Editing the Call Slip Request Screen

The call slip request screen allows patrons, after logging in, to submit a call slip request for an item. [Figure 11-5](#) shows a sample Call Slip Request form.

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Figure 11-5. A Call Slip Request Form

[Table 11-5](#) details the Call Slip Request Form callouts in [Figure 11-5](#).

Table 11-5. Call Slip Request Form Reference (Page 1 of 2)

| # | Description | Configured in |
|---|----------------------------|--|
| 1 | General request form title | The <code>Generic_Title</code> variable in the [Request Dialogs] stanza of the <code>opac.ini</code> file |
| 2 | Request Form Name | Voyager System Administration>>OPAC Configuration>>Request Forms>>callslip>>Form Name field |
| 3 | Title field caption | The <code>Title</code> variable in the [Request Dialogs] stanza of the <code>opac.ini</code> file

NOTE:
This variable controls the title field caption for many other request forms |
| 4 | Record title | MARC record |

Table 11-5. Call Slip Request Form Reference (Page 2 of 2)

| # | Description | Configured in |
|----|--|--|
| 5 | Instructions field caption | The Instructions variable in the [Request Dialogs] stanza of the opac.ini file

NOTE:
This variable controls the instructions field caption for many other request forms |
| 6 | Instructions | Voyager System Administration>>OPAC Configuration>>Request Forms>>callslip>>Instructions field |
| 7 | Item selection (radio button) caption | The CallSlipPick variable in the [Request Dialogs] stanza of the opac.ini file |
| 8 | Item selection drop-down | Item records attached to bibliographic record |
| 9 | Issue specification (radio button) caption | The CallSlipSpecify variable in the [Request Dialogs] stanza of the opac.ini file |
| 10 | Item information fields | Voyager System Administration>>OPAC Configuration>>Request Forms>>callslip>>Fields tab |
| 11 | Barcode field caption | Not configurable |
| 12 | Barcode field | Not configurable |
| 13 | Comment field caption | The Comment variable in the [Request Dialogs] stanza of the opac.ini file |
| 14 | Comment box | Not configurable |
| 15 | Submit button | The Submit variable in the [Request Dialogs] stanza of the opac.ini file |
| 16 | Clear request form button | The Reset variable in the [Request Dialogs] stanza of the opac.ini file |
| | If the Voyager System Administration>>OPAC Configuration>>Miscellaneous>Call Slip Item Required check box is NOT checked, two radio buttons display on the call slip request dialog box. | The CallSlipSpecify variable in the [Request Dialogs] stanza of the opac.ini file |

Editing the NLNZ BibU and Index New Zealand Form Screens

The NLNZ BibU and Index New Zealand request screens allow the patron, when logged in, to submit a request, to be delivered in the form of a VDX-compatible email, for a particular item or for photocopies to be made. See the *Voyager System Administration User's Guide* for more information.

Editing the ARTEmail Loan and Photocopy Form Screens

The ARTEmail Loan and Photocopy Form screens allow the patron, when logged in, to submit a request, to be delivered in the form of a ARTE-compatible email, for a particular item or for photocopies to be made. See the *Voyager System Administration User's Guide* for more information.

- The Book Request form uses the Author, Title, Place of Publication, Publisher, Edition, Year and Volume fields You cannot change the captions for these fields.
- The Photocopy Request form uses the Journal Title, Volume, Part, Year, Article Title, Article Author and Pages fields. You cannot change the captions for these fields.

Short Loan Requests

This section details Short Loan Request options.

Short Loan Messages

[Table 11-6](#) details the Short Loan Message variables.

Table 11-6. Short Loan Message Variables (Page 1 of 2)

| Variable | Description |
|---------------------|--|
| SL_NoItems | Displays in a pop-up dialog when a patron attempts to submit a short loan request for a title which has no items available for short loans. |
| SLBlock_Policy | Displays in a pop-up dialog when a patron attempts to submit a short loan request for a title which is not authorized for short loans. |
| SLBlock_Unavailable | Displays in a pop-up dialog when a patron attempts to submit a short loan request for a title which is unavailable for short loans at a particular time. |

Table 11-6. Short Loan Message Variables (Page 2 of 2)

| Variable | Description |
|-----------------|---|
| SLBlock_Closed | Displays in a pop-up dialog when a patron attempts to submit a short loan request for a date and time at which the library is closed. |
| SLBlock_Invalid | Displays in a pop-up dialog when a patron attempts to submit a short loan request and the system encounters an internal error. |
| SLBlock_Patron | Displays in a pop-up dialog when a patron attempts to submit a short loan request and the patron has a block that does not allow the submission of short loans (for example, an excessive number of overdue items). |
| SLBlock_Total | Displays in a pop-up dialog when a patron attempts to submit more short loan requests than he/she is permitted. |
| SLBlock_Title | Displays in a pop-up dialog when a patron attempts to submit more short loan requests than he/she is permitted for a particular title. |
| SLBlock_Day | Displays in a pop-up dialog when a patron attempts to submit more short loan requests than he/she is permitted to submit in one day. |

The request.cfg and requesth.cfg files

The request.cfg and requesth.cfg files are located in each of the /m1/voyager/xxxdb/etc/webvoyage database sub-directories (/local, /Z3950, /vcit, /zcit, etc.). Use these files to configure what bibliographic information appears with "Bib Level" requests. The files request.cfg and requesth.cfg must appear in the display config subdirectory of each local and remote voyager system you connect to. These are configured just like any other displayn.cfg file, and determine what bib info gets shown in the Request window.

[REDACTED]

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WebVoyáge OpenURL features

WebVoyáge uses the OpenURL standard to generate links and obtain information from external sources. The features which use the OpenURL standard are:

- [WebVoyáge OpenURL Linking on page 12-2](#)

This feature sends information gathered from the MARC record in WebVoyáge to an OpenURL-compliant linking server to obtain full text articles and more.

- [OpenURL Item requests on page 12-10](#)

This feature sends requests for items to external services (such as RelaisTM) using information gathered from the MARC record.

These features require configuration (in configuration files) specific to the features, as well as OpenURL parsing profile configuration generic to all OpenURL features. The feature-specific configuration can be found in the section for each feature. For the generic OpenURL parsing profile information, see [General MARC Field Parsing Variables for OpenURL on page 12-14](#).



IMPORTANT:

For the target service to process your URI, the URI must be constructed according to the service's requirements. Even if the service accepts OpenURL formatted requests, it may have additional requirements. Make sure you check with your target service before you configure the RequestURI.cfg file.

WebVoyáge OpenURL Linking

From the WebVoyáge Record Display Page, Voyager can generate a URI in OpenURL format from information in the MARC record. When sent to an OpenURL-compliant linking server, the information in this URI is used to locate corresponding full text records.

Enabling OpenURL Links on the Record Display Page

Enabling OpenURL links on the Record Display Page consists of:

- Setting the path (in the opac.ini file) to the LinkFinder server (see [The opac.ini file on page 12-2](#)).
- Adding stanzas to the linkfinder.cfg file for each of the databases using LinkFinder, switching LinkFinder on for those databases, as well as detailing the parsing rules for MARC record information extraction for those databases.

For more information, see [Configuring parsing profiles for MARC record information extraction on page 12-5](#).

Configuring View Record Page OpenURL link display for WebVoyáge

The following sections detail configuring OpenURL support for WebVoyáge.

The opac.ini file

The first step in the process of configuring OpenURL is to direct Voyager to the LinkFinder server. This is done in the LinkFinderServer variable of the [View_Record_Page] stanza of the opac.ini file. You must configure this stanza in the opac.ini of each WebVoyáge Display Directory used by a database using LinkFinder, including any custom WebVoyáge Display Directories you have created.

Example: You are enabling OpenURL for use with all Voyager citation databases, and all Z39.50 citation databases. Configure this stanza in the `opac.ini` file of both the `/m1/voyager/xxxdb/etc/webvoyage/vcit` and the `/m1/voyager/xxxdb/etc/webvoyage/zcit` directories.

The mouse-over text for the LinkFinder button, displaying on the **Record** page in WebVoyage, is also set in the `[View_Record_Page]` stanza of the `opac.ini` file.

Directing Voyager to the LinkFinder server

Line 2 of [Figure 12-1](#) shows a sample `LinkFinderServer` variable. Enter the IP address of the server on which the LinkFinder program resides in the `xxx.xx.xx.xx` section of the variable. The remainder of the variable is the path on the server of the LinkFinder program, including the filename.

Directing WebVoyage to the LinkFinder button

Place the button desired for connecting to LinkFinder in the `/m1/voyager/xxxdb/webvoyage/html/images` directory and include the name of the button in the `LinkFinderButtonGraphic=` variable.

Setting the mouse-over text of the LinkFinder button

Line 1 of [Figure 12-1](#) shows the sample `LinkFinderButton` variable. Enter the mouse-over text of the LinkFinder button here. [Figure 12-2](#) shows sample mouse-over text of the LinkFinder button.

Line#

```
1 LinkFinderButton=LinkFinder  
2 LinkFinderServer=http://xxx.xx.xx.xx/LinkFinder/  
    LinkFinder.jsp10?  
3 LinkFinderButtonGraphic=LinkFinderPlusButton.jpg
```

Figure 12-1. Sample LinkFinderButton and LinkFinderServer variables in the [View_Record_Page] stanza of the opac.ini file

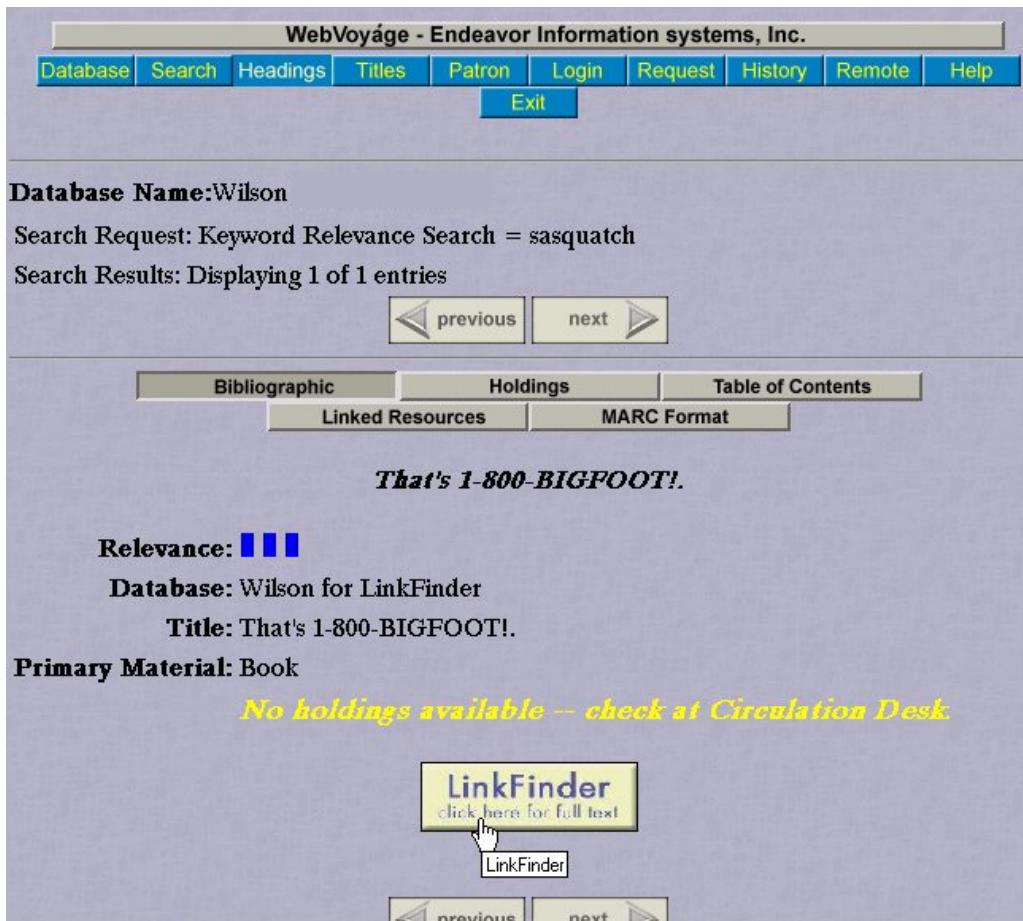


Figure 12-2. LinkFinder button with mouse-over text (as set in the opac.ini file)

The linkfinder.cfg file

The next step in LinkFinder configuration is setting up parsing profiles for LinkFinder to use in creating active URLs.

Configuring parsing profiles for MARC record information extraction

You must tell Voyager which information to extract from the MARC records in the citation databases being searched. This is done in the `linkfinder.cfg` file in the `/m1/voyager/xxxdb/etc/webvoyage` directory. LinkFinder uses the information extracted to build active URLs for each record when the LinkFinder button is clicked from the record information. Each database you are using LinkFinder with must have a stanza associated with it in the `linkfinder.cfg` file, where you provide the MARC information extraction profile for that database.

[Figure 12-3](#) shows some variables for inclusion in these stanzas. The `[Database]` stanza name is the name of the database as entered in the **Database Code** field of **Database Definitions** in **System Administration**. Each variable in the stanza corresponds to the piece of information being extracted from the MARC records being viewed in WebVoyage.

Line#

```
1 [Database]
2 LinkFinderDisplay=Y
3 USE_LFV3=Y
4 title=245/a/0///0/
5 aulast=100/a/0//, /0/
6 aufirst=100/a/0/, //0/
7 date-year=260/c/4//./0/
8 issn=022/a/9///0/
9 isbn=020/a/10///0/
10 coden=030/a/6///0/
```

Figure 12-3. Variables in a database stanza in the linkfinder.cfg file

The stanza consists of the following three component types:

-
1. The LinkFinderDisplay variable which enables or disables LinkFinder and the LinkFinder button for the specified database (see line 2 of [Figure 12-3](#)).

NOTE:

Omitting the database specification from the linkfinder.cfg file entirely also disables the Linkfinder button on that database.

2. The SID (service identifier) variable which directs Voyager to add the SID to the generated URI (see line 3 of [Figure 12-3](#)). This variable uses the following format:

USE_LFV3=**Y/N**

- Set this variable to **Y** to include the SID in the URI sent to LinkFinder.
- Set this variable to **N** to omit the SID from the URI sent to LinkFinder.

NOTE:

The SID (service identifier) for voyager is: sid=Endeavor:Citation Server. This cannot be edited or changed.

3. The MARC field parsing specification variables (or meta-tags). These variables are dictated by the OpenURL standard (see line 4 through 10 of [Figure 12-3](#)). [Table 12-3](#) on [page 12-14](#) details the meta-tags supported by the OpenURL standard.

[Figure 12-4](#) shows an example of a stanza, set to parse a standard citation record like the one in [Figure 12-5](#), with detailed descriptions of each variable and parsing elements.

Line#

| | |
|---|---------------------|
| 1 | [SDIRECT] |
| 2 | LinkFinderDisplay=Y |
| 3 | USE_LFV3=Y |

Figure 12-4. Sample database stanza in the linkfinder.cfg file

Line#

```
4 title=245/a/0///0/
5 aulast=100/a/0//, /0/
6 aufirst=100/a/0/, //0/
7 date-year=260/c/4//./0/
8 issn=022/a/9///0/
```

Figure 12-4. Sample database stanza in the linkfinder.cfg file (Continued)

- **title=245/a/0///0/** (from the 245 field, subfield a, extract all data)

Use the following to extract all of the title information from the 245a field.

1. Specify the **245** field as the Tag element.
 2. Specify the **a** subfield as the Subfield element.
 3. Since we do not want to specify a limited number of characters to extract from the beginning of the string, the Length of Start Field element will be 0.
 4. Since we do not want to specify any text after which to begin extracting, leave the Parse Start After element blank.
 5. Since we do not want to specify any text before which to end extracting, leave the Parse End Before element blank.
 6. Since we do not want to specify a limited number of characters to extract from the end of the string, the Length of End Field element will be 0.
- **aulast=100/a/0//, /0/** (from the 100 field, subfield a, extract all data up to the first , character and single space found).

Use the following to extract the Author last name information from the 100a field.

1. Specify the **100** field as the Tag element.
2. Specify the **a** subfield as the Subfield element.
3. Since we do not want to specify a limited number of characters to extract from the beginning of the string, the Length of Start Field element will be 0.
4. Since we do not want to specify any text after which to begin extracting, leave the Parse Start After element blank.
5. To extract only the text up to the , character and space, enter “, ” in the Parse End Before element blank.

-
- 6. Since we do not want to specify a limited number of characters to extract from the end of the string, the Length of End Field element will be 0.
 - **aufirst=100/a/0/, //0/** (from the 100 field, subfield a, extract all data after the , character).

Use the following to extract the Author first name information from after the , character in the 100a field.

 1. Specify the 100 field as the Tag element.
 2. Specify the a subfield as the Subfield element.
 3. Since we do not want to specify a limited number of characters to extract from the beginning of the string, the Length of Start Field element is 0.
 4. Since we want to begin extracting after the , text, enter “, “ in the Parse Start After element.
 5. Since we do not want to specify any text before which to end extracting, leave the Parse End Before element blank.
 6. Since we do not want to specify a limited number of characters to extract from the end of the string, the Length of End Field element is 0.
 - **date-year=260/c/4//./0/** (from the 260 field, subfield c, extract the four characters starting at the beginning of the subfield, up to the first . character).

Use the following to extract the four-digit year information up to the . character in the 260c field.

 1. Specify the 260 field as the Tag element.
 2. Specify the c subfield as the Subfield element.
 3. Since we want to specify a limited number of characters to extract from the beginning of the string (four), the Length of Start Field element will be 4.
 4. Since we do not want to specify any text after which to begin extracting, leave the Parse Start After element blank.
 5. Since we want to extract all information up to the first . in the subfield, set the Parse End Before element to “.”.
 6. Since we do not want to specify a limited number of characters to extract from the end of the string, the Length of End Field element will be 0.
 - **issn=022/a/9///0/** (from the 022 field, subfield a, extract the first nine characters).

Use the following to extract the nine ISSN characters from the 022a field (see line 18 of [Figure 12-5](#)).

1. Specify the 022 field as the Tag element.
 2. Specify the a subfield as the Subfield element.
 3. Since we want to specify nine characters to extract from the beginning of the string, the Length of Start Field element will be 9.
 4. Since we do not want to specify any text after which to begin extracting, leave the Parse Start After element blank.
 5. Since we do not want to specify any text before which to end extracting, leave the Parse End Before element blank.
 6. Since we do not want to specify a limited number of characters to extract from the end of the string, the Length of End Field element will be 0.
-

Line#

| | |
|----|--|
| 1 | 000 00848pam 2200241 i 45 |
| 2 | 001 31761 |
| 3 | 008 800813s1981 nyua j 000 1 eng |
| 4 | 010 __ a 80021402 /AC |
| 5 | 020 __ a 0395301718 (lib. bdg.) : c \$8.95 |
| 6 | 035 __ a ocm06666043 |
| 7 | 040 __ a DLC c DLC d m.c. d SHC |
| 8 | 049 __ a SHCM |
| 9 | 050 0_ a PZ7.C2344 b Be 1981 |
| 10 | 082 0_ a [E] 2 19 |
| 11 | 100 1_ a Carrick, Carol. |
| 12 | 245 10 a Ben and the porcupine / c by Carol Carrick ; pictures by Donald Carrick. |
| 13 | 260 __ a New York : b Houghton Mifflin/Clarion Books, c [c1981] |
| 14 | 300 __ a [32] p. : b col. ill. ; c 23 x 24 cm. |
| 15 | 520 __ a After his dog tangles with a porcupine, Christopher fears for his pet's safety until he thinks of a way to pacify the porcupine. |

Figure 12-5. MARC Information of Parsed Record

Line#

| | |
|----|----------------------------------|
| 16 | 590 __ a \$9.42 B&T 5-30-89 MM |
| 17 | 650 _1 a Porcupines x Fiction. |
| 18 | 650 _1 a Dogs x Fiction. |
| 19 | 700 1_ a Carrick, Donald. |
| 20 | |

Figure 12-5. MARC Information of Parsed Record

OpenURL Item requests

OpenURL-formatted item requests sends requests for an item to an external source, using a link formatted according to the OpenURL standard. The link is activated when a patron clicks the OpenURL request button from the View Record Page in WebVoyage. Determine which patron groups have access to this feature in the configuration file.

WebVoyage uses a configuration file (`RequestURI.cfg`) to extract information from a MARC record on view, and constructs a URI (more specifically, an OpenURL formatted link) from that information. This link is then sent to an OpenURL compliant service or server to request an item.

Configure the `RequestURI.cfg` file (`/m1/voyager/xxxdb/etc/webvoyage/local`) to suit your target service or server. Obtain the requirements from them before configuring the file. For more, see [The RequestURI.cfg File on page 12-11](#).

Enabling OpenURL Item Requests

The WebVoyage button that sends the OpenURL item request displays according to the following:

- Variables in the `opac.ini` file (see [Configuring the variables in the opac.ini on page 12-11](#))
- The database(s) listed in the `RequestURI.cfg` file
- The patron groups listed as eligible to place OpenURL Item requests in the `RequestURI.cfg` file
- Patron must be logged into WebVoyage and belong to a patron group authorized (in a `PatronGroupCODE=CanRequest` variable) to make OpenURL item requests

Configuring the variables in the opac.ini

The OpenURL Item Request-specific variables in the [View_Record_Page] stanza of the opac.ini file (/m1/voyager/xxxdb/etc/webvoyage/local) are detailed in [Table 12-1](#).

Table 12-1. OpenURL Item Request opac.ini variables

| Variable | Description |
|--------------------------|--|
| RequestURIServer= | The server address of the target.
For example: http://www.myserver.edu |
| RequestURIButton= | Alternate text of the send OpenURL Item Request button |
| RequestURIButtonGraphic= | Graphic of the send OpenURL Item Request button

NOTE:
The default path on the web server for the button is /m1/voyager/xxxdb/webvoyage/html/images. |

The RequestURI.cfg File

The RequestURI.cfg file (/m1/voyager/xxxdb/etc/webvoyage) contains the configuration for the OpenURL Item Request feature.

Create a stanza for each database for which you want OpenURL item requests available. The stanza name should be the database code as entered in **Database Definitions** in the Voyager System Administration module.

[Figure 12-6 on page 12-11](#) shows a sample RequestURI.cfg.

```
[LOCAL]
title=773/t/0///0/
aulast=092/a/3/.///
auinit=0
volume=773/g/0/Volume:/, Issue:/0/
issue=035/g/0/Issue:/, Date:/0/
date-year=773/g/0/Date://4/
spage=300/a/0///0/
```

Figure 12-6. Sample RequestURI.cfg file

```

issn=0
part=
PatronGroupFAC=CanRequest
PatronGroupUGD=CanRequest
UsePI=IID
UsePS=Y
genre=*m:Book
genre=*a:Book Item
genre=*b:Article
CN=050/a/0///0/

```

Figure 12-6. Sample RequestURI.cfg file (Continued)

[Table 12-2](#) details the RequestURI.cfg file components.

Table 12-2. RequestURI.cfg file components

| Component | Description | Variable |
|--------------------------------------|---|---|
| MARC record OpenURL parsing profiles | Determine how information gathered from the MARC record maps to OpenURL tags | See General MARC Field Parsing Variables for OpenURL on page 12-14 |
| Patron Group specifications | Determine which patrons can use the OpenURL Item Request feature | PatronGroupCODE=CanRequest |
| Patron ID inclusion option | OPTIONAL:
<i>For use with Relais ILL services. Includes the Patron ID and surname, based on WebVoyage patron login. This allows WebVoyage patrons to log into Relais automatically when requesting items.</i> | UsePI= <ul style="list-style-type: none"> • SSN- Sends the Voyager SSN as the Relais Patron ID • IID- Sends the Voyager IID as the Relais Patron ID • Barcode- Sends the Voyager Barcode as the Relais Patron ID |
| Patron Surname inclusion option | | UsePS=
Sends the Last name of the currently logged in Voyager patron to Relais ILL as the Patron Surname. |

Table 12-2. RequestURI.cfg file components

| Component | Description | Variable |
|---------------------|--|---|
| Genre specification | OPTIONAL:
<i>Substitutes the genre specification for the code in the variable.</i> | genre=
For more, see Including Genre Information Automatically on page 12-17 |

Relais-related configuration notes

The OpenURL-formatted Item Requests feature can be used with any OpenURL compatible request service. Check with the request service provider for specific (non-OpenURL) requirements, and edit the RequestURI.cfg file accordingly. This section includes additional configuration for Relais ILL solutions.

