



Voyager 8.2 Release Notes

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1

Introduction

Voyager 8.2 offers customers new features that enrich existing functionality, improve system performance, and provide tighter integration with third-party systems.

Specific enhancements in this release:

- Enhance integration with ERPs for patron information
- Improve discovery via Primo and new search options in Voyager
- Expand support for Resource Description and Access (RDA)
- Increase security of the ILS
- Satisfy user group enhancements priorities
- Extend NCIP integration

Purpose of This Document

This document lists the various enhancements and changes that are new in Voyager 8.2. You can find them listed under the following topics:

- [General](#) on page [12](#)
- [Headings and Indexes](#) on page [14](#)
- [Acquisitions](#) on page [24](#)
- [Cataloging](#) on page [27](#)
- [Circulation](#) on page [31](#)

- [Global Data Change \(GDC\)](#) on page [43](#)
- [System Administration](#) on page [45](#)
- [Patron Record Utilities](#) on page [50](#)
- [Primo Integration](#) on page [54](#)
- [Voyager Web Services](#) on page [56](#)
- [Voyager InterCirc](#) on page [59](#)
- [Web Authorities](#) on page [61](#)

Voyager 8.2 Documentation

The following is a list of the primary documentation for Voyager 8.2:

- Voyager 8.2 Release Notes
- Voyager 8.2 User's Guides
- The Road to Voyager 8.2
- Voyager 8.2 Installation and Upgrade Requirements

2

General

This section includes the following enhancements:

- Internet Browser Support
- Support for 10-digit OCLC Numbers
- MARC 21 Updates

Internet Browser Support

Purpose of Enhancement

Support for Internet Explorer 9 has been added to Voyager.

Description

Voyager's Web-based interfaces are supported on Internet Explorer 9, as well as other browsers.

Reference to Technical Documentation

Refer to *Supported Software and PC Requirements* in the Ex Libris Documentation Center for more information.

Support for 10-digit OCLC Numbers

Purpose of Enhancement

The purpose of this enhancement is to provide support for 10-digit OCLC control numbers.

Description

The OCLC Control Number is anticipated to reach one billion after July 1, 2013. At that point, OCLC will increase the length of the OCLC number to accommodate a variable length number string.

The new format uses the prefix “on” followed by ten digits. Seven- to nine-digit OCLC control numbers will also continue to exist.

Ex Libris has updated the indexing routines in Voyager to support 10-digit OCLC control numbers with the new “on” prefix. Voyager continues to support the pre-existing format for seven-, eight-, and nine-digit numbers as well.

Implementation Notes

No configuration is necessary.

MARC 21 Updates

Purpose of Enhancement

The purpose of this enhancement is to include the latest MARC 21 updates in Voyager.

Description

The Voyager tag tables have been updated to reflect the most recent changes in the MARC 21 standard.

The MARC 21 tag tables have been updated through MARC 21 Update 14 (April 2012) and the OCLC tag tables have been updated through OCLC Technical Bulletin 261 (May 2012).

Implementation Notes

New tag tables will be installed with your clients during the upgrade. If you have any locally-defined fields, you will need to add your customizations to the new tag tables as appropriate.

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3

Headings and Indexes

This section includes the following enhancements:

- Headings Types
- New and Updated Indexes
- MARC 264
- New Search Limits

Headings Types

Purpose of Enhancement

The purpose of this enhancement is to include the complete list of subject heading types, genre/form types, and occupation types recognized by the Library of Congress.

Description

All of the approved subject headings types, genre/form types, and occupation types recognized by the Library of Congress have been added to the HEADING_TYPE table in Voyager.

Implementation Notes

Your HEADING_TYPE table will be updated to include all valid heading, genre/form, and occupation types automatically during your upgrade. As part of this process, the

HEADING_CODE is being expanded from one character to a maximum of twelve characters, and will be synonymous with the code assigned to the thesaurus.

You may want to suppress or unsuppress various options in System Administration once your upgrade is complete.

Reference to Technical Documentation

Refer to the Library of Congress web site for more information.

- Subject heading types: <http://www.loc.gov/standards/sourcelist/subject.html>
- Genre/Form types: <http://www.loc.gov/standards/sourcelist/genre-form.html>
- Occupation types: <http://www.loc.gov/standards/sourcelist/occupation.html>

New & Updated Indexes

Purpose of Enhancement

The purpose of this enhancement is to update various Voyager indexes to support Resource Description and Access (RDA) and to comply with current MARC standards.

Description

Numerous changes have been made to the Voyager indexes. Seventy-eight indexes will be either added or updated in this release. Many of these are new left-anchored indexes created to support MARC fields added to support RDA.

The indexes cover a range of authority and bibliographic fields, along with updates to two bibliographic composite indexes in Voyager.

New Authority Left-Anchored Indexes

Index Name	Index Code	Subfields Indexed
Auth ISSN (022a)	A22A	022 a
Auth ISSN (022y): Incorrect	A22Y	022 y
Auth ISSN (022z): Canceled	A22Z	022 z
Auth ISSN-L (022l)	A22L	022 l

Auth ISSN-L (022m): Canceled	A22M	022 m
Auth Other Std. Ident.(024a)	A24A	024 a
Auth Other Std. Ident.(024z): Canc/Invld	A24Z	024 z
Auth Geographic Area Code (043a)	A43A	043 a
Auth Birth Date (046f)	A46F	046 f
Auth Death Date (046g)	A46G	046 g
Auth Begin or single date (046k)	A46K	046 k
Auth End Date (046l)	A46L	046 l
Auth Content Type Term (336a)	A36A	336 a
Auth Content Type Code (336b)	A36B	336 b
Auth Place of Birth (370a)	A70A	370 a
Auth Place of Death (370b)	A70B	370 b
Auth Associated Country (370c)	A70C	370 c
Auth Place of Resid/Hqrs (370e)	A70E	370 e
Auth Other Assoc Place (370f)	A70F	370 f
Auth Place of Origin of Work (370g)	A70G	370 g
Auth Field of Activity (372a)	A72A	372 a

Auth Associated Group (373a)	A73A	373 a
Auth Occupation (374a)	A74A	374 a
Auth Type of Family (376a)	A76A	376 a
Auth Language Code (377a)	A77A	377 a
Auth Form of Work (380a)	A80A	380 a
Auth Other Distinguishing Char (381a)	A81A	381 a
Auth Medium of Performance (382a)	A82A	382 a
Auth Key (384a)	A84A	384 a
Auth Personal Name (700)	A700	700 abcdefghijklmnopqrstuvwxyz2
Auth Corporate Name (710)	A710	710 abcdefghijklmnopqrstuvwxyz2
Auth Meeting Name (711)	A711	711 abcdefghijklmnopqrstuvwxyz2
Auth Uniform Title (730)	A730	730 adfghijklmnopqrstuvwxyz2
Auth Chronological Term (748)	A748	748 avxyz2
Auth Topical Term (750)	A750	750 abvxyz2
Auth Geographic Name (751)	A751	751 avxyz2
Auth Genre/Form Term (755)	A755	755 avxyz2
Auth General Subdivision (780)	A780	780 vxxyz2
Auth Geographic Subdivision (781)	A781	781 vxxyz2

Auth Chronological Subdivision (782)	A782	782 vxyz2
Auth Form Subdivision (785)	A785	785 vxyz2
Auth Complex Linking Entry (788)	A788	788 a2

