



## Voyager 6.5.1 Release Notes

### Release Overview

Responding to feedback from our library partners and trends in the automation marketplace, with Voyager 6.5.1, Ex Libris continues to provide a powerful integrated library management system that meets the growing demands placed on libraries today. This new product version addresses important functional requirements for both library patrons and staff. These include improved results display in the OPAC and staff modules, enhanced patron privacy, better handling of data from bibliographic enrichment services, and others. Voyager 6.5.1 provides easier requesting for patrons and clearer displays for library staff in consortia using Universal Borrowing.

An important new feature in this release is integration with Primo—the new-generation discovery and delivery solution for library-selected resources of all types--by Ex Libris. Designed to address the Internet-age user expectations for quick, easy, and effective search and retrieval, Primo provides a state-of-the-art user experience for finding and getting local and remote library materials – anytime, anywhere.

Library administrators can effectively and efficiently analyze Voyager data to make management decisions with Voyager 6.5.1. Voyager: Analyzer now includes dashboards to show library metrics and usage information visually in a single display. This new feature in Analyzer provides a graphical display of key statistics and relevant information to help managers make data-driven decisions about library resources.

Highlights of the Voyager 6.5.1 release include:

- Improved search results displays
- Smarter requesting options for patrons
- Enhanced patron privacy
- Better displays and more control over borrowing in consortia libraries
- Voyager integration with Primo
- Expanded management analysis tools
- Support for Internet Explorer 7.0

### New Feature Details

#### Improved Search Results Displays Enhance Users' Experiences

Voyager 6.5.1 provides users with improved search results displays within WebVoyage and via external search interfaces.

### **Limiting HTML on the View Record Display**

Many libraries rely on external sources of information to supplement their catalog data with enriched content. Through services such as Syndetic Solutions and Baker and Taylor's Content Café, patrons can view cover images, book reviews and summaries of the materials available in the library's collection. Libraries also use this feature to provide links to encyclopedias, dictionaries, and other external resources from WebVoyage.

With Voyager 6.5.1, libraries have an option to configure the WebVoyage displays to use only the first occurrence of a MARC field to link to external content. With this new option, libraries can eliminate redundant information from the record display, improving the user's experience with the library catalog.

Ex Libris is pleased to be able to provide this enhancement in this release since it was one of the top-ranked enhancements voted upon by customers in late 2006.

### **Returning Relevance-Ranked Search Results for z39.50 Searches**

Using the standard z39.50 protocol, libraries can remotely search other databases and library catalogs. Voyager can also be a search target using the z39.50 protocol, sending library catalog results to other search interfaces. With Voyager 6.5.1, search results for general keyword searches from other sites using z39.50 can be returned with relevance from Voyager. By adding relevance-ranking to the results, users are more likely to see the best records for items in the library's collection and make better use of the library's resources.

### **Navigating and Displaying Authority Records**

Voyager's powerful searching options allow users to search for and view authority records in the library catalog. Often these records contain cross references and related headings. Voyager 6.5.1 applies a more logical order to authority displays, making it easier for patrons and staff to navigate headings displays and quickly find the information they are seeking.

New in this release, Voyager will group headings by type (See, See Also, Narrower Term, Broader Term, etc.), and then order headings alphabetically within each group. This new order applies to headings viewed in WebVoyage as well as the reference information displays in the staff Cataloging module.

## **Smarter Requesting Options Make Requesting More Intuitive**

### **Limiting Pickup Locations in Request Groups**

Request groups allow libraries to associate locations into groups for the purpose of placing holds and recalls. For a title level request, only items whose permanent or temporary location is included in this group may fill the request. With Voyager 6.5.1, WebVoyage ties pickup locations to request groups such that the pickup location must be a location that belongs to the selected request group.

This is an optional feature that libraries may implement. When configured via the OPAC.ini, patrons will see a choice to select "Any Copy At" and display the available request groups. Once a request group has been selected, the pickup locations will be refreshed to display only the pickup locations valid for the request group. If items do not belong to a request group, the option to select "Any Copy At" will not be displayed.

This prevents routing requests to locations that ultimately cannot be filled and provides patrons with faster delivery of their requested materials.

### **Determining Pickup Locations in Universal Borrowing**

Universal Borrowing allows patrons to request an item from one library and have it sent somewhere else for pickup. In previous releases, patrons became accustomed to placing requests using the default pickup location even though the default may not have been the preferred pickup location they would have selected themselves. This sometimes resulted in delayed delivery of the materials and additional processing to determine where the item should be sent.

With this new release, libraries will now be able to determine whether a default pickup location should be supplied on the request form, or whether the patron must specify a valid pickup location before the request can be submitted. New options have been added to the OPAC.ini to allow libraries to enable this new feature, if desired, to streamline UB requesting for their patrons.

If enabled, when the home library is a valid pickup location, Voyager will select the home library as the default pickup location. The patron may choose to have the item delivered to another valid location for pickup. When the home library is not a valid pickup location, Voyager will use the library's settings to determine if a pickup location should be selected by default or whether the patron must select the pickup location for each request.

This enhancement preserves existing functionality for libraries that want to provide default pickup locations and extends the requesting options for libraries who desire to have patrons specify the pickup location for their materials, thereby making sure the items are being delivered to the preferred locations quickly and accurately.

### **Enhanced Patron Privacy Safeguards Users' Identity**

Ex Libris is committed to supporting the dedication of libraries to safeguard open, anonymous access to materials and information. As a part of this standard of service, we can assure libraries that patron privacy is fully protected with Voyager. In Voyager 5, we introduced new features to purge patron records and secure access to historical circulation information. With Voyager 6.5.1, we continue to expand functionality to protect the privacy of patrons' personal information.