- Including the Call Number using the CN parsing tag
- Logging into Relais ILL using the usePI and usePS variables in the RequestURI.cfg file

Including the Call Number Automatically

To include the Call number (from the bibliographic record) for record requests to Relais ILL, include the CN= variable in the RequestURI.cfg file (see [Figure 12-6](#) on [page 12-11](#) for an example). Determine which MARC field your bibliographic records use for the Call number, and create the CN= variable from that, using the MARC field parsing variables ([Table 12-3](#)).

Example:

CN=050/a/0///0/

This variable adds the contents of the 050a MARC field to the URI as the call number.

Logging into Relais ILL

Use the usePI and usePS variables to send your Relais Patron ID and your Patron Surname to Relais ILL when requesting an item from WebVoyage. The information corresponding to the PI (Patron ID) in the Voyager patron record (SSN, IID, or Barcode) must correspond to the patron's PI in the Relais database.



IMPORTANT:

You must use Voyager patron information (for the PI) corresponding to your Relais PI. The Voyager patron SSN, IID or Barcode must correspond to the Relais PI for each patron account.

Alternatively, you can include your UL (User Login) and UP (User Password) in the URL stem in the RequestURIServer variable in the opac.ini. The UL and UP specified in the configuration file will be used for *all* requests made to Relais using that Voyager database. Therefore you should only use this method if you have a single Relais account for your entire staff (using that Voyager database).

The RequestURI.cfg file.

If you are a Relais ILL customer, build your RequestURI.cfg file based on the information you use to request records using Relais ILL. Think of the OpenURL Item Request feature as entering the information into the request form for you, in one long string of characters.

General MARC Field Parsing Variables for OpenURL

Use the MARC field parsing variables to construct OpenURL-compliant URLs. The format of the URLs that you build are dictated by the site or service you are sending the URLs to.

[Table 12-3](#) details the MARC field parsing variables used for parsing MARC record fields for use with OpenURL.

Table 12-3. MARC field parsing variables (meta-tags) (Page 1 of 3)

| META-TAG | Value | Description |
|----------|-------|---|
| aulast | | A string with the first author's last name |
| aufirst | | A string with the first author's first name |
| auinit | | A string with the first author's first and middle initials |
| auinit1 | | A string with the first author's first initial |
| auinitm | | A string with the first author's middle initials |
| issn | | An ISSN |
| eissn | | An ISSN that refers to the electronic version of a serial publication |
| coden | | A CODEN |

Table 12-3. MARC field parsing variables (meta-tags) (Page 2 of 3)

| META-TAG | Value | Description |
|----------|--|---|
| isbn | | An ISBN |
| sici | | A SICI of a journal article, volume or issue. Compliant with ANSI/NISO Z39.56-1996 Version 2 (see http://sunsite.berkeley.edu/SICI/) |
| bici | | A BICI for a section of a book, to which an ISBN has been assigned. Compliant with http://www.niso.org/bici.html Book Item and Component Identifier |
| title | | The title of a bundle (journal, book, conference) |
| stitle | | The abbreviated title of a bundle |
| atitle | | The title of an individual item (article, preprint, conference proceeding, part of a book) |
| volume | | The volume of a bundle |
| part | | The part of a bundle |
| Issue | | The issue of a bundle |
| spage | | The start page of an individual item in a bundle |
| epage | | The end page of an individual item in a bundle |
| pages | | Pages covered by an individual item in a bundle. The format of this field is ' spage-epage' |
| genre | journal, book, conference, article, pre-print, proceeding, book item | The type of material |
| arnum | | The number of an individual item, in cases where there are no pages available. |
| date | YYYY-MM-DD
YYYY-MM
YYYY | The publication date of the item or bundle encoded in the "Complete date" variant of ISO8601 (see http://www.w3.org/TR/NOTE-datetime). This format is YYYY-MM-DD where YYYY is the four-digit year, MM is the month of the year between 01 (January) and 12 (December), and DD is the day of the month between 01 and 28 or 29 or 30 or 31, depending on length of the month and whether it is a leap year. |
| ssn | winter spring summer fall | The season of publication |
| quarter | 1 2 3 4 | The quarter of publication |

Table 12-3. MARC field parsing variables (meta-tags) (Page 3 of 3)

| META-TAG | Value | Description |
|----------|-------|--|
| CN | | Call number.

NOTE:
Voyager-specific tag. Not part of the OpenURL specification. |

NOTE:

This list is complete as of the time of publication, but is subject to change. More information about these variables can be found at *The NISO AX Committee for the OpenURL* website

The information entered into the MARC field parsing specification variables depends on how you want the OpenURL compliant linkserver to parse the information in the MARC record. The general parsing format is as follows:

Variable (meta-tag)=Tag/Subfield/Length of Start Field/Parse Start After/Parse End After/Length of End Field

[Table 12-4](#) describes the parsing elements, as well as the possible values for each.

NOTE:

Do not worry about including too many MARC field parsing specification variables. Voyager looks for matches one meta-tag specification at a time, and adds the results together. If, for example, a record contains a match in all but one field, Voyager will simply include the information for all but that one field in the URI.

Table 12-4. Parsing element descriptions

| Element | Description | Possible values |
|-----------------------|--|----------------------------|
| Tag | MARC field matched to | Valid MARC field number |
| Subfield | MARC subfield matched to | Valid MARC subfield letter |
| Length of Start Field | You can specify a fixed number of characters to extract from a field, or use this element in conjunction with the Information to parse from Parse Start After element as a starting point for extraction | Valid number or 0 |
| Parse Start After | Text of field/subfield after which extraction is to begin. | Text of field/subfield |

Table 12-4. Parsing element descriptions

| Element | Description | Possible values |
|---------------------|---|------------------------|
| Parse End Before | Text of field/subfield at which extraction is to end. This must be a unique character or set of characters, because Voyager will start parsing at the beginning of the string for the Parse End Before element. | Text of field/subfield |
| Length of End field | You can specify a fixed number of characters to extract from a field, or use this element in conjunction with the Information to parse from Parse End Before element as an end point for extraction. | Valid number or 0 |

Including Genre Information Automatically

Voyager will include the genre information for a record in the constructed URI, based on the record's leader 6 and 7, if you set the genre variable in the configuration file. If a record is processed using any of the WebVoyage OpenURL features, WebVoyage compares the record's leader 6 and 7 value, to the leader 6 and 7 components in the genre variables in the OpenURL configuration file. If a match is found, WebVoyage adds the corresponding genre specification to the URI.

Example:

For example, to include the genre specification of *Book* in the URI's of all MARC records with a leader 6 value of *a* and leader 7 value of *m*, include the following in the RequestURI.cfg file.

```
genre=*m:Book
```

Sample leader: 01461pam a2200325 a 45

For any MARC records with a leader 6 and 7 value of *am*, using an OpenURL feature, WebVoyage would include the genre specification of *Book* in the URI:

```
http://www.linkserveraddress.edu/
abcdefg&genre=book&lmnop
```

The genre Variable Format

The `genre` variable takes the following general form:

`genre=leader6leader7:genre specification`

WebVoyage uses the `leader6` and `leader7` components to find a match to the MARC record. Enter the leader 6 and leader 7 values, a colon (:), and the genre specification you wish to correspond to MARC records with that leader 6 and 7 values.

You can use the * symbol as a wildcard when including the genre leader specification. For example, you could set `genre=*a:Book Item` to include the *Book Item* genre specification in the URI of all MARC records with *any* leader 6 value, and a leader 7 value of `a`.

For more information about the `genre` OpenURL meta-tag, see [Table 12-3](#) or the *The NISO AX Committee for the OpenURL on the Web*.

Bibliographic ID redirect to WebVoyage

This feature allows WebVoyage to receive, and display, requests containing a MARC record. The record displays in the browser using the public view.

NOTE:

This feature may not be compatible with early browser versions. Update your browser version if you have an older one.

Along with this feature comes a URI link specification for the WebVoyage session redirected to. This link is set in the `bibredirect.ini` file in the `m1/voyager/xxxdb/webvoyage/cgi-bin` folder. The `RedirectURI` variable in the [BibRedirect] stanza contains the URI itself.

```
[BibRedirect]
RedirectURI=/cgi-bin/Pwebrecon.cgi?BBID={record_id}
```

Figure 12-7. The default RedirectURI variable

NOTE:

If the incoming record is from a different database as that pointed to in this stanza, WebVoyage displays an incorrect record, or no record at all.

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Contents

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Overview

You can use WebVoyáge to request and track media equipment, separately and as part of an item request. Once requests are placed, they can be tracked in the Patron Information Page.

The following system requests are available from WebVoyáge:

- Media Equipment Request - Consists only of equipment booking
- Media Item Request - Consists of an item request and attached equipment booking.

Media Equipment requests are placed directly from the request screen, while Media Item Requests are placed after a bibliographic record with available items is selected for view.

NOTE:

Your patron group must be authorized to place Media Booking requests in WebVoyáge, by setting privileges in the Media Scheduling client. If Media Booking requests are not available to you, please contact a member of your institution's staff.

Media Equipment Booking Requests

Place Media Equipment Booking requests through the Request screen in WebVoyage (see [Figure 13-1](#)).



Figure 13-1. Request Selection Screen

To place a Media Equipment Booking request, follow the steps in



Procedure 13-1. Placing a Media Equipment Booking Request

Use the following to place a Media Equipment Booking request.

1. Click the Request button or linked text from WebVoyage.

NOTE:

You must log in to WebVoyage before placing requests.

Result:

The Equipment Booking request screen displays (see [Figure 13-2](#)).

Equipment Booking

| | |
|--|---|
| Select Equipment: | CD Player
TV
DVD Player
AV Cart
VCR (VHS format) |
| Enter a beginning date and time for your booking: | |
| Date Needed: | <input type="button" value="Date"/> OCT 04 04 |
| Time Needed: | 12 00 |
| Enter an ending date and time for your booking: | |
| Date Finished: | <input type="button" value="Date"/> OCT 04 04 |
| Time Finished: | 14 00 |
| <input checked="" type="radio"/> Pickup | Pick up at:
College (Media Schedulin) |
| <input type="radio"/> Delivery | Deliver to:
College-Media Scheduling - B01 - Baker |
| Barcode: | <input type="text"/> |
| <input type="button" value="Check Schedule"/> <input type="button" value="Reset"/> | |

Figure 13-2. Request Selection Screen

2. Select the type of equipment desired from the list box. **CTRL+select** to select multiple pieces of equipment.
3. Enter the dates (including times) the equipment is needed. The amount of time a piece of equipment is available to you is determined by your institution.
4. Choose a pickup or delivery location after selecting either the **Pickup** or **Delivery** radio button.
5. Enter your barcode in the **Barcode** field.
6. Click the **Check Schedule** button to verify availability of equipment on the selected dates.

Result: A confirmation screen displays with the details of your successful booking (see [Figure 13-3](#)).

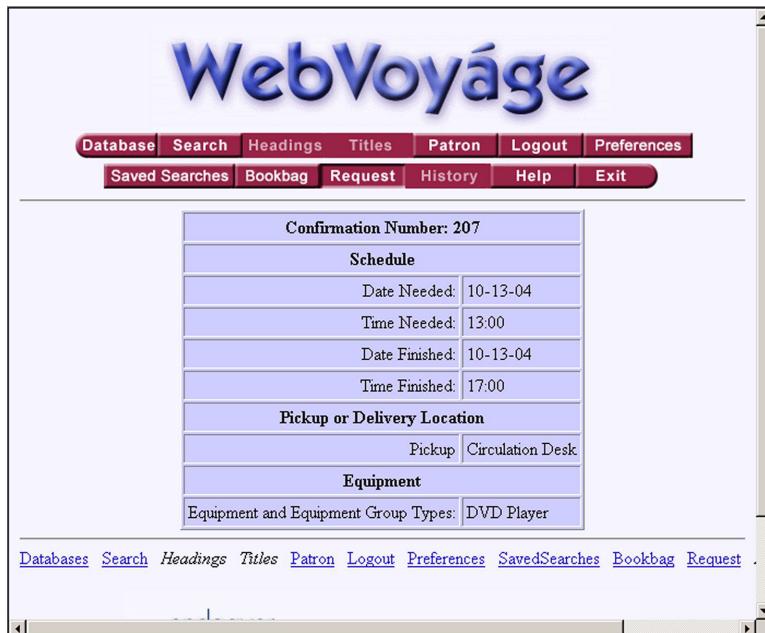


Figure 13-3. Media Equipment Booking Request Confirmation

Result:

Your Media Equipment Booking is complete. The equipment will now be delivered to the specified room, or you must pick it up at the pickup location.

Media Item Booking Requests

Place Media Item Booking requests through the Request screen in WebVoyage after selecting the record view of a bibliographic record with available items. (see [Figure 13-4](#)).



Figure 13-4. Request Selection Screen

To place a Media Item Booking request, follow the steps in [Procedure 13-2, Placing a Media Item Booking Request](#).



Procedure 13-2. Placing a Media Item Booking Request

Use the following to place a Media Item Booking request.

1. After selecting the record view of a bibliographic record with available (media-related) items (see [Figure 13-5](#)), click the **Request** button or linked text.

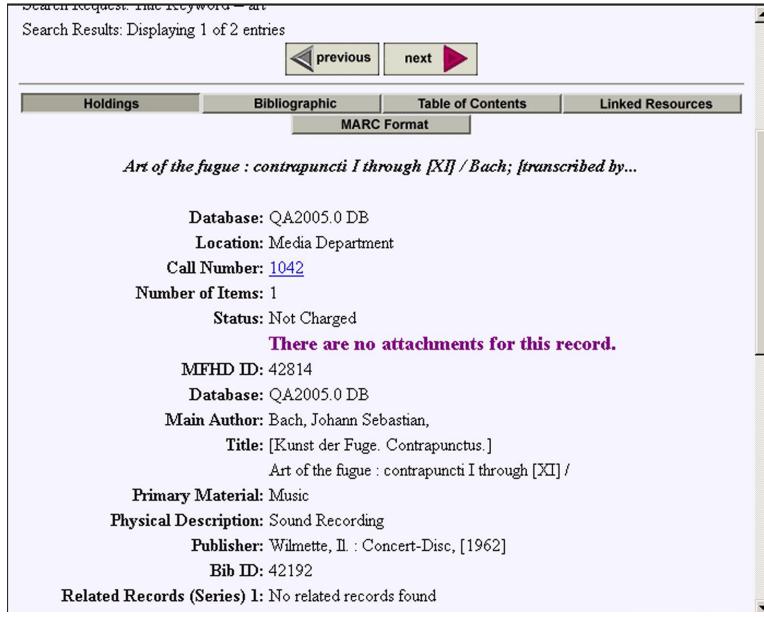


Figure 13-5. Record With Available Items

NOTE:

You must log in to WebVoyáge before placing requests.

2. Select the **Media Item Booking** request and click **OK**.

Result:

The **Item Selection for Booking** screen displays (see [Figure 13-6](#)).

| Item Selection for Booking | |
|--|--|
| Title: | 20th century art at the Metropolitan Museum the Lila Acheson Wallace Wing /... |
| Call Number: | T9715 |
| Select an Item: | <input type="button" value="c.0 Videocassette Recording College-Media Scheduling"/> |
| This item is not available during the following times: | |
| This item may be booked for up to 28 Day(s). | |
| Enter a beginning date and time for your booking: | |
| Date Needed: | <input type="button" value="OCT"/> <input type="button" value="13"/> <input type="button" value="04"/> |
| Time Needed: | <input type="button" value="13"/> <input type="button" value="00"/> |
| Enter an ending date and time for your booking: | |
| Date Finished: | <input type="button" value="OCT"/> <input type="button" value="13"/> <input type="button" value="04"/> |
| Time Finished: | <input type="button" value="13"/> <input type="button" value="00"/> |
| <input checked="" type="radio"/> Pickup | Pick up at:
<input type="button" value="Circulation Desk"/> |
| <input type="radio"/> Delivery | Deliver to:
<input type="button" value="Circulation Desk - 123 - Viewing Room"/> |
| <input type="button" value="Check Schedule"/> <input type="button" value="Reset"/> | |

Figure 13-6. Item Selection for Booking

3. If there are multiple items of a media type you are authorized to request, a drop down box displays on the Item Selection for Booking screen, containing a list of items. Select the desired item.
4. Enter the dates (including times) the equipment is needed. The amount of time a piece of equipment is available to you is determined by your institution.
5. Choose a pickup or delivery location after selecting either the **Pickup** or **Delivery** radio button.
6. Click the **Check Schedule** button to verify availability of the item on the selected dates.

Result: If the item is available during the selected period, the **Equipment Selection for Booking** screen displays (see [Figure 13-7](#)).

Exit

Optionally, you may add equipment to the booking. The first group consists of suggested equipment for the media you selected. The second group consists of other equipment available for the booking. Equipment from either or both groups may be selected. Re-enter your barcode and click "Finish Booking."

| Equipment Selection for Booking | |
|--|--|
| Title: | 20th century art at the Metropolitan Museum the Lila Acheson Wallace Wing /... |
| Item: | c.0 Videocassette Recording College-Media Scheduling |
| Pick up at: | Circulation Desk |
| Suggested equipment types for your booking: | <input type="checkbox"/> AV Cart |
| Other equipment available for your booking: | <input type="checkbox"/> CD Player
<input type="checkbox"/> DVD Player |
| Barcode: | <input type="text"/> |
| <input type="button" value="Finish Booking"/> <input type="button" value="Reset"/> | |

[Databases](#) [Search](#) [Headings](#) [Titles](#) [Patron](#) [Logout](#) [Preferences](#) [SavedSearches](#) [Boc](#)

Figure 13-7. Equipment Selection for Booking

7. Select equipment types to book from the equipment available.
8. Enter your barcode in the **Barcode** field.
9. Click the **Finish Booking** button.

Result: If the equipment booking portion of your booking was successful, a confirmation screen displays (see [Figure 13-8](#)).

| | |
|--|--|
| Confirmation Number: 210 | |
| Schedule | |
| Date Needed: | 10-13-04 |
| Time Needed: | 13:00 |
| Date Finished: | 10-13-04 |
| Time Finished: | 17:00 |
| Media | |
| Title: | 20th century art at the Metropolitan Museum the Lila Acheson Wallace Wing /... |
| Location: | Media Department |
| Media Type: | Videocassette Recording |
| Call Number: | T9715 |
| Pickup or Delivery Location | |
| Pickup | Circulation Desk |
| Databases Search Headings Titles Patron Logout Preferences SavedSearches Bookmarks | |

Figure 13-8. Item Booking Confirmation

Result:

Your Item Booking is now complete.

[REDACTED]

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Media Booking in WebVoyáge Configuration

14

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Contents

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Overview

There are two media booking options in WebVoyáge, which have corresponding system request forms:

- Media Equipment Request - Consists only of equipment booking
- Media Item Request - Consists of an item request and attached equipment booking.

Shared Media Booking Components

Media Equipment Booking and Media Item Booking Request configuration consists of the following shared components:

- Patron authorization to place WebVoyáge media bookings in the Voyager Media System Administration module.
- Enabling media types for WebVoyáge media bookings in the Voyager Media System Administration module.

Authorizing Patrons to Place Media Bookings

Before patrons can place media equipment booking requests using WebVoyáge, their patron group must be authorized to do so in the Voyager Media System Administration module.



Procedure 14-1. Authorizing Patrons to Place Media Bookings in WebVoyáge

Use the following to authorize patrons to place media bookings in WebVoyáge.

1. Open the **Voyager Media System Administration** module.
2. From the **Media Scheduling List Bar**, select **Policy Groups**.

Result: The Media Scheduling - Policy Groups screen displays (see [Figure 14-1](#)).

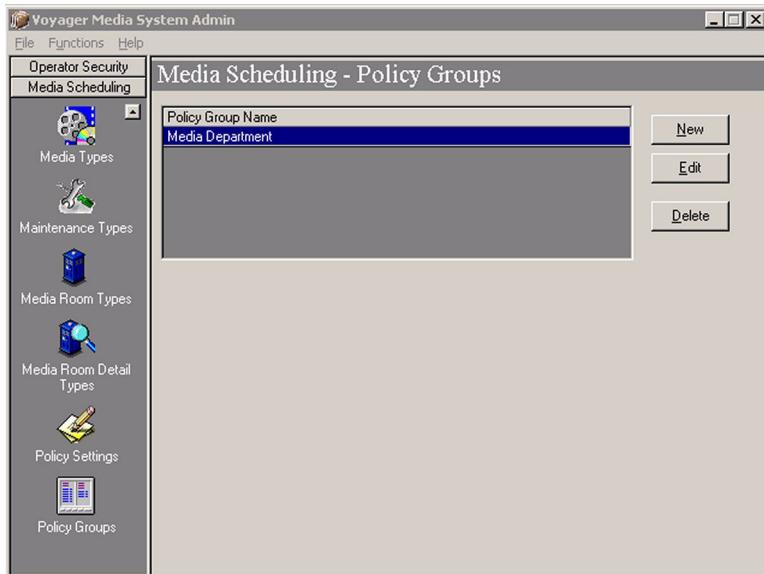


Figure 14-1. Media Scheduling - Policy Groups

3. Locate the policy group from the **Policy Group Name** box, that contains the OPAC Circ Desk (contained in **Voyager System Administration>>Circulation>>Cluster Maintenance>>(patron cluster)>>OPAC Circ Desk** field, see [Figure 14-2](#)) in the **Policy Locations** list box.

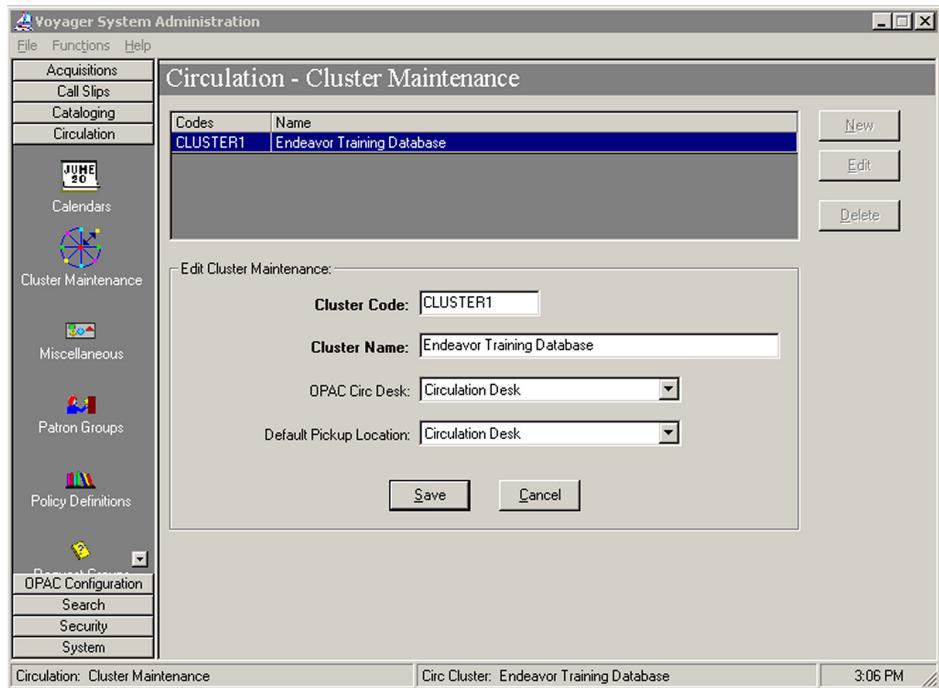


Figure 14-2. OPAC Circ Desk in Circulation - Maintenance

NOTE:

To access the Policy Locations list box in **Voyager Media System Administration**, you must select the policy group name and click the Edit button. Do this for each policy group name until you find the one containing the OPAC Circ Desk in the Policy Locations list box.

[Figure 14-3](#) shows the Media Scheduling Policy Group in Voyager Media System Administration, containing the OPAC Circ Desk displayed in [Figure 14-2](#).