New Bibliographic Left-Anchored Indexes

Index Name	Index Code	Subfields Indexed
ISSN-L (022l)	022L	022 1
ISSN-L (022m): Canceled	022M	022 m
Geographic Area Code (043a)	043A	043 a
Content Type Term (336a)	336A	336 a
Content Type Code (336b)	336B	336 b
Media Type Term (337a)	337A	337 a
Media Type Code (337b)	337B	337 b
Carrier Type Term (338a)	338A	338 a
Carrier Type Code (338b)	338B	338 b
Subject: Hierarchical	6620	662 abcdefgh24
Subject: Hierarchical (w/o country)	6621	662 bcdefgh24

Updated Bibliographic Left-Anchored Indexes

Index Name	Index Code	Subfields Added
Personal Name	100H	100 j4
Conference	111H	111 j4
Subject: Name	600H	600 ehjsu24
Subject: Conference	611H	611 hju24
Subject: Title	630H	630 eht24
Subject: Chronological	648H	648 2
Subject: LCSH	6500	650 e4
Subject: Children's LCSH	6501	650 e4
Subject: MESH	6502	650 e4
Subject: NAL	6503	650 e4
Subject: Unspecified	6504	650 e4
Subject: Canadian English	6505	650 e4
Subject: Canadian French	6506	650 e4
Subject: Other	6507	650 e24
Subject: Geographic	651H	651 e24
Subject: Faceted	654H	654 ce4
Personal Name AE	700H	700 jx4
Conference AE	711H	711 jx4
Series AE: Personal <	8000	800 fghklmnoprsvx
Personal Name Series AE	800H	800 jx4
Series AE: Conference <	8110	811 fghklnpsvx

Conference Series AE	811H	811 jx4
Series AE: Uniform Title <	8300	830 x

Updated Bibliographic Composite Indexes

Index Name	Index Code	Indexes Added
ISSN (022a y z)	ISSL	022L~022M
Subjects	SALL	648H~6621

Implementation Notes

Libraries may have customized their Voyager indexes in a previous release. Prior to your upgrade, each index to be added or changed will be checked against your current index definitions and a worksheet of exceptions will be generated for your review.

If there are no exceptions in your indexes, the upgrade can proceed without any additional information.

If there are exceptions, the library will be able to review and edit a worksheet to determine the index definition that should be applied during the upgrade. The worksheet must then be renamed and placed on the Voyager server prior to the upgrade. The upgrade process will use this conflict resolution worksheet to insert the customer's preferred index definition into Voyager during the upgrade.

A full index regen will be performed at the conclusion of your upgrade.

Note: If there is no worksheet – either because there were no conflicts or the library did not provide the modified worksheet prior to the upgrade – the recommended default index definitions will be applied during the upgrade process.

Reference to Technical Documentation

Refer to Appendix A of the *Voyager 8.2 System Administration User's Guide* for a complete description of the indexes included in Voyager.

Detailed information about the upgrade process for indexes is available in the *Voyager 8.2 Installation and Upgrade Requirements* document.

MARC 264

Purpose of Enhancement

The purpose of this enhancement is to index the new MARC 264 field in Voyager's BIB_TEXT table.

Description

MARC 21 provides two separate fields for recording production, publication, distribution, manufacture, and copyright notice information: MARC 260 and 264. Both fields are still valid, but a record should only contain one or the other.

The BIB_TEXT table has been updated to include information from both MARC fields. The Voyager fields for publication place, publisher, imprint, and publisher date will include data from either the 260 or the 264, depending on which field appears first in a record.

Implementation Notes

Since records containing data in MARC 264 may already exist in your Voyager database prior to your upgrade, the BIB_TEXT table will automatically be refreshed as part of your upgrade.

New Limits

Purpose of Enhancement

This enhancement adds new limits for Content Type, Media Type, and Carrier Type to Voyager.

Description

New limits have been added to Voyager to filter results by content type, media type, and carrier type. These limits appear both in WebVoyage and in the Voyager staff clients.

Implementation Notes

The limits are pre-configured in the *limits.ini* for the Voyager staff clients (c:\Voyager\Misc\limits.ini). For WebVoyage, new limit groups have been added to the *limits.xml* file and new configurations have been added to *webvoyage.properties*.

Reference to Technical Documentation

Refer to the *Voyager 8.2 WebVoyage Basic User's Guide*, the *Voyager 8.2 WebVoyage Architecture Overview and Configuration Models* guide, and the *Voyager 8.2 Cataloging User's Guide* for more information.

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4

Acquisitions

This section includes the following enhancements:

- Search by Bib ID
- Simplify Item Record Creation When Receiving
- Suppressed Record Indicators

Search by Bib ID

Purpose of Enhancement

The purpose of this enhancement is to add the ability to search for serials by Bib ID.

Description

A Bib ID search has been added to the search screens for Serials Check-in, Serials History, Subscription Maintenance, and Bindery Maintenance.

Staff members can use this option to quickly retrieve a serial title when the bib ID is known. This is particularly useful when there are multiple titles that are very similar.

When searching by Bib ID, your search result will be one specific record.



Implementation Notes

No configuration is necessary.

Simplify Item Record Creation When Receiving

Purpose of Enhancement

The purpose of this enhancement is to simplify the process of creating item records when receiving in Acquisitions and Serials.

Description

The process of creating a new item in Acquisitions and Serials has been simplified by reducing the number of steps in the workflow and combining others.

This screenshot shows a software dialog box for creating a new item record. The title bar reads "Item 83399 for holding 62039". The interface includes a toolbar with various icons. The main area contains several input fields and dropdown menus:

- Title: Cat ate my gymsuit; a novel.
- Location: Main Stacks
- Call #: (empty)
- Barcode: (empty)
- Temp. Loc.: (dropdown menu)
- Perm. Loc.: Main Stacks
- Temp. Type: (dropdown menu)
- Item Type: Book
- Media Type: (dropdown menu)
- Enum: (empty)
- Chron: (empty)
- Year: (empty)
- Caption: (empty)
- Free text: (empty)
- Spine: (empty)
- Copy: 1
- Pieces: 1
- Price: \$20.00
- Self Check: (checkbox)
- Magnetic Media: (checkbox)
- Sensitize: (checkbox)
- Close: (button)

The cursor is automatically focused on the barcode field without the need to click on a button to open it. A new button (a sailboat with 'X') in the toolbar allows you to save the record to the database and close the window in one step. When using this button, the confirmation message that the record was updated is suppressed. In previous releases, this process took 7 clicks; now it takes only two.

Implementation Notes

No configuration is necessary.

Suppressed Record Indicators

Purpose of Enhancement

The purpose of this enhancement is to provide more indication that a record is suppressed.

Description

When a bibliographic or holdings record is suppressed in Voyager, the record ID number will be displayed in parenthesis in the Windows title bar in the Acquisitions client.



When using the "Cat in the Acq" feature of Voyager, the staff user may also see other indications that the record is suppressed, including the "Suppress from OPAC" flag or the suppressed book icon in Cataloging.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Cataloging User's Guide* for more information.

5

Cataloging

This section includes the following enhancements:

- Print an Item Record
- Print from Get Items List Display
- Suppressed Record Indicators
- New Headings Types Filters

Print an Item Record

Purpose of Enhancement

The purpose of this enhancement is to enable printing of an item record.

Description

Staff users now have the ability to print an item record from the Cataloging module. When an item record is displayed, the File menu contains a Print Setup and a Print Record command.