### **Limiting Patron Information in Serials**

Voyager's Acquisitions and Serials module allows library staff to create routing lists for serials, adding patrons and locations to the list as necessary. When searching for patrons' names in previous releases, it was possible to view Social Security numbers. In this new release, the Social Security number has been removed from the display, leaving only the patron name and institution ID in the display.

We are pleased to incorporate this feature into this latest release of Voyager as it was one of the requests selected and prioritized by Voyager customers in the 2006 enhancement review process.

### **Enhancements to Universal Borrowing Streamline Circulation**

Voyager 6.5.1 features several enhancements defined and prioritized by Ex Libris' Universal Borrowing Task Force members. The primary goal of that task force has been to enable consortium libraries to implement and manage local policies to share library materials between member libraries, building a larger collection of library materials than can be provided by any one member. Voyager's Universal Borrowing module allows patrons from any UB library to place requests through WebVoyage and allows library staff to circulate the materials through Voyager's Circulation module.

### **Searching for Patrons**

Functionality added in Voyager 6.1 automatically determines the library to which patrons and items belong based on a library's barcode number pattern. With the Voyager 6.5.1 release, the <Auto-Select from Barcode> prompt will only display for barcode searches, clarifying the display choices staff members have when searching for patron records. When searching by patron name or institution ID, the search automatically defaults to the local library.

### **Providing Greater Control with Aggregate Blocks**

The aggregate block functionality introduced in Voyager 6.1 gave libraries in a consortium control over patron borrowing privileges by determining when other libraries' blocks should be used to restrict a patron's borrowing privileges at his home (local) library. With this new release, libraries have greater control with the ability to extend or deny borrowing privileges to local patrons when individual policies have been violated at other consortium members. It is now possible, for example, to suspend borrowing privileges when the patron owes excessive library fines, but permit borrowing when the patron has placed too many Universal Borrowing requests.

### **Voyager Integration with Primo Enhances Access to Library Materials**

Today's library users seeking scholarly knowledge resources have more options than ever before. Libraries that don't meet user expectations for speed, ease of use, and relevance of the discovery experience risk being relegated to a secondary role.

With Primo, libraries can once again assume a leadership position in setting discovery and delivery standards. Primo unlocks library potential by providing users with a universal solution for the discovery and delivery of print and digital information sources regardless of format and location.

### **Voyager/Primo Integration Makes Library Resources More Accessible to Users**

Primo is the new Ex Libris solution for the discovery and delivery of all types of local and remote institutional resources. Primo draws on Web 2.0 concepts to offer new search paradigms, user-centric design, collaborative workspace, and access anywhere, anytime. Information from Voyager is harvested and provided to the Primo Publishing Platform, where the records are enriched with links to book covers, facets, and other information. Primo provides options for linking back to Voyager for full holdings details, patron information, item requests, and more.

To take advantage of the interoperability between Voyager and Primo, a library must have Voyager 6.5.1 or later and Primo 1.0 or later. For more information about Primo, check out this link on our Web site: <http://www.exlibrisgroup.com/primo.htm>.

### **Expanded Management Analysis Tools Enable Better Decision Making**

Voyager: Analyzer offers a powerful tool for analyzing library data and applying business intelligence principles to library management. Voyager transactions provide lots of data about library usage, trends, and allocation of resources. Dashboards provide a quick graphical view of key library statistics and measurements, enabling managers to identify bottlenecks, spot trends, anticipate needs, and allocate resources in the most effective ways possible.

### **Using Dashboards to Communicate Key Information**

Analyzer for Voyager 6.5.1 offers improved decision-making support for library administrators by using dashboards to view Voyager data quickly and easily. Dashboards provide a quick glance of library metrics and key performance indicators to facilitate making data-driven decisions. This reduces the

time necessary to review multiple reports and results in better use of library resources. Library administrators and managers determine what types of information should be presented in a dashboard display by adding reports to a template. Different users may customize the templates to meet individual needs or offer multiple views of library reports, Web pages, or other relevant information.

## OpenURL ILL Requestor

The Voyager ILL extended service for OpenURL requesting has been updated to provide libraries with more options to configure it for use with multiple link resolvers. By default, the OpenURL ILL requestor is configured for use with SFX.

## Hardware/Software Requirements

The Voyager 6.5.1 release includes a full set of server binaries and new Voyager clients for staff workstations.

For Voyager 6.5.1, the browser requirements have been updated to include Internet Explorer 7. Supported browsers are:

- Internet Explorer 7
- Netscape 7

For the client operating system:

- Windows Vista, Business and Enterprise editions
- Windows XP, service packs 1 and 2
- Windows 2000 Professional, service pack 3

For more information on supported browsers, PC operating systems and recommended PC hardware requirements, see this page on SupportWeb:

[https://support.endinfosys.com/cust/voy/cust\\_supp/tech/clientplatform.html](https://support.endinfosys.com/cust/voy/cust_supp/tech/clientplatform.html).

To help you take advantage of features in recent releases, the **Voyager.ini file** for your PC has been updated to include these options:

- Circulation charge timeout setting
- GlobalLog stanza (Single client login, Encryption, Staff client results sorting)
- Search URI stanza
- MARC posting stanza for WebVoyage
- E-mail server stanza

The **MARC tag tables** (MARC21, MARC21\_v5, OCLC, and RLIN versions) now include the code for Integrating Resource in the [RecFormat] stanza of the Master.cfg file.

## Contacts

For information on any of Ex Libris' products, please contact the nearest Ex Libris regional office:

<http://www.exlibrisgroup.com/offices.htm>.

Additional information, including the Voyager 6.5.1 Release Handbook, will be posted to SupportWeb and the Voyager-L list-serv as it becomes available.