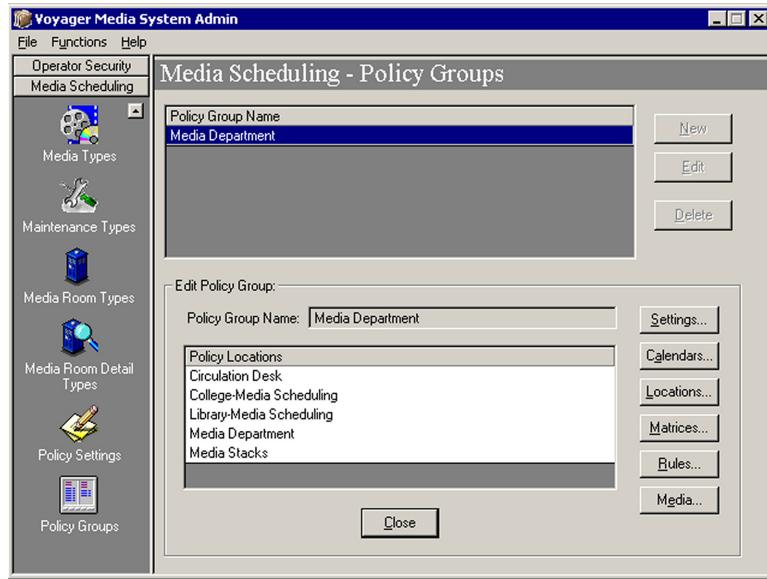


Figure 14-3. OPAC Circ Desk in Media Scheduling Policy Group

4. Click the **Rules** button in the **Edit (or Add) Policy Group** dialog box.

Result: The Policy Group Rules list box displays (see [Figure 14-4](#)).

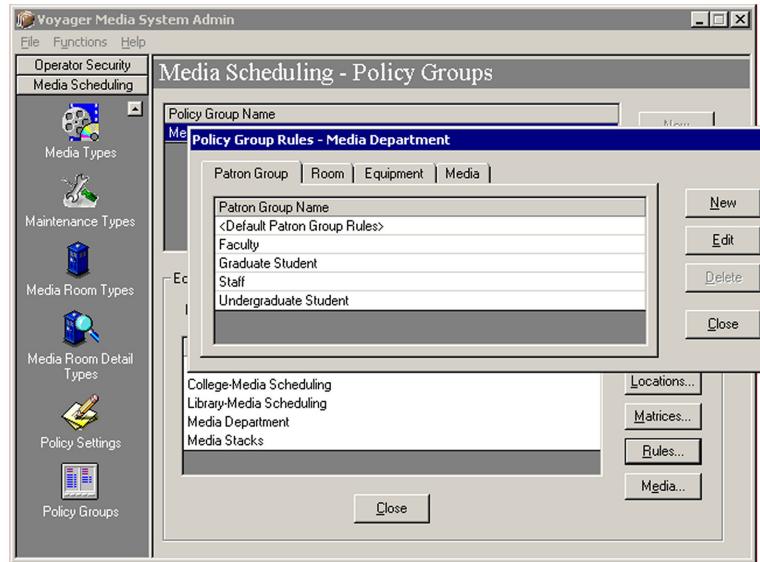


Figure 14-4. Patron Groups in Policy Group Rules

5. Select the Patron Group and click the **Edit** button or click the **New** button to add a patron group to the list.

Result: The Patron Group Rules dialog box displays below the patron group list (see [Figure 14-5](#)).

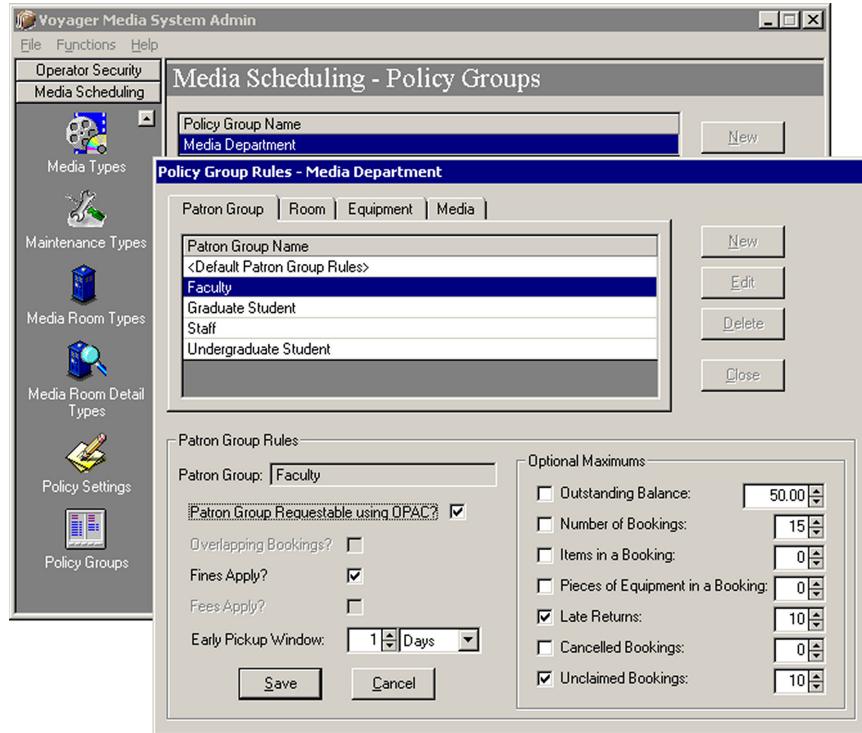


Figure 14-5. Patron Group Rules

6. Make sure the **Patron Group Requestable using OPAC?** checkbox is selected.
7. Click the **Save** button.

Result:

The patron group is now authorized to place Media Bookings in WebVoyáge. Do this for each patron group you wish to authorize to place Media Bookings in WebVoyáge.

NOTE:

For more information about media scheduling privileges, see the *Voyager Media Scheduling User's Guide*.

Enabling Media Types for WebVoyáge Media Bookings

To make media bookings requests with WebVoyáge, media types must be designated in Voyager Media System Administration as able to be booked in WebVoyáge.



Procedure 14-2. Enabling Media Types and Equipment to be Booked Using WebVoyáge

Use the following to enable media types and equipment to be booked using WebVoyáge.

1. Open the **Voyager Media System Administration** module.
2. From the **Media Scheduling** List Bar, select **Policy Groups**.

Result: The Media Scheduling - Policy Groups screen displays (see [Figure 14-6](#)).

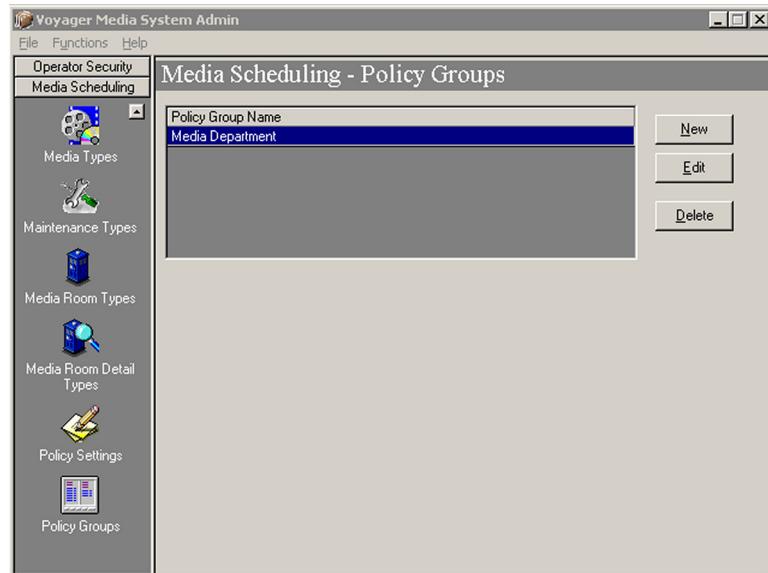


Figure 14-6. Media Scheduling - Policy Groups

-
3. Locate the policy group from the **Policy Group Name** box, that contains the OPAC Circ Desk (contained in **Voyager System Administration>>Circulation>>Cluster Maintenance>>(patron cluster)>>OPAC Circ Desk** field, see [Figure 14-7](#)) in the **Policy Locations** list box.
-

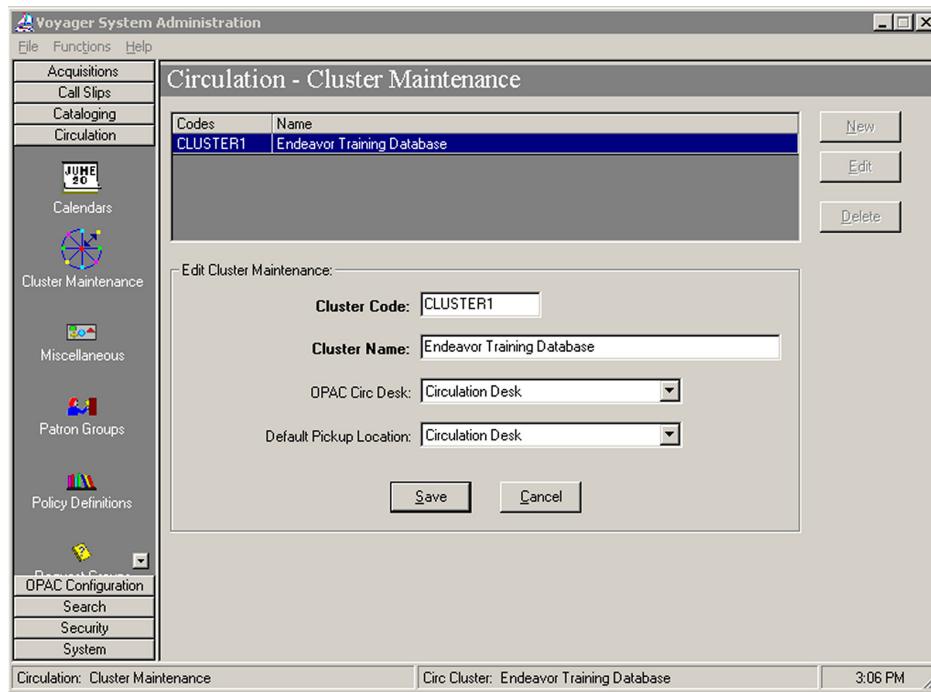


Figure 14-7. OPAC Circ Desk in Circulation - Maintenance

NOTE:

To access the Policy Locations list box in **Voyager Media System Administration**, you must select the policy group name and click the Edit button. Do this for each policy group name until you find the one containing the OPAC Circ Desk in the Policy Locations list box.

[Figure 14-8](#) shows the Media Scheduling Policy Group in Voyager Media System Administration, containing the OPAC Circ Desk displayed in [Figure 14-7](#).

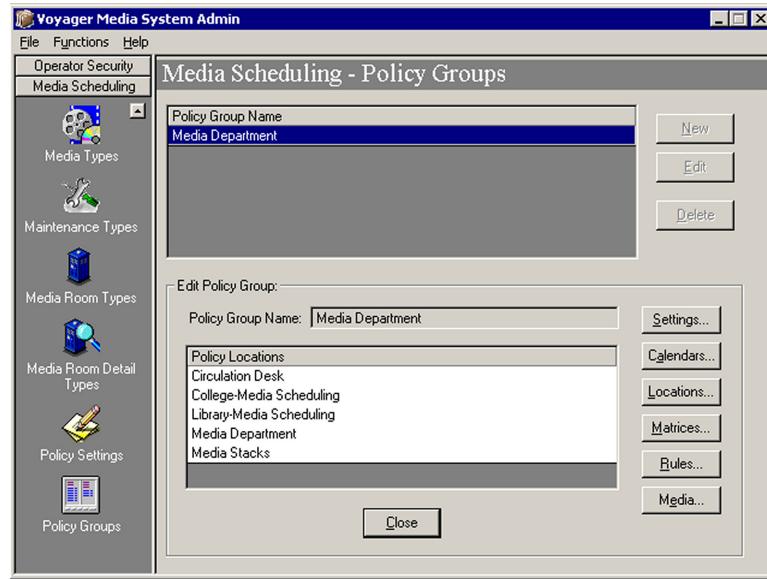


Figure 14-8. OPAC Circ Desk in Media Scheduling Policy Group

4. Click the **Rules** button in the Edit (or Add) Policy Group dialog box.

Result: The Policy Group Rules list box displays.
5. Select the **Equipment** tab.

Result: The Equipment Rules list box displays (see [Figure 14-9](#)).

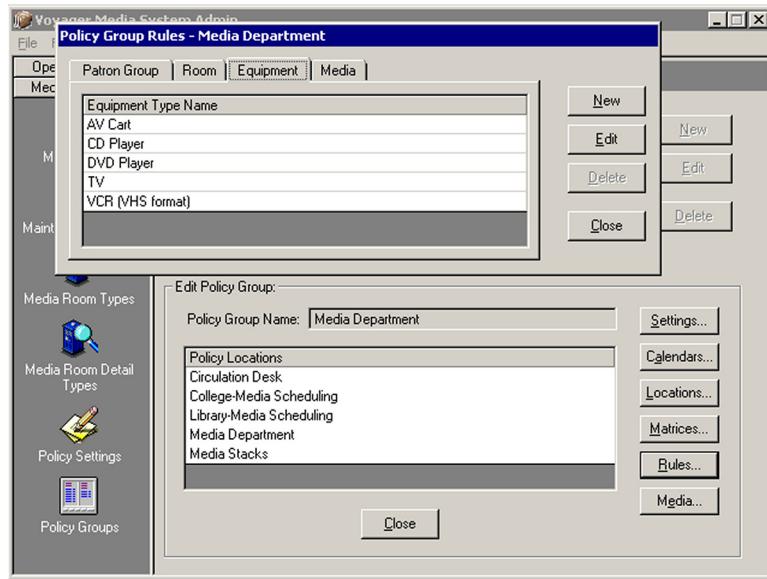


Figure 14-9. Equipment in Policy Group Rules

6. Select the equipment type and click the **Edit** button or click the **New** button to add a group to the list.

Result: The Patron Group Rules dialog box displays below the patron group list (see [Figure 14-10](#)).

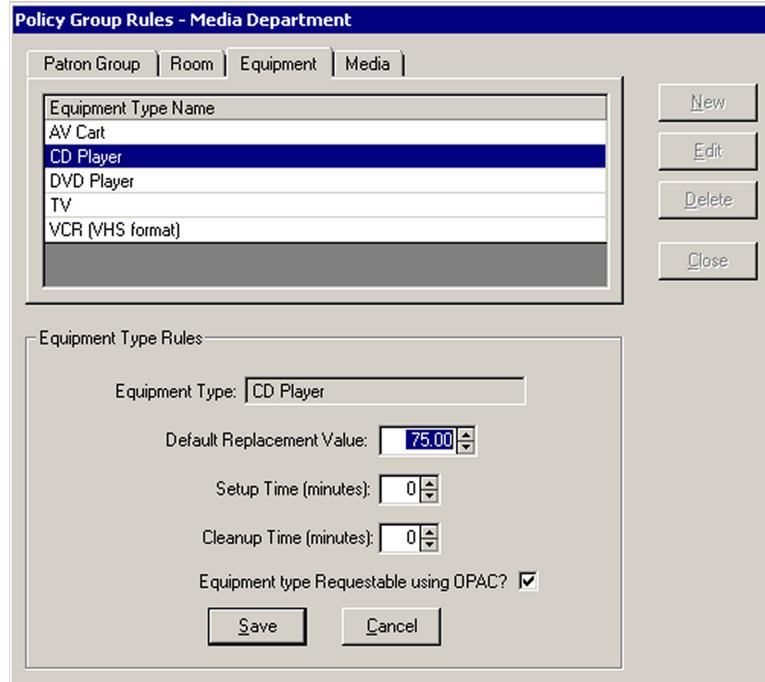


Figure 14-10. Patron Group Rules

7. Make sure the **Equipment type Requestable using OPAC?** checkbox is selected.
8. Click the **Save** button.

Result:

The equipment type is now authorized to place Media Bookings on in WebVoyáge. Do this for each equipment type you want to make available for Media Bookings in WebVoyáge.

9. Select the **Media** tab.
 10. For each type of media, select the media type, and make sure the **Media type Requestable using OPAC?** checkbox is selected.
-

Media Equipment Bookings

In addition to the required configuration in [Shared Media Booking Components on page 14-1](#), the following optional configuration is also available for Media Equipment Bookings:

- Request form labels
- Request Form Name on Request Selection Page
- Error and Informational Message Text

Request form labels

Configure the request form labels for the Media Equipment Booking request in the [Equipment Booking Form] stanza of the `mediaschedule.ini` file (`/m1/voyager/xxxdb/etc/webvoyage/local`). [Figure 14-11](#) shows an example of the Media Equipment Booking request form. [Figure 14-12](#) contains an example of the [Equipment Booking Form] stanza.

The screenshot shows a web-based booking form titled "Equipment Booking". At the top, there is a message: "Select the equipment for your booking followed by the schedule. Choose to have this booking delivered to or picked up at a room listed below. Click "Check Schedule" when you are finished." Below this, the form fields are arranged in a grid:

| Equipment Booking | |
|--|---|
| Select Equipment: | CD Player
DVD Player
AV Cart |
| Enter a beginning date and time for your booking: | |
| Date Needed: | <input type="text"/> OCT <input type="text"/> 04 <input type="text"/> 04 |
| Time Needed: | <input type="text"/> 15 <input type="text"/> 00 |
| Enter an ending date and time for your booking: | |
| Date Finished: | <input type="text"/> OCT <input type="text"/> 04 <input type="text"/> 04 |
| Time Finished: | <input type="text"/> 15 <input type="text"/> 00 |
| Pickup: | <input checked="" type="radio"/> Pickup
<input type="radio"/> Delivery |
| Pickup at: | Circulation Desk |
| Delivery to: | Circulation Desk - 123 - Viewing Room |
| Barcode: | <input type="text"/> |
| <input type="button"/> Check Schedule <input type="button"/> Reset | |

Figure 14-11. Media Equipment Booking Request Form

```
[Equipment Booking Form]
TitleBar=Equipment Booking
SelectEquipment>Select Equipment:
BeginBooking=Enter a beginning date and time for your booking:
DateNeeded=Date Needed:
TimeNeeded=Time Needed:
EndBooking=Enter an ending date and time for your booking:
DateFinished=Date Finished:
TimeFinished=Time Finished:
PickupButton=Pickup
DeliveryButton=Delivery
PickupLoc=Pick up at:
DeliverLoc=Deliver to:
Submit=Check Schedule
Reset=Reset
```

Figure 14-12. The [Equipment Booking Form] Stanza of mediaschedule.ini

Request Form Name on Request Selection Page

The name of the request in the drop down box in the request selection page in WebVoyáge is configured in the **Form Name** field in **Voyager System Administration>>OPAC Configuration>>mediaequip** request code.

[Figure 14-13](#) shows the request name in the drop-down box on the Request Selection page in WebVoyáge.

[Figure 14-14](#) shows the **Form Name** field in the *mediaequip* request code in Voyager System Administration, which determines the request name on the Request Selection page.



Figure 14-13. Request Selection Page

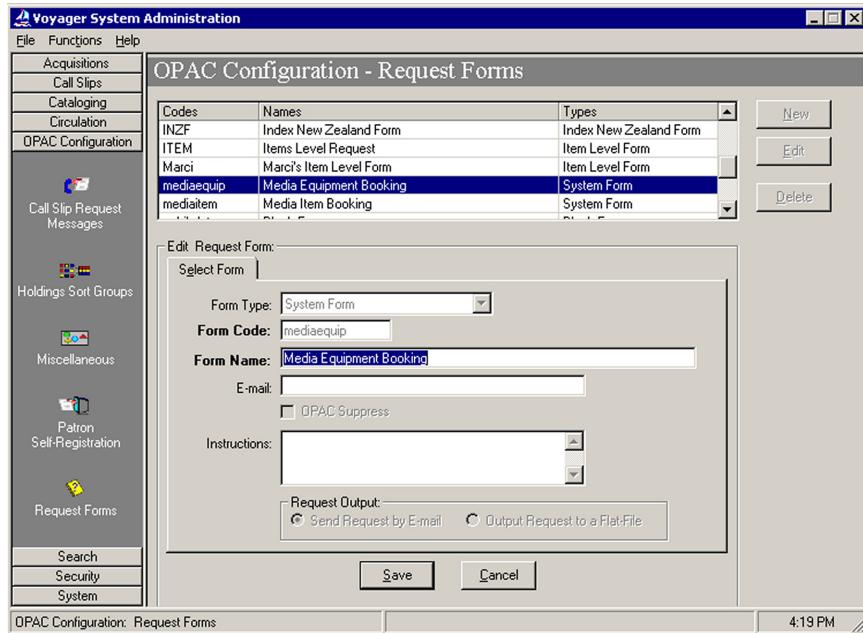


Figure 14-14. Media Equipment Booking Request Form Name Field

Error and Informational Message Text

You can edit the error and informational message text. [Table 14-1](#) lists the relevant message files and the default text.

Table 14-1. Messages and Default Text

| File | Default Text |
|----------------------|---|
| equipbookinghelp.htm | Select the equipment for your booking followed by the schedule. Choose to have this booking delivered to or picked up at a room listed below. Click "Check Schedule" when you are finished. |
| medstartclosed.htm | The library is closed on the specified start date or time. Please enter a different start time. |
| medendclosed.htm | The library is closed on the specified end date. Please enter a different end date. |
| medbadstart.htm | Your selected starting time and/or date does not fall in the media calendar. Please enter a different start time. |

Table 14-1. Messages and Default Text

| File | Default Text |
|--------------------------|--|
| medbadend.htm | Your selected ending time and/or date does not fall in the media calendar. Please enter a different end time. |
| medbadroom-times.htm | The specified room cannot be booked at the necessary time. Please select a different room from the list. |
| medroominterval-max.htm | The specified booking schedule exceeds the maximum booking interval for the room. Please select a different room from the list. |
| medbaddelloc.htm | The media item cannot be delivered to the specified location. Please select another delivery location from the list. |
| medbadpickuploc.htm | The media item cannot be picked up at the specified location. Please select another |
| meddelroom-nousage.htm | The selected location cannot be used for delivery. Please select a different delivery location. |
| medequipinterval-max.htm | The specified booking schedule exceeds the maximum booking interval for the equipment. Please select a different piece of equipment from the list. |
| medbadequip-times.htm | The specified equipment cannot be booked at the necessary time. Please select a different piece of equipment from the list. |
| medequippieces-max.htm | You have reached the maximum number of pieces of equipment allowed in a media booking. Please remove one or more pieces from the list. |
| medequip-nousage.htm | The selected equipment cannot be picked up or delivered. Please select a different piece of equipment from the list. |

Media Item Bookings

In addition to the required configuration in [Shared Media Booking Components on page 14-1](#), the following optional configuration is also available for Media Item Bookings:

- Request form labels
- Request Form Name on Request Selection Page
- Error and Informational Message Text

Request form labels

The Media Item Booking request form consists of three pages:

- Item page
- Equipment page
- Confirmation page

Item Page

The Item Page contains general booking scheduling information, as well as a drop-down to select a specific item if multiple items are available.

Configure the request form labels for the Media Item Booking Item Page in the [Item Booking Item Page] stanza of the mediaschedule.ini file (/m1/voyager/xxxdb/etc/webvoyage/local). [Figure 14-15](#) shows an example of the Item page of the Media Item Booking request form. [Figure 14-16](#) contains an example of the [Item Booking Item Page] stanza.

| Item Selection for Booking | |
|--|--|
| Title: | 20th century art at the Metropolitan Museum the Lila Acheson Wallace Wing /... |
| Call Number: | T9715 |
| Select an Item: | c.0 Videocassette Recording College-Media Scheduling |
| This item is not available during the following times: | |
| This item may be booked for up to 28 Day(s). | |
| Enter a beginning date and time for your booking: | |
| Date Needed: | <input type="button" value="Date"/> OCT 13 04 |
| Time Needed: | 13 00 |
| Enter an ending date and time for your booking: | |
| Date Finished: | <input type="button" value="Date"/> OCT 13 04 |
| Time Finished: | 13 00 |
| Pickup | <input checked="" type="radio"/> Pick up at:
Circulation Desk |
| Delivery | <input type="radio"/> Delivery to:
Circulation Desk - 123 - Viewing Room |
| <input type="button" value="Check Schedule"/> <input type="button" value="Reset"/> | |

Figure 14-15. Media Item Booking Item Page

```
[Item Booking Item Page]
TitleBar=Item Selection for Booking
Title=Title:
CallNumber=Call Number:
SelectItem>Select an Item:
ScheduleDisplayDays=7
ItemNotAvailable=This item is not available during the
following times:
ItemLoanPeriod=This item may be booked for up to \n \i(s).
BeginBooking=Enter a beginning date and time for your booking:
DateNeeded=Date Needed:
TimeNeeded=Time Needed:
EndBooking=Enter an ending date and time for your booking:
DateFinished=Date Finished:
TimeFinished=Time Finished:
PickupButton=Pickup
DeliveryButton=Delivery
PickupLoc=Pick up at:
DeliverLoc=Deliver to:
EquipInRoom=Equipment In Room:
Submit=Check Schedule
Reset=Reset
```

Figure 14-16. The [Item Booking Item Page] Stanza of mediaschedule.ini

Equipment Page

The Equipment Page contains suggested equipment information, as well as additional equipment which you can book.