The printout is configurable by the user. By default, the printout contains the title of the item, along with the location, call number and summary holdings statements from the holdings record, and all fields from the item record.

Implementation Notes

Configuration for printing an item record is controlled by the [ITEM_RECORD] stanza in the catalog.ini file on the staff workstation (C:\Voyager\Catalog). If a label is removed, the data element will not print.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Cataloging User's Guide* for more information.

Print from Get Items List Display

Purpose of Enhancement

The purpose of this enhancement is to print a group of item records selected by the user.

Description

Staff users now have the ability to print item records selected from the "Get Items" display in the Cataloging module. When displaying a list of item records attached to a single holding, the user can select one or more records and use the Print Selected button to print them out.

The printout is configurable by the user. By default, the printout contains the title of the item, along with the location, call number and summary holdings statements from the holdings record, and all fields from the item record.

Implementation Notes

Configuration for printing an item record is controlled by the [MFHD_ITEM_LIST] stanza in the catalog.ini file on the staff workstation (C:\Voyager\Catalog). If a label is removed, the data element will not print.

To configure default printing options, the user should select Print Setup from the File menu before retrieving a list of items.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Cataloging User's Guide* for more information.

Suppressed Record Indicators

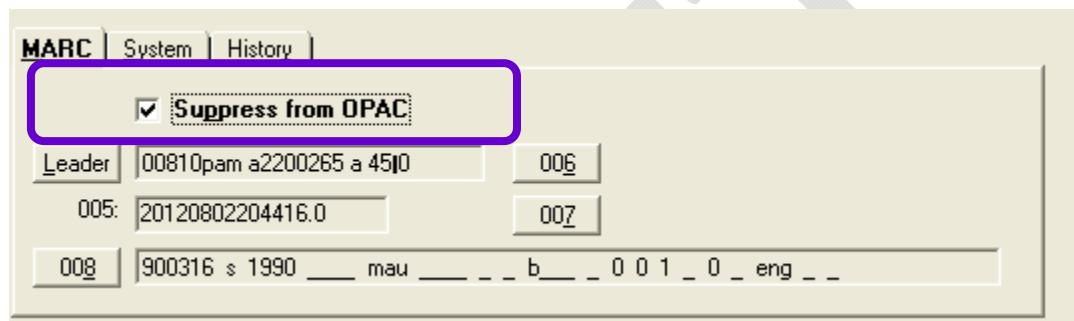
Purpose of Enhancement

The purpose of this enhancement is to provide more indication that a record is suppressed.

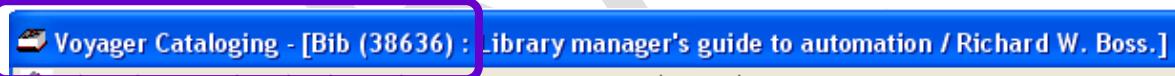
Description

Voyager now makes it easier to identify records that have been suppressed from OPAC view.

The “Suppress from OPAC” flag has been moved from the System tab to the MARC tab.



When a bibliographic or holdings record is suppressed in Voyager, the record ID number will be displayed in parenthesis in the Windows title bar in the Cataloging client.



Finally, the record ID number will also appear in parenthesis on the Record Hierarchy display in the staff client.

Holdings and Items for bib (38636)			
Bib ID	Title	Owning Library	Order
MFHD ID	Location	Call Number	Order
(38636)	Library manager's guide to automation / Richard W. Boss.	Training Master DB	
(39258)	Main Stacks	Z678.9 .B66 1990	

As in previous releases, suppressed status is also indicated by a gray icon in the Windows menu bar.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Cataloging User's Guide* for more information.

New Headings Types Filters

Purpose of Enhancement

The purpose of this enhancement is to provide filters for the complete list of subject heading types, genre/form types, and occupation types recognized by the Library of Congress.

Description

All of the approved subject heading types, genre/form types, and occupation types recognized by the Library of Congress have been added to the HEADING_TYPE table in Voyager. As a result, staff users searching in the Cataloging client are now able to filter results by all recognized heading types.

Implementation Notes

Your HEADING_TYPE table will be automatically updated during your upgrade. Your system administrator may want to suppress or unsuppress various heading filters in the System Administration module (Search > Heading Filters) once the upgrade has been completed.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User's Guide* for more information.

6

Circulation

This section includes the following enhancements:

- Modify Due Date from Charged Items Index
- Option to Disable “Smart Defaults”
- Send Courtesy and Recall Overdue Notice by SMS
- Calculate the Sum when Posting Fines and Fees
- Sort Items on the Item Display
- Check Calendar When Modifying Due/Return Date
- Create Due Date Receipt Per Charge Session
- Add Department and Major to Patron Profile
- Add Birth Date to Patron Profile
- Copy Patron Record
- Increase Size of Patron Record Fields
- Suppressed Record Indicators

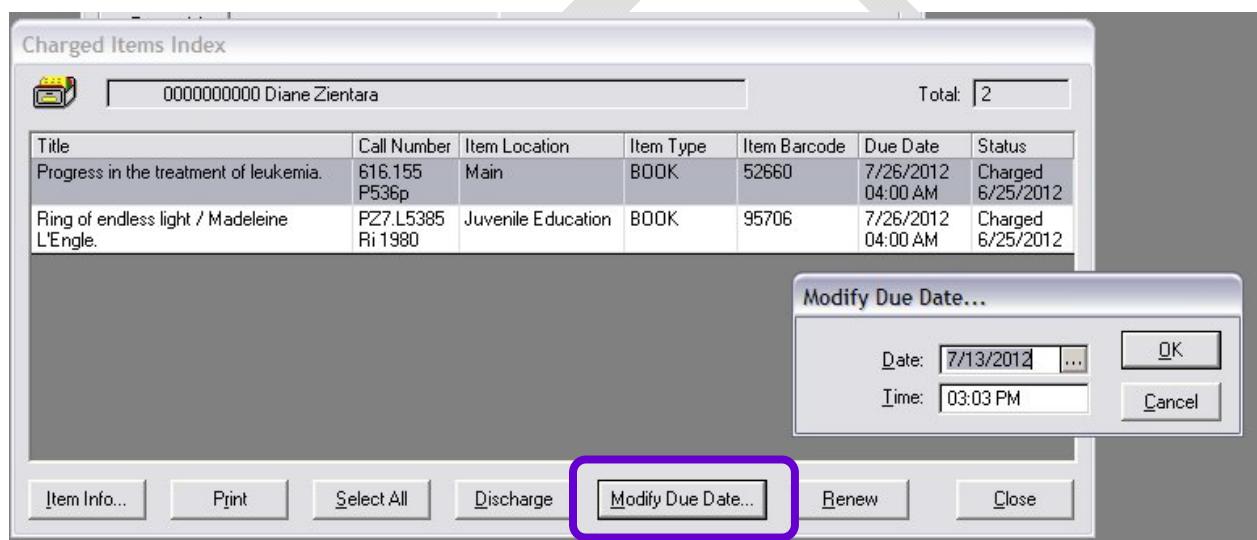
Modify Due Date from Charged Items Index

Purpose of Enhancement

The purpose of this enhancement is to provide an option to modify the due date on one or more items previously charged to a patron.

Description

An authorized Circulation operator may now manually change the due date on an item previously charged out. To use this feature, select one or more items in the Charged Items Index display and right-click on one of the entries. A "Modify Due Date" window opens and the operator can set the specific due date/time for the item. The current date and time will be supplied by initial default.



In accordance with the related feature to check the library's circulation calendar, the operator will be warned if the due date/time is outside of the library's operating schedule.

Implementation Notes

The privilege to use this feature is controlled by the Circulation operator security profile setting to "Change Due Date". No additional configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

Option to Disable “Smart Defaults”

Purpose of Enhancement

The purpose of this enhancement is to disable the default settings on pop-up windows and alerts in the Circulation module and force the operator to acknowledge the alerts.

Description

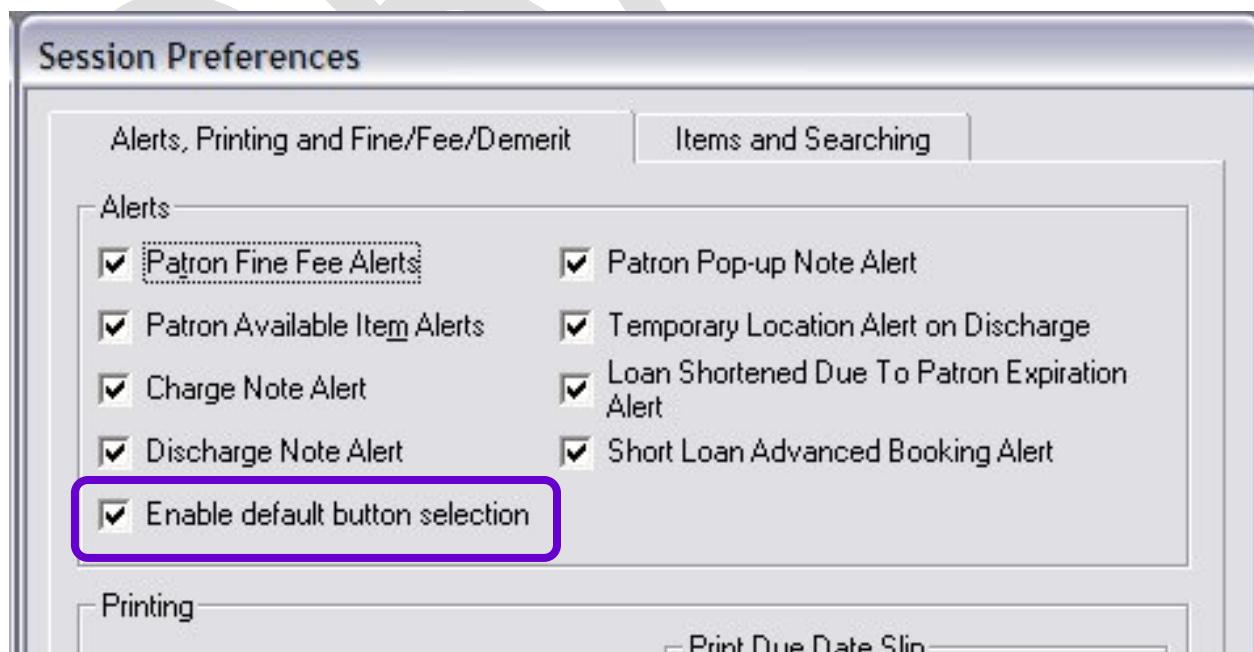
Many alerts display in the Circulation client during the course of normal circulation workflows. By default, these alerts have some action pre-selected, which enables the operator to quickly acknowledge the alert or take a default action. However, these defaults can lead to incomplete transactions when an operator is not paying attention.

To prevent incomplete transactions, it is now possible to disable the default buttons for these transaction exceptions and force the operator to acknowledge the alert or take a specific action before he can continue.

Implementation Notes

In accordance with previous functionality, the default buttons are automatically enabled. The user must disable the defaults in session preferences in order to use this new feature.

Individual operators may disable defaults under Options > Session Preferences > Alerts.



When defaults are disabled, buttons that require an operator decision will not have a default selected. When the only button is “OK”, the default may still be selected.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User’s Guide* for more information.

Send Courtesy and Recall Overdue Notice by SMS

Purpose of Enhancement

This enhancement sends borrowers a courtesy notice via SMS before items are due, and can notify borrowers via SMS of an overdue recall.

Description

SMS messages were added in Voyager 8.0 to alert borrowers when items were ready for pickup, items were overdue, or items were recalled. Effective with this release, it is now possible to send a courtesy notice via SMS to alert borrowers before items are due, and to send overdue recall notices via SMS.

Implementation Notes

Use of this feature is contingent upon configuring the Voyager SMS functionality and running the daily circulation jobs to generate courtesy and recall overdue notices. Use of SMS functionality depends on integration of the Ex Libris SMS Proxy Server with the services of a SMS gateway provider. The borrower’s profile must contain a valid SMS number in order to receive SMS messages from Voyager.

The text of the default SMS notice can be modified by the library. The default SMS text is located in `yyydb/ini/smsnotices.properties`.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User’s Guide* and the *SMS Proxy User Guide* (available in the Cross-Product section of the Ex Libris Documentation Center) for more information.

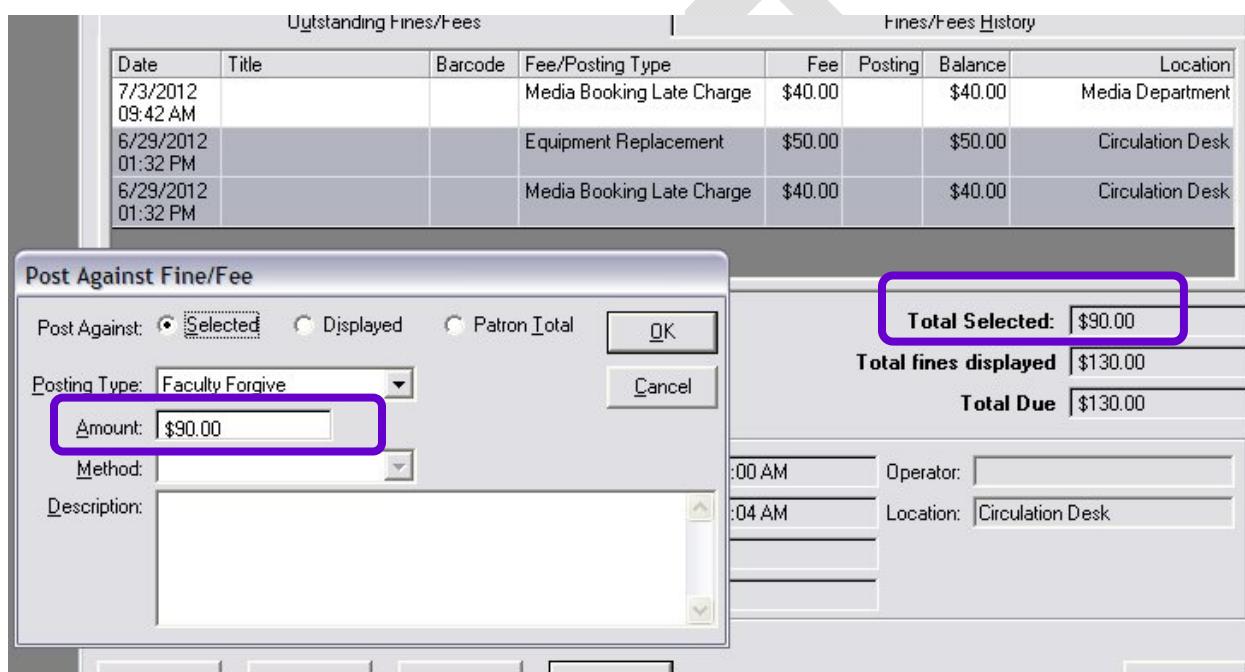
Calculate the Sum When Posting Fines and Fees

Purpose of Enhancement

The purpose of this enhancement is to automatically calculate the sum of fines and fees or demerits when posting transactions.