Configure the request form labels for the Media Item Booking Equipment Page in the **[Item Booking Equipment Page]** stanza of the mediaschedule.ini file (/m1/voyager/xxxdb/etc/webvoyage/local). [Figure 14-17](#) shows an example of the Item page of the Media Item Booking request form. [Figure 14-18](#) contains an example of the [Item Booking Equipment Page] stanza.

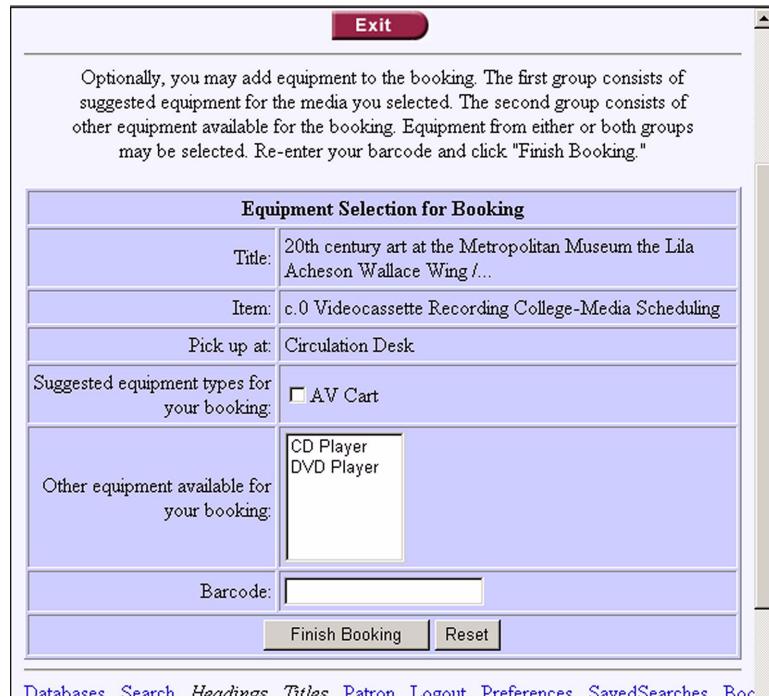


Figure 14-17. Media Item Booking Equipment Page

```
[Item Booking Equipment Page]
TitleBar=Equipment Selection for Booking
Title=Title:
Item=Item:
PickupAt=Pick up at:
DeliverTo=Deliver to:
InRoomEquip=Equipment in room:
SuggestedEquip=Suggested equipment types for your booking:
OtherEquip=Other equipment available for your booking:
Submit=Finish Booking
Reset=Reset
```

Figure 14-18. The [Item Booking Equipment Page] Stanza of mediaschedule.ini

Confirmation Page

Configure the request form labels for the Confirmation Page in the [Confirmation Page] stanza of the mediaschedule.ini file (/m1/voyager/xxxdb/etc/webvoyage/local). [Figure 14-19](#) shows an example of the Item page of the Media Item Booking request form. [Figure 14-20](#) contains an example of the [Confirmation Page] stanza.

The screenshot displays a confirmation page for a media item booking. At the top, it says "Confirmation Number: 210". Below that is a section titled "Schedule" containing four rows of information:

| | |
|----------------|----------|
| Date Needed: | 10-13-04 |
| Time Needed: | 13:00 |
| Date Finished: | 10-13-04 |
| Time Finished: | 17:00 |

Below the schedule is a section titled "Media" containing five rows of information:

| | |
|--------------|--|
| Title: | 20th century art at the Metropolitan Museum the Lila Acheson Wallace Wing /... |
| Location: | Media Department |
| Media Type: | Videocassette Recording |
| Call Number: | T9715 |

At the bottom, there is a section titled "Pickup or Delivery Location" with two rows:

| | |
|---------|------------------|
| Pickup: | Circulation Desk |
|---------|------------------|

At the very bottom of the page, there is a horizontal menu bar with several options: Databases, Search, Holdings, Titles, Patron, Trans, Preferences, Saved Searches, and Help.

Figure 14-19. Media Item Booking Confirmation Page

```
[Confirmation Page]
###Order of sections determines order of display!!
ConfirmSectionTitle= Confirmation Number: \c

ScheduleSectionTitle=Schedule
```

Figure 14-20. The [Confirmation Page] Stanza of mediaschedule.ini

```

DateNeeded=Date Needed:
TimeNeeded=Time Needed:
DateFinished=Date Finished:
TimeFinished=Time Finished:

MediaSectionTitle=Media
Title=Title:
Location=Location:
MediaType=Media Type:
CallNumber=Call Number:

DeliveryMethodSectionTitle=Pickup or Delivery Location
DeliveryMethodSectionPickup=Pickup
DeliveryMethodSectionDelivery=Delivery

EquipmentSectionTitle=Equipment
EquipmentandEquipmentGroupTypes=Equipment and Equipment Group
Types:

```

Figure 14-20. The [Confirmation Page] Stanza of mediaschedule.ini (Continued)

Substitution Tokens

[Table 14-2](#) contains valid substitution tokens for the Media Item Booking configuration files.

Table 14-2. Media Item Booking Substitution Tokens

| Token | Description |
|-------|--|
| \n | The maximum booking time number from policy settings. |
| \i | The booking interval from policy settings (minutes, hours, days, term, unlimited).

If the interval is unlimited, there will be no associated maximum booking time number. In this case, neither the maximum booking time, nor the booking interval display. |
| \c | Booking confirmation number. |

Request Form Name on Request Selection Page

The name of the request in the drop down box in the request selection page in WebVoyage is configured in the **Form Name** field in **Voyager System Administration>>OPAC Configuration>>Request Forms>>mediaitem** request code.

Error and Informational Message Text

You can edit the error and informational message text. [Table 14-1](#) lists the relevant message files and the default text.

Table 14-3. Messages and Default Text

| File | Default Text or Notes |
|---------------------------|---|
| itembookingitem-help.htm | This is the first of two steps in creating a booking. Please select an item from the drop-down menu, enter booking dates and times, and then select a pickup or delivery room. Click "Check Schedule" when you are finished. (Displays on the Item page). |
| itembook-ingequiphelp.htm | Optionally, you may add equipment to the booking. The first group consists of suggested equipment for the media you selected. The second group consists of other equipment available for the booking. Equipment from either or both groups may be selected. Re-enter your barcode and click "Finish Booking." (Displays on the Equipment page). |
| equipbooking-noequip.htm | NOTE:
Display instead of the request forms if there are no equipment or items available for the request |
| itembookingnoitems.htm | |
| itembooking-noequip.htm | NOTE:
Displays at the head of the Media Item Equipment form in place of itembookingequiphelp.htm if there is no equipment available for the item requested |
| medequip-nousage.htm | The selected equipment cannot be picked up or delivered. Please select a different piece of equipment from the list. |
| medroomnousage.htm | The selected location cannot be used for delivery. Please select a different delivery location. |

Displaying Media Booking Information on the Patron Information Page

WebVoyáge must be configured to display media bookings on the Patron Information Page. Do this in the Media Bookings Section of the opac.ini file (/m1/voyager/xxxdb/etc/webvoyage/local).

[REDACTED]

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Overview

NOTE:

This feature is only available if your institution has purchased the Geospatial Searching tools.

WebVoyáge provides you with a variety of options when searching for map-related items in your database. You can conduct a search for geospatial items by specifying a region which must be covered, in part or in whole, by the item. This region can be a rectangle, a polygon, a point or circle, a corridor or route, or a range.

To begin map searching, from the main search page click the **Maps** button. This will display the map-related search functions.

NOTE:

If your institution has customized your version of WebVoyáge, the names of buttons on screen may be different from those listed in this section. The names used in this section assume that your installation uses the default captions and settings.

Rectangle Searching

The Rectangular Search function allows you to perform a search on a rectangular area. To define the area, you must provide the lower-left corner and the upper-right corner of the rectangle.



Procedure 15-1. Performing a Rectangle Search

To perform a search on a rectangular area:

1. Click the **Rectangle Search** button. The Rectangle Search tools appear on screen.

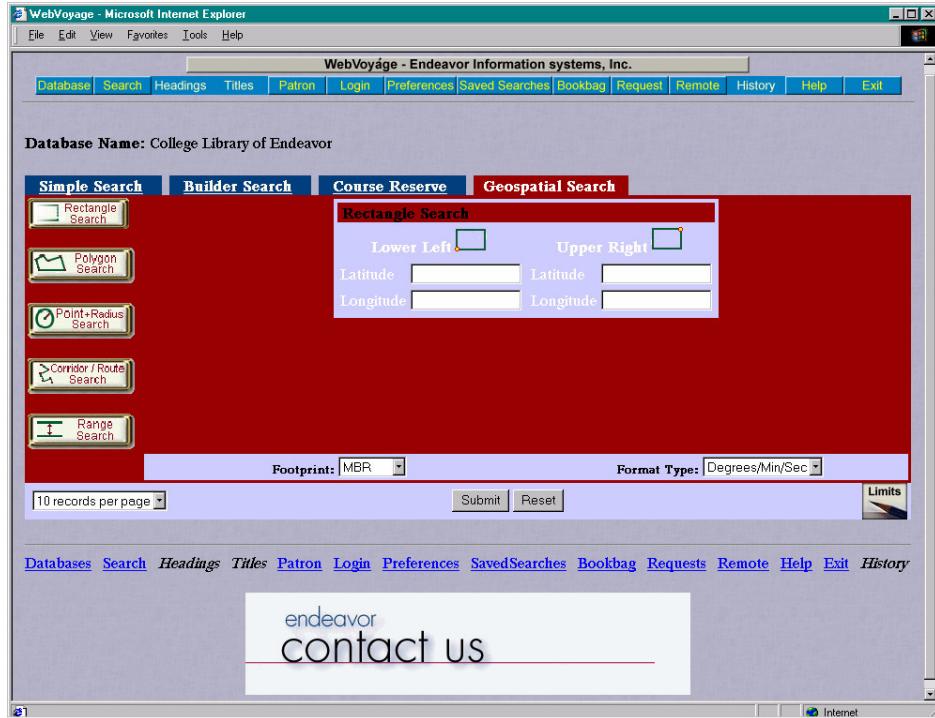


Figure 15-1. Map Searching - Rectangle Search Page

2. Enter whether you want your search to include only the area covered by the map or the Minimum Bounding Rectangle (the smallest rectangular area that would enclose the entire map) by selecting **Polygon** or **MBR** from the **Footprint** drop-down list.

3. Enter which units you want to use in order to describe the coordinates by clicking the **Format Type** drop-down and selecting a type from the list. You can select **Degrees/Minutes/Seconds**; **Degrees/Decimal Minutes**; **Decimal Degrees**; **UTM Meters**; **MGRS**; or **UPS**.
 4. Enter the coordinates for the lower-left point of the area into the field(s) in the Lower Left column. If you selected units of Degrees/Minutes/Seconds, Degrees/Decimal Minutes, or Decimal Degrees, you must enter a Latitude value and a Longitude value. If you selected UTM Meters, MGRS, or UPS, you must enter the point into the field in that format.
 5. Enter the coordinates for the upper-right point of the area into the field(s) in the Upper-Right column. If you selected units of Degrees/Minutes/Seconds, Degrees/Decimal Minutes, or Decimal Degrees, you must enter a Latitude value and a Longitude value. If you selected UTM Meters, MGRS, or UPS, you must enter the point into the field in that format.
 6. Select how many records you want to appear on each page of search results by clicking the **Records Requested** drop-down and selecting a number from the list.
 7. Click the **Search** button to perform the search; or click the **Clear** button to reset the fields on screen.
-

Polygon Searching

The Polygon Searching function allows you to perform a search on an area that is not rectangular. You can enter up to ten points into the list. The area that will be searched is created by connecting each coordinate with the next in the order in which they were entered. (The first and last coordinates are also connected together.)

For example, if you entered Latitude and Longitude information into the fields Coordinate 1 through Coordinate 5, Coordinate 1 would be connected with Coordinates 2 and 5; Coordinate 2 would be connected to Coordinates 1 and 3; and so on. A visual representation of the polygonal area would appear as the following:

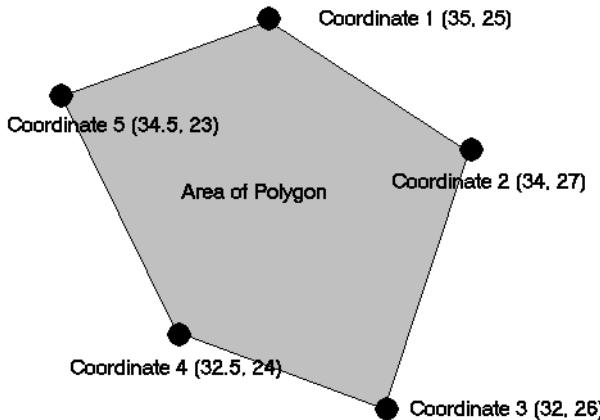


Figure 15-2. Area Defined in a Polygonal Search



Procedure 15-2. Searching on a Polygon area

To perform a search on a polygonal area:

1. Click the **Polygon Search** button. The Polygon Search tools appear on screen.
2. Enter whether you want your search to include only the area covered by the map or the Minimum Bounding Rectangle (the smallest rectangular area that would enclose the entire map) by selecting **Polygon** or **MBR** from the **Footprint** drop-down list.
3. Enter which units you want to use in order to describe the coordinates by clicking the **Format Type** drop-down and selecting a type from the list. You can select **Degrees/Minutes/Seconds**; **Degrees/Decimal Minutes**; **Decimal Degrees**; **UTM Meters**; **MGRS**; or **UPS**.
4. Enter the coordinates for each point of the area to be searched (in the order that they are to be connected to form the polygon; the last point in the list will be connected to the first point in the list) into the Coordinate fields. If you selected units of Degrees/Minutes/Seconds, Degrees/Decimal Minutes, or Decimal Degrees, you must enter a Latitude value and a Longitude value for each coordinate. If you selected UTM Meters, MGRS, or UPS, you must enter the coordinates into the field in that format.

5. Select how many records you want to appear on each page of search results by clicking the **Records Requested** drop-down and selecting a number from the list.
6. Click the **Search** button to perform the search; or click the **Clear** button to reset the fields on screen.

Point and Radius Searching

The Point and Radius Searching function allows you to perform a search for a single point, or for a circular area centered around a point.



Procedure 15-3. Searching on a Circular Area

To perform a search on a circular area:

1. Click the **Point and Radius Search** button. The Point and Radius Search tools appear on screen.

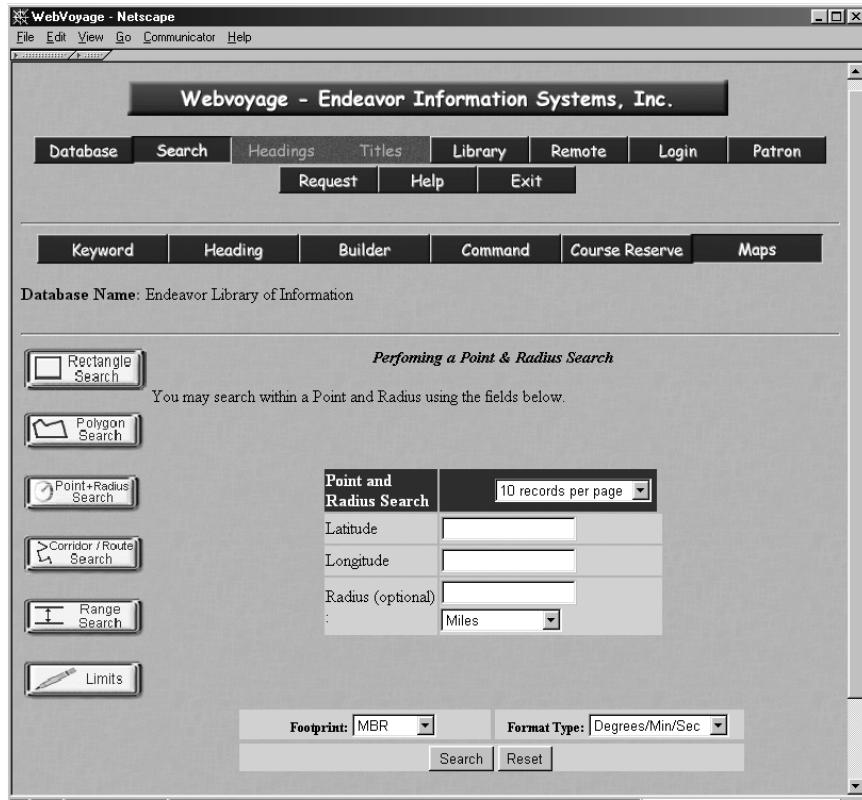


Figure 15-3. Map Searching - Point and Radius Search Page

2. Enter whether you want your search to include only the area covered by the map or the Minimum Bounding Rectangle (the smallest rectangular area that would enclose the entire map) by selecting **Polygon** or **MBR** from the **Footprint** drop-down list.
3. Enter which units you want to use in order to describe the coordinates by clicking the **Format Type** drop-down and selecting a type from the list. You can select **Degrees/Minutes/Seconds**; **Degrees/Decimal Minutes**; **Decimal Degrees**; **UTM Meters**; **MGRS**; or **UPS**.
4. Enter the coordinates for the center point of the circle into the field(s) in the Point and Radius block. If you selected units of Degrees/Minutes/Seconds, Degrees/Decimal Minutes, or Decimal Degrees, you must enter a Latitude value and a Longitude value. If you selected UTM Meters, MGRS, or UPS, you must enter the point into the field in that format.

5. Enter the dimension of the radius of the circle into the Radius field, and select a unit of measurement for the radius from the Radius drop-down menu. Entering a Radius measurement is optional.
6. Select how many records you want to appear on each page of search results by clicking the **Records Requested** drop-down and selecting a number from the list.
7. Click the **Search** button to perform the search; or click the **Clear** button to reset the fields on screen.

Corridor/Route Searching

The Corridor/Route Searching function allows you to perform a search on an area defined as a path along a series of points. You can enter up to ten points into the list. The area that will be searched is created by connecting each coordinate with the next in the order in which they were entered, and then measuring tangentially away from each 'leg' of the path. (Unlike the Polygon Search, however, the first and last coordinates are not connected together, and no interior range is searched.)

For example, if you entered Latitude and Longitude information into the fields Coordinate 1 through Coordinate 6, Coordinate 1 would be connected with Coordinate 2; Coordinate 2 would be connected to Coordinates 1 and 3; and so on. A visual representation of the corridor would appear as the following:

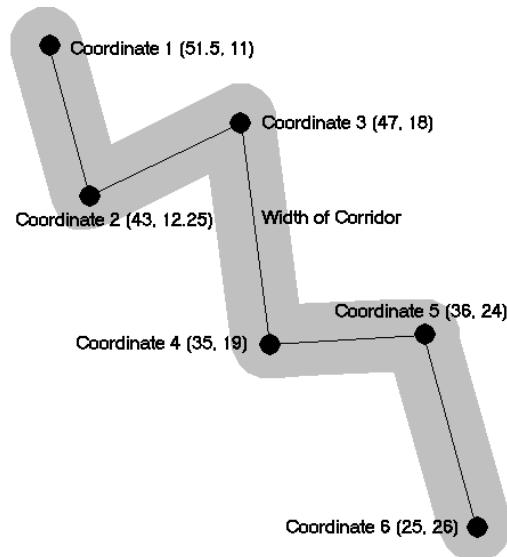


Figure 15-4. Area Defined in a Corridor Search

To perform a search on a corridor or route:

1. Click the **Corridor/Route Search** button. The Corridor/Route Search tools appear on screen.

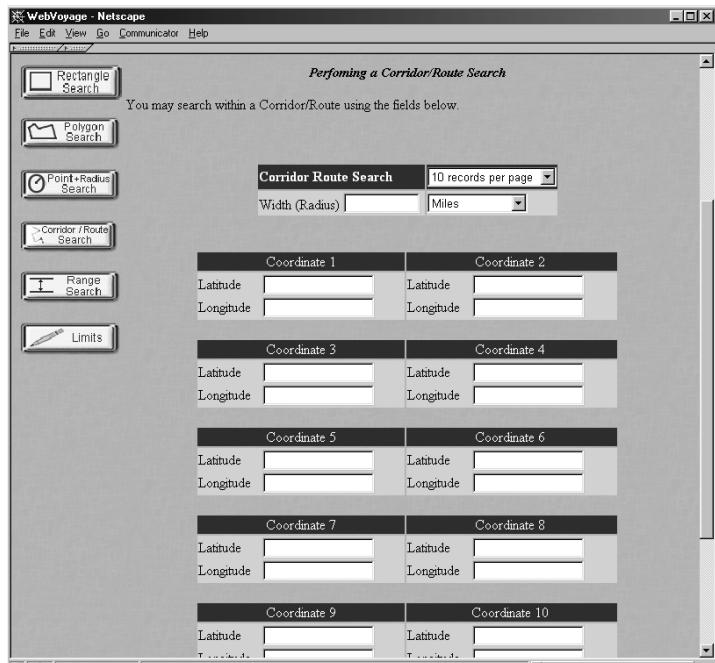


Figure 15-5. Map Searching - Corridor/Route Search Page

2. Enter whether you want your search to include only the area covered by the map or the Minimum Bounding Rectangle (the smallest rectangular area that would enclose the entire map) by selecting **Polygon** or **MBR** from the **Footprint** drop-down list.
3. Enter which units you want to use in order to describe the coordinates by clicking the **Format Type** drop-down and selecting a type from the list. You can select **Degrees/Minutes/Seconds**; **Degrees/Decimal Minutes**; **Decimal Degrees**; **UTM Meters**; **MGRS**; or **UPS**.
4. Enter the coordinates for each point of the route to be searched (in the order in which they are to be connected to form the route; unlike the Polygon Search, however, the last point in the list will not be connected to the first point in the list) into the Coordinate fields. If you selected units of Degrees/Minutes/Seconds, Degrees/Decimal Minutes, or Decimal Degrees, you must enter a Latitude value and a Longitude value for each coordinate. If you selected UTM Meters, MGRS, or UPS, you must enter the coordinates into the field in that format.
5. Select how many records you want to appear on each page of search results by clicking the **Records Requested** drop-down and selecting a number from the list.

-
6. Click the **Search** button to perform the search; or click the **Clear** button to reset the fields on screen.
-

Range Searching

The Range Search function allows you to perform a search on a partially bounded area. To define the area, you may provide any combination of upper, lower, left and right coordinates.

To perform a search over a range:

1. Click the **Range Search** button. The Range Search tools appear on screen.
 2. Enter whether you want your search to include only the area covered by the map or the Minimum Bounding Rectangle (the smallest rectangular area that would enclose the entire map) by selecting **Polygon** or **MBR** from the **Footprint** drop-down list.
 3. Enter which units you want to use in order to describe the coordinates by clicking the **Format Type** drop-down and selecting a type from the list. You can select **Degrees/Minutes/Seconds**; **Degrees/Decimal Minutes**; **Decimal Degrees**; **UTM Meters**; **MGRS**; or **UPS**.
 4. Enter the coordinate for each limit of the range into the field(s) in the Lower Left column. If you selected units of Degrees/Minutes/Seconds, Degrees/Decimal Minutes, or Decimal Degrees, you must enter a Latitude value and a Longitude value. If you selected UTM Meters, MGRS, or UPS, you must enter the point into the field in that format.
 5. Select how many records you want to appear on each page of search results by clicking the **Records Requested** drop-down and selecting a number from the list.
 6. Click the **Search** button to perform the search; or click the **Clear** button to reset the fields on screen.
-

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Overview of the Map Search Page

You can perform Map (Geospatial) searches from the Geospatial Search page. [Figure 16-1](#) shows a sample Geospatial search page.

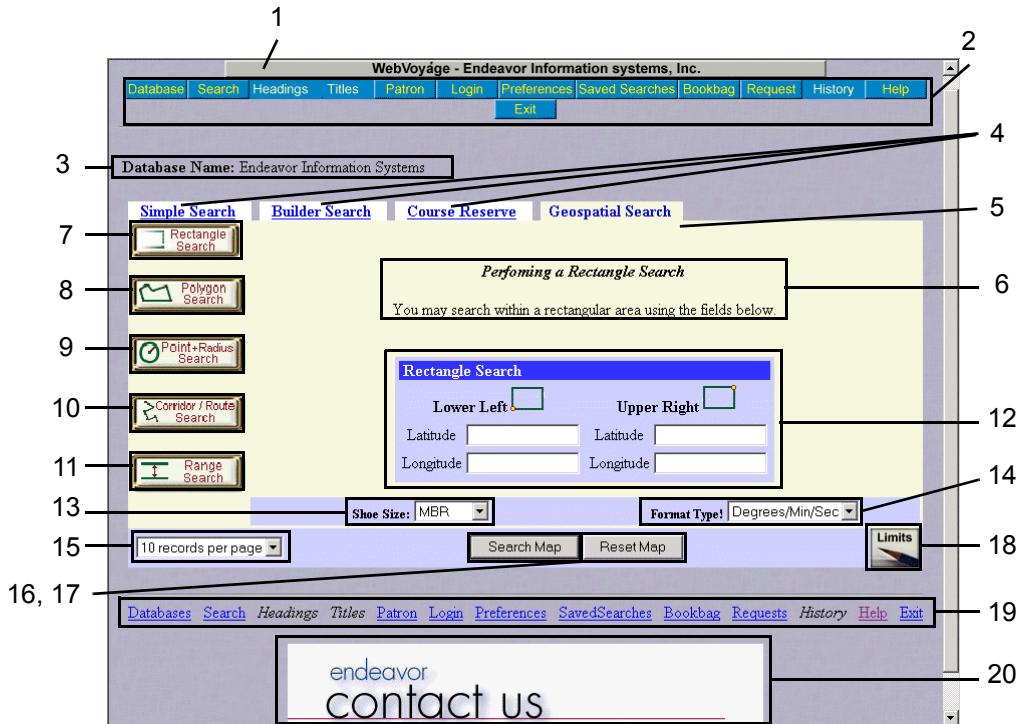


Figure 16-1. Geospatial (Map) Search Page

In addition to the general Page Appearance components of the Geospatial Search page (see [Table 4-3](#)), you can configure the components detailed in [Table 16-1](#).

[Table 16-1](#) also details the callouts in [Figure 16-1](#).

Table 16-1. Geospatial Search Page Configuration Reference (Page 1 of 5)

| # | Description | Configured in |
|----|----------------------------|--|
| 1 | Web-Voyage Banner (header) | /m1/voyager/xxxdb/etc/webvoyage/header.htm |
| 2 | Top toolbar | [Toolbar_Top] stanza of opac.ini |
| 3 | Database Name | Voyager System Administration>System>Default Address>Library Name field |
| 4a | Inactive tab color | InActiveTabColor= variable of the corresponding stanza in the opac.ini file. |

Table 16-1. Geospatial Search Page Configuration Reference (Page 2 of 5)

| # | Description | Configured in |
|----|---------------------------------------|--|
| 4b | Tab text | Tab_Text= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 4c | Inactive font color | InActiveFontColor= variable of the corresponding stanza in the opac.ini file. |
| 5a | Active tab color | ActiveTabColor= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 5b | Tab text | Tab_Text=variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 5c | Active font color | ActiveFontColor= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 6 | Search page instructions | /m1/voyager/xxxdb/etc/webvoyage/webvoyage <i>DisplayDirectory</i> /ht_geosearch_x.htm

X stands for a number between 1 and 5, corresponding to the geospatial search type: <ul style="list-style-type: none">• ht_geosearch_1.htm= Rectangle• ht_geosearch_2.htm= Polygon• ht_geosearch_3.htm= Point and Radius• ht_geosearch_4.htm= Corridor/Route• ht_geosearch_5.htm= Range |
| 7a | Rectangle button not pressed (up) | /m1/voyager/xxxdb/webvoyage/html/images/bt_rectangle.gif

Appearance of button when you are on any geospatial search page other than the Rectangle search. |
| 7b | Rectangle button after pressed (down) | /m1/voyager/xxxdb/webvoyage/html/images/d-bt_rectangle.gif

Appearance of button when you are on the Rectangle search page. |
| 8a | Polygon button not pressed (up) | /m1/voyager/xxxdb/webvoyage/html/images/bt_polygon.gif

Appearance of button when you are on any geospatial search page other than the Polygon search. |
| 8b | Polygon button after pressed (down) | /m1/voyager/xxxdb/webvoyage/html/images/d-bt_polygon.gif

Appearance of button when you are on the Polygon search page. |

Table 16-1. Geospatial Search Page Configuration Reference (Page 3 of 5)

| # | Description | Configured in |
|-----|--|--|
| 9a | Point and Radius button not pressed (up) | /m1/voyager/xxxdb/webvoyage/html/images/bt_point.gif
Appearance of button when you are on any geospatial search page other than the Point and Radius search. |
| 9b | Point and Radius button after pressed (down) | /m1/voyager/xxxdb/webvoyage/html/images/d-bt_point.gif
Appearance of button when you are on the Point and Radius search page. |
| 10a | Corridor/Route button not pressed (up) | /m1/voyager/xxxdb/webvoyage/html/images/bt_route.gif
Appearance of button when you are on any geospatial search page other than the Corridor/Route search. |
| 10b | Corridor/Route button after pressed (down) | /m1/voyager/xxxdb/webvoyage/html/images/d-bt_route.gif
Appearance of button when you are on the Corridor/Route search page. |
| 11a | Range button not pressed (up) | /m1/voyager/xxxdb/webvoyage/html/images/bt_range.gif
Appearance of button when you are on any geospatial search page other than the Range search. |
| 11b | Range button after pressed (down) | /m1/voyager/xxxdb/webvoyage/html/images/d-bt_range.gif
Appearance of button when you are on the Range search page. |
| 12 | Map Search dialog box | Depends on which Geospatial search page is active. See individual sections on Geospatial dialog box configuration. <ul style="list-style-type: none"> • Rectangle Search Dialog Box on page 16-6 • Polygon Search Dialog Box on page 16-7 • Point And Radius Search Dialog Box on page 16-8 • Corridor/Route Search Dialog Box on page 16-9 • Range Search Dialog Box on page 16-10 |
| 13a | Footprint drop down box label | Footprint= variable of the [Map_Footprint] stanza in the opac.ini file. |

Table 16-1. Geospatial Search Page Configuration Reference (Page 4 of 5)

| # | Description | Configured in |
|-----|---|---|
| 13b | Footprint drop-down box label text color | FontColor= variable of the [Map_Footprint] stanza in the opac.ini file. |
| 14a | Format type drop-down box label | FormatType= variable of the [Map_FormatType] stanza in the opac.ini file. |
| 14b | Format drop-down box label text color | FontColor= variable of the [Map_FormatType] stanza in the opac.ini file. |
| 14c | UTM Meters selection text in format drop-down | UTM_Meters= variable of the [Map_Search_Page] stanza in the opac.ini file.

UTM stands for <i>Universal Transverse Mercator</i> |
| 15a | Records Per Page drop-down items | The 1, 2, 3, and 4 variables in the [Records_Requested] stanza in opac.ini file. |
| 15b | Records Per Page label | Description= variable of the [Records_Requested] stanza in the opac.ini file. |
| 16 | Submit search button text | SubmitButton= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 17a | Reset search button text | ResetButton= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 17b | Clear search button text | ClearButton= variable of the [Map_Search_Page] stanza in the opac.ini file.

NOTE:
This button is not pictured in Figure 16-1 on page 16-2 . Button only appears after a search with no results is performed. |

Table 16-1. Geospatial Search Page Configuration Reference (Page 5 of 5)

| # | Description | Configured in |
|-----|---------------------|--|
| 18a | Set limits button | /m1/voyager/xxxdb/webvoyage/html/images/limit.gif
Only appears if the Limits= variable in the Search_Dialog stanza of the opac.ini file is set to True. |
| 18b | Clear limits button | /m1/voyager/xxxdb/webvoyage/html/images/clear.gif
NOTE:
This button is not pictured in Figure 16-1 on page 16-2 . Button only appears if limits are set on the Search Limits page (and the Limits= variable in the Search_Dialog stanza of the opac.ini file is set to True). |
| 19 | Bottom toolbar | [Toolbar_Bottom] stanza of opac.ini |
| 20 | Footer | /m1/voyager/xxxdb/webvoyage/html/images/footer.htm |

The following sections detail the individual Geospatial search type dialog boxes (referred to in number [12](#) of [Table 16-1 on page 16-2](#)).

Rectangle Search Dialog Box

[Figure 16-6](#) shows the Rectangle Search dialog box.

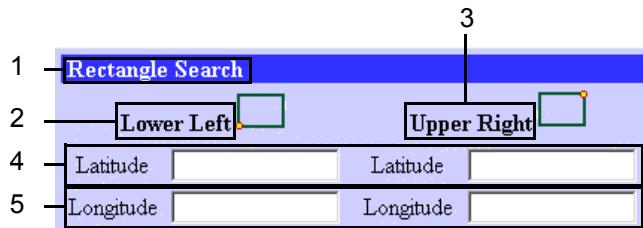


Figure 16-2. Rectangle Search dialog box

[Table 16-2](#) details the Rectangle Search dialog box components.

Table 16-2. Rectangle Search Dialog Configuration Reference

| # | Description | Configured in |
|---|----------------------------------|--|
| 1 | Dialog box title | Rectangle_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 2 | Lower left coordinate set label | Lower_Left= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 3 | Upper right coordinate set label | Upper_Right= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 4 | Latitude field label | Latitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 5 | Longitude field label | Longitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |

Polygon Search Dialog Box

[Figure 16-3](#) shows the Polygon Search dialog box.

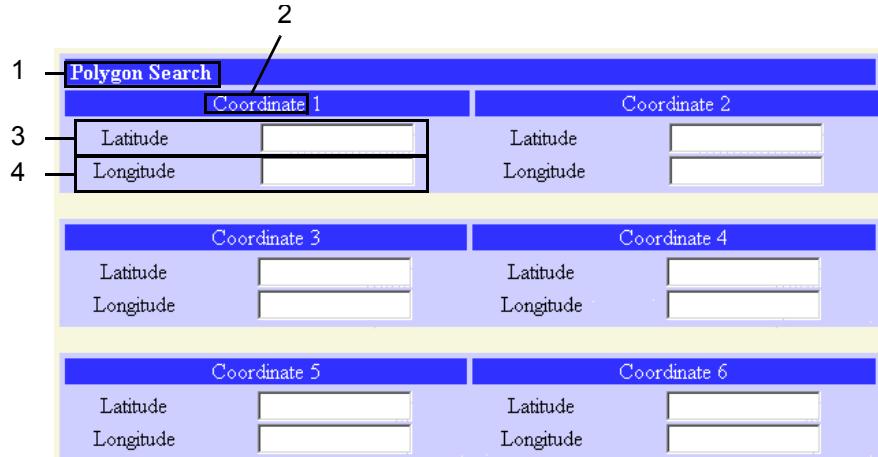


Figure 16-3. Polygon Search dialog box

[Table 16-3](#) details the Polygon Search dialog box components.

Table 16-3. Polygon Search Dialog Configuration Reference

| # | Description | Configured in |
|---|-------------------------------------|--|
| 1 | Dialog box title | Polygon_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 2 | Coordinate set heading label | Coordinate= variable of the [Map_Search_Page] stanza in the opac.ini file.

NOTE:
This variable controls the headings of all sets of coordinates on the Polygon Search page. |
| 3 | Latitude field label | Latitude= variable of the [Map_Search_Page] stanza in the opac.ini file.

NOTE:
This variable controls the labels of all latitude fields on the Polygon Search page. |
| 4 | Longitude field label | Longitude= variable of the [Map_Search_Page] stanza in the opac.ini file.

NOTE:
This variable controls the labels of all longitude fields on the Polygon Search page. |
| | Number of sets of coordinate fields | Number_Of_Coordinates= variable of the [Map_Search_Page] stanza in the opac.ini file. |

Point And Radius Search Dialog Box

[Figure 16-4](#) shows the Point and Radius Search dialog box.

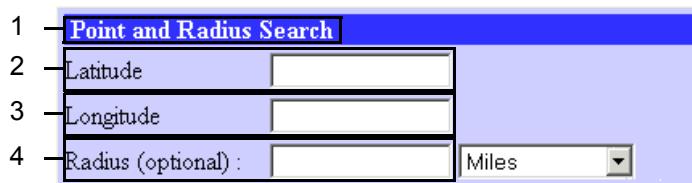


Figure 16-4. Point and Radius Search dialog box

[Table 16-4](#) details the Point and Radius Search dialog box components.

Table 16-4. Point and Radius Search Dialog Configuration Reference

| # | Description | Configured in |
|---|-----------------------|---|
| 1 | Dialog box title | Point_And_Radius_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 2 | Latitude field label | Latitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 3 | Longitude field label | Longitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 4 | Radius field label | Radius_Text= variable of the [Map_Search_Page] stanza in the opac.ini file. |

Corridor/Route Search Dialog Box

[Figure 16-5](#) shows the Corridor/Route Search dialog box.

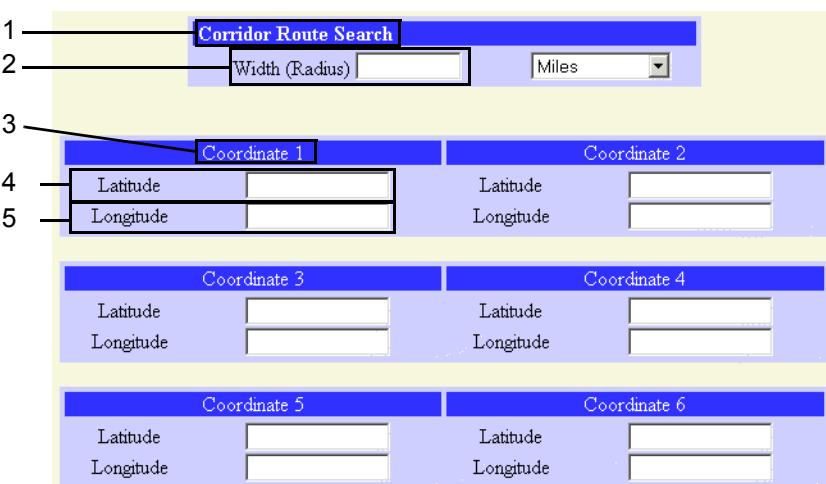


Figure 16-5. Corridor/Route Search dialog box

[Table 16-5](#) details the Corridor/Route Search dialog box components.

Table 16-5. Corridor/Route Search Dialog Configuration Reference

| # | Description | Configured in |
|---|-------------------------------------|--|
| 1 | Dialog box title | Corridor_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 2 | Corridor width field label | Width= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 3 | Coordinate set heading label | Coordinate= variable of the [Map_Search_Page] stanza in the opac.ini file.

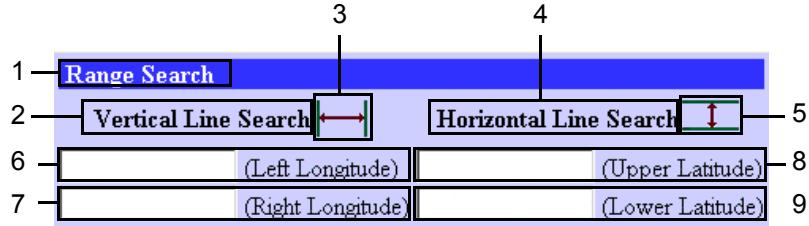
NOTE:
This variable controls the headings of all sets of coordinates on the Polygon Search page. |
| 4 | Latitude field label | Latitude= variable of the [Map_Search_Page] stanza in the opac.ini file.

NOTE:
This variable controls the labels of all latitude fields on the Polygon Search page. |
| 5 | Longitude field label | Longitude= variable of the [Map_Search_Page] stanza in the opac.ini file.

NOTE:
This variable controls the labels of all longitude fields on the Polygon Search page. |
| | Number of sets of coordinate fields | Number_Of_Coordinates= variable of the [Map_Search_Page] stanza in the opac.ini file. |

Range Search Dialog Box

[Figure 16-6](#) shows the Range Search dialog box.

**Figure 16-6. Range Search dialog box**

[Table 16-2](#) details the Range Search dialog box components.

Table 16-6. Range Search Dialog Configuration Reference

| # | Description | Configured in |
|---|-------------------------------------|--|
| 1 | Dialog box title | Range_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 2 | Vertical search field set label | Verticle_Line_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 3 | Vertical search field set graphic | /m1/voyager/xxxdb/webvoyage/html/images/range_vert.gif |
| 4 | Horizontal search field set label | Horizontal_Line_Search= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 5 | Horizontal search field set graphic | /m1/voyager/xxxdb/webvoyage/html/images/range_horz.gif |
| 6 | Left Longitude field label | Left_Longitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 7 | Right Longitude field label | Right_Longitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 8 | Upper latitude field label | Upper_Latitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |
| 9 | Lower latitude field label | Lower_Latitude= variable of the [Map_Search_Page] stanza in the opac.ini file. |

The [Map_Search_Page] stanza

The Geospatial (Map) Search Page is configured in the [Map_Search_Page] stanza (see [Figure 6-36](#)).

Line#

```
1 [Map_Search_Page]
2 Background=
3 Text=
4 BGCOLOR=FFFF00
5 LINK=
6 VLINK=
7 ALINK=
8 ActiveFontColor=
9 InactiveFontColor=#000000
10 ActiveTabColor=
11 InactiveTabColor=
12 Tab_Text=
13 Top_BackGround_Color=3333FF
14 Table_Background_Color=CCCCFF
15 Font_Color=000000
16 Top_Font_Color=FFFFFF
17 Latitude=Latitude
18 Longitude=Longitude
19 Rectangle_Search=
20 Corridor_Search=
21 Point_and_Radius_Search=
22 Radius_Text=
23 Polygon_Search=
24 Range_Search=
25 Lower_Left=
26 Upper_Right=
```

Figure 16-7. Sample [Combined_Search_Page] stanza

| Line# | |
|-------|---|
| 27 | Upper_Latitude= |
| 28 | Lower_Latitude= |
| 29 | Left_Longitude= |
| 30 | Right_Longitude= |
| 31 | Vertical_Line_Search= |
| 32 | Horizontal_Line_Search= |
| 33 | UTM_Meters= |
| 34 | Coordinate= |
| 35 | Width= |
| 36 | No_Format_Defined=No Format Defined !!! |
| 37 | Number_Of_Coordinates=4 |
| 38 | SubmitButton=Search Map |
| 39 | ResetButton=Reset Map |

Figure 16-7. Sample [Combined_Search_Page] stanza (Continued)

Cannot Connect Message

The *No_Format_Defined* variable controls the message that appears on the search pages when WebVoyage cannot connect to the server and get the list of format types. Enter the text that you want to display onscreen after the *No_Format_Defined* variable. For example, if you entered *No Format Defined* after the *No_Format_Defined* variable, the message might display as “*No Format Defined*”. If nothing is entered after the *No_Format_Defined* variable, *No Format Defined* will be used as the default.

Map Limits

The Map Limits section displays in the lower half of the Search Limits page. This is where you set limits to filter Geospatial (Map) searches.

Map-Related Limits in the limits.ini File

Editing the map-related limits in the `limits.ini` file (`/m1/voyager/xxxdb/etc/webvoyage/local`) is done the same way as for the Language Limits, Medium Limits, Type Limits, Status Limits, and Place Limits stanzas.

- Do **not** edit the stanza names (the text that appears in brackets: [and]). These are required by WebVoyáge. Editing these will cause WebVoyáge to behave unpredictably.
- You should generally **not** edit the code that immediately follows the equals sign. The code that follows the equals sign is the string that WebVoyáge will look for in the fields of your MARC record. This means that, in order for a limit to be a useful option, you should make sure that the code that you enter is a code that you use in your MARC records.
- You may edit the text that follows the code on each numbered line. This is the description for that limit that will appear in WebVoyáge.

```
[Map Projection Limits]
__=Projection not specified
aa=Aitoff
ab=Gnomic
ac=Lambert's azimuthal equal area
ad=Orthographic
ae=Azimuthal equidistant
af=Stereographic
ag=General vertical near-sided
am=Modified stereographic for Alaska
an=Chamberlin trimetric
ap=Polar stereographic
au=Azimuthal, specific type unknown
az=Azimuthal, other specific projection
ba=Gall
bb=Goode's homolographic
bc=Lambert's cylindrical equal area
bd=Mercator
```

Figure 16-8. Sample Map-Related Stanzas of the LIMITS.INI File

```
be=Miller
bf=Mollweide
bg=Sinusoidal
bh=Transverse Mercator
bi=Gauss-Kruger
bj=Equiangular
bo=Oblique Mercator
br=Robinson
bs=Space oblique Mercator
bu=Cylindrical, specific type unknown
bz=Cylindrical, other specific projection
ca=Alber's equal area
cb=Bonne
cc=Lambert's conformal conic
ce=Equidistant conic
cp=Polyconic
cu=Conic, specific type unknown
cz=Conic, other specific projection
da=Armadillo
db=Butterfly
dc=Eckert
dd=Goode's homolosine
de=Miller's bipolar oblique conformal conic
df=Van Der Grinten
dg=Dimaxion
dh=Cordiform
dl=Lambert conformal
zz=Other

[Map Date Type Limits]
COM=Completion Date
EDI=Edition Date
REP=Reprint Date
```

Figure 16-8. Sample Map-Related Stanzas of the LIMITS.INI File (Continued)

```
SUR=Survey Date  
REC=Receipt Date  
REV=Revision Date  
  
[Map Class Classification]  
CLS1=Class 1  
CLS2=Class 2  
CLS3=Class 3  
CLS4=Class 4  
  
[Map Release Classification]  
NOB=Nobody  
ANY=Anybody  
  
[Map Type Classification]  
TYP1=Type 1  
TYP2=Type 2  
TYP3=Type 3  
TYP4=Type 4
```

Figure 16-8. Sample Map-Related Stanzas of the LIMITS.INI File (Continued)

The above limits.ini would produce a Search Limits page that would resemble the following:

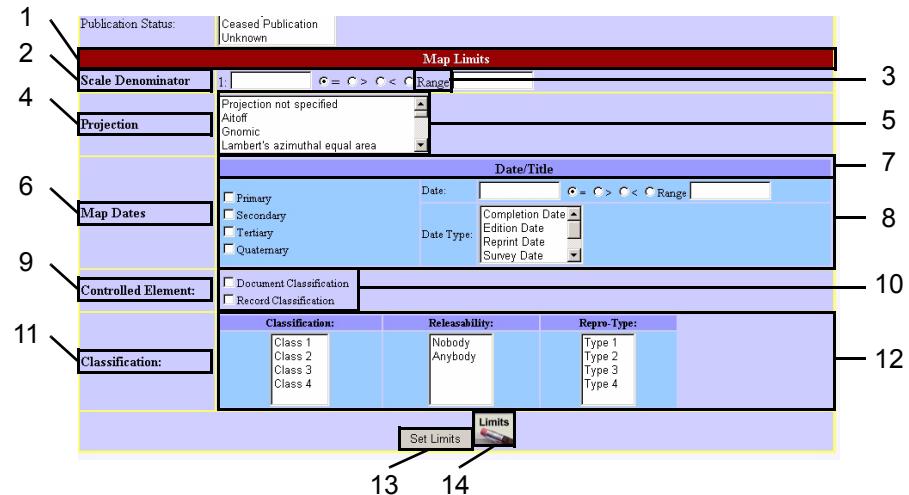


Figure 16-9. Sample Map-Related Search Limits Display

Editing the Map Limits Section of the Search Limits Page

In addition to the general Page Appearance components of the Map Limits page (see [Table 4-3](#)), you can configure the components detailed in [Table 16-7](#).

[Table 16-7](#) also details the callouts in [Figure 16-9](#).