Description

An authorized operator can easily post a transaction against selected amounts, displayed amounts, or the patron total by selecting the appropriate radio button.



Changing the radio button will automatically change the amount to be posted. Once the operator has manually entered an amount, however, Voyager will not change the amount if a different radio button is chosen.

Note that "Total Selected" has also been added to the Patron Fines/Fees display.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

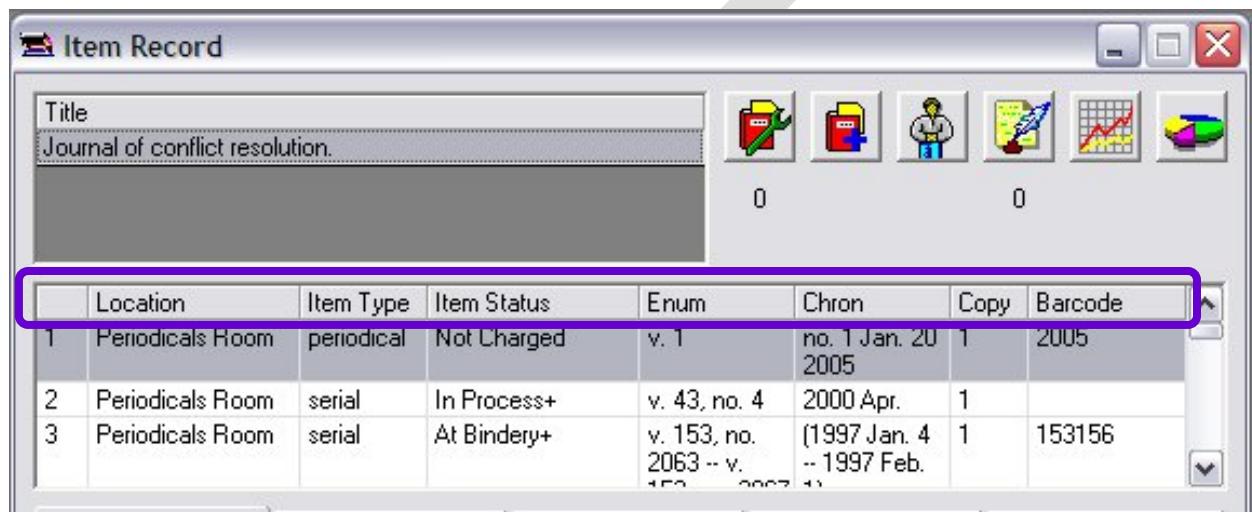
Sort Items on the Item Display

Purpose of Enhancement

This enhancement allows the user to sort items on the item information display.

Description

Staff users in Circulation can sort items on the item information display by clicking on a column header. Clicking the header again will re-sort in reverse order.



The screenshot shows the 'Item Record' window with a title bar and various icons. Below is a table displaying item information. A purple box highlights the first column, 'Location', which is the new sort indicator column. The table has columns for Location, Item Type, Item Status, Enum, Chron, Copy, and Barcode. Three items are listed:

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Periodicals Room	periodical	Not Charged	v. 1	no. 1 Jan. 20 2005	1	2005
2	Periodicals Room	serial	In Process+	v. 43, no. 4	2000 Apr.	1	
3	Periodicals Room	serial	At Bindery+	v. 153, no. 2063 -- v. 153 -- 2007	(1997 Jan. 4 -- 1997 Feb. 153 -- 2007)	1	153156

A new column has been added to the display to indicate the default sort order. This column can be used to return the item display to the original sort order.

Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

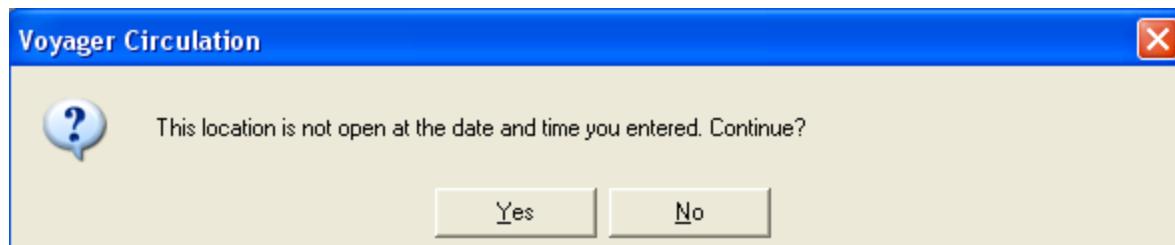
Check Calendar When Modifying Due/Return Date

Purpose of Enhancement

This enhancement alerts the operator if a manually-entered due or return date is outside the library's operating hours.

Description

An authorized operator can manually modify a due date and time or backdate a discharge to a previous date and time. With this enhancement, Voyager will check the manually-entered date and time against the library's operating schedule and provide an alert if the date and time is outside the library's hours.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

Create Due Date Receipt by Charge Session

Purpose of Enhancement

The purpose of this enhancement is to provide a single due date slip showing all items charged in a single session.

Description

Staff users can set a preference option that controls the printing of date due slips for charged items. Choices are: no due date slip, per single charge, or all charges in one receipt.

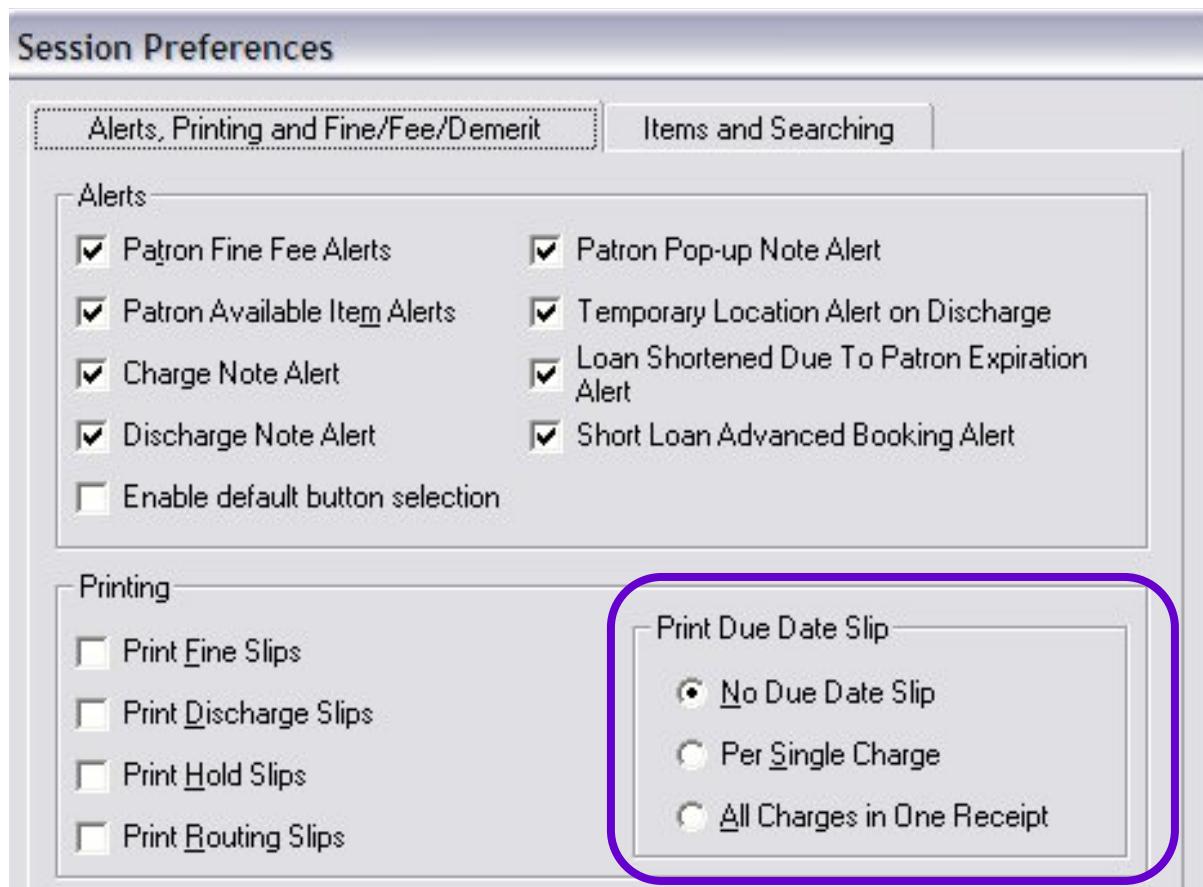
When printing all charges in one receipt, a new "Receipt" button appears on the Charge display. The Receipt button is grayed out until the first item is charged.