Table 16-7. Geospatial Search Page Configuration Reference (Page 1 of 3)

| # | Description | Configured in |
|----|----------------------------------|---|
| 1a | Map Limits heading text | The <code>Map_Limits</code> variable in the <code>[Map_Limits_Page]</code> stanza of the <code>opac.ini</code> file. |
| 1b | Map Limits background color | The <code>Top_BackGround_Color</code> variable in the <code>[Map_Limits_Page]</code> stanza of the <code>opac.ini</code> file. |
| 1c | Map Limits background text color | The <code>Font_Color</code> variable in the <code>[Map_Limits_Page]</code> stanza of the <code>opac.ini</code> file. |
| | Map Limits table color | The <code>Table_Background_Color</code> variable in the <code>[Map_Limits_Page]</code> stanza of the <code>opac.ini</code> file. |
| 2 | Scale Denominator caption | The <code>Scale_Denominator_Label</code> variable in the <code>[Map_Limits_Page]</code> stanza of the <code>opac.ini</code> file. |

Table 16-7. Geospatial Search Page Configuration Reference (Page 2 of 3)

| # | Description | Configured in |
|-----|--|---|
| 3 | Range Scale caption | The Range_Scale variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 4 | Projection caption | The Projection_Label variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 5 | Projection limits | The [Map Projection Limits] stanza of the limits.ini file |
| 6 | Map Dates caption | The Map_Dates_Label variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 7 | Map Dates/ Title Block Heading text | The Date_Title variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 8a | Primary through Quaternary check box-captions | The Primary, Secondary, Tertiary and Quaternary variables in the [Map_Limits_Page] stanza of the opac.ini file. |
| 8b | Map Dates/ Title block Date Field caption | The Date variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 8c | Map Dates/ Title block Range Field caption | The Range variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 8d | Map Dates/ Title block Date Type Field caption | The Date_Type variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 8e | Map Dates/ Title block Date Type Field limits | The [Map Date Type Limits] stanza of the limits.ini file |
| 9 | Controlled Element Field caption | The Controlled_Element_Label variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 10a | Document Classification Checkbox caption | The Document_Classification variable in the [Map_Limits_Page] stanza of the opac.ini file. |

Table 16-7. Geospatial Search Page Configuration Reference (Page 3 of 3)

| # | Description | Configured in |
|-----|--|--|
| 10b | Record Classification Checkbox caption | The Record_Classification variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 11 | Classification Field caption | The Classification_Label variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 12a | Classification block column 1 caption text | The Col1 variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 12b | Classification block column 1 limits | The [Map Class Classification] stanza of the limits.ini file |
| 12c | Classification block column 2 caption text | The Col2 variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 12d | Classification block column 2 limits | The [Map Release Classification] stanza of the limits.ini file |
| 12e | Classification block column 3 caption text | The Col3 variable in the [Map_Limits_Page] stanza of the opac.ini file. |
| 12f | Classification block column 3 limits | The [Map Type Classification] stanza of the limits.ini file |
| 13a | Set Limits button text | The SubmitButton variable in the [Limit_Page] stanza of the opac.ini file. |
| 13b | Set Limits button alternate text | The Set_Limits_Button_Alt_Text variable in the [Limit_Page] stanza of the opac.ini file. |
| 14a | Clear limits button | /m1/voyager/xxxdb/webvoyage/html/images/clear.gif |
| 14b | Clear Limits button alternate text | The Clear_Limits_Button_Alt_Text variable in the [Limit_Page] stanza of the opac.ini file. |

[REDACTED]

Endeavor Information Systems, Inc.
See notice on first page

Displaying additional information in WebVoyáge



Overview

Additional information can be displayed in WebVoyáge using HTML code. This chapter covers the following configuration using HTML code:

- Displaying information from the BIB_TEXT table on the Titles list screen.
- Displaying information using Syndetics Solutions Catalog Enrichment Support.
- Generic HTML Generation on the View Record page.

Displaying information on the Titles list screen

You can configure WebVoyáge to display or use on the Titles List page, information from any column in the BIB_TEXT table. You can display information on the page in a column on the left, on the right, or both.

Configure this in the [Title_Page] stanza of the opac.ini file. There are three components to this configuration.

- Determining which column(s) to include on the page (Left, Right, or both)
- Configuring the header text of the column(s)
- Configuring information displayed in the column, or used to display information in the column(s). This information can be HTML code and text.

Determining which column(s) to include on the page

First configure the general display options of the Titles List page columns. This consists of enabling column display of the left or right columns, or both, on the Titles List page. Do this by adding a `GenerateHTMLColumn` variable to the `[Title_Page]` stanza of the `opac.ini` file.

Set this variable to:

- `L` to display information in the “left” column (the first column to the right of the `#` column).
- `R` to display information in the rightmost column of the Titles List page.
- `B` to display information in both of the columns.

This merely sets WebVoyage to *display* the columns. Additional configuration is needed to establish the information displayed in those columns.

The header text of the column(s)

Configure the text of the column in the `HTMLColumnHeader` variable. This variable will differ according to which column you are displaying (left or right).

- The variable to set the *left* column header text is `HTMLColumnHeaderL`.
- The variable to set the *right* column header text is `HTMLColumnHeaderR`.

The text after the variable is the text of column heading.

Example:

`HTMLColumnHeaderR=ISBN` creates the column heading in the right column shown in [Figure A-1](#).

| Search Results: Displaying 1 through 10 of 5276 entries. | | | | | |
|---|--|--|-------------------------------------|--|---|
| Find This: <input type="text" value="art"/> | | Find Results in: Keyword Relevance Search | | Quick Limit: <input type="text" value="None"/> | |
| <input type="button" value="10 records per page"/> | | <input type="button" value="Submit"/> <input type="button" value="Reset"/> | | | |
| <input type="button" value="previous"/> 1 11 21 31 41 51 ... 5271 <input type="button" value="next"/> | | | | | |
| Sort by: | <input type="button" value="Relevance"/> | | | | <input type="button" value="Post Limit"/> |
| # | Relevance | Full Title | Author | Format | ISBN |
| <input type="checkbox"/> | | Pays de Chartreuse / préface de M. Paul Leon ... couverture de A. Artigue. | Auscher, Leon | Book | |
| [1] | | Library Location: A: Main Collection Call Number: 914.4 Au7 Status: Not Charged | | | |
| <input type="checkbox"/> | | Artist in Indiana--then and now : Indiana fiber artists. An exhibition [September 12-October 31, 1976] made possible in part through a grant from the Indiana Arts Commission and the National Endowment for the Arts. | Ball State University. Art Gallery. | Book | |

Figure A-1. ISBN column heading on Titles List page

Since we have not instructed WebVoyáge to display anything in the column yet, only the column heading displays.

Establishing the information displayed in the column

Configure the column information displayed in the `HTMLColumnL` and `HTMLColumnR` variables (the *column information* variables). These control the information displayed for the left and right columns, respectively. The general format of these variables is:

```
HTMLColumnC=Table_Column:Begin HTML code {Table_Column
substitution} End HTML Code
```

- `HTMLColumnC` is the variable where `C` corresponds to `L` for left or `R` for right.
- `Table_Column` is the column in the `BIB_TEXT` table you want to display in the column on the Titles List page.
- `Begin HTM Code` and `End HTML Code` simply correspond to HTML code, with the `{Table_Column substitution}` representing where in the HTML code to place the value of the `Table_Column`.

[Figure A-3](#) shows the display of the lines added to the `[Title_Page]` stanza in [Figure A-2](#). This displays the edition information from each record, based on the information in the *Edition* column of the `BIB_TEXT` table.

```
[Title_Page]
...
GenerateHTMLColumn=L
HTMLColumnHeaderL=Edition
HTMLColumnL=EDITION:<p>Edition: {EDITION}</p>
```

Figure A-2. Sample left column display variables

The screenshot shows a library search results page for the Endeavor Library. The search term is "psychology". The results are displayed in a table with columns: #, Edition, Relevance, Full Title, Author, Format, and ISBN. The first result is "Fall of public man / by Richard Sennett", with the author listed as Sennett, Richard, 1943-. The second result is "Library Location: A: Reference Department (non-circulating)" with the call number HN13 .S45 1977. The third result is "Handbook of modern personality theory / edited by Raymond B. Cattell, Ralph Mason Dreger", with the author listed as Cattell, Raymond B., and Dreger, Ralph Mason. The fourth result is "Library Location: A: Reference" with the call number HN13 .S45 1977.

| # | Edition | Relevance | Full Title | Author | Format | ISBN |
|-----|-----------------|-----------|--|-----------------------------|--------|---|
| | Edition 1st ed. | | Fall of public man / by Richard Sennett | Sennett, Richard, 1943- | Book | Click for Table of Contents |
| [1] | | | Library Location: A: Reference Department (non-circulating) | Call Number: HN13 .S45 1977 | | Status: No item data available |
| | | | Handbook of modern personality theory / edited by Raymond B. Cattell, Ralph Mason Dreger | | Book | Click for Table of Contents |
| | | | Library Location: A: Reference | Call Number: | | Status: No item |

Figure A-3. Display of left column on Titles List page

Example:

You can also use the columns to do more complicated configuration. For example, you can create a .gif file for each material type configured in Voyager System Administration, and display the appropriate graphic depending on the record's value in the BIB_FORMAT column of the BIB_TEXT table.

In this example (see [Figure A-4](#) and [Figure A-5](#)), we use the `{Table_Column_substitution}` to determine the graphic displayed in the column of each record. The `HTMLColumnL` variable instructs Voyager to select the value of the `bib_format` column of the `BIB_TEXT` table and place that value into the name of the .gif file to display. You first must create .gif files in the `/m1/voyager/xxxdb/webvoyage/html/images` directory for the various material types.

So if a record's material type code in the `bib_format` column of the `BIB_TEXT` table is `am`, the graphic file `am.gif` displays, if its type code is a `gf`, the `gf.gif` file displays and so on.

NOTE:

Remember that you must create and place any extra files, graphics or otherwise, referenced in this code, in the `/m1/voyager/xxxdb/webvoyage/html/images` directory. In the case of this example, you must create a .gif file for each material type entered into Voyager System Administration, and place the files in the images directory.

```
GenerateHTMLColumn=L  
HTMLColumnHeaderL=Bib Format  
HTMLColumnL=bib_format:
```

Figure A-4. Sample format display variables

The screenshot shows a library catalog search results page with the following details:

- Search Results:** Displaying 1 through 10 of 669 entries.
- Search Parameters:**
 - Find This: film
 - Find Results in: Keyword Relevance Search
 - Quick Limit: None
 - 10 records per page
 - Submit and Reset buttons
- Navigation:** previous [1] 11 21 31 41 51 ... 661 next
- Sort by:** Relevance
- Post Limit:** button

| # | Bib Format | Relevance | Full Title | Author | Format |
|---|------------|-----------|---|---------------------|---------------|
| [1] | | | Ansel Adams, photographer [videorecording] / Filmamerica, Inc. | | Videocassette |
| <i>Title has multiple holdings</i> | | | | | |
| [2] | | | West German filmmakers on film : visions and voices / edited by Eric Rentschler. | | Book |
| <i>Library Location: A: Main Call Number: PN1993.5.G3 Status: Not Charged Collection W44 1988</i> | | | | | |
| | | | Multimedia approach to children's literature : a selective list of films, filmstrips, and recordings based on children's books / compiled and edited by Elin Greene and Madalynne Schoenfeld. | Greene, Elin, 1927- | Book |

Figure A-5. Sample Bib Format display

In [Figure A-5](#), the first record's format type (its value in the bib_format column) is *gf*, so the *gf.gif* file displays in the Bib Format column.

Syndetics Solutions Catalog Enrichment Support

If you subscribe to Syndetics Solutions services, Syndetics Solutions Cataloging Enrichment support allows you to send information from a record, and retrieve information about that record. Syndetics Solutions maintains databases of tables of contents, cover images, reviews, and other information about library material.

By configuring WebVoyage to communicate with these databases, you can retrieve information, based on the ISBN of a record. WebVoyage sends the ISBN of the record to the database, searches for information about the material corresponding to the ISBN, and returns the types of information to WebVoyage display depending on your configuration and availability.

For more information about subscribing to Syndetics Solutions Cataloging Enrichment support, see the *Contacts* section of their website.

Configuring WebVoyáge for use with Syndetics Solutions Catalog Enrichment Support

Syndetics Solutions offers a number of types of information for retrieval, but we must detail the general WebVoyáge configuration before getting to the types of information to retrieve.

- You can add small cover images to the Titles List by editing the [Title_Page] stanza of the opac.ini file.
- You can add other information to the View Record page by appending the displayN.cfg files on your server.



Procedure A-1. Adding small cover images to the Titles List by editing the [Title_Page] stanza of the opac.ini file

Use the following to add small cover images to the Titles List.

1. Set up the columns on the Title List page as detailed in [Determining which column\(s\) to include on the page](#) on [page A-2](#) and [The header text of the column\(s\)](#) on [page A-2](#).
2. Add the following column information variable to the [Title_Page] stanza:

```
HTMLColumnC=ISBN:
```

where the C in the column information variable (HTMLColumnC) corresponds to L for left column or R for right column.

The **clientCode** in the **client** portion of the URL corresponds to your Syndetics client code. Please contact Syndetics for this code.

Result: This column information variable takes the value of the ISBN column in the BIB_TEXT table for each record, sends it to Syndetics Solutions' server, and retrieves corresponding cover image thumbnails (if found).

[Figure A-6](#) shows a sample thumbnail cover image retrieved from the Syndetics Solutions database (with an HTMLColumnHeaderR=Cover variable).

| # | Bib Format | Relevance | Full Title | Author | Format | Cover |
|-----|------------|-----------|--|-------------------------------------|---------------------|-------|
| [1] | | | Pays de Chartreuse / préface de M. Paul Leon ... couverture de A. Artigue. | Auscher, Leon. | Book | |
| | | | Library Location: A: Main Collection | Call Number: 914.4 Au7 | Status: Not Charged | |
| [2] | | | Artist in Indiana--then and now : Indiana fiber artists. An exhibition [September 12-October 31, 1976] made possible in part through a grant from the Indiana Arts Commission and the National Endowment for the Arts. | Ball State University. Art Gallery. | Book | |
| | | | Library Location: A: Main Collection | Call Number: 746.41 I39a | Status: Not Charged | |
| [3] | | | Toulouse-Lautrec [videorecording] / a LWT South Bank production in association with RM Arts. | | Videocassette | |
| | | | Library Location: B: Media Department | Call Number: T7255 | Status: Not Charged | |
| | | | Medieval manuscript : [videorecording] art and function. | | Videocassette | |
| | | | Library Location: B: Media Department | Call Number: T7255 | Status: Not Charged | |

Figure A-6. Sample cover thumbnail image

[Figure A-7](#) shows the text added to the [Title_Page] stanza to create the display in [Figure A-6](#).

```
GenerateHTMLColumn=B
HTMLColumnHeaderR=Cover
HTMLColumnHeaderL=Bib Format
HTMLColumnL=bib_format:
HTMLColumnR=ISBN:
```

Figure A-7. Excerpt of [Title_Page] stanza

Adding information to the View Record page

You can also display information on any view record page, by editing the `displayX.cfg` files. For the purposes of sending information to Syndetics Solutions, there are two general display type options for the information.

- As an image on the view record page
- As a link to another HTML page

Depending on which type of display you want to use, the text in the `displayX.cfg` file takes one of two forms.

Label

You can specify the label and error text for each line of HTML information. Add this information to the line directly before the HTML in the `displayn.cfg` file.

LabelText +Error Message text

The `LabelText` portion of the command corresponds to the label appearing to the left of the HTML information.

The text after the `+` displays if the target of the HTML information on the next line cannot be found.

Format of images on the view record page

The following is the format of the HTML required to view images on the view record page:

```
HTML:020||a:
```

1. The `HTML` indicates to WebVoyáge that the code entered into the file is HTML code.
2. The `:020||a:` indicates the MARC field and subfield WebVoyáge should search for information. For Syndetics Solutions purposes, this will be the ISBN.
3. The `<` indicates the beginning of the HTML code.
4. The `hwN.pl?` above specifies what type of window WebVoyáge should open to display the information.
 - `hw5pl?` opens the information in a new window
 - `hw7pl?` displays the information in the current window
5. The `isbn=` indicates in the URL created that the ISBN is being sent.

-
6. The {a} substitution token places the information from the (:020||a:) field and subfield after the isbn=, to indicate the actual ISBN of the record to retrieve information from.
 7. The /filename indicates the type of information to retrieve for this ISBN (see [Table A-1](#) on [page A-11](#)).
 8. The client= includes your institution's Syndetics Solutions client code. Contact Syndetics Solutions if you do not know your client code.
 9. The /> indicates the end of the HTML code.

Format of links to another page

The following is the format of the HTML required to view links on the view record page:

```
HTML:020||a:<href="http://syndetics.com/
hwN.pl?isbn={a}/filename&client=ClientCode">
```

1. The HTML indicates to WebVoyage that the code entered into the file is HTML code.
2. The :020||a: indicates the MARC field and subfield WebVoyage should search for information. For Syndetics Solutions purposes, this will be the ISBN.
3. The < indicates the beginning of the HTML code.
4. The hwN.pl? above specifies what type of window WebVoyage should open to display the information.
 - hw5pl? opens the information in a new window
 - hw7pl? displays the information in the current window
5. The isbn= indicates in the URL created that the ISBN is being sent.
6. The {a} substitution token places the information from the (:020||a:) field and subfield after the isbn=, to indicate the actual ISBN of the record to retrieve information from.
7. The /filename indicates the type of information to retrieve for this ISBN (see [Table A-1](#) on [page A-11](#)).
8. The client= is your institution's Syndetics Solutions client code. Contact Syndetics Solutions if you do not know your client code.
9. The /> indicates the end of the HTML code.

Data Elements and Filenames used by Syndetics Solutions

The filename is determined by Syndetics Solutions, and dictates the data element to retrieve. [Table A-1](#) details the available filenames and the corresponding data elements.

Table A-1. Data elements and filenames

| Data Elements | Filename |
|-------------------------------|--|
| Index (or Menu) page | INDEX.HTML or INDEX.XML |
| Table of Contents | TOC.HTML, TOC.XML, BNATOC.HTML, or BNATOC.XML |
| Fiction/Biography Profile | FICTION.HTML or FICTION.XML |
| Summary / Annotation | SUMMARY.HTML or SUMMARY.XML |
| First Chapter or Excerpt | DBCHAPTER.HTML or DBCHAPTER.XML |
| Library Journal Review | LJREVIEW.HTML or LJREVIEW.XML |
| Publishers Weekly Review | PWREVIEW.HTML or PWREVIEW.XML |
| School Library Journal Review | SLJREVIEW.HTML or SLJREVIEW.XML |
| CHOICE Review | CHREVIEW.HTML or CHREVIEW.XML |
| Booklist Review | BLREVIEW.HTML or BLREVIEW.XML |
| Doody's Medical Review | DOREVIEW.HTML or DOREVIEW.XML (Not yet loaded) |
| Author Notes | ANOTES.HTML or ANOTES.XML |
| Large Cover Image (400x400) | LC.JPG |
| Medium Cover Image (187x187) | MC.GIF |
| Small Cover Image (94x94) | SC.GIF |

Examples

Example:

To add a link to the table of contents to the view record page, add the following to one of the displayX.cfg files (see [Figure A-8](#)):

```
HTML:020||a:<a href="http://syndetics.com/
hw5.pl?isbn={a}/TOC.HTML&client=ClientCode">Table of
Contents</a>
```

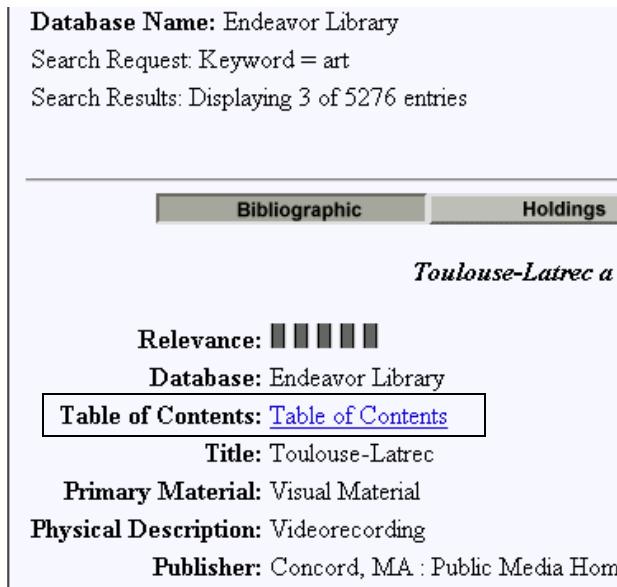


Figure A-8. Sample Table of Contents link

Example:

To add a link to the large cover image to the view record page, add the following to one of the displayX.cfg files:

```
CoverImage: +No cover image found
HTML:020||a:<a href="http://syndetics.com/
hw7.pl?isbn={a}/LC.JPG&client=ClientCode">Cover Image</
a>
```

Example:

To add the image of the cover itself, add the following to one of the displayX.cfg files (see [Figure A-9](#)):

```
CoverImage: +No cover image found  
HTML:020||a:
```

[Figure A-10](#) shows the error message displayed if a cover image is not found (as configured in this example).

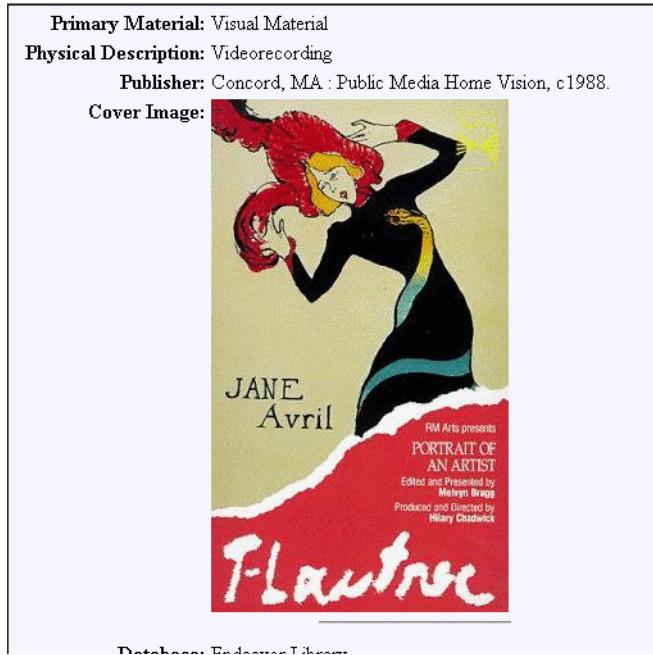


Figure A-9. Sample large cover image

Endeavor

Database: Endeavor Library
Title: Toulouse-Latrec
Subject(s): Artists
Primary Material: Visual Material
Physical Description: Videorecording
Publisher: Concord, MA : Public Media Home Vision, c1988.
Cover Image: No cover image found

Database: Endeavor Library
Database: No information available
Location: B: Media Department
Call Number: [T7255](#)
Call Number: No call number available
Number of Items: 1
Status: Not Charged
Status: No information available
There are no attachments for this record.

Figure A-10. Sample error message

Example:

To add a link to the Syndetics index page, add the following:

```
Index: +Index information not found
HTML:020||a:
```

Overview

This chapter contains collected information regarding many of the file types that WebVoyáge uses. It is intended as an overview or quick reference to familiarize the reader with configuration files from a file type point of view, rather than as a feature by feature reference.

*.HTM Files

*.htm files are used by WebVoyáge for a variety of reasons and in a variety of different circumstances. Some *.htm files contain error, assistance or block messages that, when an error occurs, are displayed within the contents of other pages within WebVoyáge; some correspond to pre-built individual context-sensitive help pages that display when a user clicks the **Help** button on any page within WebVoyáge; some contain general information that is used on a number of pages in WebVoyáge; and some *.htm files correspond to other pre-built pages that can be connected to through buttons on the WebVoyáge toolbars or the WebVoyáge introduction page. You can modify or delete everything in the *.htm files.

Error, Assistance and Block Messages

The following *.htm files correspond mainly to error, assistance or block messages that, when an error occurs, are displayed within the contents of other pages within WebVoyage. You can modify or delete everything in these *.htm files, including changing the text the font size or color, position, and so on. You can include anything in the *.htm files, including Java/JavaScript (and VBSCRIPT with 20 lines of text maximum). However, **do not** include <BODY>, <FORM>, </FORM>, or </BODY> tags because WebVoyage provides these when the pages are dynamically built. Each line in these files must not be longer than 80 bytes (characters) and each file may contain no more than 20 lines. In addition, you cannot change where these messages display on the built WebVoyage pages. Use standard HTML codes to modify these files. These files are located in the /m1/voyager/xxxdb/etc/webvoyage subdirectories (/local, /Z3950, /vcit, and /zcit).

You may not want some of the messages from some of the files in these directories displayed. In this case, find the file name of the message you wish to disable and rename it with a .bak extension. Rename it, instead of deleting it, so you can change the extension back later if you decide to use it. For example, if you do not want the "There are no attachments for this record" message to display, rename the "noattmsg.htm" file to "noattmsg.bak".

Note that information contained in parenthesis in the Default Message column is not part of the default message.

Table B-1. Error Messages (Page 1 of 3)

| FILE | DEFAULT MESSAGE |
|-----------------------|---|
| badformmsg.htm | The system could not interpret your search statement. |
| failedmsg.htm | Your search failed! |
| failmsg.htm | Your Email Request failed! |
| ht_combinedsearch.htm | Informational text for Combined/Simple search |
| ht_buildersearch.htm | Informational text for Builder/Boolean search |
| ht_coursereserve.htm | Informational text for Course Reserve search |
| ht_geosearch_1.htm | Informational text for Rectangle map search |
| ht_geosearch_2.htm | Informational text for Polygon map search |

Table B-1. Error Messages (Page 2 of 3)

| FILE | DEFAULT MESSAGE |
|------------------------|---|
| ht_geosearch_3.h
tm | Informational text for Point and Radius map search |
| ht_geosearch_4.h
tm | Informational text for Corridor/Route map search |
| ht_geosearch_5.h
tm | Informational text for Range map search |
| limitmsg.htm | Search Limits are in effect! |
| logonidmsg.htm | Please enter your Institution ID and Last Name, then click the OK button. |
| logonmsg.htm | Please enter your Patron Barcode and Last Name, then click the OK button. |
| logonsocmsg.htm | Please enter your Social Security Number and Last Name, then click the OK button. |
| mailmsg.htm | Your Email was sent correctly. |
| noattmsg.htm | There are no Attachments for this record. |
| nohitsmsg.htm | Your search resulted in no hits! |
| noholdmsg.htm | No holdings available - check at Circulation Desk. |
| note.htm | Scope Notes |
| notimemsg.htm | You timed out during your search! |
| notocmsg.htm | There is no Table of Contents for this record. |
| patronidmsg.htm | You may not have entered your institution id and name correctly. Retry your request or ask for help at the Circulation or Reference Desk. |
| patronmsg.htm | You may not have entered your barcode and name correctly. Retry your request or ask for help at the Circulation or Reference Desk. |
| patronsoc-
msg.htm | You may not have entered your social security number and name correctly. Retry your request or ask for help at the Circulation or Reference Desk. |
| refer.htm | The references listed below may also contain information related to your search. References may include: |
| setlimmsg.htm | Help text for limiting a search |
| truncmsg.htm | Your search was truncated! |

Table B-1. Error Messages (Page 3 of 3)

| FILE | DEFAULT MESSAGE |
|-----------------|--|
| validatemsg.htm | The barcode you entered does not match that of the currently logged in patron. You may retry your request or log out and start over. |
| weberr.htm | The Online Public Access Catalog is not available. Please contact the library. |

Help Pages

Each page within WebVoyáge has a corresponding help page that can be displayed by clicking the Help button or Help link text. The following *.htm files correspond to pre-built individual context-sensitive help pages that display when a user clicks the Help button or Help link text from specific pages within WebVoyáge. You can modify or delete everything in these files. These files are located in the /m1/voyager/xxxdb/webvoyage/html/help directory.

Table B-2. Help Pages (Page 1 of 2)

| FILE | DESCRIPTION |
|-------------------------|--|
| bookbag.htm | Bookbag help page |
| buildersearch.htm | Builder (Boolean) Search help page |
| callslip.htm | Call Slip Request help page |
| combinedsearch.htm | Combined Search help page |
| contents.htm | WebVoyáge Help Contents page |
| coursereservesearch.htm | Course Reserve Search help page |
| database.htm | Database Connections help page |
| disphlp1.htm | Bibliographic Details (Record Display) help page |
| disphlp2.htm | Holdings Display (Record Display) help page |
| disphlp3.htm | Table of Contents (Record Display) help page |
| disphlp4.htm | Linked Resources (Record Display) help page |
| disphlp5.htm | MARC Format (Record Display) help page |
| headings.htm | Headings Index help page |
| history.htm | Search History help page |
| hldrcl.htm | Hold/Recall Request help page |
| icons.htm | WebVoyáge Icons help page |

Table B-2. Help Pages (Page 2 of 2)

| FILE | DESCRIPTION |
|-----------------|--|
| libinfo.htm | Library Information help page |
| limits.htm | Limiting a Search help page |
| login.htm | Patron Login help page |
| map_srch.htm | Map Searching (Geospatial) help page |
| myopac.htm | MyOPAC help page |
| patron.htm | Patron Information help page |
| pin.htm | Personal Identification Number help page |
| preferences.htm | Preferences help page |
| purchase.htm | Purchase Order Request help page |
| refer.htm | References help page |
| remote.htm | Remote Library Selection help page (Remote button) |
| request.htm | Request Selection help page |
| savedsearch.htm | Saved Searches help page |
| sdi.htm | Selective Dissemination of Information help page |
| status.htm | Status bar (links at bottom of pages) help page |
| titles.htm | Titles Index help page |
| default_ns.css | Cascading Style Sheet for use with the Netscape browser.

NOTE:
Not officially supported but you can use this stylesheet to change the appearance of the help page background color and text to mimic your site's WebVoyage color scheme. To disable, rename file. |
| default.css | Cascading Style Sheet for use with browsers other than Netscape.

NOTE:
Not officially supported but you can use this stylesheet to change the appearance of the help page background color and text to mimic your site's WebVoyage color scheme. To disable, rename file. |

Other Pages

The following files correspond to content that can be displayed from WebVoyage. The webvoy.htm, webconerr.htm, libinfo.htm, and remote.htm files all are located in the /m1/voyager/xxxdb/webvoyage/html directory. The dbselmsg.htm, footer.htm and header.htm files are located in the /m1/voyage/xxxdb/etc/webvoyage directory.

callslipmsg_CODE.htm

The callslipmsg_CODE.htm file contains the content of the call slip request message where “CODE” is the Message Code entered on the Call Slip Request Messages dialog box. See OPAC Call Slip Request Messages in the Voyager System Administration User’s Guide for more information.

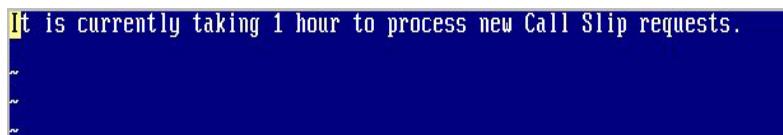


Figure B-1. Callslipmsg_CODE.htm message file

One message file is required for each code created through the **Call Slip Request Messages** function. The message files are stored on the WebVoyage server in .../etc/webvoyage/local/.

See also the *Voyager Circulation User’s Guide* for information about how to select a specific call-slip-related message to display to patrons.

NOTE:

You must create `callslipmsg_CODE.htm` files from scratch if implementing Call Slip Suspension Messages (2001.1+).

Like many of the *.htm files for WebVoyage, this is a fragment which WebVoyage.cgi pulls and inserts into the dynamically-generated HTML which you see in WebVoyage. Therefore, you should never place `<html>`, `<head>`, or `<body>` tags into these files the resulting dynamically-generated HTML would have doubles of these tags, which is against http's rules for Web display.

Apart from this, any standard HTML may be used, or the user may simply choose to enter a text statement with no HTML formatting commands.



Procedure B-1. Creating a Message

Use the following steps to create the message

1. From the Voyager System Administration Module, select **OPAC Configuration > Call Slip Request Messages > New**. Create your message here and take note of the Message Code that you've assigned. Do not forget to select the **Suspension Message** check box.
 2. Connect and log in to your server as voyager (using Telnet, for example).
 3. Go to /m1/voyager/xxxdb/etc/webvoyage/local
 4. Using a text editor such as *vi*, edit the callslipmsg_CODE.htm (where CODE corresponds to the Message Code entered into the System Administration Module, see step 1).
 5. Type in your message, with or without HTML tags for formatting (see [Figure B-2](#) and [Figure B-3](#)).
 6. When finished, save the file (in *vi*, press the **Esc** key, type :**wq!**, and press Enter).
-

The Call Slip service will not be available today. Please try again tomorrow. If you have any questions, please contact the library.

Figure B-2. Sample message without HTML formatting tags

```
<blockquote>
<font face="Arial" color="#0000ff"><h2>IMPORTANT!</h2></font><br>
<h3><font face="Garamond"><b>The Call Slip service will not be available
today.</b> Please try again tomorrow.<br>
<i>If you have any questions, please contact the library.</i></h3>
</blockquote>
```

Figure B-3. Sample message containing HTML formatting tags

dbselmsg.htm

The dbselmsg.htm file controls the instructional text that appears at the top of the database selection page in WebVoyáge. The database selection page displays when a user clicks the Database button on the toolbar that appear on most WebVoyáge pages. The Database button will not appear on the toolbar in WebVoyáge unless it is added to one of the toolbars (see [Top and Bottom Toolbar Configuration](#) on [page 4-12](#)" for more information).

libinfo.htm

The libinfo.htm file corresponds to a page on which information about your library (for example, hours of operation) can be displayed. Your library can customize how this page displays and what information it contains. This library information page will display when a user presses the Library button on the WebVoyáge toolbar or, if your library is using the webvoy.htm as a WebVoyáge introduction page, when a user clicks the Library Information button on the WebVoyáge introduction page. If you would like to use the libinfo.htm file as the library information page that displays when the Library button is pressed on the toolbar, you must add it to one of the toolbars (see [Top and Bottom Toolbar Configuration](#) on [page 4-12](#)" for more information).

remote.htm

The remote.htm file corresponds to a page on which links to other sites (for example, other libraries' home pages) can be displayed. Your library can customize how this page displays and what information it contains. This page will display when a user presses the Remote button on the WebVoyáge toolbar or, if your library is using the webvoy.htm as an introduction page, when a user clicks the Remote Libraries button on the WebVoyáge introduction page. If you would like the remote.htm file to be called up when the Remote button is pressed on the WebVoyáge toolbar, you must add it to one of the toolbars (see [Top and Bottom Toolbar Configuration](#) on [page 4-12](#)" for more information).

webconerr.htm

The webconerr.htm file corresponds to an error page that can be customized and used by your institution. This error page will display when WebVoyáge times out or when any WebVoyáge failure occurs. If you would like to use the webconerr.htm file as your error page, you must specify it after the *ErrorFile* variable in the [WebRecon] stanza of the opac.ini file.

webvoy.htm

The webvoy.htm file corresponds to a WebVoyage introduction and/or exit page that can be used by your institution. The introduction page will display when WebVoyage is launched and the exit page will display when a user clicks the Exit button or the large WebVoyage button at the top of most pages within WebVoyage. You can modify or delete everything in this file. In order for the Web Server to load WebVoyage's default introduction page, you must add webvoy.htm to the DirectoryIndex entry in:

/usr/local/apache/conf/httpd.conf

Example:

```
DirectoryIndex webvoy.htm index.html
```

If you would like to use the webvoy.htm file as your exit page, you must specify it after the *ExitPage* variable in the [WebRecon] stanza of the webvoyage.ini.

Image Files

You can customize many of the images within WebVoyage. The /m1/voyager/xxxdb/webvoyage/html/images directory initially contains all of the image files as they are distributed. You can substitute your own *.gif files for the *.gif files that Endeavor provides. However, you must give the substitute *.gif file the exact same name as the original *.gif file. The following table lists all of the image files that are contained within the above mentioned directory. The *d-* or *Disabled* prefix means it is the image of a button in its depressed or unavailable state (for example, d-head.gif or DisabledHeadings.gif). The *s-* or *Up* prefix means it is the image of a button in its raised, unpressed or available state (for example, s-head.gif or UpHeadings.gif). The *u-* or *Down* prefix means it is the image of a button in its flat or unavailable or disabled state (for example, u-head.gif or DownHeadings.gif). Not all buttons or links have all three states.

Table B-3. Image Files (Page 1 of 8)

| NAME | DESCRIPTION |
|---------------|--|
| back2recd.gif | button that takes you back to the record after a request has been attempted. |
| banner.gif | button at very top of most WebVoyage pages that takes you to the WebVoyage exit page or to the location that is specified after the <i>ExitPage</i> variable in the [WebRecon] stanza of the webvoyage.ini file. |

Table B-3. Image Files (Page 2 of 8)

| | |
|----------------------|---|
| bg4.gif | image that can be used as the background of WebVoyage pages (see “Html_Body stanza” of the webvoyage.ini file on page for information about customizing the background of WebVoyage pages). |
| bt_point.gif | point and radius search button (in its available state) that appears on the map searching page. |
| bt_polygon.gif | polygon search button (in its available state) that appears on the map searching page. |
| bt_range.gif | range search button (in its available state) that appears on the map searching page. |
| bt_rectangle.gif | rectangle search button (in its available state) that appears on the map searching page. |
| bt_route.gif | corridor/route search button (in its available state) that appears on the map searching page. |
| clear.gif | clear search limits button (in its available state) on the limits page and on a search page after limits have been set. |
| database.gif | remote libraries button on webvoy.htm page (see webvoy.htm on page B-9 for more information about the webvoy.htm page). |
| d_bt_point.gif | point and radius search button (in its disabled state) that appears on the map searching page. |
| d_bt_polygon.gif | polygon search button (in its disabled state) that appears on the map searching page. |
| d_bt_range.gif | range search button (in its disabled state) that appears on the map searching page. |
| d_bt_rectangle.gif | rectangle search button (in its disabled state) that appears on the map searching page. |
| d_bt_route.gif | corridor/route search button (in its disabled state) that appears on the map searching page. |
| DisabledDatabase.gif | database button (in its disabled state) in the toolbar that otherwise would take you to the Database page. Used in conjunction with DownDatabase.gif and UpDatabase.gif. |
| DisabledExit.gif | exit button (in its disabled state) in the toolbar that otherwise would restart WebVoyage. Used in conjunction with DownExit.gif and UpExit.gif. |
| DisabledHeadings.gif | headings button (in its disabled state) in the toolbar that otherwise would take you to the headings list page. Used in conjunction with DownHeadings.gif and UpHeadings.gif. |

Table B-3. Image Files (Page 3 of 8)

| | |
|----------------------|---|
| DisabledHelp.gif | help button (in its disabled state) in the toolbar that otherwise would take you to the relevant help page. Used in conjunction with DownHelp.gif and UpHelp.gif. |
| DisabledHistory.gif | history button (in its disabled state) in the toolbar that otherwise would take you to the Search History page. Used in conjunction with DownHistory.gif and UpHistory.gif. |
| DisabledLibrary.gif | library button (in its disabled state) in the toolbar that otherwise would take you to the Library Information page. Used in conjunction with DownLibrary.gif and UpLibrary.gif. |
| DisabledLogin.gif | login button (in its disabled state) in the toolbar that otherwise would take you to the Patron Login page. Used in conjunction with DownLogin.gif, UpLogin.gif and UpLogout.gif. |
| DisabledPatron.gif | patron button (in its disabled state) in the toolbar that otherwise would take you to the Patron Information page. Used in conjunction with DownPatron.gif and UpPatron.gif. |
| Disable-dRemote.gif | remote button (in its disabled state) in the toolbar that otherwise would take you to the Remote Databases page. Used in conjunction with DownRemote.gif and UpRemote.gif. |
| Disable-dRequest.gif | request button (in its disabled state) in the toolbar that otherwise would take you to the Request Type page. Used in conjunction with DownRequest.gif and UpRequest.gif. |
| Disabled-Search.gif | search button (in its disabled state) in the toolbar that otherwise would take you to the Search page. Used in conjunction with DownSearch.gif and UpSearch.gif. |
| DisabledTitles.gif | titles button (in its disabled state) in the toolbar that otherwise would take you to the Title List page. Used in conjunction with DownTitles.gif and UpTitles.gif. |
| d-next.gif | next button (in its disabled state) on all search result indexes and record displays that takes you to the next entries in the index or the next record. |
| DownDatabase.gif | database button (in its unavailable state) that otherwise would take you to the Database page. Used in conjunction with DisabledDatabase.gif and UpDatabase.gif. |
| DownExit.gif | exit button (in its unavailable state) that otherwise would restart WebVoyage. Used in conjunction with DisabledExit.gif and UpExit.gif. |
| DownHeadings.gif | exit button (in its unavailable state) that otherwise would take you to the Headings List page. Used in conjunction with DisabledDatabase.gif and UpDatabase.gif. |

Table B-3. Image Files (Page 4 of 8)

| | |
|-----------------|---|
| DownHelp.gif | help button (in its unavailable state) that otherwise would take you to the relevant Help page. Used in conjunction with DisabledHelp.gif and UpHelp.gif. |
| DownHistory.gif | history button (in its unavailable state) that otherwise would take you to the Search History page. Used in conjunction with DisabledHistory.gif and UpHistory.gif. |
| DownLibrary.gif | library button (in its unavailable state) that otherwise would take you to the Library Information page. Used in conjunction with DisabledLibrary.gif and UpLibrary.gif. |
| DownLogin.gif | login button (in its unavailable state) that otherwise would take you to the Patron Login page. Used in conjunction with DisabledLogin.gif, UpLogin.gif and UpLogout.gif. |
| DownPatron.gif | patron button (in its unavailable state) that otherwise would take you to the Patron Information page. Used in conjunction with DisabledPatron.gif and UpPatron.gif. |
| DownRemote.gif | remote button (in its unavailable state) that otherwise would take you to the Remote Databases page. Used in conjunction with DisabledRemote.gif and UpRemote.gif. |
| DownRequest.gif | request button (in its unavailable state) that otherwise would take you to the Request Type page. Used in conjunction with DisabledRequest.gif and UpRequest.gif. |
| DownSearch.gif | search button (in its unavailable state) that otherwise would take you to the Search page. Used in conjunction with DisabledSearch.gif and UpSearch.gif. |
| DownTitles.gif | titles button (in its unavailable state) that otherwise would take you to the Request Type page. Used in conjunction with DisabledTitles.gif and UpTitles.gif. |
| d-prev.gif | previous button (in its disabled state) on all search result indexes and record displays that takes you to the next entries in the index or the next record. |
| eisi.gif | Endeavor logo that appears at the bottom of the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| email.gif | email button in the Save Options box - sends selected information to an email account. |
| footer.gif | image that displays at the bottom of all of the generated screens (i.e., not in webvoy.htm, libinfo.htm or remote.htm). |
| help.gif | help button on the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |

Table B-3. Image Files (Page 5 of 8)

| | |
|----------------|---|
| libinfo.gif | library information button on the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| limit.gif | search limits button on the search pages that takes you to the search limits page. |
| loccat.gif | local catalog button on the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| logo.gif | large logo at the top of the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| note.gif | note link that displays beside entries in a Headings Index that have scope notes. |
| patinfo.gif | patron information button on the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| point_ll.gif | lower-left coordinate graphic that appears on the map search page. |
| point_ur.gif | upper-right coordinate graphic that appears on the map search page. |
| range_horz.gif | horizontal range coordinates graphic that appears on the map search page. |
| range_vert.gif | vertical range coordinates graphic that appears on the map search page. |
| remote.gif | remote button on the webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| save.gif | save button in the Save Options box - saves the selected information to a file. |
| search.gif | search button on webvoy.htm page (see webvoy.htm on page B-9 for information about the webvoy.htm file). |
| seealso.gif | see also link that displays beside entries in a Headings Index that either have references or references and scope notes. |
| s-next.gif | next button (in its available state) on all search result indexes and record displays that takes you to the next page of entries in the index or the next record. |
| s-prev.gif | previous button (in its available state) on all search result indexes and record displays that takes you to the previous page of entries in the index or the next record. |

Table B-3. Image Files (Page 6 of 8)

| | |
|----------------|---|
| s-rel1.gif | image of single bar indicating the highest level of relevance (i.e., this image is repeated five times to create five relevance measurement units) - used to display the amount of relevance a particular result has for a keyword/relevance search (for example, if dots were being used as the relevance measurement unit, five dot). |
| s-rel1h.gif | image of one-half bar indicating four and one-half relevance measurement units (i.e., this image is used when 5 1/2 relevance units are to be displayed) - used to display the amount of relevance a particular result has for a keyword/relevance search (for example, if dots were being used as the relevance measurement unit, four and one-half dots). |
| s-rel2.gif | image used to display four relevance measurement units. |
| s-rel2h.gif | image used to display the one-half part of three and one-half relevance measurement units. |
| s-rel3.gif | image used to display three relevance measurement units. |
| s-rel3h.gif | image used to display the one-half part of two and one-half relevance measurement units. |
| s-rel4.gif | image used to display two relevance measurement units. |
| s-rel4h.gif | image used to display the one-half part of four and one-half relevance measurement units. |
| s-rel5.gif | image used to display one relevance measurement unit. |
| s-rel5h.gif | image used to display one-half of one relevance measurement unit (lowest level of relevance). |
| UpDatabase.gif | database button (in its available state) on the toolbar that takes you to the Database page. Used in conjunction with DisabledDatabase.gif and DownDatabase.gif. |
| UpExit.gif | exit button (in its available state) on the toolbar that restarts Web-Voyage. Used in conjunction with DisabledExit.gif and Down-Exit.gif. |
| UpHeadings.gif | headings button (in its available state) on the toolbar that takes you to the Headings List page. Used in conjunction with DisabledHeadings.gif and DownHeadings.gif. |
| UpHelp.gif | help button (in its available state) on the toolbar that takes you to the appropriate Help page. Used in conjunction with DisabledHelp.gif and DownHelp.gif. |
| UpHistory.gif | history button (in its available state) on the toolbar that takes you to the Search History page. Used in conjunction with DisabledHistory.gif and DownHistory.gif. |

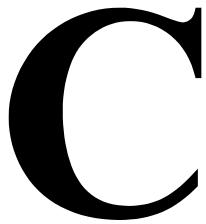
Table B-3. Image Files (Page 7 of 8)

| | |
|---------------|---|
| UpLibrary.gif | library button (in its available state) on the toolbar that takes you to the Library page. Used in conjunction with DisabledLibrary.gif and DownLibrary.gif. |
| UpLogin.gif | login button (in its available state) on the toolbar that takes you to the Patron Login page. Used in conjunction with DisabledLogin.gif, DownLogin.gif and UpLogout.gif. |
| UpLogout.gif | logout button (in its available state) on the toolbar that logs the patron out of WebVoyage. Used in conjunction with DisabledDatabase.gif, DownDatabase.gif and UpDatabase.gif. |
| UpPatron.gif | patron button (in its available state) on the toolbar that takes you to the Patron Information page. Used in conjunction with DisabledPatron.gif and DownPatron.gif. |
| UpRemote.gif | remote button (in its available state) on the toolbar that takes you to the Remote Databases page. Used in conjunction with DisabledRemote.gif and DownRemote.gif. |
| UpRequest.gif | request button (in its available state) on the toolbar that takes you to the Request Type page. Used in conjunction with DisabledRequest.gif and DownRequest.gif. |
| UpSearch.gif | search button (in its available state) on the toolbar that takes you to the Search page. Used in conjunction with DisabledSearch.gif and DownSearch.gif. |
| UpTitles.gif | titles button (in its available state) on the toolbar that takes you to the Title List page. Used in conjunction with DisabledTitles.gif and DownTitles.gif. |
| view1.gif | first button on an item's record display (in its raised state) - displays information that corresponds to the data within the display1.cfg file. |
| view1a.gif | first button on an item's record display (in its disabled state) - displays information that corresponds to the data within the display1.cfg file (for example, Bibliographic Information). |
| view2.gif | second button on an item's record display (in its raised state) - displays information that corresponds to the data within the display2.cfg file (for example, Holdings Information). |
| view2a.gif | second button on an item's record display (in its disabled state) - displays information that corresponds to the data within the display2.cfg file (for example, Holdings Information). |
| view3.gif | third button on an item's record display in its (raised state) - displays information that corresponds to the data within the display3.cfg file (for example, Table of Contents). |

Table B-3. Image Files (Page 8 of 8)

| | |
|------------|---|
| view3a.gif | third button on an item's record display (in its disabled state) - displays information that corresponds to the data within the display3.cfg file (for example, Table of Contents). |
| view4.gif | fourth button on an item's record display (in its raised state) - displays information that corresponds to the data within the display4.cfg file (for example, Linked Resources). |
| view4a.gif | fourth button on an item's record display (in its disabled state) - displays information that corresponds to the data within the display4.cfg file (for example, Linked Resources). |
| view5.gif | fifth button on an item's record display (in its raised state) - displays information that corresponds to the data within the display5.cfg file (for example, MARC View). |
| view5a.gif | fifth button on an item's record display (in its disabled state) - displays information that corresponds to the data within the display5.cfg file (for example, MARC View). |

Configuring WebVoyage Bibliographic Record Linking Display



Overview

Bibliographic records are related to each other for different reasons. You can use bibliographic record linking to relate a new serial title with its preceding title. Conversely, you can relate an old serial title with its succeeding title. Those are just two types of related records.