After all items have been charged out, the staff operator clicks the Receipt button to print a single due date slip containing all of the items charged out during the session.

The due date slip can be configured by the library.

Implementation Notes

The staff user can select a default setting in Session Preferences in the Circulation client.



In previous releases, Voyager printed one date due slip per charged item. This functionality continues as the default following your upgrade. If the user continues to print a due date slip per single charge, the "Receipt" button will not display.

The default setting for a library policy group can be set in the Circulation Policy settings in System Administration.

Configuration of the session-wide due date slip is controlled by the [DUE DATE SLIP SESSION] stanza in the circ.ini (C:\Voyager\Circulation\Circ.ini).

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation and System Administration User's Guides* for more information.

Add Department, Major and Birthdate to the Patron Profile

Purpose of Enhancement

The purpose of this enhancement is to record the patron's department, major, and birthdate in his patron profile.

Description

New fields have been added to the patron record to record a patron's department, major and birthdate. These fields are optional.

The patron record display has been re-organized to include these new fields. A new "Details" tab has been added to the display.

Edit Patron Record

Name	Details	Barcode	Address	Phone	
SMS Number:					
Expires:	12/31/2382	[...]	Purge Date:	12/31/2382	[...]
Department:	Business				
Major:	Marketing				
Birth Date:	01/10/2012				

Patron Id	Details	Address/Phone	Counters	Proxy Patrons	History
SMS Number:	1-607-555-1234				
Expires:	12/31/2382		Purge:	12/31/2382	
Department:	Business				
Major:	Marketing				
Birth Date:	01/10/1993				

Implementation Notes

The new patron fields can be manually entered via the Circulation client, or added to the patron record via the new XML patron update utility.

To maintain compatibility with the existing patron update, export, and purge utilities, these new fields have *not* been added to the Patron SIF.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

Copy Patron Record

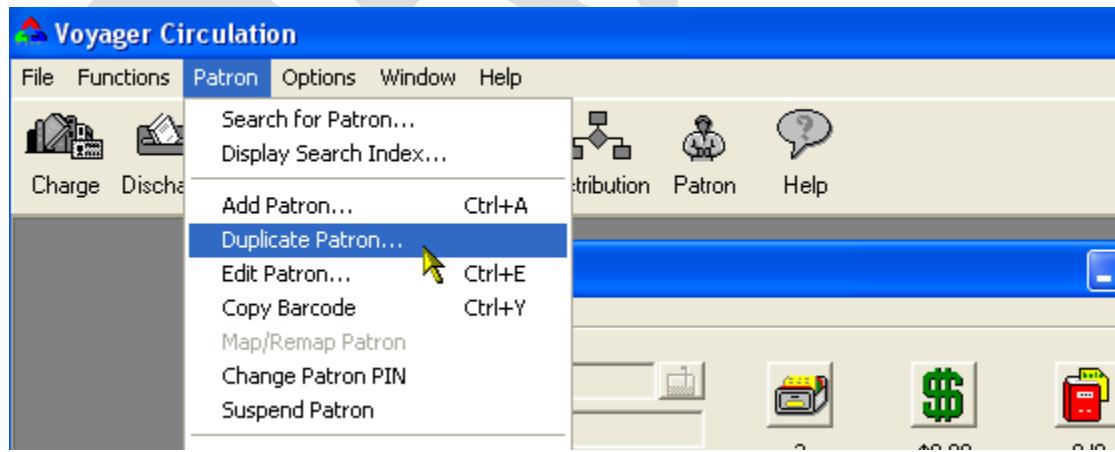
Purpose of Enhancement

This feature allows a staff operator to manually copy a patron's record to create a new patron record.

Description

A new "Duplicate Patron" option is available on the right-click action menu and on the Patron menu. The patron record can be duplicated so that the staff member can easily add a new patron record to the Voyager database.

The new patron record must have a unique SSN or institution ID before it can be saved to the Voyager database.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

Increase Size of Patron Record Fields

Purpose of Enhancement

This enhancement increased the size of several fields in the patron record.

Description

To accommodate larger values in a variety of patron-related fields, specific field lengths have been increased.

- All address lines have been increased to a maximum of 100 characters.
- Patron first and middle name fields have been increased to a maximum of 50 characters.
- The city field has been increased to a maximum of 40 characters.

Implementation Notes

The longer field lengths are fully compatible with the new XML patron update, export and purge utilities.

To preserve compatibility with customers' existing patron update programs, the Patron SIF has *not* been changed to accommodate the longer fields. Customers who continue to use the Patron SIF to update and export patron records will find the values truncated to their original lengths in the Patron SIF.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Circulation User's Guide* for more information.

Suppressed Record Indicators

Purpose of Enhancement

The purpose of this enhancement is to provide more indication that a record is suppressed.

Description

When a bibliographic or holdings record is suppressed in Voyager, the record ID number will be displayed in parenthesis in the Windows title bar in the Circulation client.



Implementation Notes

No configuration is necessary.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Cataloging User's Guide* for more information.

DRAFT

7

Global Data Change (GDC)

This section includes the following enhancements:

- GDC “Index Only” Job

GDC “Index Only” Job

Purpose of Enhancement

The purpose of this enhancement is to provide an option to re-index a set of bibliographic records without updating the record.

Description

This feature provides a quick and easy way to re-index a set of bibliographic records using Voyager’s Global Data Change module.

Using this feature, an authorized operator can submit a job that re-indexes a set of bibliographic records. The index job runs without requiring any other updates to the records, and does not affect the update history of the records.



This new job is particularly useful when a batch of records needs to be re-indexed without the need for an index regen.

Implementation Notes

This functionality is controlled by a new GDC operator security privilege to run an index-only job.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Global Data Change User's Guide* for more information.