Bibliographic Record Linking provides sites with a method for:

- Defining relationships between bibliographic records using profiles created in the Voyager System Administration module.
- Displaying those relationships in WebVoyage using configuration files in the opac.ini file.
- Maintaining those relationships with templates in the Voyager Cataloging module.

The bibliographic record linking profiles are created so that related records can be identified using data from a single source, the source record. In each profile, the data from the source record is expressed in MARC format by pairing coordinated tags and subfields with a left-anchored index.

For example, the 773 \$x tag and subfield might be paired with the left-anchored index for searching ISSN numbers. The tag/subfield/index combination that links the source record to its related records can be any tag/subfield in the source record and any left-anchored index defined in System Administration.

NOTE:

The left-anchored indexes available for bibliographic record linking are those defined in the Search component of Voyager System Administration.

Left-anchored indexes which are not available for bibliographic record linking include headings searches as defined in Search Definitions and composite searches as defined in Composite Definitions of Voyager System Administration.

Defining Record Relationships

Bibliographic records can be linked in different directions. For example, a vertical relationship can be used to relate the main bibliographic record of a serial title to its article level bib records and then to relate the article level bib records back to the main record. In addition to vertical relationships, the following relationships exist.

- Sibling relationships between “children” records that share the same host or “parent” record
- Chronological relationships between records that are predecessors and successors
- Horizontal relationships between records that reflect different versions of the same bibliographic item

Complementary relationships are defined separately. In this type of relationship, the tag/subfield that links a source record to related records does not automatically specify the complementary tag that links the related records back to the source record. Each complementary relationship must be explicitly defined and all tag/subfields must be available in a left-anchored index.

Displaying Related Records

The detailed record view of bibliographic records in WebVoyáge can be completely configured to each site's preferences. Because of this, different bibliographic relationships can be configured to display at different times using different display elements for the labels.

When a source record displays in WebVoyáge, the related record information is displayed by clicking a hyperlink. The information can display in up to three columns, such as title, author, and publication date; and each site determines the information that creates the hyperlink. Patrons view the related records by clicking the hyperlink which leads directly to the detailed record view of the related record.

Each site can specify the maximum number of related records to display in the detailed record view. If the number of related records exceeds this threshold, the detailed record view of the source record includes a hyperlink to a title list of the related records rather than displaying a single record.

Maintaining Related Records

Related records can be maintained using the Voyager Cataloging module. You can view and edit existing related records as well as create new related records quickly and easily using templates which contain derivation fields.

Derivation fields allow you to map data from the source record into the new, target record. Standard template functionality remains in place, so you can create new records containing mapped data as well as static text and empty tags and subfields.

Configuring Voyager for Bibliographic Record Linking

Bibliographic Record Linking integrates the functionality of several Voyager modules.

- System Administration
- WebVoyage
- Cataloging

System Administration

In the System Administration module, you determine the tag, subfields, and indexes that link a source record to one or more related records. This is accomplished through a new feature, the Bibliographic Record Linking Profile. This profile allows you to create multiple profiles for multiple record relationships.

Cataloging

In the Cataloging module, staff can search for, review, and edit the related records using current cataloging functions. If the active bibliographic record contains any of the subfields that define a bibliographic record relationship, a new menu option displays on the menu bar.

The Record Relationships menu lists any profiles that include tags/subfields that exist in the current active record. Selecting one of the profiles returns a list of all related records.

NOTE:

Any bibliographic records that have been suppressed do not display in WebVoyáge. However, they do display in the Cataloging module.

Also, if multiple owning libraries exist for records in the database, related records only display per owning library. That is, only the related records belonging to the same owning library as the source record display in WebVoyáge.

WebVoyáge

You can edit existing display configuration files in order for the relationships to display correctly in WebVoyáge. A new code has been created which, when added to the appropriate configuration file, displays the related records. The new code is a four-digit number, 3500, and is similar to the 3000 code used to display linked resources or the 4000 code used to display the bibliographic record in MARC format.

You can also configure WebVoyáge to display a related records list for relationships which exceed the maximum number of records defined in the opac.ini file.

Configuring WebVoyáge for Bibliographic Record Linking

The opac.ini file and the display configuration files need to be configured in order to properly display related records in WebVoyáge.

There are two stanzas in the opac.ini file that must be configured for Bibliographic Record Linking.

- [View_Record_Page] stanza
- [Max_Related_Records_Page] stanza

[View_Record_Page] Stanza

Four variables in the [View_Record_Page] stanza accommodate the display of a source record with an exceedingly large number of related records. See [Figure C-1](#).

```
[View_Record_Page]
MaxRelatedRecords=
MaxRelatedRecordsMessage=
MaxRelatedRecordsMainTableData=
MaxRelatedRecordsBorder=
```

Figure C-1. Related records variables in the [View_Record_Page] stanza

If the related records of the source record do not exceed the maximum, they display in the detailed record view of the source record. These related records actually display in a table format. Two of the variables allow you to control this table.

NOTE:

The [View_Record_Page] stanza has been truncated to display only those variables related to Bibliographic Record Linking.

Table C-1. Related records variables in the [View_Record_Page] stanza

| Variable | Description |
|---------------------------|--|
| MaxRelatedRecords | The MaxRelatedRecords variable defines the maximum number of related records which can display with a source record. If the number of related records exceeds this number, the system supplies a hyperlink to a new web page displaying a title list of all related records.

To define the maximum number of related records, enter a number after the equal sign following the MaxRelatedRecords variable. |
| MaxRelatedRecords Message | Message which displays on the source record display as a hyperlink when the maximum number of related records exceeds the number set in the MaxRelatedRecords variable.

For example, if the MaxRelatedRecords variable is set to 30, and the source record is linked to 50 related records, the message defined in the MaxRelatedRecordsMessage variable displays as a hyperlink. When you click the hyperlink, the system creates a web page displaying a title list of all the related records.

To define the maximum related records message, enter the message you want to display in the source record after the equal sign in the MaxRelatedRecordsMessage variable. |

Table C-1. Related records variables in the [View_Record_Page] stanza

| | |
|------------------------------------|---|
| MaxRelatedRecords
MainTableData | <p>The MaxRelatedRecordsMainTableData variable allows you to control the color of the background of the fields in the related records table that displays in the detailed record view of the source record.</p> <p>You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the MaxRelatedRecordsMainTableData variable to configure the color of the text on a page.</p> <p>For example, if you want to make the cells white, you would enter ffffff (the hexadecimal color code for white) after the MaxRelatedRecordsMainTableData variable.</p> |
| MaxRelatedRecords
Border | <p>The MaxRelatedRecordsBorder variable allows you to define the width of the related records table border that displays in the detailed record view of the source record.</p> <p>To define the border width for the related records table, enter a number after the MaxRelatedRecordsBorder variable.</p> <p>Enter a “0” (zero) to make the border invisible; enter a “1” (one) to make the border width the same as all other table displays in WebVoyage.</p> |

[Figure C-2](#) shows related records displayed on the View Record page.

The screenshot shows a WebVoyage interface for a bibliographic record. At the top, there are tabs: Bibliographic, Holdings, Table of Contents, Linked Resources, and MARC Format. Below the tabs, the title 'Journal of academic librarianship.' is displayed. A note indicates it is from the Endeavor Library of Information. The 'Child Records' section lists three entries, each with a link to a detailed view:

| Child Records: | # | Author | Full Title | Date |
|----------------|------------------|---|------------|------|
| [1] | Glynn, Thomas G. | Academic Librarianship in the 21st Century. | 2000 | |
| [2] | Blahut, Kevin L. | Current reviews in Academic Librarianship. | 2000 | |
| [3] | Nolan, Ted. | Goals of the profession. | 2000 | |

The 'Preceding Title' section shows one entry:

| Preceding Title: | # | Full Title |
|------------------|--|------------|
| [1] | Original Journal of Academic librarianship | |

Other metadata fields shown include 'Title: Journal of academic librarianship.', 'Primary Material: Periodical', and 'Publisher: [Ann Arbor, MI, etc., Mountainside Pub.]'.

Figure C-2. Related records display in WebVoyage

[Figure C-2](#) is the type of related record display that results if the number of related records is less than the number defined in the MaxRelatedRecords variable.

Using [Figure C-2](#) as a guide:

- the `MaxRelatedRecordMainTableData` variable controls the background color of the results table
- the `MaxRelatedRecordsBorder` variable controls the size of the results table border (0)

[Figure C-3](#) is the type of related record display that results if the number of related records is greater than the number defined in the `MaxRelatedRecords` variable.



Figure C-3. Maximum related record display in WebVoyage

Using [Figure C-3](#) as a guide the `MaxRelatedRecordMessage` variable displays after the Child Records label **Click here to display related records**.

If a patron clicks the related records hyperlink, the results display as in [Figure C-5](#). You can configure the results table on this page by changing the variables in the `[Max_Related_Records_Page]` stanza (see [The \[Max_Related_Records_Page\] Stanza on page C-7](#)).

The `[Max_Related_Records_Page]` Stanza

The `[Max_Related_Records_Page]` is a stanza which has been added to the opac.ini file for bibliographic record linking (see [Figure C-4](#)).

This stanza defines the appearance of the web page that displays when a user clicks the maximum related records hyperlink (see [MaxRelatedRecords](#) on [page C-5](#)) in the source record display.

```
[Max_Related_Records_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
Records_per_page=1
HotLink_=#
HotLink_1=
HotLink_2=
HotLink_3=
Leading#Text=[ ||
Trailing#Text=|| ]
MaxRelatedRecordsMainTableData=
MaxReltedRecordsBorder=
HostRecLinkTextTop=
HostRecLinkTextBottom=
```

Figure C-4. [Max_Related_Records_Page] stanza of the opac.ini file

The first six variables within the [Max_Related_Records_Page] are the same as the [Html_Body] stanza. They allow you to configure the background of a page as an image or a color, the color of the text on a page, the color of an unclicked (unvisited) link on a page, the color of a clicked (visited) link on a page, and the color of a link as it is being clicked.

[Table C-2](#) details the variables of the [Max_Related_Records_Page] stanza.

Table C-2. [Max_Related_Records_Page] stanza in the opac.ini file

| Variable | Description |
|----------------------------------|--|
| Records_per_page
Default = 10 | <p>The Records_per_page variable allows you to control the number of related records which display on the page.</p> <p>For example, if the total number of records related to your source record is 100, and you set this variable to 25, then the related records display 25 records at one time. Patrons must click the next button to view additional records.</p> <p>Enter a number after the Records_per_page variable to define the number of records to display at one time on the Max Related Records page.</p> |
| HotLink_N ... Variables | <p>The HotLink_N variables control which fields in the related records table are used as hotlinks. The following variables are used:</p> <p>HotLink_# # (Row number column)
 HotLink_1 Column 2
 HotLink_2 Column 3
 Hotlink_3 Column 4</p> <p>These variables control the hotlinks for the related records on both the detailed view of the source record and on the Max Related Records page.</p> <p>After each variable, enter Y (yes) to indicate that this field in the headings list is to be a hyperlink to the record display page for that record. Enter N (no) to prevent this field from being used as a link.</p> <p>The HotLink_1, 2, and 3 variables do not represent specific types of data - each variable refers to a particular column, no matter what is in the column. The data that displays is controlled by the Search Results selected for the particular profile.</p> |

Table C-2. [Max_Related_Records_Page] stanza in the opac.ini file

| Variable | Description |
|---|---|
| Leading#Text=
and
Trailing#Text=] | <p>The Leading#Text and Trailing#Text variables allow you to make the hypertext link connected to the number in the # column larger. This is done by specifying extra characters that display before and after each record number that displays in the # column. These characters simply display on screen in order to allow the hypertext link to be much larger than the single digits that sometimes display in this column.</p> <p>Enter the text to display before the number after the Leading#Text variable; enter the text to display after the number after the Trailing#Text variable. Entering a pipe (" ") after the variable causes a space to display on screen. (Entering spaces after the variable does not cause spaces to display on screen.)</p> |
| MaxRelatedRecordsMainTableData | <p>The MaxRelatedRecordsMainTableData variable allows you to control the background color of the fields in the related records table. The related records table displays after the max related records hyperlink is clicked in the detailed record view of the source record.</p> <p>You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the MaxRelatedRecordsMainTableData variable to configure the color of the text on a page.</p> <p>For example, if you want to make the cells white, you would enter ffffff (the hexadecimal color code for white) after the MaxRelatedRecordsMainTableData variable.</p> |
| MaxRelatedRecordsBorder

Default = 1 | <p>The MaxRelatedRecordsBorder variable allows you to define the width of the related records table border. The related records table displays after the max related records hyperlink is clicked on the detailed record view of the source record.</p> <p>To define the border width for the related records table, enter a number after the MaxRelatedRecordsBorder variable.</p> <p>Enter a "0" (zero) to make the border invisible; enter a "1" (one) to make the border width the same as all other table displays in WebVoyage.</p> |

Table C-2. [Max_Related_Records_Page] stanza in the opac.ini file

| Variable | Description |
|-----------------------|---|
| HostRecLinkTextTop | The HostRecLinkTextTop variable allows you to define the text for the hyperlink which returns the patron from the related records list to the source record display. The hyperlink displays above the list.

The default text is “Click here to return to the original record.” You can change the text to anything you want. |
| HostRecLinkTextBottom | The HostRecLinkTextBottom variable allows you to define the text for the hyperlink which returns the patron from the related records list to the source record display. The hyperlink displays below the list.

The default text is “Click here to return to the original record.” You can change the text to anything you want. |

Once the [Max_Related_Records_Page] stanza has been configured, the page displays in WebVoyage as in [Figure C-5](#).

| # | Author | Full Title |
|------|----------------------------|--|
| [1] | Gluck, Christoph Willibald | Alceste [Nuottijulkaisu] arie der Alceste |
| [2] | Rossini, Gioacchino | Barbier von Sevilla [Nuottijulkaisu] Cavatine der Rosina: Frag ich mein bekomm |
| [3] | Bizet, Georges | Carmen [Nuottijulkaisu] Habanera: Ja die Liebe hat bunte Flügel |
| [4] | Bizet, Georges | Carmen [Nuottijulkaisu] Sequidilla: Draussen am Wall von Sevilla |
| [5] | Mozart, Wolfgang Amadeus | Cosi fan tutte [Nuottijulkaisu] Arie der Dorabella: Ein loser Dieb ist Amor |
| [6] | Mozart, Wolfgang Amadeus | Cosi fan tutte [Nuottijulkaisu] Schon ein Mädchen von fünfzehn Jahren |
| [7] | Wagner, Richard | Der fliegende Holländer [Nuottijulkaisu] Ballade der Senta |
| [8] | Nicolai, Otto | Die lustigen Weiber von Windsor [Nuottijulkaisu] Arie der Anna |
| [9] | Nicolai, Otto | Die lustigen Weiber von Windsor [Nuottijulkaisu] Arie der Frau Fluth |
| [10] | Mozart, Wolfgang Amadeus | Don Juan [Nuottijulkaisu] Arie der Zerline: Schmäle, tobe lieber Junge |

Figure C-5. Maximum related records display in WebVoyage

Using [Figure C-5](#) as a guide:

- the RecordsPerPage variable controls the number of titles that display at one time (10)
- the Hotlinks variables control which columns of information should display as hyperlinks (Hotlink_# and Hotlink_1)

-
- the `MaxRelatedRecordMainTableData` variable controls the background color of the results table
 - the `MaxRelatedRecordsBorder` variable controls the size of the table border (1)
 - the `HostRecLinkTextTop` variable controls the hyperlink above the results table (Click here to return to the original record)
 - the `HostRecLinkTextBottom` variable controls the hyperlink below the results table (Click here to return to the original record)

Basic Record Display Customizing Information

The following section is an introduction to the record display files and how to edit them. This is a general discussion and not specific to Bibliographic Record Linking. Please read this section if you are unfamiliar with editing files of this type. If you are familiar with these files, you can skip to the next section, [Configuring the `DisplayN.cfg` file for Bibliographic Record Linking](#) beginning on [C-15](#).

The `displayn.ini` file is located in each of the `/m1/voyager/xxxdb/etc/webvoyage` database sub-directories (`/local`, `/z3950`, `/vcit`, or `/zcit`).

When a user selects a record entry from a WebVoyage index to display the record's detail, the system looks for data in the MARC bibliographic record, the MARC holdings record, the line item in the purchase order, and the item record. Whenever any of these records are present, the system displays data based on a variety of factors including:

- Definitions in the `*.ini` and `*.cfg` files (described in this section)
- Available data in the MARC bibliographic record
- Available data in the linked MARC holdings record(s)
- Available data in the linked line item copy(ies) of a purchase order(s)
- Available data in the linked item record(s)

However, before the system constructs a display from this data, it first considers whether or not records have been set for suppression from WebVoyage displays. This is always accomplished by the manual or automatic setting of the `Suppress from OPAC` values in either the MARC bibliographic record or the MARC holdings record, or both.

DisplayN.cfg Files

The `displayn.cfg` files dictate the information that displays in the Record Details in the OPAC.

The `displayn.cfg` files, along with the `print.cfg`, `save.cfg`, and `email.cfg` files, can contain any tag, indicator, subfield combination from a MARC bibliographic record, as well as text labels for those combinations.

In addition, the file can contain one of the following codes.

Table C-3. Example of codes available for display configuration files

| Code | Description |
|------|--|
| 2000 | Table of Contents (505 subfields a, r, t, g) |
| 3000 | 856 Links (Linked Resources from 856 tag) |
| 3500 | Related bibliographic records |
| 4000 | Marc record |
| 5000 | Database name of Bib Record |
| 8000 | UNICODE characters (Original Language from 880 tags) |
| 9000 | Holdings Information |
| 9500 | Display Holdings Summary information |

NOTE:

The list of codes in [Table C-3](#) is only a partial list.

You can modify or delete everything in the `displayn.cfg` files. However, deleting certain information could disable your patrons from accessing available information about your bibliographic information. A sample `displayn.cfg` file is shown in [Figure C-7 on page C-15](#).

For each label, you assign one or more MARC tags, indicator values, and subfields. You may add other labels, change any already supplied, or delete any already supplied, reassign tags/subfields to other labels, remove subfields, add subfields, specify different indicator values, and so on.

You can also reorder the labels to suit your needs, reorder the sequence of multiple fields displaying under one label, or split out the grouped tags with individual labels. If you want, you can completely redo the entire configuration although Endeavor believes that you only need to edit these to meet local needs rather than completely redo them.

You can add a hypertext title link (search redirect) to the WebVoyage display of author, title, subject or call number fields. After the end of the tag subfields for which you want a link, add a T (for title), S (subject), A (Author), D (Date) or C (call number) and the subfields for the hypertext. See [Figure C-6](#) for an example.

Supersedes:

780 02 at T t

780 03 at T t

Figure C-6. Example of a search redirect in **displayn.cdf** file

In the following configuration file examples, xx indicates that any indicator values apply. To indicate a blank, use the pipe or vertical bar (|). Notice the labels used for the 000, 006, 007, and 008 fields. When the system finds these byte position values in the MARC record, it uses the `displayn.cfg` file to supply the labels, and then retrieves the actual text descriptor from the `marcinfo.ini` file.

A sample `displayn.cfg` file is shown in [Figure C-7](#).

```
Database: +No information available
      5000
Main Author:
      100 XX aqd A aq
      110 XX ab A ab
Title:
      240 XX aplskfmnor T apl
      730 XX aplskfmnor T apl
      245 XX abcfnps
Variant Title:
      246 XX abfnp T ab
Continues:
      780 00 at
      780 01 at
Supersedes:
      780 02 at
      780 03 at
Primary Material:
      000 06 2
Physical Description:
      007 00 1
Includes:
      006 00 1
Holdings Information: +No Data Available
      9000
```

Figure C-7. Sample displayn.cfg File

Configuring the Displayn.cfg file for Bibliographic Record Linking

In order to display related records in WebVoyáge, the `displayn.cfg` file must be edited to include a new code. This new code signals the system to check the profiles defined in System Administration for related records. If the system finds

one or more related records, the information selected on the Search Results tab for the profile displays as a hyperlink. Clicking the hyperlink displays the related record.

Related records hyperlinks can be added to the `displayn.cfg` file you have defined to display a detailed view of a bibliographic record. For example, if you have defined the `display1.cfg` file to contain many tags and subfields in order to display very complete and detailed information about a bib record, use that same configuration file to display related records.

Follow the steps in [Procedure C-1, Choosing a Displayn.cfg file](#), to select a `displayn.cfg` file.



Procedure C-1. Choosing a Displayn.cfg file

1. In the appropriate `displayn.cfg` file, type the text you would like to display in WebVoyáge to label related records. This label should be typed flush against the left margin.

For example, if you want “Linked Records:” to display as the label in WebVoyáge, type **Linked Records:** in the configuration file.

You can specify a message (a display constant) to display in WebVoyáge if the current record is not related to any other records.

2. Enter a space then a plus sign (+) after the linked records label followed by the message you want to display if there are no related records. For example, if you want the message “No Related Records” to display, type **+No Related Records** after the label.

NOTE:

Be aware that the system uses the textual messages for all records. For example, if you added “+No related records” as a display constant for the “Related Records” label, that display constant would display for all materials without related records.

3. Enter a carriage return.
4. Enter the 3500 code followed by the profile code you want the system to use to look for related records.

For example, if the profile code is “ISSNPREC,” enter three spaces followed by **3500 ISSNPREC**.



IMPORTANT:

This line must be indented 3 spaces from the left margin.

If no there is no information associated with the code or MARC tag, then nothing displays (including the label), unless information is included after the plus sign.

You can leave up to one blank line between all labels and codes or tags. If you insert more than one blank line, only one blank line displays.

If you added the information, the `display1.cfg` file would include the two lines shown in [Figure C-8](#).

```
Linked Records: +No Related Records  
3500 ISSNPREC
```

Figure C-8. Linked records section of `display1.cfg` file



IMPORTANT:

If you want to display related records for every Bib Linking Profile you have created, you must add the 3500 code for every profile.

For example, if you created four Bib Linking Profiles named “Child,” “Parent,” “ISSNPreceding,” and “ISSNSucceeding,” you need to add each of the Profile Codes for these profiles to a display configuration file following the 3500 code.

For example, you could add multiple bib linking profiles to the `display1.cfg` file as shown in [Figure C-9](#).

```

Child Records: +No Related Records
 3500 790CHILD

Parent Records: +No Related Records
 3500 790PARENT

Preceding Title: +No Related Records
 3500 ISSNPREC

Succeeding Title: +No Related Records
 3500 ISSNSUCC

```

Figure C-9. Example of a display1.cfg file for multiple bib linking profiles

When you display a source record in WebVoyage, the system sees the 3500 code in the display, checks the Bib Linking Profiles, and displays the corresponding information.

For this example, assume that the system found Child records related to our source record but no Parent, Preceding, or Succeeding related records. The WebVoyage display for the display1.cfg described in [Figure C-9](#) would look like the example in [Figure C-10](#).

Journal of academic librarianship.

| Database: Endeavor Library of Information | | | |
|--|------------------|--|-------------------|
| Child Records: | # | Author | Full Title |
| [1] | Glynn, Thomas G. | Academic Librarianship in the 21st Century. | 2000 |
| [2] | Blahut, Kevin L. | Current reviews in Academic Librarianship. | 2000 |
| [3] | Nolan, Ted. | Goals of the profession. | 2000 |
| Preceding Title: | # | Full Title | |
| [1] | | Original Journal of Academic Librarianship | |
| Title: Journal of academic librarianship. | | | |
| Primary Material: Periodical | | | |
| Publisher: [Ann Arbor, MI, etc., Mountainside Pub.] | | | |
| <hr/> | | | |
| Database: Endeavor Library of Information | | | |
| Location: Main Collection (3rd Floor) | | | |
| Call Number: Z671 J58 | | | |
| Number of Items: 1 | | | |
| Status: Not Charged | | | |
| Older Issues: 1- 1991- | | | |

Figure C-10. WebVoyage display for multiple bib linking profiles

Each of the Child Records displays as a hyperlink. Clicking a hyperlink displays the detailed record view of the child record.

The detailed record view of a related record always includes a hyperlink to return to the source record. You can define the text for the hyperlink in the [Max_Related_Records_Page] stanza (see [The \[Max_Related_Records_Page\] Stanza on page C-7](#) for more information).

A hyperlink to view related records displays if the number of related records exceeds the maximum related records defined in the [View_Record_Page] stanza in the opac.ini. The text of the hyperlink is also defined in the [View_Record_Page] stanza (see [\[View_Record_Page\] Stanza on page C-4](#)).

[REDACTED]

Endeavor Information Systems, Inc.
See notice on first page

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