8

System Administration

This section includes the following enhancements:

- Configurable Password Requirements
- Remember Last “N” Passwords
- Password Expiration Alert
- Lockout Feature for Invalid Login Attempts
- Log of Invalid Login Attempts
- “View Only” Security Profile

Configurable Password Requirements

Purpose of Enhancement

This enhancement allows the library to define the rules for staff user passwords.

Description

Libraries can now configure the parameters for operator passwords. The following password criteria are now configurable:

- Minimum and maximum password length
- Minimum and maximum password age

- Number and format of characters allowed, including upper and lower case letters, numbers, and special characters
- Any password group requirements (e.g. “your password must contain at least three of the following four types of characters”)
- Whether the user’s password can contain the user’s name or ID or not

The library is also responsible for describing the password requirements to users. This description will be displayed to staff members when using the “Change Password” feature in any of the staff clients.

The screenshot shows the 'Security - Security Options' dialog box. Under the 'Password Options' tab, there are several configuration sections:

- Password Requirements:** A tabbed section with tabs for 'Password Requirements', 'Password Requirements 2', and 'Invalid Login Attempts'. The 'Password Requirements' tab is selected. It contains the following fields:
 - New password cannot be same as previous passwords
 - Minimum password age: Days
 - Maximum password age (expiration): days
 - Alert user days before password will expire
- Password Length:** A section with 'Minimum - at least: ' and 'Maximum - at most: ' fields.
- Password may contain:** A section with checkboxes for 'User's Id' and 'User's name', both of which are checked.
- Password must contain:** A section with two radio button options:
 - All requirements below
 - At least of the requirements selected below
 Below these are five fields for character counts:
 - At least alphabetic character(s)
 - At least uppercase character(s)
 - At least lowercase character(s)
 - At least number character(s)
 - At least special character/symbol(s)
 There is also a field for 'Special / symbols: .

At the bottom are 'Save' and 'Cancel' buttons.

Implementation Notes

System Administrators can define password requirements in the Security section of Voyager System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User’s Guide* for more information.

Remember Last “N” Passwords

Purpose of Enhancement

The purpose of this enhancement is to provide a history of user passwords for comparison when new passwords are created.

Description

The system administrator can determine how many previous passwords are saved in Voyager. The previous passwords are used for comparison to make sure that a new password is not the same as the previously-used passwords.

Implementation Notes

The password comparison setting is configured in the Security options in System Administration. The system administrator should enter the number of previous passwords to use for comparison. The maximum setting is 99. Entering a zero (0) indicates that this option will not be used.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User’s Guide* for more information.

Password Expiration Alert

Purpose of Enhancement

The purpose of this enhancement is to provide a configurable alert that will warn staff users before their current password expires.

Description

The library system administrator can specify the number of days before expiration to display an alert to warn staff members that their password is about to expire.

Implementation Notes

The password expiration alert setting is configured in the Security options in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User's Guide* for more information

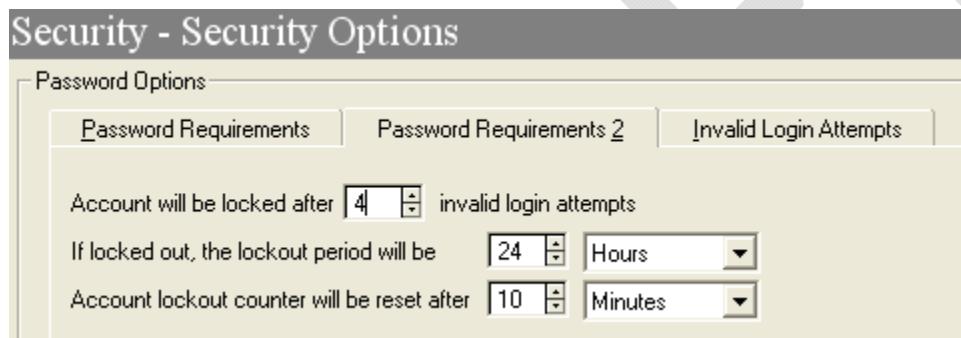
Lockout Feature for Invalid Login Attempts

Purpose of Enhancement

New security features have been added to Voyager to lock staff user accounts after a library-defined number of invalid login attempts.

Description

The library system administrator can now define a lockout counter, the lockout duration, and the number of invalid attempts after which a user's account will be locked. Additionally, the invalid login attempts can be recorded in a security audit log.



Implementation Notes

The lockout settings are configured in the Security options in System Administration. The system administrator should enter the number of invalid login attempts, the duration of the lockout period, and the period after which the lockout counter will be reset. The system administrator can also determine if the invalid login attempts will be recorded.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User's Guide* for more information.

Log of Invalid Login Attempts

Purpose of Enhancement

The purpose of this enhancement is to create an audit log of invalid login attempts.

Description

System Administrators have an option to record invalid login attempts to the Voyager staff clients. If logged, invalid login attempts will record the user ID, operator name, date and time, lockout counter, and lockout time of the login attempts.

Additionally, the security audit log can be exported, cleared, or refreshed by the system administrator.

Implementation Notes

The security audit log settings are configured in the Security options in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User's Guide* for more information.

"View Only" Security Profile

Purpose of Enhancement

The purpose of this enhancement is to provide "view only" security options for System Administration.

Description

New operator security profiles can be created to give authorized operators "view only" access to various functional areas in Voyager System Administration.

Implementation Notes

The "view only" security profiles can be configured in the Master Profile section in Voyager System Administration. A profile can be created to give users access to one or more functional areas of system administration.

Reference to Technical Documentation

Refer to the *Voyager 8.2 System Administration User's Guide* for more information.

9

Patron Record Utilities

This section includes the following enhancements:

- XML Patron Import Utility
- XML Patron Export Utility
- XML Patron Purge Utility

XML Patron Import Utility

Purpose of Enhancement

The purpose of this enhancement is to provide a patron update utility to load patron record information from XML files.

Description

In order to create a more flexible patron update interface, Ex Libris has introduced a completely new process that uses an XML-based input format to load and update patron information. The new patron import job is completely separate from the previous patron update batch job. Both jobs can be used in parallel, if desired.

Created a new job, called PpatronUpdX (patron update – xml). This is a completely new program, separate in every way from the existing Pptrnupt.

The purpose of the program is to add, update, or (for some data) delete existing patron information such as name, address, etc. Like the original job, the program does not update

or change patron barcodes or patron groups because of the associated circulation history. Barcodes can be expired, though, just as in the original program.

The input file must be in XML format which conforms to the accompanying XSD. Each patron record is represented by a single XML record.

The patron record enhancements added in this release have been included in the new XML patron import utility. However, to maintain compatibility with the previous patron update utility, the patron record enhancements were not added to the Patron SIF.

Customers planning to take advantage of the patron record enhancements in Voyager 8.2 must use the XML patron import utility to load patron details into Voyager.

It is now possible to run the patron import utility from the Web Admin interface.

Implementation Notes

The new XML patron file format is documented in an XSD and is available on EL Commons. The library's system administrator may use the XSD to verify that the patron XML files are properly formed.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Technical User's Guide* for more information and instructions for the XML patron import utility.

The patron schema XSD is available on EL Commons:

<http://www.exlibrisgroup.org/display/VoyagerOI/Patron+Schema+XSD>.

XML Patron Export Utility

Purpose of Enhancement

The purpose of this enhancement is to provide a patron export utility to extract patron record information in XML format.

Description

In order to create a more flexible patron export interface, Ex Libris has introduced a completely new process that uses an XML-based input format to extract patron information. The new patron export job is completely separate from the previous patron extract batch job. Both jobs can be used in parallel, if desired.

The PpatronExpX batch job will export a group of patron records to an XML file that is suitable for re-loading into the database with the PpatronUpdX job.

The patron record enhancements added in this release have been included in the new XML patron export utility. However, to maintain compatibility with the previous patron export utility, the patron record enhancements were not added to the Patron SIF.

Customers planning to take advantage of the patron record enhancements in Voyager 8.2 must use the XML patron export utility to extract patron details from Voyager.

It is now possible to run the patron export utility from the Web Admin interface.

Implementation Notes

The new XML patron file format is documented in an XSD and is available on EL Commons. The library's system administrator may use the XSD to verify that the patron XML files are properly formed.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Technical User's Guide* for more information and instructions for the XML patron export utility.

The patron schema XSD is available on EL Commons:

<http://www.exlibrisgroup.org/display/VoyagerOI/Patron+Schema+XSD>.

XML Patron Purge Utility

Purpose of Enhancement

The purpose of this enhancement is to provide a patron purge utility that outputs patron record information in XML format.

Description

In order to create a more flexible patron purge interface, Ex Libris has introduced a completely new process that produces an XML-based input format of patron information. The new patron purge job is completely separate from the previous patron purge batch job.

The new batch job is called PpatronPrg and is called from the sbin directory to purge patron records and write records to an export file in XML format. The patron purge job can be run using the patron expiration date, the patron purge date, or a combination of both dates. Patron records that could not be purged are written to various exception files as necessary.

The patron record enhancements added in this release have been included in the new XML patron utilities. However, to maintain compatibility with the previous patron purge utility, the patron record enhancements were not added to the Patron SIF. Customers planning to take advantage of the patron record enhancements in Voyager 8.2 must use the XML patron purge utility to output patron details from Voyager.

It is now possible to run the patron purge utility from the Web Admin interface.

Implementation Notes

The new XML patron file format is documented in an XSD and is available on EL Commons. The library's system administrator may use the XSD to verify that the patron XML files are properly formed.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Technical User's Guide* for more information and instructions for the XML patron purge utility.

The patron schema XSD is available on EL Commons:

<http://www.exlibrisgroup.org/display/VoyagerOI/Patron+Schema+XSD>.

10

Primo Integration

This section includes the following enhancements:

- Paging for My Account Loans Display
- Primo Extract Log File Naming
- OPAC via Primo Integration Enhancements

Paging for My Account Loans Display

Purpose of Enhancement

The purpose of this enhancement is to provide options for paging through multiple displays showing patron loan details in Primo.

Description

Patrons who have numerous items on loan can now display their loaned items a few at a time, resulting in improved performance of the My Account information.

Implementation Notes

Paging functionality in the My Account display requires integration with Primo 4.1 or higher.

Primo Extract Log File Naming

Purpose of Enhancement

The purpose of this enhancement is to append a time stamp to the name of the Primo extract log file.

Description

The Voyager extract log file names will now include HHMMSS from when the file is generated.

Implementation Notes

No configuration is necessary.

OPAC via Primo Integration Enhancements

Purpose of Enhancement

The purpose of this enhancement is to improve the OPAC integration with Primo.

Description

Two enhancements have been made in the OPAC via Primo integration.

When requests are cancelled in Primo, the user will receive a proper status message regarding the cancellation of the request. Previously, only a brief message was displayed.

The patron's available request types have been re-ordered to make "Hold" the default request option when the library has a copy of a title available for use.

Implementation Notes

No configuration is necessary.

11

Voyager Web Services

This section includes the following enhancements:

- Add Patron Web Service
- Patron Export Web Service
- DB Info Web Service
- Get Holdings Service

Add Patron Web Service

Purpose of Enhancement

A new Web service that adds or updates a single patron record in Voyager has been added.

Description

Voyager now provides a Web service to add or update patron records one by one. The record must be sent to the Web service in XML format using the POST method. Success or failure is returned in a <reply> stanza of the patron XML.

Reference to Technical Documentation

Documentation for this Web service is available in CodeShare on EL Commons (www.exlibrisgroup.org).

Patron Export Web Service

Purpose of Enhancement

A new Web service that exports a single patron record from Voyager has been added.

Description

Voyager now provides a Web service to export patron records one by one. The record can be requested from the Web service by sending an XML document or by appending parameters to the URL.

The entire patron XML will be returned if possible. Any errors (major or minor) will be provided in a <reply> stanza in the XML record.

Reference to Technical Documentation

Documentation for this Web service is available in CodeShare on EL Commons (www.exlibrisgroup.org).

DB Info Web Service

Purpose of Enhancement

A new Web service that describes information about the library's database has been added.

Description

This new Web service provides information about the local database associated with the port called.

- Locations
- Patron Groups
- Note Types
- Stat Codes
- Clusters

- dbKey
- Voyager version
- dbName

This Web service provides details that are necessary for the new patron services available in this release, and can be used with other Voyager Web services previously available.

Reference to Technical Documentation

Documentation for this Web service is available in CodeShare on EL Commons (www.exlibrisgroup.org).

Get Holdings Service

Purpose of Enhancement

The GetHoldingsService has been enhanced to retrieve item information or a Bib ID with the item ID.

Description

Ex Libris has modified the GetHoldingsService to retrieve item information or Bib ID with Item ID.

- <http://server:port/vxws/GetHoldingsService?itemId=XXX>
- RESTful version: <http://server:port/vxws/item/50000>

Reference to Technical Documentation

Documentation for this Web service is available in CodeShare on EL Commons (www.exlibrisgroup.org).

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Voyager InterCirc

This section includes the following enhancements:

- Integration with OCLC

Integration with OCLC

Purpose of Enhancement

This enhancement expands Voyager's NCIP integration to work with OCLC resource sharing systems.

Description

NCIP integration enables different systems to share information about users and items, and to transmit transaction information such as hold requests and circulation of materials. Effective with this release, the Voyager can interoperate with the OCLC Circulation Gateway, which provides circulation and resource sharing interoperability with VDX® and WorldCat Navigator™.

Integration with Voyager requires configuration and setup of the Voyager InterCirc-U module, which uses the NCIP standard to support the integration between the two systems.

Implementation Notes

Voyager InterCirc-U is a Voyager extension module and requires additional licensing and configuration.

Reference to Technical Documentation

Refer to the *Voyager InterCirc-U.2 User's Guide* for more information.

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Web Authorities

This section includes the following enhancements:

- Web Authorities Interface Re-Design

Web Authorities Interface Re-Design

Purpose of Enhancement

This enhancement re-implements current Web Authorities™ functionality in the re-designed WebVoyage user interface.

Description

Voyager's Web Authorities™ module provides an end-user interface to authority record information, including the ability to download the authority records from Voyager.

The Web Authorities functionality is now available in the re-designed WebVoyage user interface. Libraries may offer a combined OPAC catalog with authority records or provide separate bibliographic and authority user interfaces. Both configurations are supported.

Implementation Notes

Implementation of the Web Authorities functionality in WebVoyáge is delivered via the en_US WebVoyáge configuration files.

Reference to Technical Documentation

Refer to the *Voyager 8.2 Web Authorities User Guide* for more information.

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